

Vubis Smart Patch

2.4.1.17

Release notes/Impact statement
September, 2006

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1. Introduction

While Vubis Smart version 2.4.1 was mainly a functional upgrade, the objectives of the Vubis Smart patch 2.4.1.17 are the following:

- ✓ Resolve known outstanding server defects that were reported in version 2.4.1 or earlier versions of Vubis Smart;
- ✓ Resolve known outstanding client defects that existed in version 4.104 or earlier versions of the Vubis Smart client;
- ✓ Introduce a selection of smaller functional enhancements;
- ✓ Deliver updates to the On-line user documentation;
- ✓ Deliver Dutch and French translations for previously untranslated texts.

WARNING: Please read the 2.4.1.17 upgrade instructions and documentation carefully prior to starting an upgrade to Vubis Smart 2.4.1.17.

2. Migration path to Vubis Smart 2.4.1.17

The following migration paths are possible for upgrades to 2.4.1.17:

2.4.1.15 → 2.4.1.17
2.4.1.16 → 2.4.1.17

There is no straight migration path to patch 2.4.1.17 from pre-2.4.1.15 installations. In other words, this patch can only be applied to a system that is already running version 2.4.1.15 or 2.4.1.16.

If you are currently running an older version of Vubis Smart (i.e. 2.3.1), the upgrade to Vubis Smart patch 2.4.1.17, must be preceded by an upgrade to version 2.4.1.15. For upgrades to 2.4.1.15 please refer to the 2.4.1.15 upgrade documents and release notes. That process will not be described anymore in this document.

3. Client version compatibility

The recommended version of the Vubis Smart client to run with server version 2.4.1.17 is client build 4.105 (which is made available with patch 2.4.1.17). The minimal client build for this release is 91 for most functions. Minimum level is client build 99 for administrative functions in Acquisitions (AFO272 / Miscellaneous) and in Circulation (AFO469 / Miscellaneous).


Server Based online help

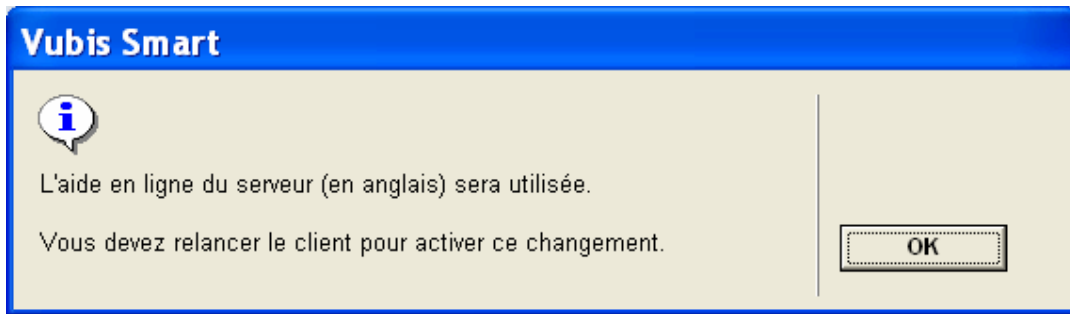
Note that if the site is implementing the server based online help, it is highly recommended to use the Setup.exe to upgrade the client workstation. A new field has been added to set the online help source.



This field will not be set automatically with automatic updates or by using the update.exe.

Alternatively, the clients may be set to use the server based online help after the client has been installed by using the French language interface.

On the main toolbar click the icon  once. This will toggle the help source files between the local version and the online version. The following message appears. Click OK.



Close the client and restart. The online help source files are now server based.

4. Release notes for new feature Claimed Returned

4.1 Introduction

General

VubisSmart has been enhanced to manage items on loan which borrowers claim to have returned or have lost. In addition to marking the specific copy of a title appropriately, the development allows the library to determine its policies with regard to how overdue fines are calculated, how to handle overdues and so on.

The changes to the system also allow the library to generate replacement charges and associated invoices automatically for items marked as lost.

Refunds for lost book charges

In the current release, refunds for ANY type of charges raised, including lost book invoices, cannot be linked directly to either the transaction for which the charge was raised or the transaction when the payment was made. This area of the system will not be enhanced for the processing of lost books. Refunds can be made as an independent function of the system.

Reservations

There are no changes to the handling of reservations with regard to setting items to “lost”.

4.2 Functional description

4.2.1 Overview

There are two main scenarios relating to the status of items on loan to a given borrower, which have special processing within the system.

The first case occurs when the borrower claims to have returned an item, even though the system still records it as on loan to them. The second occurs when a borrower has lost or destroyed the item, and typically there is no dispute that this has happened. These are known as “claims returned” and “lost” respectively (although of course “lost” is a shorthand for meaning that the actual item no longer exists for some reason).

In the following we refer to “loan status” to indicate such a special status to the item. As is described below, setting the loan status for an item may be carried out from the displays within the system of items on loan to a borrower or may be set from the full display of the item information (for example, from AFO423 [Edit Items]).

Typically, when an item is marked as “claimed returned” or “lost”, the library would normally stop sending overdue notices for that item. Now the ability to “turn off” overdues for a given loan transaction is useful in other situations. For this reason, the assignment of a “loan status” to an item is made more general than the above two areas, and how this is achieved is described below.

The first section then describes the settings behind the system, which can be configured by the library, and subsequent sections describe the functions within the system that can be used to assign a loan status. Finally we discuss the implications of the settings for notice production, fines calculation and so on.

In previous releases, setting an item to missing was implemented by moving the item to a “missing” location manager. This is now superseded by this new status.

Finally, for the sake of completeness, a new setting has been added to the existing feature which allows an invoice for a long overdue item to be generated. This new setting allows a loan status, such as “Lost” to be set for the item.

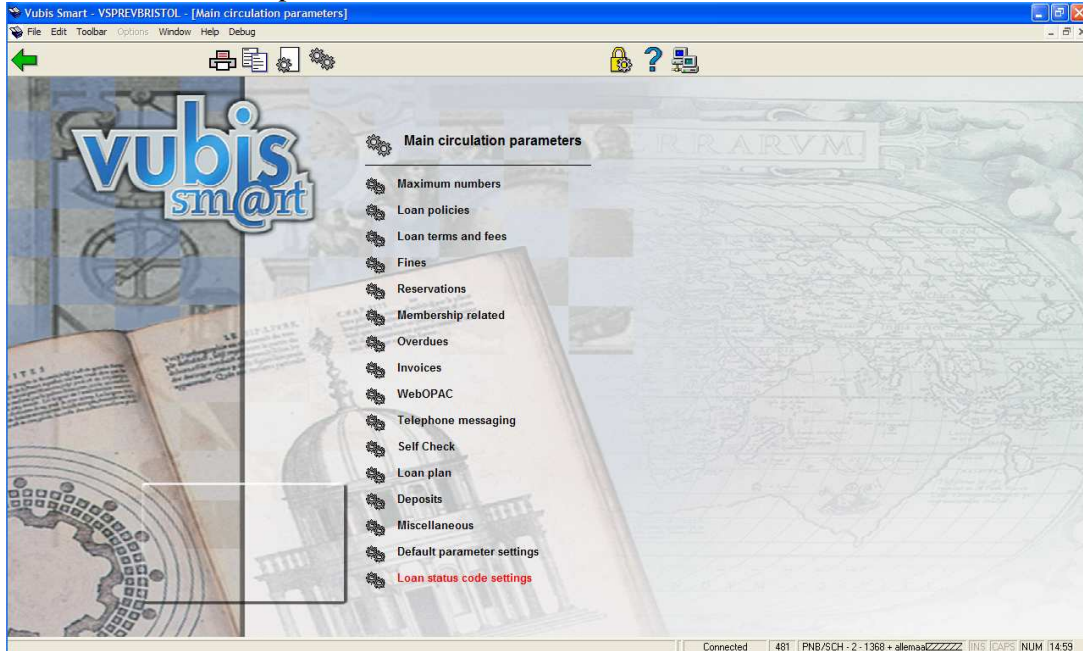
4.2.2 Loan status parameters

When an item on loan is to be marked as “claimed returned”, for example, a new command on the list of loans will allow the loan status to be assigned. In brief, a simple code may be selected to assign the specific status. Such codes might be one of “lost”, “claims returned” and so on. The processing implied by such a code is determined by the settings of the parameters described below, which may therefore be adjusted to reflect the policies of the library.

The library may choose to set up any number of codes. For example, a library might wish to define a setting “Suspend overdues” which simply suspends overdue notices. Alternatively, it is possible to set up different codes but which have the same functional processing implied – for example, the library may wish to distinguish between “Lost” and “Destroyed in fire” – perhaps, the latter has insurance implications and the difference in the coding could be used for reporting purposes, even though the functional implications for the system are the same.

4.2.2.1 Loan status settings - detail

The loan status settings are accessed from a new option “Loan status code settings” in the “Main Circulation parameters” menu from AFO481.



Loan statuses are defined for each circulation metainstitution.- that is, the settings are shared (and identical) for each library in a shared circulation system. However, it is possible to limit the Statuses which can be selected to specific locations (see below for details) and it is therefore feasible to set up (say) statuses “Lost1”, “Lost2”, “Lost3” as slightly different flavours, to be used by different institutions.

4.2.2.2 Location restrictions

In prior releases, items were set to missing by transferring them to a “missing” type administrative location manager (although in certain contexts, this technique was disguised by a more intuitive interface). One feature of the transfer processing is the ability to limit the locations from which an item can be sent to a missing manager.

4.2.2.3 WebOpac displays

Some statuses may require different wording in the online or WebOpac. For example, a simple “Suspend overdue” would have no impact on the status of the item itself - it is still on loan.

For others, such as Claimed returned, then it is appropriate to display “Claimed returned” in the staff functions, but simply “Not available” in the WebOpac.

Since this wording is language specific, of course, a separate command Icon for the Status code causes another screen to be displayed.

This is prefilled with the possible language codes in use – both for the online and for the WebOpac. Appropriate text can be entered.

There are TWO settings relevant – a. how should such items be described from the point of view of the bibliographic data and b. if they are on loan, how should they be described when listed as loans against the borrower’s record.

These displays will OVERRIDE any other item statuses – e.g. rather than a due date the system will show “missing” in the OPAC.

If these fields are left EMPTY, then this status is ignored and the “normal” status will be displayed (in other words the status applied is not interesting to the public) - for example, the fact that Fines have been suspended is not relevant to the OPAC.

4.2.2.4 Overdue fines handling

This section describes the options for handling of overdue fines.

The setting of “Suspend fines” means that the system will no longer calculate fines for this item (whilst the status is set). In various places, the system uses the idea of “fines owing” i.e. fines that would be payable if the item were to be returned. If “suspend fines” is ON, then no fines are considered to be owing.

The question then arises as to what happens if the item is overdue when the status is assigned – the “Generate overdue fines” setting tells the system to calculate and make payable any such fines. For a “Claimed returned” this would typically be set to NO;¹ whilst for a lost item, it is many libraries’ policy to charge the overdue fine (as well as a possible replacement charge).

Assuming suspend fines is “on”, then from that point on, the system will not calculate further fines. What happens if the item is “found”, for example after the user has claimed that it has been returned? Normally, it would be expected that the claim would be accepted, the item is effectively returned and if this happened to be past the due date, then the fines would be discarded. However, it is possible to tell the system to calculate and make payable the fines, although this would be an unusual setting.

There is possibly a difference between the actions to be taken if the item “appears” as the result of an action taken in backup or self-service, hence the different options for offline or staff activity. Clearly the option to ask what to do is inapplicable.

Finally, note that once if the item is overdue when the status is set, and overdue fines are generated, then no further fines will be calculated. So, for example, if the setting leaves the item on loan for a “probationary” period, and it is subsequently returned, then the overdue fines will be discarded. (On the other hand, if it was NOT overdue when the status was applied, then no fines would have been generated and subsequent returns of the item when overdue would generate fines!). What this comes down to is that the system will only generate an overdue fine ONCE for a given loan transaction² – any other logic becomes hopelessly confusing to staff and borrower.

¹ Since it is typical that a borrower only realises there is a problem when an overdue appears in their mail.

² (A subsequent renewal would allow further fines to be calculated).

4.2.2.5 Keep Current and Retain as loan period

AFO482/Block borrowers/Borrower file parameters/Abnormal returns allows blocks to be allocated when too many such returns have been found. This block (and parameter) is extended to cover “claimed returned” and “lost” item statuses. The “Keep current” setting determines whether such transactions should be counted towards this block. First of all, a setting of “0” means that an item loan status setting would never be counted. Of course, 10 lost books in 40 years is rather different from 10 lost books in 3 months – the keep current setting determines for how many days the setting should count towards this block.

The Retain as loan setting allows for a (typically) short period during which further investigations can be carried out. If the setting is greater than zero, then applying such a status to an item means that the item will stay against the borrower **as a loan** for that period. During this period, the status setting may be “undone” but subsequently the transactions are taken off the borrower’s list of loans.

For a status which really does only apply to the loan (e.g. overdues suspended) then “Retain as Loan” should be set to some large number (e.g. 99999).

Once this period is over then the transaction is moved to a separate set of records – see section Loan Status Displays.

4.2.2.6 Report When Found

If an item has a status with the “report when found” option checked then this means that the system will report on the status if the item is subsequently returned or issued. It should be noted that this does not apply if the loan status causes the item to be set to a full “lost”/“missing” status, which is handled by the regular processing of item missing statuses.

What happens if the item is “found” during the period in which it is “retained on loan”?

First of all, if the loan status is cleared, then this implies that the loan is re-instated. For some reason, the status was presumed to have been applied incorrectly – for example, it is established that the item was NOT returned, or was not lost.

If the item reappears, however, then the context of the re-appearance needs to be taken into account.

AFO411 – Item is “returned”.

If the loan status applied caused a fine to be generated when the status was applied, then the item is simply returned without a further fine being generated.

If the status is such as to cause fines to be suspended, then the item is simply “returned”.

Otherwise, the system doesn’t know whether the item was found by staff (in which case the “claimed returned” was genuine) or perhaps the claimed returned was spurious and the item is being returned by the borrower.

The system therefore offers the option to apply fines or not. The precise screen offered depends on the context of the transaction. In particular, if fines would otherwise be owing, AND the setting “Discard fines” is set to Ask, then the second screen shown below is offered – with a choice as to whether to waive the fines or not.

@MissingStatus.ReportedMissing - Item status

The following has been reported

Item	60045
Title	on vacation without my da
Loan status	Claimed
Date set	17 May 2006
When on loan to	Walker
Barcode	900024312

Do you want to remove this status and proceed with the transaction?

OK
Cancel
Help

@MissingStatus.ReportedMissing - Item status

The following has been reported

Item	60045
Title	on vacation without my da
Loan status	Claimed
Date set	17 May 2006
When on loan to	Walker
Barcode	900024312
Fine	1.00

Waive overdue fines

No
 Yes

Do you want to remove this status and proceed with the transaction?

OK
Cancel
Help

4.2.2.7 Example statuses

The following section describes some of the main statuses that would commonly be used.

Claimed returned

Code	ClaimRet
Description	Regular Claimed returned
Suspend fines	Yes
Generate overdue fines	No
Discard fines : Staff	Yes
: Offline	Yes
Report when found	No
Suspend overdues	Yes
Change to loan status	AssumeLost
After how many days	100
Transaction type	Loans only
Keep current	100
Retain as loan period	20
Create invoice	No

These settings might be used for a simple claims returned status. The claim is taken at face value and any current or subsequent fines are discarded. If the item subsequently appears then no special online warning is made. After 100 days, the item is deemed to be lost - the loan status will be changed to “AssumeLost” and the actual item will be set to missing. This “Claimed returned” will be used to assess the borrower’s loan privileges for 100 days as well (however since the Assume Lost is also counted for 265 days, the net effect is to include this for 1 year). Items with this status WILL be included automatically in a borrower’s list of items on loan for a period of 20 days.

The following coding might be used for the subsequent “AssumeLost”.loan status

Code	AssumeLost
Description	Set to lost after a claimed returned
Suspend fines	Yes
Generate overdue fines	No
Discard fines : Staff	Yes
: Offline	Yes
Report when found	Yes
Suspend overdues	Yes
Change to loan status	
After how many days	0
Valid for	Either
Keep current	265
Retain as loan period	0
Create invoice	Yes

In this case, the item is subsequently assigned a Lost status- as if the item were set to Missing type “LOST”. Since the item hasn’t turned up, the library policy IS to actually charge the borrower for a replacement (in this example).
Note that if it subsequently turns up, then the item missing processing will take effect.

Item Destroyed

The following settings might be used when a borrower reports that they have accidentally destroyed the book.

Code	Destroyed
Description	Item irreparably damaged/lost/destroyed
Suspend fines	Yes
Generate overdue fines	Yes
Discard fines : Staff	Yes
: Offline	Yes
Report when found	Yes
Suspend overdues	Yes
Change to loan status	
After how many days	0
Valid for	Either
Keep current	0
Retain as loan period	0
Create invoice	Yes

In this example, the item is set to Missing type DESTROYED (LOST would have the same effect online – but the library wishes to keep separate statistics). The “Standard” mechanism for calculating the replacement charge is used. Since the borrower has “owned up” and is paying for the item, this status does NOT count to their running total.

Borrower deceased

This setting might be used on the death of the borrower

Code	Deceased
Description	Fines suspended on death
Suspend fines	Yes
Generate overdue fines	No
Discard fines : Staff	Yes
: Offline	Yes
Report when found	No
Suspend overdues	No
Change to loan status	
After how many days	0
Missing type	
Keep current	0
Retain as loan period	999999
Create invoice	No

In this example, the library chooses to simply suspend the fines, under the circumstances, but overdues continue to be generated as a reminder to executors or relatives to ask for the return of the item.

Suspend overdues

Another status might be defined to simply suspend overdues. An example might be when previous mail has been returned as “not known at this address”, then it might be useful to suspend the overdues, although all other functions keep working.

4.2.2.8 Abnormal Returns

In previous releases, the system keeps track of “abnormal returns”. That is, items which are checked out to a borrower, when already on loan to another borrower. A count (and brief details) are maintained against the original borrower. It can be seen that this circumstance has processing in common with the settings implied above.

A predefined setting will exist on the system called “AbnormalReturn”, with settings (by default) as follows :

Code	AbnormalReturn
Description	Abnormal returns
Suspend fines	No
Generate overdue fines	No
Discard fines : Staff	Ask
: Offline	No
Report when found	No
Suspend overdues	No
Change to loan status	
After how many days	0
Missing type	
Keep current	99999
Retain as loan period	0
Create invoice	No

Effectively this corresponds to the existing logic within the system. When such an item is checked out, this code is “applied” to the loan. As in the current implementation, the system will ask online how to handle any overdue fines. Currently such “abnormal returns” are kept indefinitely – hence the setting 99999 for “Keep current”.

4.2.2.9 Replacement charges

The “create invoice” status settings causes the system to create an invoice. Calculations of a replacement charge and admin fee, if any, are made in the same way that such charges are raised for a very long overdue item (as used in AFO451/Prepare invoices).

See also the section on the Quick Invoice screen.

Conversely, in AFO481/Invoices, it is possible to define after how long overdue, a replacement invoice should automatically be raised.

For borrower category EPA	28,28/10/B*,L*,V*/2,5,7,3,3/0
For borrower category EIS	
For borrower category EBI	28,28/100/B*,L*/2,5,7,3,3/0
For borrower category PS	
For borrower category GS	
For borrower category KCO	
For borrower category EBW	
For borrower category MIL	28,28/100/B*,L*/2,5,7,3,3/0
For borrower category VRK	
For borrower category RNV	
For borrower category NEW	

For readers unfamiliar with this rather complicated parameter – looking at the setting for category EPA above, the /10/ field in combination with the “V*” setting indicates that a book replacement invoice (V) should be raised after 10 days.³

³ In this example, we are looking at a Short Loan item.

4.2.3 Example Codes

The following codes will be installed with the system.

- VubisClaimed
- VubisLost
- VubisMissing
- VubisDestroyed
- VubisStopFines
- AbnormalReturn

These are meant to be some sample configurations to give some guidelines to systems managers as to how to configure the setup. It is not expected that these codes would be used within the system (and they are supplied with the setting “In use” turned OFF).

The Annotation icon is used to show some comments as to how the supplied combination of settings is meant to behave. This Comments function is also available to systems managers to “explain” the setup of the parameter, if they wish to use it. (Comments are NOT multi-lingual - and are meant for the use of specialised staff only).

4.2.4 Online functions

The following section describes the functions within the main online system to apply and use the settings above.

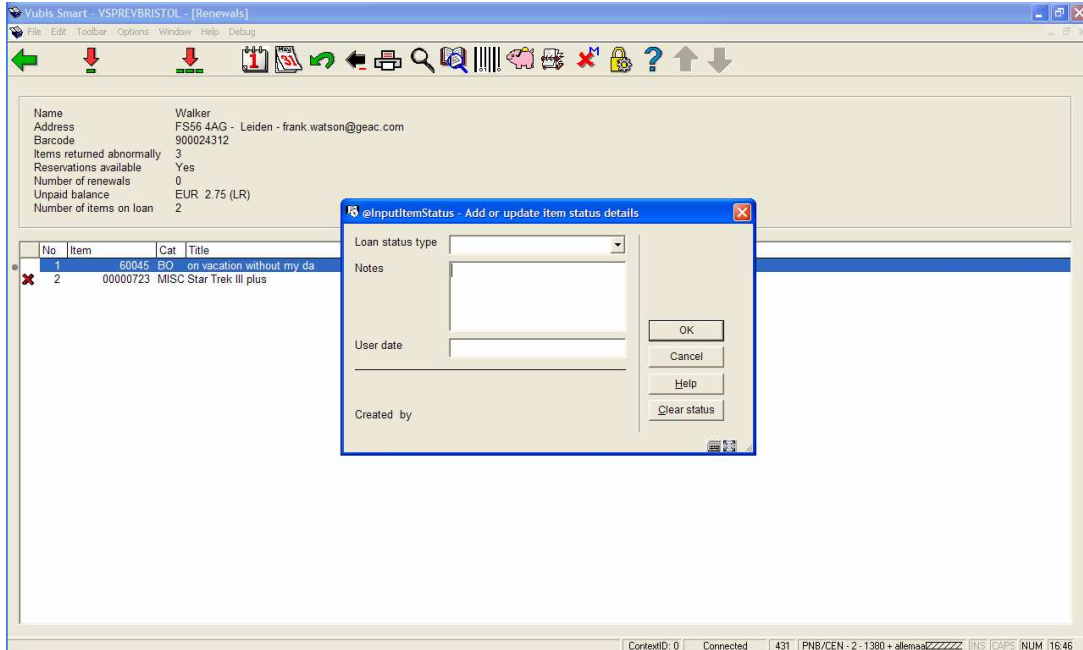
4.2.4.1 Loans displays

There are two main displays of the items on loan to a borrower. The above, from AFO431, will be enhanced with a new command icon as shown to allow for the setting of the loan status.

If a loan transaction HAS a note or a loan status applied, then the Icon specified in the settings will be displayed against the loan (see Display Icon above). If no icon is explicitly defined, or the status is only a note, then a blue letter I icon is displayed by default. This applies to both of the above displays.

4.2.4.2 Setting the loan status

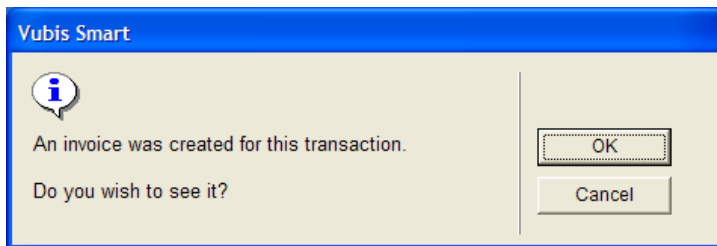
A loan status may be applied by selecting the line and using the “Modify status” icon as above. The following input form will be shown. If the item was already set to some special status, then the form will be shown with the current values completed, and may be used to update or change the status.



It is possible to simply add a note to the item, by leaving the loan status empty.

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

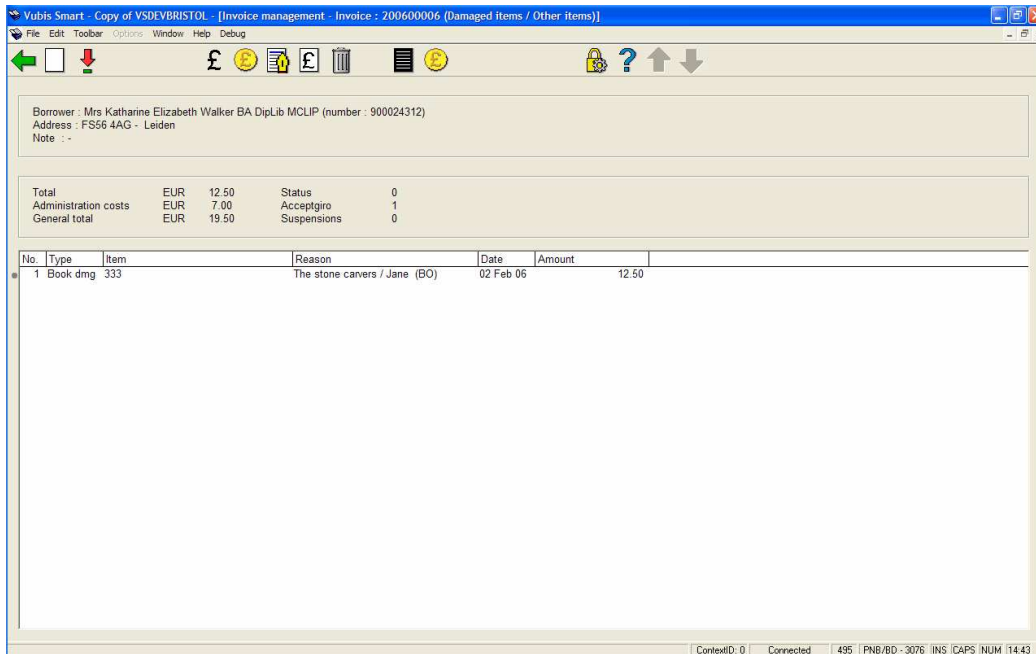
If the Loan Status has been configured to cause an invoice to be generated, then the system offers takes the user to the Quick invoice screen.



4.2.4.3 Quick Invoice screen

The system will automatically generate a provisional invoice for the item(s) selected, and will proceed to display the Invoice management screen as if the details had been entered from AFO495.

For example :



From this screen it is possible to adjust the figures manually, to close the invoice which would make the charge immediately payable, or to leave it open – for example if the library wishes to make a better evaluation of the replacement charge.

Exiting this screen will take the user back to the displays from which they entered. (Precisely where this will be depends on the context – for example, if this was entered from the Loans display from AFO431 and all the items are marked as lost, then the user would be returned to the level prior to that).

The invoice number generated will also be logged against the transactional information for the loan status transaction.

The amount of the charge and the admin fee are calculated as for the automatic invoice generation processing for very long overdue items. (See also the section on Replacement charges),

Change to loan status

A feature of the loan status settings described above (section Loan status settings - detail) describes how an item with a given status may automatically move forward to

another status. What happens if this moves forward to a status for which an invoice is to be generated ?

In this situation, the system will only generate the invoice if the item is still on loan to the borrower. In order for this to happen, the “Retain as loan period” setting must be more than the period in which the loan status is changed.

Consider (as before) an item marked as “claimed returned”. Let us suppose that the policy is to mark such items as missing after 60 days without their turning up. The question then arises as to whether to invoice the borrower or not. In order to simply take the borrower’s word and effectively assume that the library lost the item, then the Claimed returned status can be set to move on to a missing type for which no invoice is generated; alternatively, the status setting can be set such that the “retain as loan period” is set to less than 60 days. The loan transaction will have disappeared from the borrower’s record (although of course there will be a “claimed returned” transaction) and no invoice will be generated.

On the other hand, to generate an invoice then the item must be left with the “retain as loan period” set to more than 60 days, and then an invoice will be generated.

Generating the invoice

If an invoice is generated in this situation, then this processing will be initiated by the overnight processing (see the section on Overnight processing). In this case, there is no opportunity for staff intervention and the invoice will be prepared as if it had been prepared from AFO451/Prepare invoices. In this case, an actual invoice is not created but the information is accessed from AFO495 (Overview of long overdue items) and an invoice can be created directly from this review function.

Permissions

If the “current” staff user does not have permissions for AFO495, the system will simply create a provisional invoice, left open and will pop up a brief message to this effect. The invoice thus created may be accessed using the standard functions of AFO495 by a staff member with appropriate permissions.

(From AFO495, it is possible to ask the system to display all open invoices – so these can be resolved later on).

Other observations

Other scenarios include situations where a borrower has purchased a replacement copy of a lost item. In this case, perhaps, the replacement charge could be set to 0.00 but an admin fee retained; or the invoice (and charge) could be deleted in toto from the system.

4.2.4.4 Updating the Loan Status

If a loan status has already been applied to the loan, then the current settings will be displayed and may be amended.

An existing loan status may be removed by simply clearing the combo box entry (and possibly the note, of course).

An item may only have ONE loan status setting – changing the loan status means that the previous setting is no longer in force.

In what circumstances can the loan status be updated ? It is, of course, not always possible to reverse a loan status change. If the loan status is such as to make the item missing (i.e. a lost book) then the item is flagged as missing, the loan information is removed, and the “lost item” information is recorded against the borrower record as a “lost item” transaction rather than a normal loan. In such a case, the loan has gone and clearly the status cannot be updated.

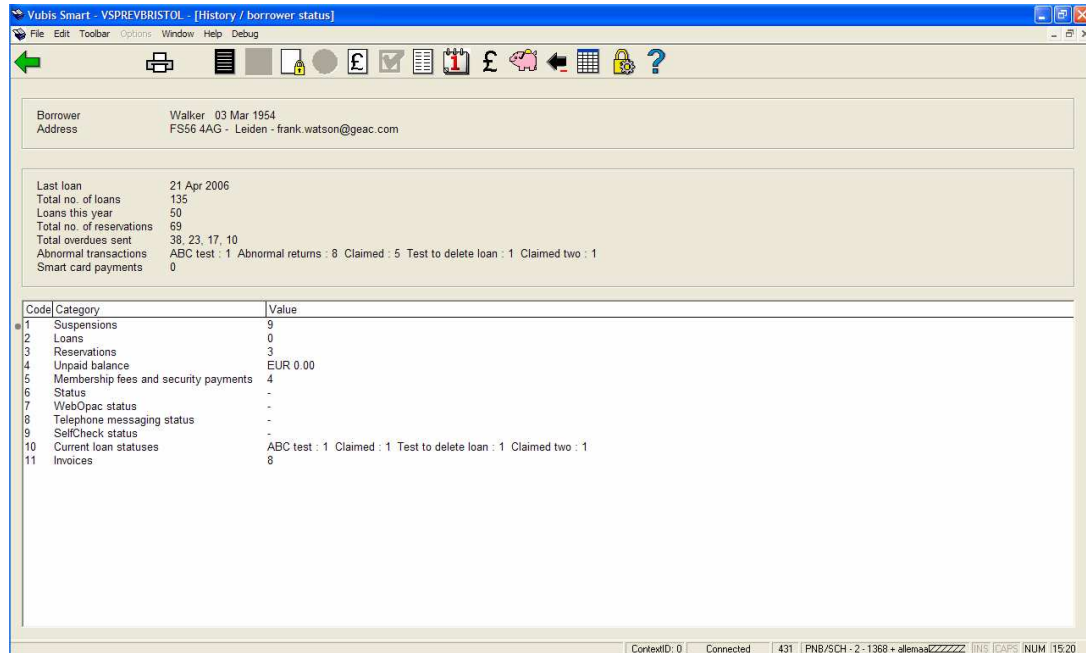
Conversely, for a more temporary status e.g. the “Suspend overdues” status suggested above the checkout record is retained indefinitely and so the loan status can be removed or changed at any time.

Things are more ambiguous for “claimed returned” transactions. Although it is possible for the system to move the status on (e.g. to “Lost”) after a period, it may be appropriate to leave the loan as a current item on loan (albeit marked with a special status), with a view to staff manually adjusting the claims returned status.

For example, after investigation, it may be appropriate to remove the claims returned status from the item, rather than to log this against the borrower’s record. The RETAIN AS LOAN PERIOD setting for the loan status determines for how long the actual loan transaction is retained before the loan is deleted and the “claimed returned transaction” created.

4.2.4.5 Loan Status Displays

The borrower details display will be enhanced as indicated below.



The figures in the window border show the totals of each type ever applied. A new line 10 in the screen displays show the numbers of these considered to be “current” as defined by the settings for each type.

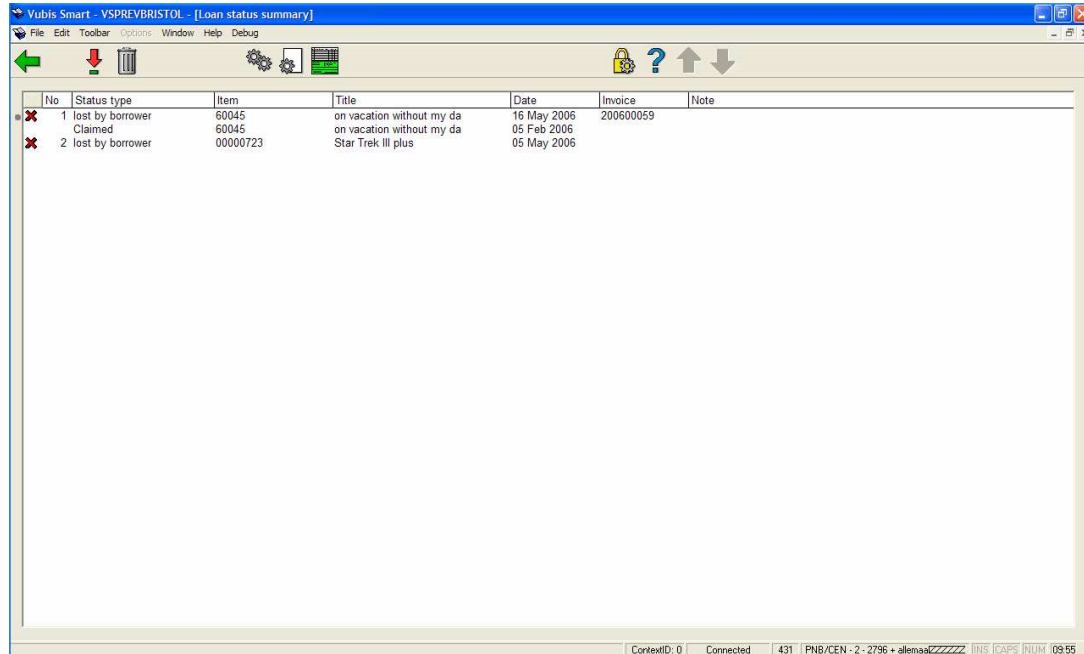
Selection of line 10 allows you to display a summary of all such transactions.

Line 11 is also new – allowing you to display a summary of invoices associated with this borrower. (Effectively this behaves as if you had used AFO495/View invoices by borrower- although line 11 is always shown, selection of this line does nothing unless you have privileges to AFO495).

4.2.4.6 Loan Status Summary Display

The loan status summary display shows a grid with one line per transaction, in a manner very similar to the display of loans.

Transactions will be shown in reverse date order i.e. most recent first.



No	Status type	Item	Title	Date	Invoice	Note
1	lost by borrower	60045	on vacation without my da	16 May 2006	200600059	
	Claimed	60045	on vacation without my da	05 Feb 2006		
2	lost by borrower	00000723	Star Trek III plus	05 May 2006		

This displays only the **current** setting (or if no current loan status) shows the previously saved status. (Thus for example it is possible to see that an item was returned from missing). An additional option on this grid listing allows ALL historic loan status transactions to be displayed, if they were set to be “kept in status history”.

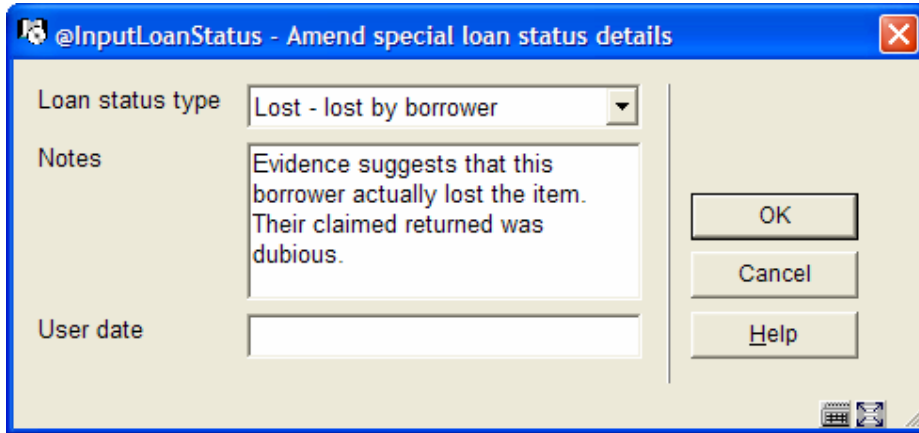
In the above example, line 1 was generated from the “claimed” status shown in the second (unnumbered) line. This arises because (in this particular case) the “claimed” settings were configured to move to “lost” after 100 days (5th Feb – 16th May). The system retains and displays the “chain” of events leading to a specific status.

4.2.4.7 Updating a lost/claim returned transaction

Internally to the system, the information held for such transaction basically corresponds to the information held for a loan transaction. Updating a transaction is basically then a more or less identical exercise to updating the status of a loan.

The main reason for this would be to convert a claimed returned to a lost status i.e. to “move” an item through the logical chain of events.

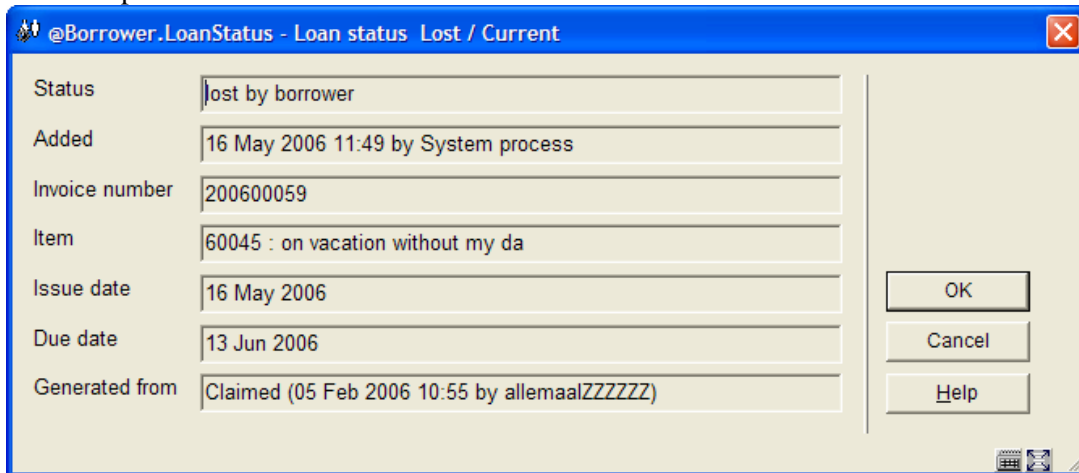
However, there will be nothing in the system to prevent changing a “lost” item to “suspend overdues”. This would of course be totally meaningless – the system will keep a log of changes (see the section on “details”) – but cannot prevent this.



4.2.4.8 Details of a transaction

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 changes, then we keep a history of these changes i.e. to track the change of claimed returned, to lost.(for example). This history will be displayed as well.

For example:



4.2.4.9 Invoice Display



Use of the icon for a specific line, for which an invoice was created takes the user to the invoice display (if they have permissions for AFO495). For example :

Borrower : Walker (number : 900024312)
Address : FS56 4AG - Leiden - frank.watson@geac.com
Note : -

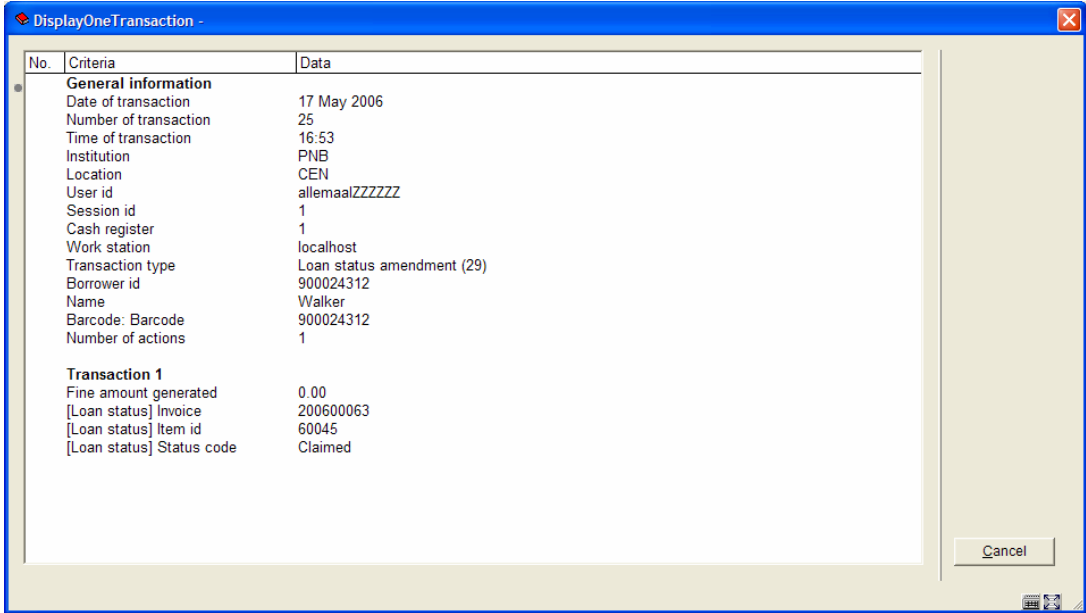
Total	EUR	15.65	Status	0
Administration costs	EUR	7.00	Acceptgiro	1
General total	EUR	22.65	Suspensions	0

No.	Type	Item	Reason	Date	Amount
1	Book dmg	60045	on vacation without m	16 May 06	15.65

ContextID: 0 | Connected | 431 | PNB/CEN - 2 - 2796 + allemaaZZZZZZ | INS | EAPS | NUM | 10.01

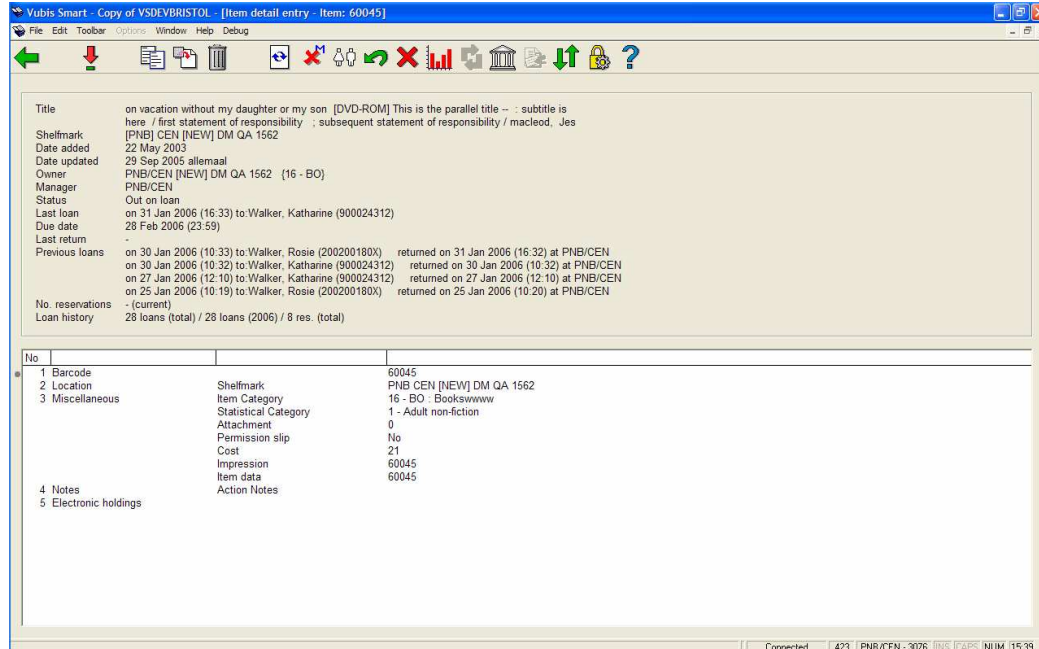
4.2.4.10 Borrower Transaction History

When an item status is added, amended or removed from a borrower’s list of transactions, then an entry is made in the transaction history log, and will be visible from the borrower transaction history display, like other such transactions.



4.2.4.11 Setting the loan status from the item display

Until now, from the item detail display, it was not possible to change the status of an item on loan.



The Modify status command for an item on loan will now take the user to the same loan status display, just as if the item was selected from the borrower’s loan display screen, with the same effect.

Once the loan has been deleted, and the claimed returned loan status has been taken off the list of loans, then of course the link between the item and the borrower is “broken”. (For example, suppose a lost item is found – then the item reverts to its regular status, whilst the fact of losing it still stays against the borrower record.)

In this latter case, the item status may still be updated from the Modify status command. It should be noted that there is a “flag” on the loan status settings which indicates whether this is appropriate to set on an item not on loan; in this case, such settings are not offered.

It is possible to delete the item loan status.

4.2.4.12 Functional implications of item status

Clearing the special item status

The item status will be “cleared” at points within the system where the actual existence of the item is implied. Specifically then any item with a special status will have that status cleared by scanning it in Returns (AFO411), Loans (AFO412), Renewals (AFO413/Renewal by item). In addition the item transfer options (AFO462, 463) also imply the physical existence of the item.

The status may also be explicitly cleared from AFO423 (Edit items). Whilst the former situations imply that the staff member has the book “in their hands”, this option does not. The system may need further information about where the item actually is, therefore.

If the recorded location is the same as the current location, then the system will assume that the item really is “here”; otherwise the system will offer one of five options :

- a. To relocate the item to the current location.
- b. To relocate the item to the current location and then put it back into transit to its current managing location
- c. To relocate the item to the current location and then put it back into transit to its current owning location
- d. To take the last recorded location as the current item location
- e. None of these

In the latter case, then the staff member must update the item data, put it into transit etc as appropriate, manually (and in fact option d. will be applied).

When “found” in AFO411, 412 etc, then if the current location is NOT the item’s managing location, the item will be temporarily relocated to the current location.

The setting in the Loan status parameter “Treat item as unavailable” will determine how the item is to be considered. Effectively, if set, then items with such a loan status will be treated, effectively as if they are missing. That is, they may not appear on the reservations picklist and so on.

Other settings


“Item cannot be updated” – prevents the item information from being updated (e.g. in 423).

“Item is not reservable” – the item is not to be offered as a possible candidate for satisfying a reservation, when this status is applied.

4.2.5 Overnight processing

There are several time-dependent processes associated with the loan status settings, as described above. These are

- To change the loan status automatically from one state to another
- The period for which the loan status setting is considered as “current” for a borrower
- The period for which the loan stays as a loan (the Retain as loan period setting)
- The ability to remove loan status settings completely from the system

This is initiated using the  command icon from the loan status settings option in AFO481.

This process can be run online, batch or, more normally, in memory using the standard techniques in VubisSmart.

This carries out the four tasks identified above.

4.2.6 *Offline processing*

4.2.6.1 *Item on loan*

If an item currently on loan and marked with a special loan status is either reissued or checked-in via the offline processing, then the special loan status flag is always cleared. It should be noted that the system always keeps track of the status as the “Previous” setting, and according to the settings for the specific type of loan status may also keep track of this historically.

Typically, for an item on loan, the status is either something specific to the loan (e.g. suspend overdues) or indicates a temporary condition for the item (e.g. when a claimed returned is temporarily left as “on loan” to the borrower, whilst further checks are made).

The special loan status may, however, have been applied either before or after the transaction being processed was “generated”.

If the status setting was made BEFORE the transaction, then the status option “Report when found” is checked – if this is set to “no”, then the system takes no further action. If it is set to yes, then a “loan status cleared” log message is added to the offline processing report for this transaction.

If the status was added AFTER the transaction, then a log message is added “loan status superceded”, irrespective of the value for the “report when found” setting.

Finally, if the transaction is NOT processed for some other reason (e.g. the borrower record cannot be found), then the loan status is NEVER cleared, but the report is still made. In this latter situation, the system should perhaps clear the status ANYWAY, since we have, presumably, seen the item; however the convolutions of Ifs and Buts get so complicated that the special status is left anyway. The user DOES have the reports to go on, if required !

4.2.6.2 *Item not on loan*

The same considerations apply – for a return, since the item is not on loan, the transaction will not get processed, and the status will not get cleared, but a report is made.

If the transaction is an issue, then the loan overrides and clears the loan status setting. Again, a report is made and the information IS kept historically

5. Release notes for various Functional Enhancements

5.1 Email via server

5.1.1 Introduction

In the current release of VubisSmart, it is possible send emails to borrowers and suppliers. This process however, must be started from a client workstation running both Vubis Smart and an email application.

As this was not a satisfactory solution, this process has been improved. It is now possible to send emails via the Vubis Smart server rather than the client.

5.1.2 Improvements

The following improvements have been made to the email process:

- We now have the ability to CC or defined multiple alternative recipients of email notices.

- SSP type notices were previously sent as attachments for the email. The notice is now part of the body of the email. SSP type notices will be formatted to Courier text. There is no change for card type notices.

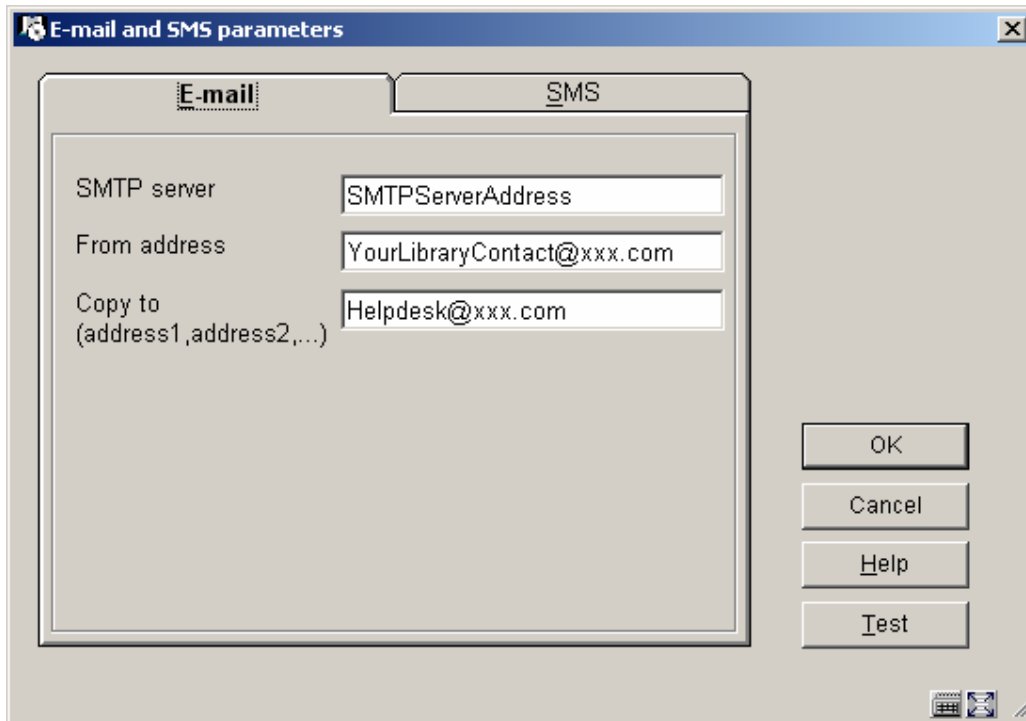
- The actual sending of email is now done via the server and no longer is transferred to the client producing the notices in AFO 452 using the default email of the logged in user.

Previously, if notices were produced per location a separate email address was used for sending the notices (per workstation). Now we only have one email address sending the notices. This is the one of the sender defined in AFO 651. The CC option can be used to send a copy of the email for the different locations.

5.1.3 Parameter settings

General

There is currently no additional setup required short of making sure you have the email portion of the settings defined in the 651 Email / SMS parameters.



SMTP server: required - Enter the Name or the IP of the SMTP server for this site.

From address: required - Enter the sender address (your library) of the system generated email.

Copy to: Optionally enter email addresses to receive a copy of the email. Enter multiple CC recipients by separating them with a comma.

Previously this option allowed you to define parameters for email and/or SMS (Short messaging service) configuration used for the WebOpac Reservation confirmations. The confirmation notices can be optionally set up in the User Activities preferences. The site may define that a confirmation notice be sent to the borrower upon successfully placing a new reservation on the system.

Now that email traffic is processed via the server rather than the client, this option has been enhanced.

It now allows you to define parameters for email and/or SMS configuration used for the generation of email or SMS notices to borrowers as well as WebOpac reservation confirmations. Webopac confirmation notices can be optionally set up in the User Activities preferences. The site may define that a confirmation notice be sent to the borrower upon successfully placing a new reservation on the system. It now also defines the services available for notices.

Note that general notices (overdue, reservation pickup etc.) are generated via AFO451/ 452.

Apart from this, the server itself needs to have email functionality at the Operating System ./ Networklevel enabled. See your system administrator for more information on this subject.

Contact methods

In addition, you must of course set up the following:

- an email format in AFO 616 – Miscellaneous settings for notice output – Physical output format methods
- an email contact method for notice production in AFO 616 – Miscellaneous settings for notice output –Borrower contact methods
- a system contact method in AFO 616 – Vubis Smart client settings (for borrowers as wells as suppliers and staff)
- (Optional - AFO481 - Miscellaneous - Notification method defaults per location / per borrower category)

After this you must ensure that borrowers (AFO431) and suppliers (AFO241) are set to use the email contact method.

See the release notes of 2.4 and/or the help of the above mentioned AFO's for complete details on contact methods.

5.1.4 Processing borrower notices

When running production jobs in AFO 451 the last column (Contact method & number of notices) will display how many notices were generated for each contact method.

When subsequently running the same jobs in AFO 452, you will not ‘see’ anything happening for the email type contact methods, as they will be processed by the server. Notices with a print type contact method will of course come out in the normal way (printer, screen, word processor, etc.).

Because you do not ‘see’ the emails generated, you cannot view, suppress or redirect them. Therefore, the CC option might be useful, as this enables you to see what the emails were after all. Albeit after they have already been sent.

5.2 Borrower Category change

5.2.1 Introduction

In the current release of Vubis Smart, it is possible to define settings which allow a borrower's category to be automatically changed according to their age.

However, in certain cases, this change may imply that other actions need to be taken (for example, a junior borrower might need to re-register, in writing with the library). This document describes how such a category change may be reported in the online system.

5.2.2 Parameter settings

A new option is added to AFO481/Main circulation parameters / Miscellaneous / Circulation Workflow / Borrowers –screen shot shown below.

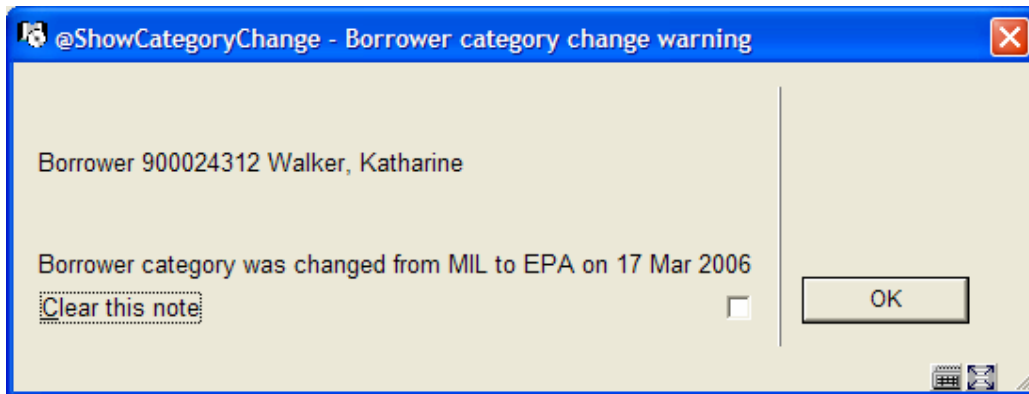
The screenshot shows a software window titled "@CirculationSub11140pt1 - Miscellaneous - Circulation workflow - Borrowers". The window contains the following settings:

- Segment of barcode to display: 1_99
- Normalize borrower barcode with capitals:
- Display reason for block:
- Display unpaid membership fee: 1_0
- Validate statistical category:
- Define membership renewal method: 2
- Reject old borrower barcodes: 0
- Calculate outstanding membership fee: (empty field)
- Active block types for borrowers: A list of block types (04 - Acc, 07 - Out, 10 - Out, 11 - Per, 13 - Iter, 14 - Out) on the left and (01 - Ove, 02 - Cur, 03 - Ove, 05 - Exj, 06 - Ove, 08 - Abr) on the right, with arrows indicating selection.
- Borrower indexes for advanced search: 1_0123456789
- Convert district to upper case:
- Accept payments in borrower maintenance: 1
- Automatically generate membership fee in borrower maintenance:
- Recalculate fee when renewing membership:
- Turn off calculation of expiry date based on date of birth: EPA
- Borrower's address display order: 1,3,2
- Recharge membership fee: (empty field)
- Default borrower category: EPA
- No. of borrower relations: 20
- Suspended point for acceptgiros: 2
- Activate additional optional features: borrower pincode only
- Show warning message if contribution is open more than n days: 1
- Display warning to staff after automatic category change [Check box]: (checked)

Buttons: OK, Cancel, Help, Defaults.

5.2.3 Online displays

If this option is set, then a “flag” is set in the borrower’s record. If this is set, then a warning is displayed as shown below. This is offered at the same places in the online that blocks, suspensions and so on are also shown. It is also shown explicitly when the borrower is accessed in AFO 431 and AFO 414.



Pressing OK simply accepts the message. By default, the “Clear this note” checkbox is unticked. If the user ticks the checkbox, then the flag is removed and this status change report will not be shown again.

5.3 Borrower Collection Agency (new AFO 435)

5.3.1 Introduction

Library borrower accounts that go unpaid are being referred to professional Bill collectors with increasing frequency. These professional Collection Agencies pursue the unpaid accounts and trace borrowers to new addresses whenever possible. If the collection agency succeeds in collection of the account, it retains a negotiated portion of the revenue collected and returns the balance to the library.

To maintain accurate records when collecting on borrower accounts, the Collection Agency needs to be updated with any ongoing changes to a borrower's account, once that borrower has been sent to collection.

In order for this process to be possible, it is necessary to generate account information of these collectable accounts from the libraries automation system and submit it electronically to the Collection Agency with sufficient information to properly identify the borrower and his/her existing account information. Electronic submission methods currently in use include FTP and email.

Within the context of this document, a borrower that is 'in collection' has been reported to the collection agency and still has outstanding amounts owing on his/her account.

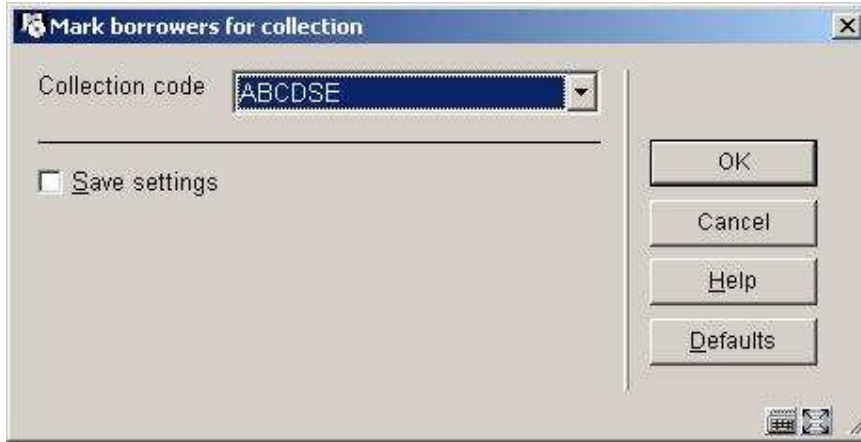
The administration of the collection agency process is done through the new AFO 435 – Borrower Collection Agency. Choosing AFO 435 presents you with two menu choices:

- Mark borrowers for collection
- Submit files to collection agency

Parameter setup is done in AFO 482 – Collection agency – see section 5.3.5

5.3.2 Mark borrowers for collection

Choosing this menu option presents you with a form containing one field:



Collection code: choose one collection agency code from the dropdown list of collection agency codes for your Circulation metainstitution.

Pressing OK presents you with the standard procedure for executing processes (online, batch or memory).

The process ignores any charges or invoices made to the borrower's record on the date it is run. For this reason, this process should be scheduled to run after midnight (when the library is closed) or be run just after the library opens for the day.

Specific borrower types and specific fee types can be ignored by this process by including the specific types in the exemptions lists in the Collection agency code record (in AFO 482).

If a borrower is not yet 'in collection', the system sums up the amount of money owed by the borrower that was assessed within the ageing limits defined in the Collection agency code record (defined in AFO 482- Collection Agency Code). The aging limits are defined as the period between the *Aging parameter (in days from today)* and *Grace period (in days from today)*. Amounts assessed to the borrower's account outside this period are ignored. If the summed amount of owed money is greater than the *Monetary threshold*, the borrower is marked as 'in collection'. A *Collection fee* (the amount is defined in the Collection agency code – AFO 482) is added to the borrower's record.

For a borrower that is already 'in collection', the system calculates new amounts owing by the borrower since the last time the borrower was reported to the collection agency.

Once a borrower has been sent to collection, all amounts owing (except for amounts calculated against exempt fee types as defined in AFO482 - Collection Agency Code) are expected to be collected regardless of when the amount was assessed.

Note: A borrower remains 'in collection' until the total amount owing (not including amounts calculated against exempt fee types) has reached zero. For a borrower previously 'in collection' that has reached a balance of zero, the system reports the zero balance to the collection agency. This should be a clue to the collection agency that this borrower should no longer be considered for collection.

5.3.3 Submit files to collection agency

A form is presented with the following prompts:

This process produces report files whose formats are described in section 5.3.4. After successfully creating the report files, you can either send the files to the collection agency via FTP or as attachments in an email.

NOTE: the output file can only be produced once. It can NOT be run again.

If you wish to produce a printout of the collections information, you can easily open the saved file from disk and import the contents into Microsoft Word or Excel.

5.3.4 Output file layout

The formats of the report files are as follows: each field is delimited by “|”. Records are delimited by Carriage return.

New borrowers report file –

For each ‘in collection’ borrower that has not already been reported to the collection agency, one header record is produced

- “H” – record type - header
- Borrower Name Borrower ID/Barcode/RecordNumber
- Borrower Address
- Borrower City
- Borrower State
- Borrower Postal Code
- Borrower Home Phone Number
- Borrower Date of Birth (format DD/MM/YYYY)
- Borrower Category
- Borrower alternate identifier/Social Security Number (if on file and if *Include alternate identifier in reports* flag set)
- Total (Borrower's Amount Due)
- Earliest debit date of accrued invoices (the date stamp of the oldest charge on the borrower record)
- Earliest due date of invoiced items (the date stamp of the earliest overdue item that has been invoiced) (format DD/MM/YYYY)

If you have chosen to include details of invoiced overdue items in the report files, the system produces one report record for each item.

- “D” – record type - detail
- Borrower Name
- Borrower ID/Barcode/RecordNumber
- Item barcode
- Title
- Author
- Material category
- Item price
- Due date(format DD/MM/YYYY)

Updated borrowers report file –

For each ‘in collection’ borrower that has already been reported to the collection agency, one header record is produced

- “H” – record type - header
- Borrower Name
- Borrower ID/Barcode/RecordNumber
- Borrower alternate identifier/Social Security Number (if on file and if *Include alternate identifier in reports* flag set)
- Total (Borrower's Amount Due)
- Amount paid (the sum of payments made on the borrower’s record since the last report was sent)
- New Money Owed (sum of new charges on the borrower’s record since the last report was sent)
- Amount Waived (sum of payments waived on the borrower’s record since the last report was sent)
- Earliest due date of invoiced items (the date stamp of the earliest overdue item that has been invoiced) (format DD/MM/YYYY)

If you have chosen to include details of invoiced overdue items in the report files, the system produces one report record for each item.

- “D” – record type - detail
- Borrower Name
- Borrower ID/Barcode/RecordNumber
- Item barcode
- Title
- Author
- Material category
- Item price
- Due date(format DD/MM/YYYY)

Synchronisation report file –

For each ‘in collection’ borrower, one report record is produced in the following format

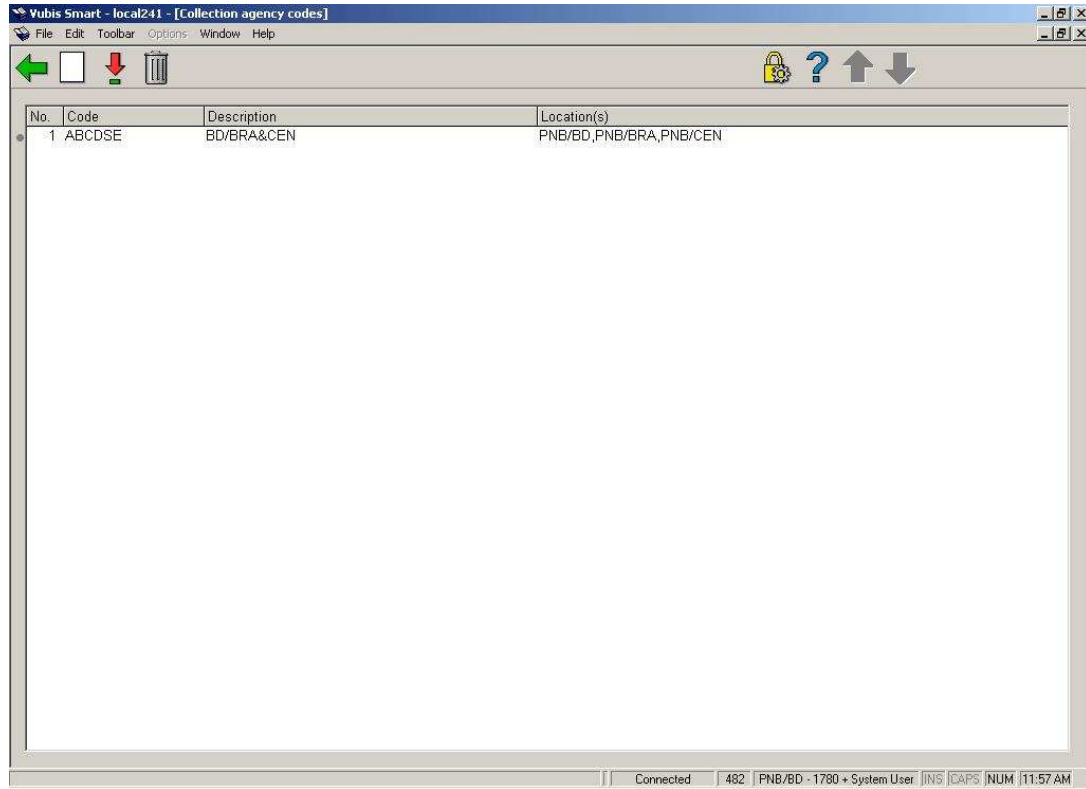
- “H” – record type - header
- Borrower Name
- Borrower ID/Barcode/RecordNumber
- Borrower alternate identifier/Social Security Number (if on file and if *Include alternate identifier in reports* flag set)
- Total (Borrower's Amount Due)
- Earliest due date of invoiced items (the date stamp of the earliest overdue item that has been invoiced)

If you have chosen to include details of invoiced overdue items in the report files, the system produces one report record for each item.

- “D” – record type - detail
- Borrower Name
- Borrower ID/Barcode/RecordNumber
- Item barcode
- Title
- Author
- Material category
- Item price
- Due date(format DD/MM/YYYY)

5.3.5 Parameter settings

There is a new menu item in AFO 482 Borrower file parameters – Collection agency codes which includes the parameters required for Collection agency functionality. These parameters are stored at the Circulation metainstitution level. Multiple collection agency codes may be set up for each Circulation metainstitution. After choosing the Collection agency codes option, a screen appears showing you all of the collection agency codes already set up for your Circulation metainstitution:



Standard Add and modify icons are available. The Delete icon is only available if no locations are linked to the collection agency code.

Choosing the Add or Modify icons presents you with the parameter form:

Collection agency detail

Collection code: ABCDSE

Description: BD/BRA&CEN

Locations to link: PNB/*, PNB/AATOP, PNB/CL, PNB/CTR, PNB/DEV, PNB/GEACTEST (selected); PNB/BD, PNB/BRA, PNB/CEN

Exempt fee types: (A) Administrative fees, (B) Refund from depos, (C) Catalogue printout, (D) Security payments, (E) Enrolment fees, (F) Fines

Monetary threshold: 2

Collection fee: 8.5

Aging parameter (in days): 1500

Grace period (in days): 0

Exempt borrower categories: EBI, EBW, EIS, EPA, GS, KCO

Email address: Collections@acme.com

Save settings

OK, Cancel, Help, Defaults

The parameter form includes the following fields:

Collection code: a unique code for this collection agency

Description: description of the collection agency

Locations to link: combo box showing list of institution/location combinations (including institution/* to select all locations for a specific institution). If an institution/location combination is already linked to another collection agency code, the list will not include this combination.

Exempt fee types: combo box showing list of fee types that are not collected by the collection agency.

Monetary threshold: If a Borrower's aged aggregate amount owed (see Aging and Grace period parameter below) equals or exceeds this value, the Borrower's bills and invoices will be sent to the Collection Agency for collection. The aggregate amount is calculated only from fee types not included in the *Exempt fee types* field.

Collection fee: On going to collection, an additional processing fee will be added to the existing invoices.

Aging parameter (in days): (i.e. 6 years = 2189). Invoices, fines and other payable amounts older than this criteria will be ignored.

Grace period (in days): (ignore current invoices within X days). Invoices, fines and other payable amounts more recent than this will be ignored.

Exempt borrower categories: list of borrower categories that are exempt(i.e. Staff, Bankruptcy).

Email address: email address of Collection Company

There is also a change to AFO 482 – Borrower Address Priority Setup

Overdue 2	Address 2	<input type="checkbox"/>
Overdue 2 - use guarantor address		<input type="checkbox"/>
Overdue 3	Address 6	<input type="checkbox"/>
Overdue 3 - use guarantor address		<input type="checkbox"/>
Overdue 4	Address 2	<input type="checkbox"/>
Overdue 4 - use guarantor address		<input type="checkbox"/>
Reservations	Address 9	<input type="checkbox"/>
Reservations - use guarantor address		<input type="checkbox"/>
Acceptgiros 1	Home Address	<input type="checkbox"/>
Acceptgiros 1 - use guarantor address		<input type="checkbox"/>
Acceptgiros overdue 1	Home Address	<input type="checkbox"/>
Acceptgiros overdue 1 - use guarantor address		<input type="checkbox"/>
Acceptgiros overdue 2	Home Address	<input type="checkbox"/>
Acceptgiros overdue 2 - use guarantor address		<input type="checkbox"/>
Automatic recalls	Home Address	<input type="checkbox"/>
Automatic recalls - use guarantor address		<input type="checkbox"/>
Manual recalls	Home Address	<input type="checkbox"/>
Manual recalls - use guarantor address		<input type="checkbox"/>
Acceptgiros for invoices	Home Address	<input type="checkbox"/>
Acceptgiros for invoices - use guarantor address		<input type="checkbox"/>
Direct debits	Home Address	<input type="checkbox"/>
Direct debit - use guarantor address		<input type="checkbox"/>
Invoices	Home Address	<input type="checkbox"/>
Invoices - use guarantor address		<input type="checkbox"/>
Collection agency	Home Address	<input type="checkbox"/>
Collection agency - use guarantor address		<input type="checkbox"/>

Two new fields have been added to the bottom of the 'Borrower Priority Address ...' form.

Collection agency: dropdown list of addresses defined for borrowers

Collection agency – use guarantor address: checkbox

5.4 Borrower Import reports (new AFO 446)

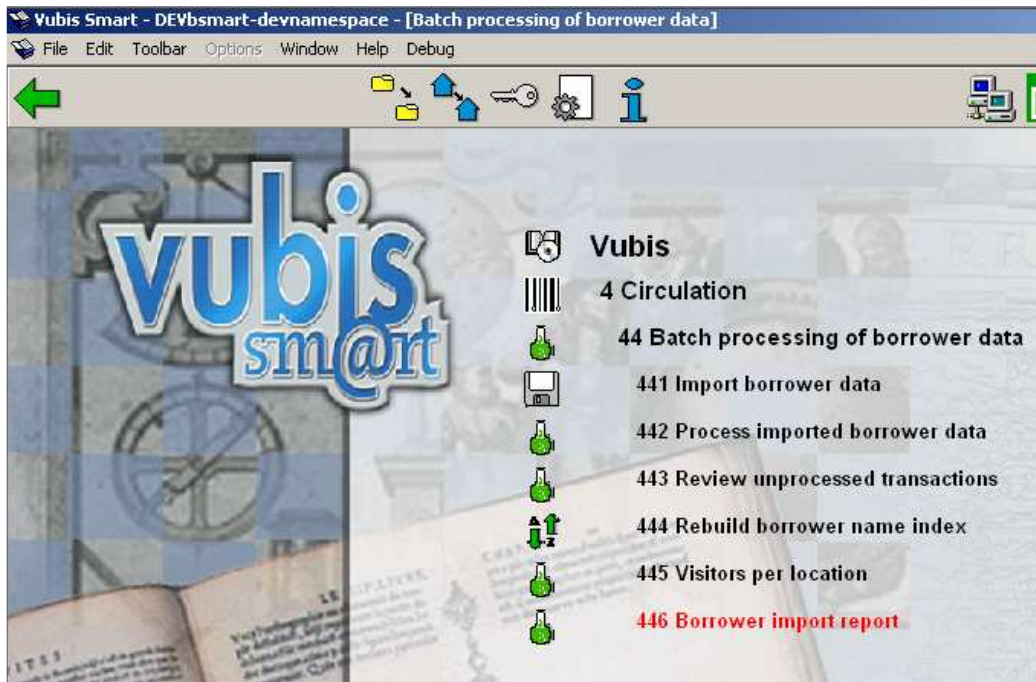
5.4.1 Introduction

There was a need to improve the reporting from the borrower import (AFO441-442). This includes the following:

1. Produce a summary report from AFO441 Import Borrower Data showing the number of New , Updated, and Deleted records loading to the internal intermediate file. Show the Total of all borrowers processed.
2. From AFO442 Process Borrower Import Data show each borrower barcode loaded with the action being taken. Update, New, Delete.
3. For Update borrower records show the fields that wereupdated. Allow fields shown to wrap to multiple lines.
4. For New borrower records just say “New”
5. For Delete borrower records just say “Deleted” or “Not Deleted”
6. For Update and New borrower records show if the record is incomplete.
7. User must be able to see all previous reports with the newest first and with an option to delete reports.

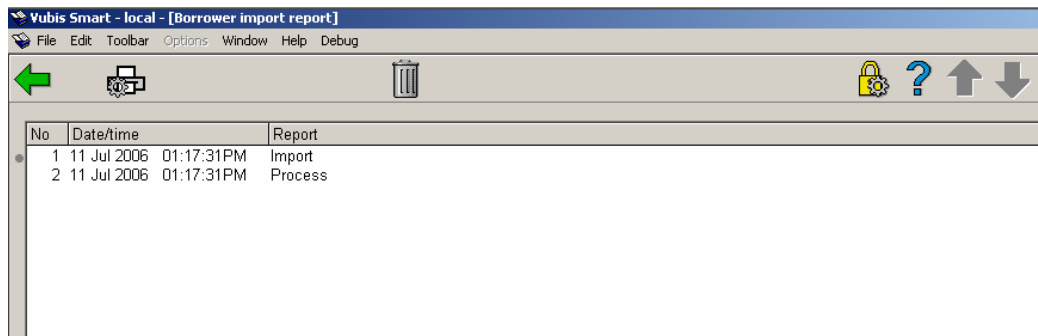
AFO’s 441 and 442 have been enhanced with a new form after the load to show the summary of what was done by the import.

There is a new AFO446 – Borrower Import Report



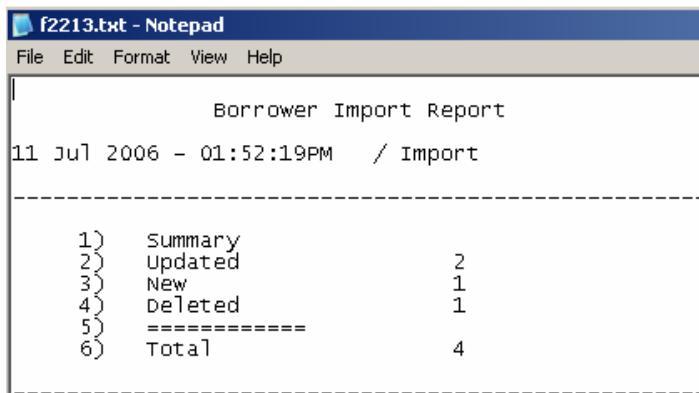
5.4.2 Functional description

Selecting 446 – Borrower import report displays the list of reports by date and time. The system shows the newest import first.



The Print Report (P*) icon will allow the user to select and print the selected report to the screen, printer or etc.

Sample of the AFO441 Import borrower data report



Summary

- Unknown A - Record type of 'A' or anything other unknown type.
- Updated - Record type of 'M'.
- New - Record type of 'N'.
- Deleted - Record type of 'S'.

The above record status codes are described in detail with the Borrower Import file structure documents and will not be described here in detail.

Sample of the AFO442 Process Import borrower data report

```
f2214.txt - Notepad
File Edit Format View Help

Borrower Import Report
11 Jul 2006 - 01:52:19PM / Process
-----
1) 39999000000042 Update Street2,Phone2. Incomplete.
2) 39999000000043 Update Phone1
3) 39999000000099 New
4) 39999000000500 Deleted
5)
6) Summary
7) Updated 2
8) New 1
9) Deleted 1
10) Not Deleted 0
11) Errors 0
12) Warnings 0
13) =====
14) Total 4
-----
```

Report shows the borrower barcodes processed.

If it is an Update it shows the Group name in square brackets [Home Address] with the description of the field that was updated. If the field description is in upper case then it is new data. If lower case it is replaced data.

The borrower barcodes that do not update information are not listed in detail. Only the total number of unchanged borrowers is reported.

Summary of the statistics

Updated. Shows the number of update records processed.

New. Shows the number of new records processed.

Deleted. Shows the number of records deleted processed.

Update not found. Shows the number of borrower updates that could not be found.

New duplicate found. Shows the number of new records for which a match could be found, but it was not the same borrower. Record not added.

Delete not found. Shows the number of records to be deleted where the borrower could not be found.

Unchanged. Shows the number of updates that did not change the borrower record.

Total. Shows the total number of records in the import.

The Delete Report (S*) icon will allow the user delete the selected report. User will be prompted if it is ok to delete this report. This will have no impact on processing.

5.5 Item Statistical categories (new option in AFO 469)

5.5.1 Introduction

Until now libraries had to ask Infor PS staff if they wanted to add new statistical categories at item level.

In this patch a new option has been added to AFO469 Item Management Parameters – Statistical Categories to allow sites maintain their own Item Statistical Categories:



5.5.2 Functional description

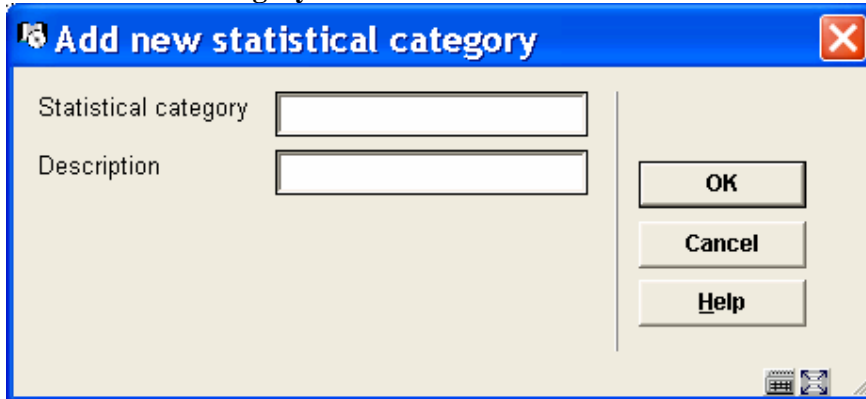
After choosing this new menu option, you are presented with the overview screen of codes already defined:

The screenshot shows a software window titled "Vubis Smart - VSQAPREV - [Item statistical categories]". The window contains a table with three columns: "No", "Code", and "Description". The table lists 30 rows of data, including categories like "Adult non-fiction", "Adult fiction", and "SWAN" material types. The status bar at the bottom indicates "Connected", "469", "PNB/VP - 3520", "INS", "CAPS", "NUM", and "9:00 AM".

No	Code	Description
1	1	Adult non-fiction
2	2	Adult fiction
3	21	Adult fiction in Dutch
4	22	Adult fiction in English
5	23	Adult fiction in French
6	221	Adult fiction in English 20th century
7	222	Adult fiction in English 19th century
8	2211	Adult fiction in English 20th century 1945-today
9	2212	Adult fiction in English 20th century 1939-1945
10	31188	SWAN 20th century 1939-1945 No Language
11	31560	SWAN 17th century 1650-1699
12	31561	SWAN 17th century 16??
13	31570	SWAN 18th century 1750-1799
14	31571	SWAN 18th century 17??
15	31590	SWAN 19th century 1850-1899
16	31591	SWAN 19th century 18??
17	32189	SWAN English 20th century
18	32279	SWAN English 19th century
19	32288	SWAN English 20th century 1945-today
20	99010	SWAN MISC Material type
21	99030	SWAN PER Material type
22	99040	SWAN SER Material type
23	99050	SWAN YB Material type
24	99060	SWAN ANN Material type
25	99070	SWAN CDR Material type
26	99110	SWAN STAT Material type
27	99130	SWAN MAP Material type
28	99140	SWAN AV/M Material type
29	99150	SWAN CD Material type
30	99160	SWAN BC Material type

Options:

New statistical category

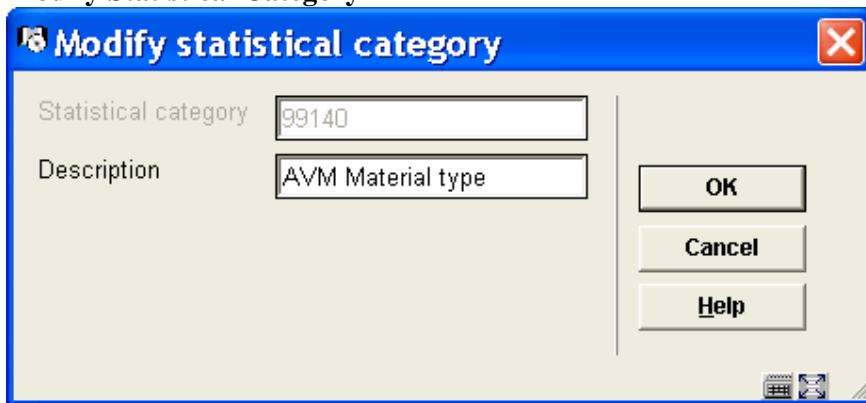


The screenshot shows a dialog box titled "Add new statistical category". It has a blue title bar with a close button (X) in the top right corner. The main area is light gray and contains two text input fields. The first field is labeled "Statistical category" and is empty. The second field is labeled "Description" and is also empty. To the right of these fields are three buttons stacked vertically: "OK", "Cancel", and "Help". At the bottom right of the dialog, there are small icons for a calendar and a refresh button.

Enter the new statistical category code. The code must be unique. Valid entries contain a combination of characters A-Z, numbers 0-9 only. Punctuation, lowercase characters, space and characters with diacritics are not accepted as valid codes. Maximum length for the category code is 40.

Description – Descriptive wording for the statistical category. Punctuation, diacritics and spaces are allowed in the description. Maximum length for the description is 150.

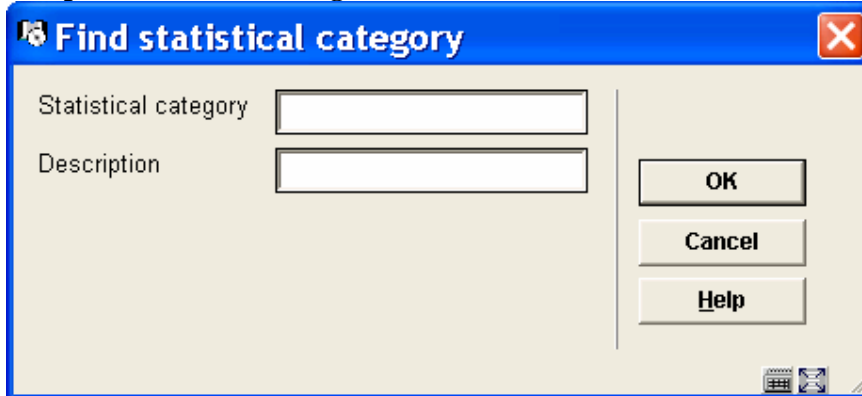
Modify Statistical Category



The screenshot shows a dialog box titled "Modify statistical category". It has a blue title bar with a close button (X) in the top right corner. The main area is light gray and contains two text input fields. The first field is labeled "Statistical category" and contains the text "99140". The second field is labeled "Description" and contains the text "AVM Material type". To the right of these fields are three buttons stacked vertically: "OK", "Cancel", and "Help". At the bottom right of the dialog, there are small icons for a calendar and a refresh button.

The descriptive text for the Statistical category may be modified.

Jump to screen containing code



The image shows a dialog box titled "Find statistical category". It has a blue title bar with a close button (X) in the top right corner. The main area is light beige and contains two text input fields. The first field is labeled "Statistical category" and the second is labeled "Description". To the right of these fields are three buttons: "OK", "Cancel", and "Help". At the bottom right of the dialog, there are small icons for a keyboard and a mouse.

This option will display the screen containing the first occurrence of the text entered.

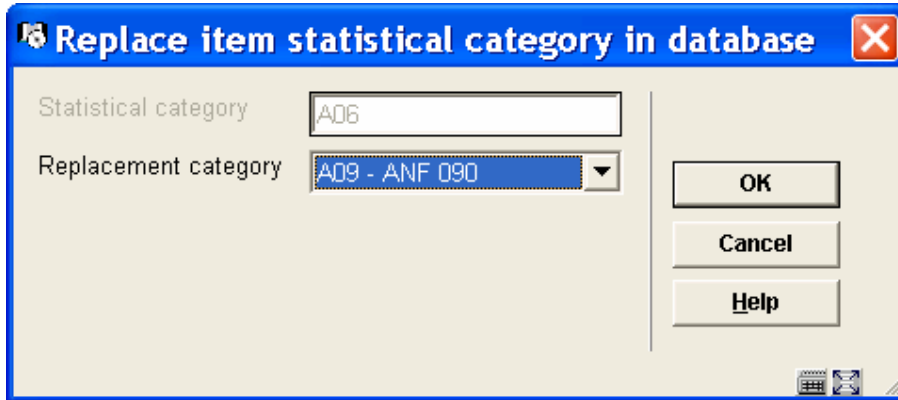
Enter a code or part of a code into the Statistical category to find the first occurrence of this string as a code.

OR

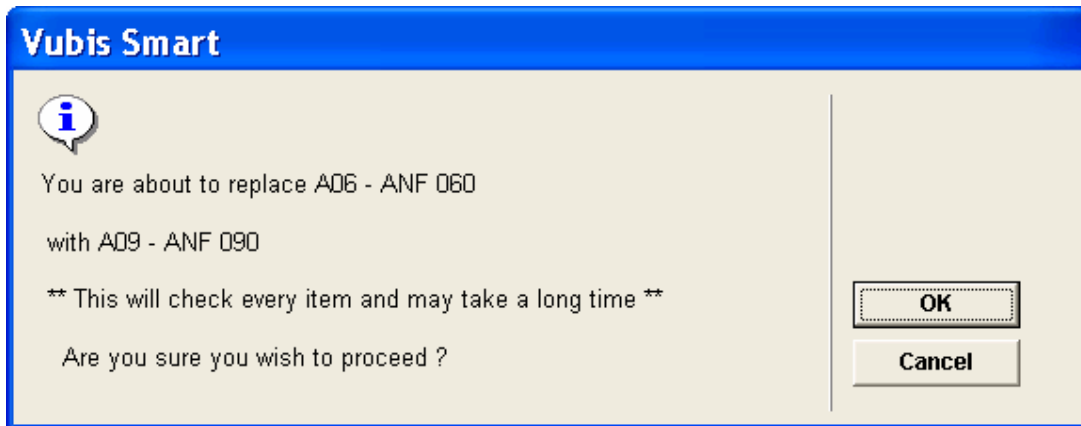
Enter text into the description field to find the first occurrence of this string used in the description field. If there is an entry in the code and the description, the code portion will take precedence in the result presented.

Replace statistical category

This option globally replaces the selected statistical category with the replacement category selected from the drop down list.



The process will check all items on the system and replace the statistical code as specified for the item statistical category. This process can be used to delete a code which is no longer in use by reassigning the current statistical categories to a new value. The process can be executed while the system is active.



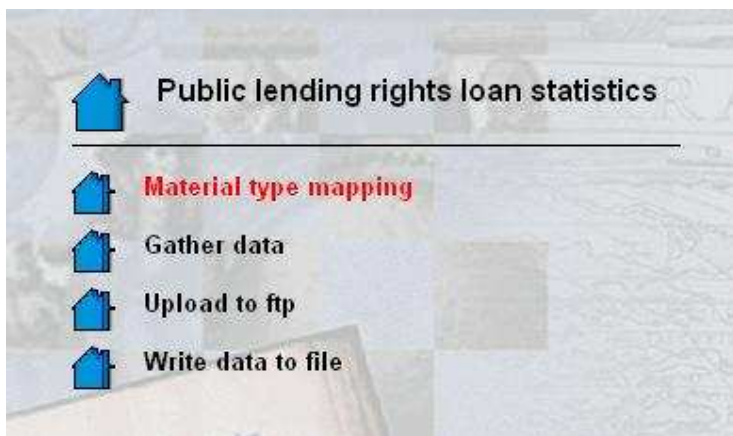
Once the processing has been completed, the original statistical code is removed from the list of defined item categories.

5.6 PLR (new AFO 733)

5.6.1 Introduction

The Vubis Smart system produces loan statistics in two different formats: Stichting Leenrecht and Public lending rights. After choosing AFO 733, the system allows you to choose from two different loan statistics formats: Stichting Leenrecht and Public lending rights (PLR). This document describes only the latter format.

As an overview for those not familiar with public lending rights, selected libraries in the United Kingdom are required to provide the government periodic statistics on the borrowing of particular titles and items. The government uses these statistics to reimburse authors for library use of their works each year.



There are four menu options on this screen:

Material type mapping – if necessary, use this option to map the material codes in your Vubis Smart system to material codes that are acceptable to the authority requesting the PLR file (see section 5.6.2). For example, if your system uses code BO for books but the Authority expects a code of BOOKS, you would have to create a mapping table.

Gather data – set up the parameters to gather the PLR data and create the PLR file.

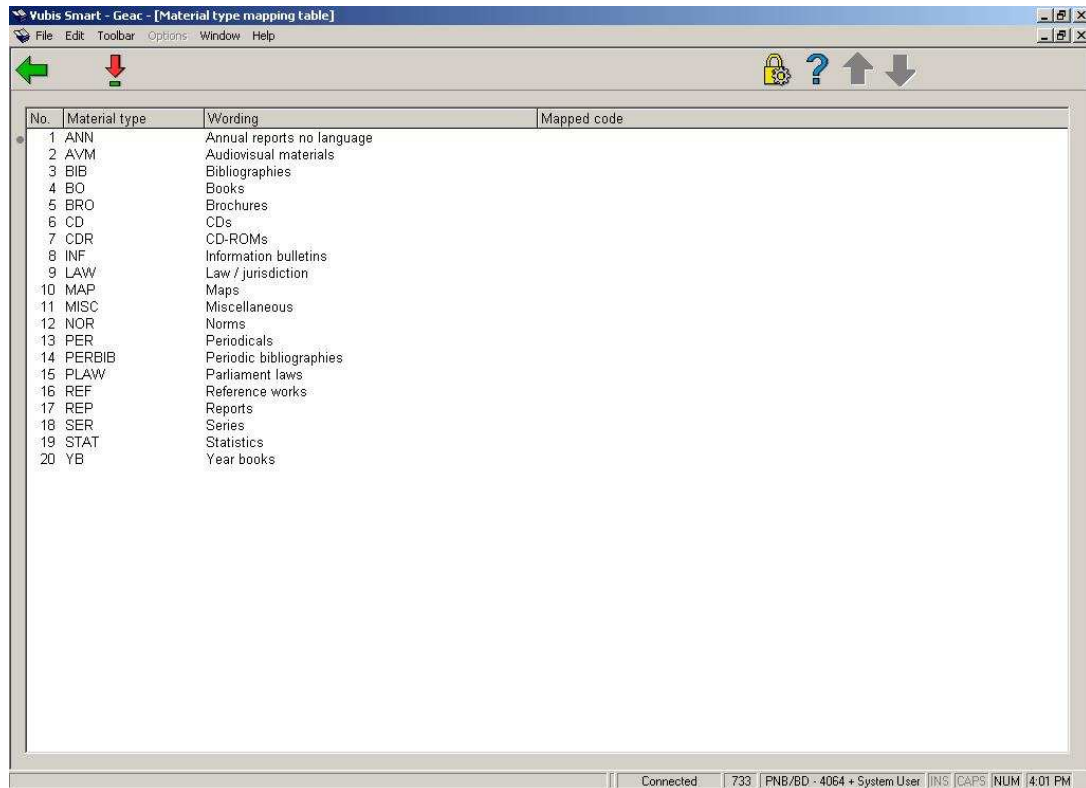
Upload to ftp – if sending the PLR file via ftp, use this option

Write data to file – if sending the PLR file as an attachment to an email, use this option to write the PLR file to disk. The disk file can then be attached to an email.

5.6.2 Material type mapping

If necessary, use this option to map the material codes in your Vubis Smart system to material codes that are acceptable to the authority requesting the PLR file. For example, if your system uses code BO for books but the Authority expects a code of BOOKS, you would have to create a mapping table.

The system displays a screen listing all of the material codes in your system.



No.	Material type	Wording	Mapped code
1	ANN	Annual reports no language	
2	AVM	Audiovisual materials	
3	BIB	Bibliographies	
4	BO	Books	
5	BRO	Brochures	
6	CD	CDs	
7	CDR	CD-ROMs	
8	INF	Information bulletins	
9	LAW	Law / jurisdiction	
10	MAP	Maps	
11	MISC	Miscellaneous	
12	NOR	Norms	
13	PER	Periodicals	
14	PERBIB	Periodic bibliographies	
15	PLAW	Parliament laws	
16	REF	Reference works	
17	REP	Reports	
18	SER	Series	
19	STAT	Statistics	
20	YB	Year books	

To create a mapping, double-click one of the entries and enter the value in the Mapped code field that you want to appear in the PLR output file.

Only use this option if the material codes in your Vubis Smart system are not the same as the ones requested by the Authority or if multiple material codes in your Vubis Smart system need to be mapped into a single code.

If you are using the mapping table, an entry must be set up for each Material type on your system. The value in the Mapped code field may be the same as the value of the Material code for some entries. Multiple Material type codes may be mapped to one Mapped code.

5.6.3 Gather data

The Gather data step prompts you for the parameters to use for the PLR extract and then creates the extract file.

Set parameters for data collection

Library number: 25

Database: 6

ISBN matching profile: ISBNMarc21

Include all institution/locations:

Include only institution/locations: PNB/A*, PNB/BF, PNB/CL, PNB/CT, PNB/GE, PNB/LC to PNB/*, PNB/BD, PNB/CEN, PNB/DEV

Include all borrower categories:

Include only borrower categories: GS, KCO, MIL, NEW, PS, RNV to EBI, EBW, EIS, EPA

Include all item categories:

Include only item categories: 01 (MIS), 03 (PEF), 04 (SEF), 05 (YB), 06 (ANN), 07 (CDF) to 02 (LAW), 16 (BO)

Include all item statistical categories:

Include only item statistical categories: - BLAN, 1 - Adult f, 221 - Ac, 2211 - A, 2212 - A, 222 - Ac to 2 - Adult f, 21 - Adult f, 22 - Adult f

Map item categories:

Multiple material types are added together on single record:

From: 01 Jun 2006

To: 27 Jun 2006

OK, Cancel

After pressing Ok, the system does some preliminary checks. One of the checks is to make sure that a previously-created file for the same library number has already been sent. In this case, the loan statistics were extracted but the file was not sent using either the 'Upload to ftp' or 'Write data to file' menu options.

5.6.3.1 Miscellaneous information

1. Multiple loans (issues) of the same item on the same day are only counted once.
2. Renewals count as separate loans (issues).
3. Any record without an ISBN is not reported in the statistics. The '!ISBNForPLR' element/group profile in AFO 151 is used to determine the tag/subfield combination(s) used to derive the ISBN from the bibliographic record. You should check to make sure that this profile contains the correct tag/subfield combinations.
4. The '!AuthorSurname' element/group profile in AFO 151 is used to determine the tag/subfield combination(s) used to derive the Author's surname from the bibliographic record. You should check to make sure that this profile contains the correct tag/subfield combinations.

5.6.3.2 Layout of output file

The resulting PLR output file has a layout containing three different types of records: Header record (one only), the Issues Records (many) and the Trailer Record (one only).

All fields are mandatory and are delimited with a 'pipe' character (|). The pipe character does not appear in the actual field values, only as a delimiter. Records are delimited by a carriage return (ASCII value 13) character.

Header Record

Field No.	Field Name	Description	Value
1	Library number	Alphanumeric	Assigned to the library by the Authority collecting PLR statistics
2	Start Date	Numeric (ddmmyyyy)	Start date for period (e.g. 01072003)
3	End Date	Numeric (ddmmyyyy)	End date for period (e.g. 30082003)

Issues Records

These records indicate the number of times each unique ISBN has been issued during the specified period in the Header Record. If the *Multiple material types are added together on one ISBN* flag is set, each ISBN should appear ONLY ONCE in the dataset (multiple copies of the same ISBN and accrued borrowings should be reported as one record).

Field No.	Field Name	Description	Value
1	ISBN	Alphanumeric	ISBN only (e.g. 10 digit ISBNs such as 0412542404 or 080187386X – or 13 digit ISBNs such as 9781844289576 or 9790753119500). Please do not report any other type of control number in this field.
2	Issues in Period	Numeric	The number of times ALL copies of the ISBN were borrowed in the period
3	Copies in Authority	Numeric	The number of copies of the ISBN in stock within all the authority's libraries being sampled. If this data not available, then 0.
4	Contributor Code	Alphanumeric	The first 4 characters of the principal author's surname - or alternatively, the complete author's surname.
5	Item or Material Type	Alphanumeric	The item or material type for this record.

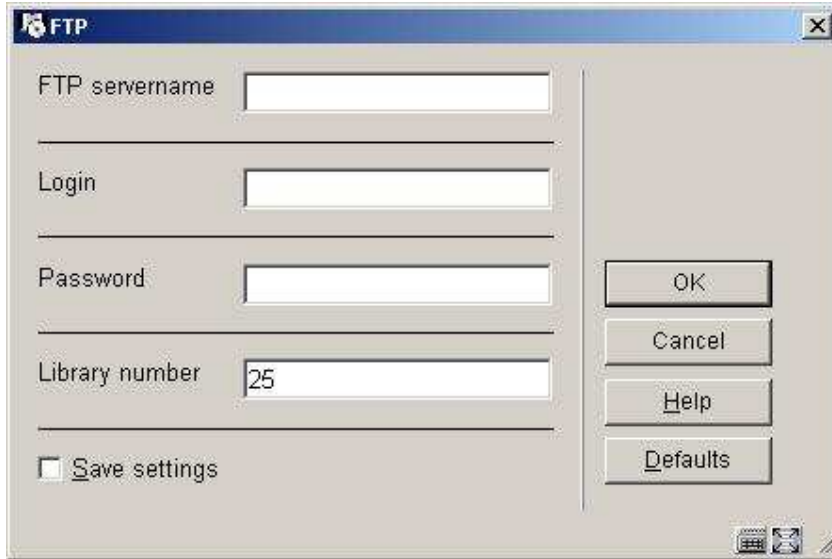
Trailer Record

This record must appear ONCE ONLY and be the LAST in the dataset.

Position	Field Name	Description	Value
1	ISBN Count	Numeric	Count of all records in the dataset
2	Issues	Numeric	Count of loans (issues) in the period for all records in the dataset

5.6.4 Upload to FTP

Use this option to upload the extracted file using ftp.



FTP servername – the name of the ftp server.

Login – the login user on the ftp server

Password – the password for logging in to the ftp server

Library number – the Library number for which you are sending the PLR file. The system defaults the Library number for which you last gathered statistics.

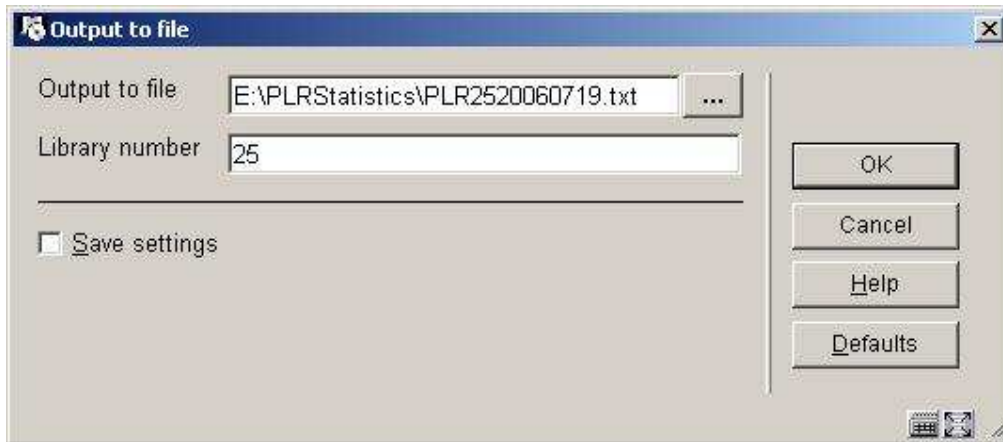
The system might respond with a message that the file has already been sent via FTP.

If you press OK, the system logs in to the ftp server and transfers the file. A log of the actions taken or errors encountered is displayed at the end of the transfer.

The name of the transferred file always begins with ‘PLR’ and is followed by the Library number.

5.6.5 Write data to file

Use this option to save the PLR file in a file on disk. The file can then later be sent as an email attachment to the Authority requesting the PLR file.



Output to file – specify the directory and file name where the output file should be saved. The directory can either be one local to your PC or a mapped network drive.
Library number - the Library number for which you are sending the PLR file. The system defaults the Library number for which your login last gathered statistics.

When you press OK, the system checks to make sure that the file has not already been created. If it has, a message is displayed.

If you press OK, the system continues with the file creation.

Once the file has been created, you can locate it in the directory where it was saved and attach it to an email to send to the Authority requesting the PLR.

Licence information

Note that AFO 733 is not a standard part of the Vubis Smart application. It requires a specific license and must be installed and activated separately. Please contact your account manager for pricing and installation information.

5.7 Title Accession History (new AFO 142)

5.7.1 Introduction

Title accession history is used to supply location additions and deletions details to a central bureau catalogue. The additions detail record should be sent when the first item is added to a title record in the library catalogue and the deletions detail record should be sent when the last item is deleted from the title record in the library catalogue. Each item added to the library catalogue should be checked to see if it passes the validation rules for inclusion in the notification details file. Similarly the items deleted should pass the same validation. Each title / item included in the notification file must also indicate if the library considers the item to be a reference copy or a lending copy.

Notification files need to be created periodically and the duration of each period is currently monthly but this may change at some point in the future.

The TAH statistics are in essence brief records relating to the addition of the first piece to a title, and the deletion of the last piece from a title. Circulating and Reference items are treated as separate 'actions', i.e. the addition of the first Circulating item for a title is recorded AND the first Reference item for a title; similarly with regard to deletion.

The statistics will be produced by an initial extract of the relevant data, and subsequent comparison of that data at site selected intervals against the current data in the database. Appropriate changes will be written to a flat file and saved on disk for transmission to the TAH bureau either via email or ftp.

A code table is provided to configure what material is relevant to the TAH extract.

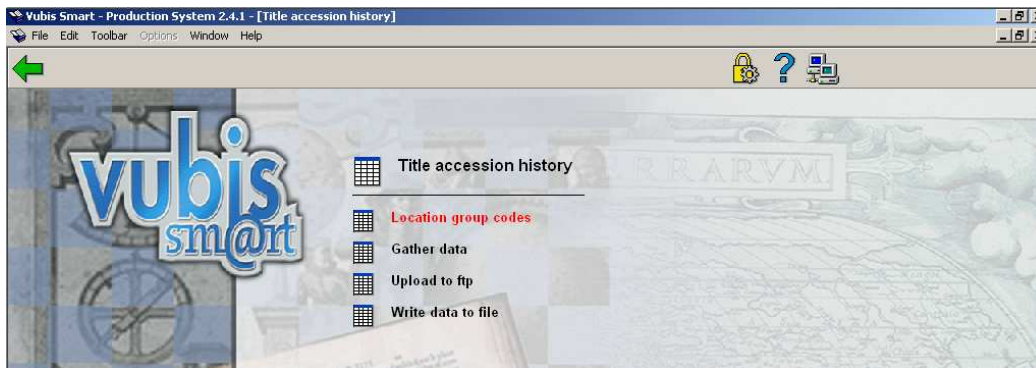
The main menu has four options:

Location group codes – enter the location group codes

Gather data – set up the parameters to gather the TAH data and create the export file.

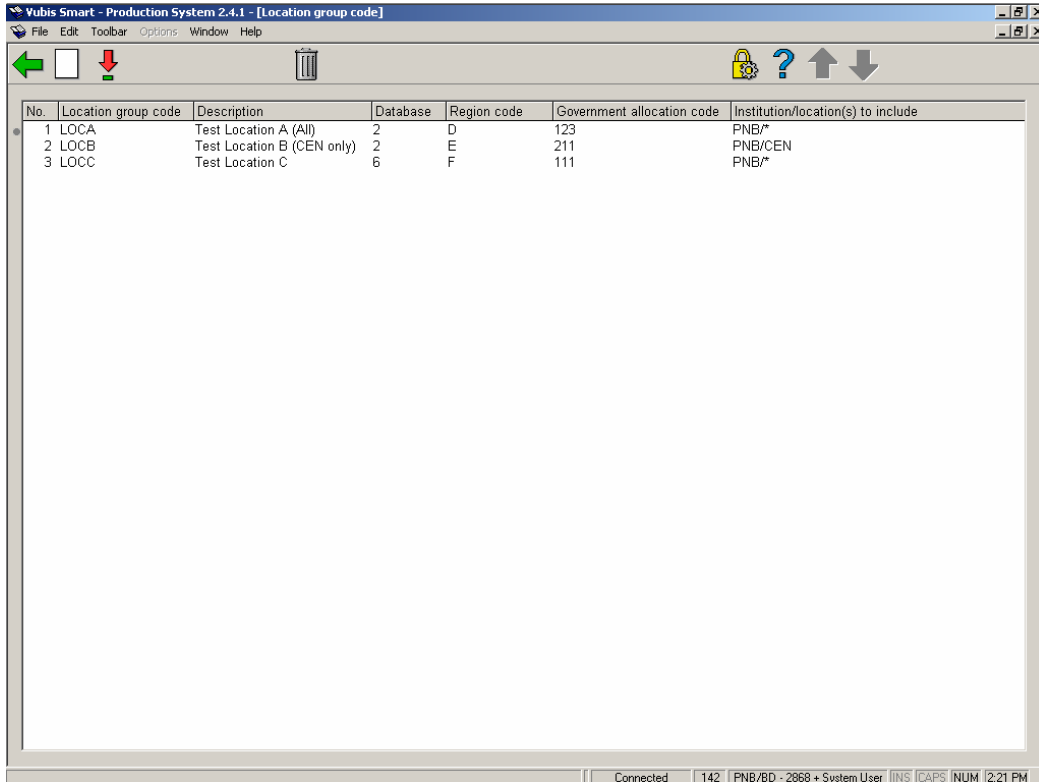
Upload to ftp – if sending the export file via ftp, use this option

Write data to file – if sending the TAH file as an attachment to an email, use this option to write the TAH file to disk. The disk file can then be attached to an email.



5.7.2 Location group codes

Shows a summary of the Location group codes. Options are New (I), Choose (*), Delete (S*), Forward (F), Backward (B).



No.	Location group code	Description	Database	Region code	Government allocation code	Institution/location(s) to include
1	LOCA	Test Location A (All)	2	D	123	PNB/*
2	LOCB	Test Location B (CEN only)	2	E	211	PNB/CEN
3	LOCC	Test Location C	6	F	111	PNB/*

After selecting Choose Code(*) or New Record (I) an input form will be displayed:

The screenshot shows a window titled "Location group code" with the following fields and lists:

- Location group code: LOCA
- Description: Test Location A (All)
- Database: 2: Vubis Smart database release 2.1.1 B6 devel
- Include only institution/locations: PNB/AATOP, PNB/BD, PNB/BRA, PNB/CEN, PNB/CL, PNB/CTR; PNB/*
- Region code: D
- Government allocated code: 123
- Reference item categories: 01 (MISC), 02 (LAW), 05 (YB), 06 (ANN), 07 (CDR), 08 (PERBIB); 03 (PER), 04 (SER), 13 (MAP), 19 (REF)
- Ignore item categories: 01 (MISC), 02 (LAW), 03 (PER), 04 (SER), 05 (YB), 06 (ANN)
- Priority for control numbers: !ISBNForTAH, !BNBForTAH, !LCCNForTAH, !OCLCForTAH, !VISCOUNTForTAH
- Include all item statistical categories:
- Include only item statistical categories: - BLANK, 1 - Adult non-fiction, 2 - Adult fiction, 21 - Adult fiction in D, 22 - Adult fiction in E, 221 - Adult fiction in I

Buttons: OK, Cancel, Help

Location group code: Upper case and must be unique.

Description: Free text

Database: Select from a dropdown list.

Institution/location(s) to include: choose one or more Institutions/locations.

Region code: 1 character long.

Government allocated code: Numeric value in the range 1-255.

Reference item categories: choose one or more item categories.

Item categories to ignore: choose one or more item categories

Priority for control numbers: Enhanced list box including element/group profiles for !ISBNForTAH, !BNBForTAH, !VISCOUNTForTAH, !LCCNForTAH and !OCLCForTAH. The user selects one or more entries and is able to determine the order of the entries. Users should review and update the AFO151 –

Formats – MARC21 (Etc) – Element group profiles for the title accession history profiles added.

Include all item statistical categories: checkbox. If set, next field is ignored.

Include only item statistical categories: choose one or more item statistical categories.

Note: any item categories not included in fields *Reference item categories* or *Item categories to ignore* are assumed to be Circulating item categories. If an item category is contained in both fields *Reference item categories* and *Item categories to ignore*, it is assumed to be ignored and will NOT be processed.

5.7.3 Gather data

The Gather data screen shows the location group codes with the last run date and end run date. If the location group code extract file as been sent it displays the date, time and file name that it was sent too. If the Location group code was sent via FTP it show “FTP” before the date sent.

The options from the Gather data screen are Gather data (*), Show last run (S*).

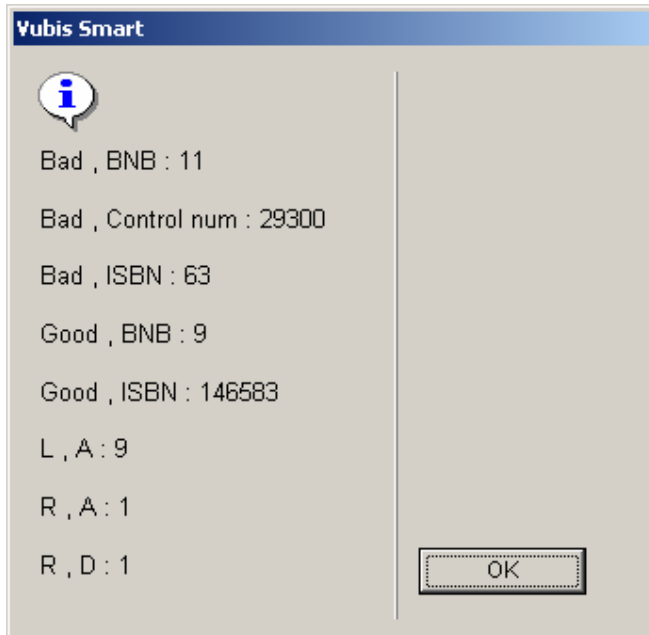
Both have to select a Location group code, Forward (F), Backward (B).

No.	Location group code	Description	Last run date	End run date	Sent
1	LOCA	Test Location A (All)	Sep 8 2006 11:29:34	Sep 8 2006 11:29:37	FTP Sep 8 2006 11:30:38 , D123SEP.txt
2	LOCB	Test Location B (CEN only)	Sep 8 2006 12:20:09	Sep 8 2006 12:20:11	Sep 8 2006 12:20:33 , D211SEP.txt
3	LOCC	Test Location C	Sep 8 2006 14:20:38	Sep 8 2006 14:20:38	

Command Show last run (S*) shows a form with the statistics from the last run for the selected Location group code. The form shows the count of Bad (invalid) Control numbers and the good (valid) control numbers. It also shows the type if reported titles.

The first character “L” is for circulating items and “R” is for reference items.

The second character “A” is for addition and “D” is for deletion.



Command Gather data(*) is to run the title accession history for the selected location group code.

The system does some preliminary checks. One of the checks is to make sure that a previously-created file for the same location group code has already been sent. In this case, the TAH statistics were extracted but the file was not sent using either the 'Upload to ftp' or 'Write data to file' menu options.

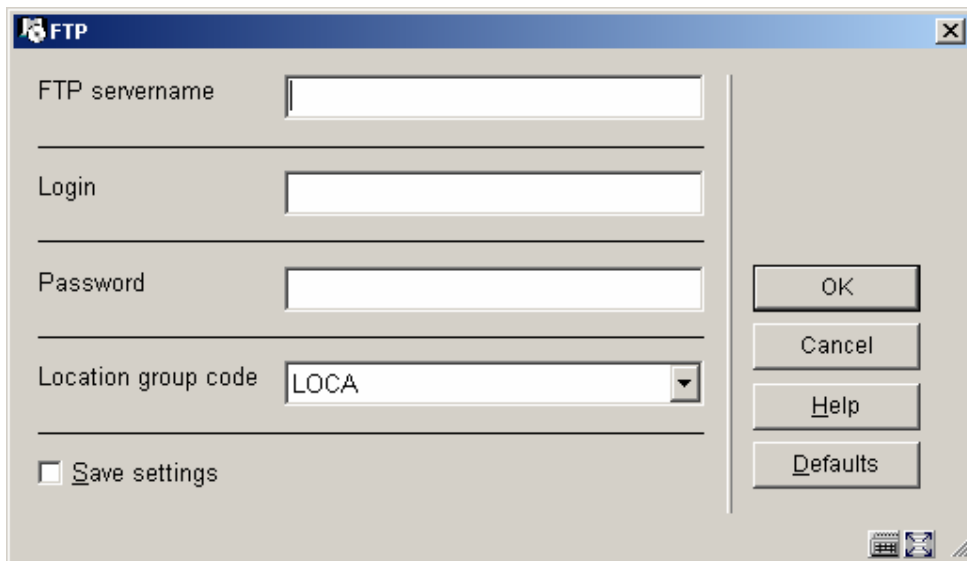
It also checks to see if an extract was started for the location group code that has not been completed.

Note: You should set the parameter "Remove jobs after how many days" in AFO 642 to be a large enough number to ensure that you keep the process reports that you are likely to need.

If the extract is run Online the system will display a progress screen. The process active is the hours, minutes, and seconds that the extract has been running. The number processed is the number of bibliographic records processed. The Last processed is the database number “/” the database record. This updates every few seconds.

5.7.4 Upload to ftp

Use this option to upload the extracted file using ftp.

The image shows a dialog box titled "FTP" with a close button in the top right corner. It contains several input fields: "FTP servername" (text box), "Login" (text box), "Password" (text box), and "Location group code" (dropdown menu with "LOCA" selected). At the bottom left, there is a checkbox labeled "Save settings". On the right side, there are four buttons: "OK", "Cancel", "Help", and "Defaults".

FTP servername – the name of the ftp server.

Login – the login user on the ftp server

Password – the password for logging in to the ftp server

Location group code – dropdown list - location group code that you want to send title accession history statistics for.

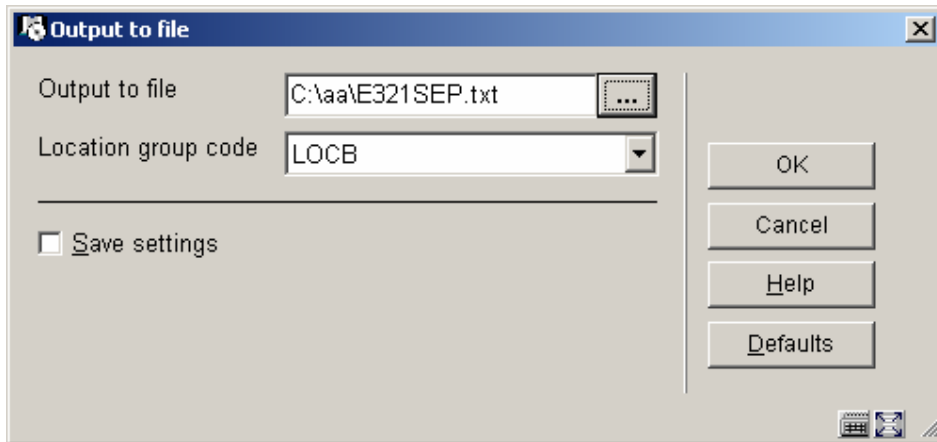
The system might respond with a message that the file has already been sent via FTP.

If you press OK, the system logs in to the ftp server and transfers the file. A log of the actions taken or errors encountered is displayed at the end of the transfer.

The name of the transferred file always begins with the Region code (1 character), the Government allocation code (3 numerics) and the name of the month (alphabetic).

5.7.5 Write data to file

Use this option to save the TAH file in a file on disk. The file can then later be sent as an email attachment to the Authority requesting the TAH file.



Output to file – specify the directory and file name where the output file should be saved. The directory can either be one local to your PC or a mapped network drive. The system defaults to a format for the file name “D11mmmx.txt” that you can overtype with the correct Region code, Government allocation code and month.
Location group code – dropdown list - location group code that you want to send title accession history statistics for.

When you press OK, the system checks to make sure that the file has not already been created. If it has, a message is displayed.

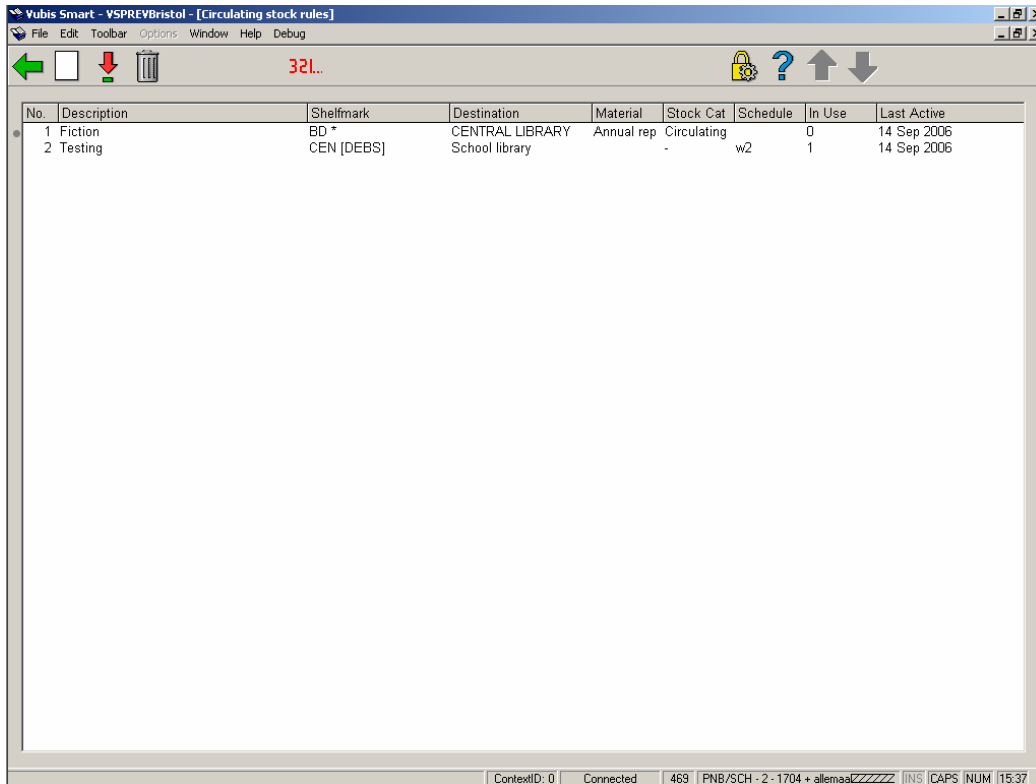
If you press OK, the system continues with the file creation.

Once the file has been created, you can locate it in the directory where it was saved and attach it to an email to send to the Authority requesting the TAH.

5.8 Changes to circulating stock processing

5.8.1 The Circulating Stock Process command

Has been moved from AFO462 to AFO469/Circulating stock rules



The screenshot shows the Vubis Smart software interface with a menu bar (File, Edit, Toolbar, Options, Window, Help, Debug) and a toolbar containing icons for back, forward, and search. A table displays the following data:

No.	Description	Shelfmark	Destination	Material	Stock Cat	Schedule	In Use	Last Active
1	Fiction	BD *	CENTRAL LIBRARY	Annual rep	Circulating		0	14 Sep 2006
2	Testing	CEN [DEBS]	School library	-	-	w2	1	14 Sep 2006

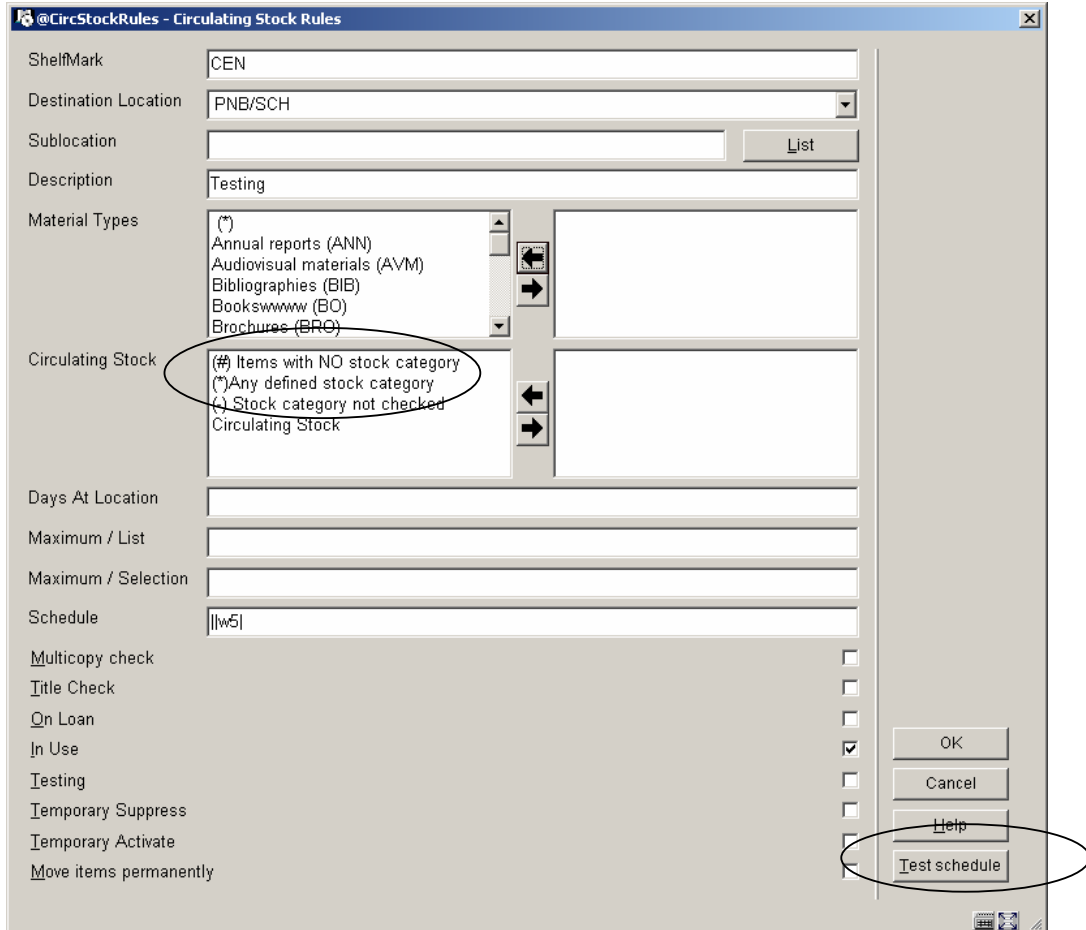
At the bottom of the window, a status bar shows: ContextID: 0 | Connected | 469 | PNB/SCH - 2 - 1704 + allemaaZZZZZ | JNS | CAPS | NUM | 15:37

There is now a 'start process' option at the top of the screen. After selection of this option the system will switch to the standard procedure for scheduling processes.

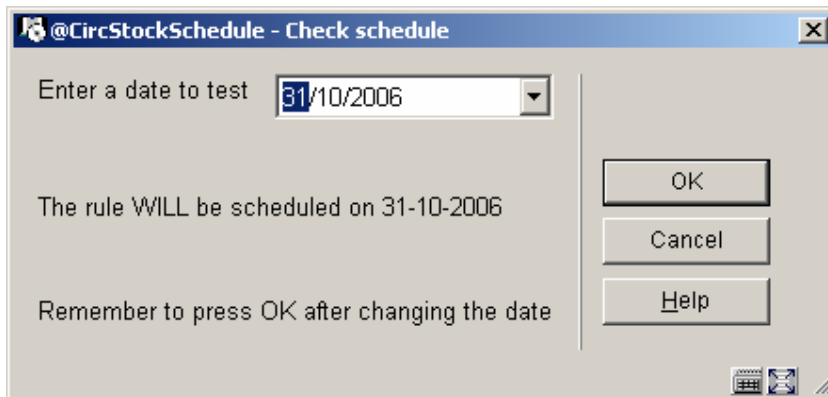
This not only makes it a more logical place to allow for the submission of the actual processing, but it also allows the standard Access control setup to be applied to this function.

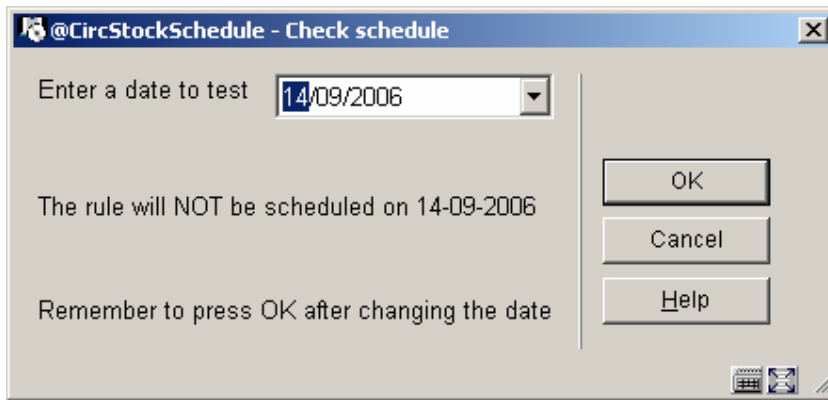
5.8.2. A new "Test Schedule" command button

Has been added to the Circulating StockRule maintenance form.



This allows users to test the Schedule entry against specific days in the Calendar to ensure that the rule entered does act as required.





On pressing the "Test Schedule" button, the system will automatically test "today's date", but other dates can be selected from the input field as shown above.

5.8.3. Additional options for checking an item's circulating stock category.

In previous versions, only items with an assigned circulating stock category could be moved through the circulating stock processing. Three new options are now available:

- Any defined stock category* - the system will check that an item has a stock category (but doesn't care what it is)
- Stock category not checked* - the processing does not check the circulating stock category at all
- Items with NO stock category* - only items which do NOT have a category are checked.

In addition some extra checks and warnings are made against the rules entered

5.8.4. The "w" option for the schedule

Was not always working correctly. This is now resolved.

5.9 Miscellaneous enhancements

In this section a number of smaller though noteworthy enhancements are described.

They are:

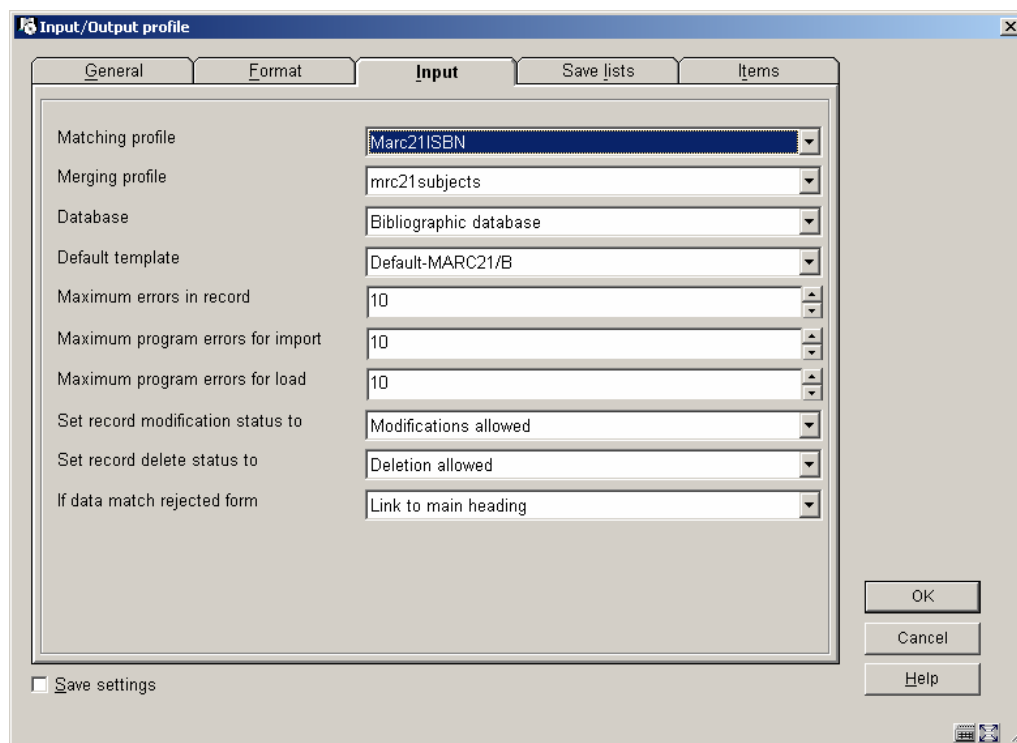
- 5.9.1 AFO 133 – Import/export
- 5.9.2 AFO 141 – SSP – class definition
- 5.9.3 AFO 151 – Formats - Element / Group definitions
- 5.9.4 AFO 271 – Receipt printing
- 5.9.5 AFO 415, 418 etc. – Reservations messaging display
- 5.9.6 AFO 481 – View/print matrices
- 5.9.7 AFO 612 – Communications bandwidth
- 5.9.8 AFO 623 – Fast user switch
- 5.9.9 WebPreferences - Bread crumb
- 5.9.10 WebPreferences – Rate & Review
- 5.9.11 WebPreferences – Suppressing CSP error message

5.9.1 AFO 133 – Import/export

When importing via AFO 131 problems could occur with fields that match the rejected form of an authority.

If a bibliographical, authority-controlled, field is loaded and the authority to which it would link is a rejected form, no relation is created and the field is removed from the record.

To solve this a new option has been added in AFO 133 – Input/Output profiles – Tab Input:



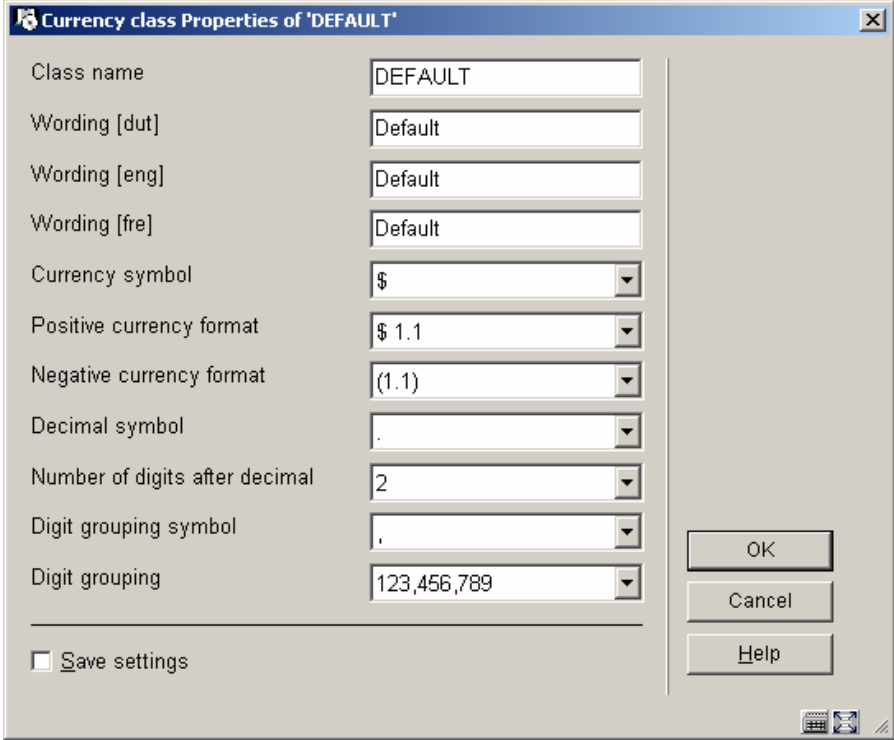
If data match rejected form: When records are loaded through AFO 131 with the record loader it may occur that the contents of an authority controlled bibliographic field match with an existing rejected form in the related authority database. Here you can specify what must happen in such a case. Three different options can be chosen if the data match a rejected form:

- Create new main heading: The rejected form is removed from the database, and instead a new main heading will be created
 - Discard data: The data are removed from the import record – this is the current situation
 - Link to main heading: The field is linked to the main heading of the rejected form
- In all three cases a warning message will be added to the loader report.

5.9.2 AFO 141 – SSP, class definition

A new option has been added to allow for definition of a class for displaying currency.

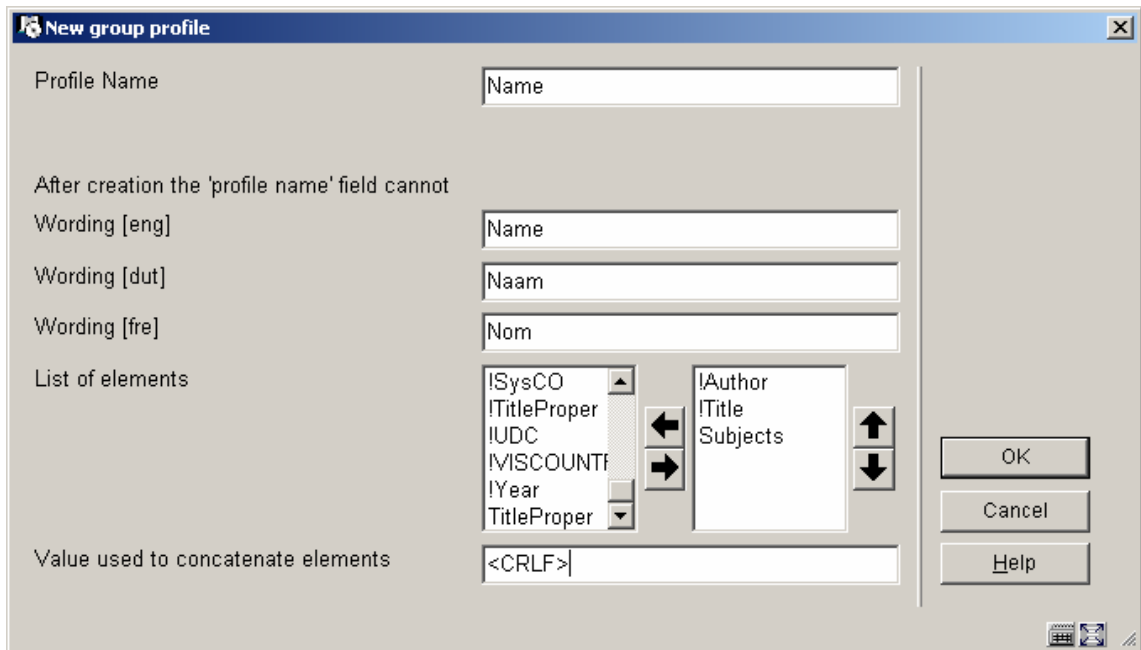
Currency classes can be used to format amounts. For instance: A comma in stead of a dot, and 2 decimals behind the dot, even when the amount is for instance 1.1. (So the class should transform 1.1 as 1,10) The following properties can be defined for each class:



5.9.3 AFO 151 – Formats, Element / Group definitions

A new option has been added to AFO 151 – Data dictionary for records – Formats – Element/Group profiles, for specific use in SSP (AFO 141).

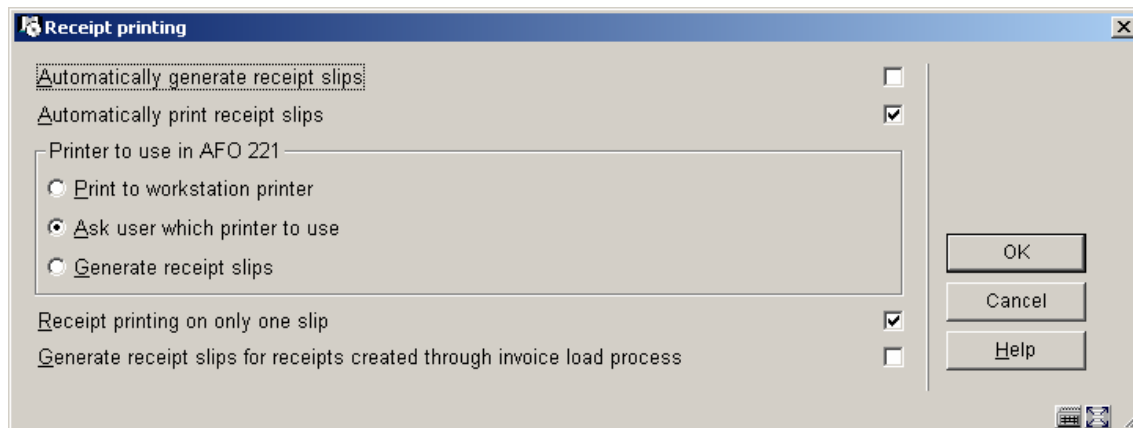
SSP type output can intercept <CRLF> from Logical Elements or Profiles of Bibliographic format and output linefeed carriage return.
<CRLF> will be used as a delimiter in the punctuation fields of Element/group profiles of Bibliographic formats. The SSP module will interpret it as carriage return and line feed characters. All other places will just display the delimiter.



Note that this will be ignored for all other uses of Element/Group Profiles.

5.9.4 AFO 271 – Receipt printing

A new option has been added to AFO 271 – Receipt printing which allows you to specify whether all receipts of a particular order must be printed on 1 slip:



Receipt printing on only one slip

If the new parameter is set then the system will print only one slip for the whole order. A summary element will be printed that contains the information for all the copies received. This summary will include location, budget, number of items received at that location for that budget, price per item (actual amount paid), the total amount and the note for this partial order.

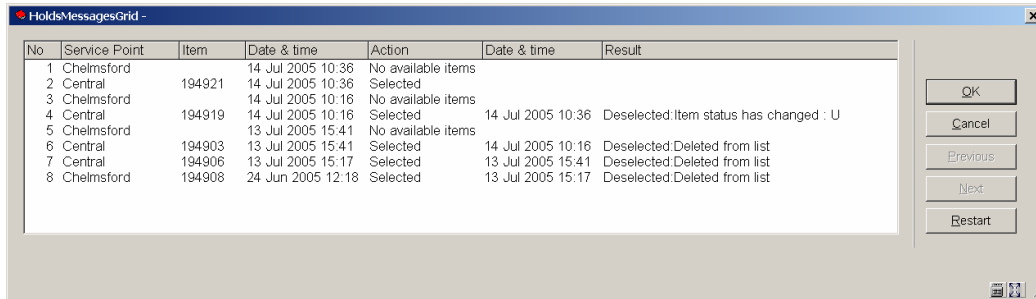
Example

Location	Budget	Items	Price per item	Total Amount	Note
C	1000	1	5	5	
B	1001	5	5	25	
A	1002	6	5	30	note text

If the new parameter is not set then the system will work as it used to work in the past. It will print a slip for each copy that is received. The system will print the volume if applicable and the location where the copy was received.

5.9.5 AFO 415, 418 etc. – Reservations messaging display

Under various circumstances, an item may be removed from the reservations message list. In the previous release, this was displayed as “Item deselected – technical error”, which was rather misleading. The displays have been enhanced to give a reason why the item was removed / deselected from the message list. For example,



The display now shows you the text “Deselected” followed by a reason for the deselection.

Possible reasons are :

Deleted from list

A user manually removed the entry from the messaging picklist.

Item status has changed

The item is no longer available – followed by a code indicating the new item status.

U on loan, **A** – it is no longer at an active location, **W** – item is in transit

Item now trapped for reservation

The item is trapped now – you are unlikely to see this reason.

No specific reason available

No reason code associated – messages occurring before this release will show this “reason” (since the information was not logged before).

Unknown reason code

The system has found unexpected data for the “reason” – this represents a system problem and will be followed by the unexpected code.

Service point data is corrupted

Represents a technical problem

No information now available for service point list (when selected)

This represents a complex situation (unlikely to occur) where the parameters that caused the item to be added to the list (some time ago) are now no longer available. (For example, if a user deleted all the relevant settings!)

Note

This screen appears when you choose the button ‘Messages’ from the reservations details by borrower in either AFO 415 or AFO 418 – option By borrower.

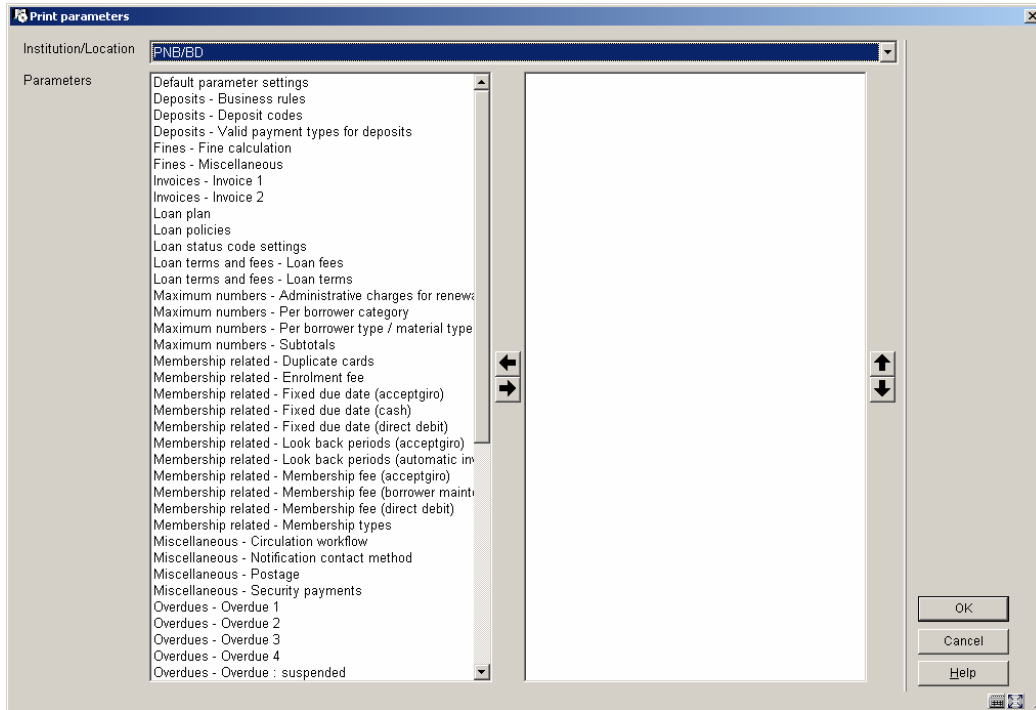
5.9.6 AFO 481 – View/print matrices

The functionality behind “View/Print matrices” option in “AFO 481 Main Circulation Parameters” will be changed in order to include the option to print *all* the parameters defined in AFO 481. At present it is possible to print only the following 15 circulation matrices:

Fine calculation
Invoices 1
Loan fees
Loan terms
Maximum numbers
Overdue 1
Overdue 2
Overdue 3
Overdue 4
Overdue: suspended
Reservation terms and fees
Self check - Loan fees
Telephone messaging - Loan fees
WebOPAC - Loan fees
WebOPAC - Reservation terms and fees

The option “View/Print matrices [P]” will be changed to “Print parameters [P]”.

Choosing this option will present you, with a screen similar with the one below:



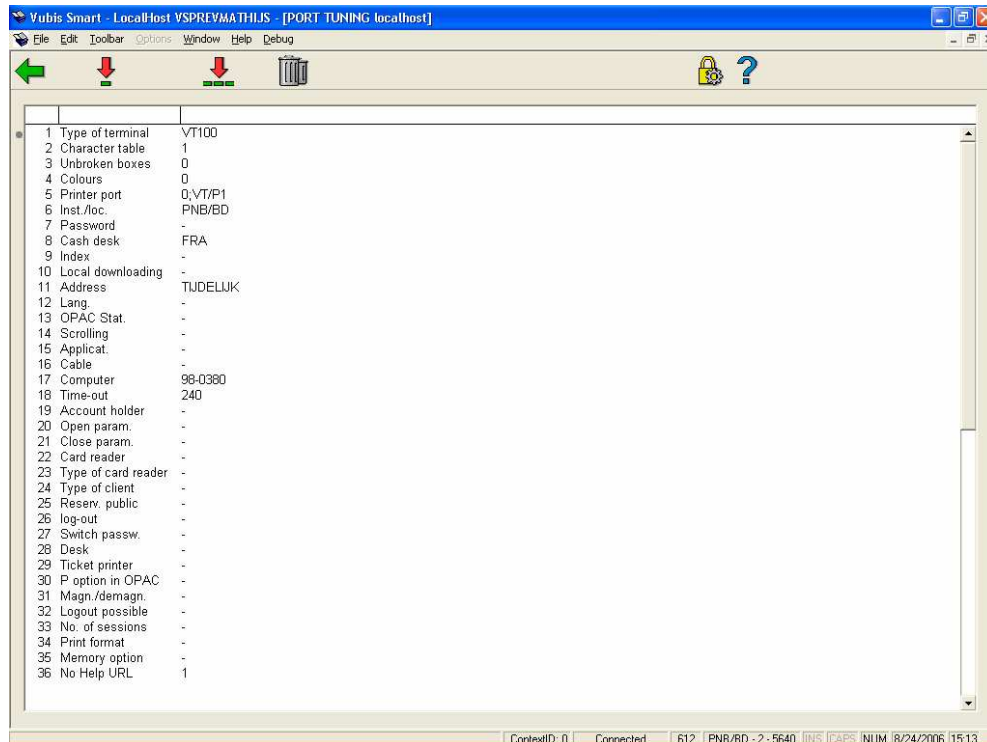
The user selects what reports should be available for output. After pressing OK the standard Output screen will be presented.

Each report will show the information contained in that particular set of parameters in columns.

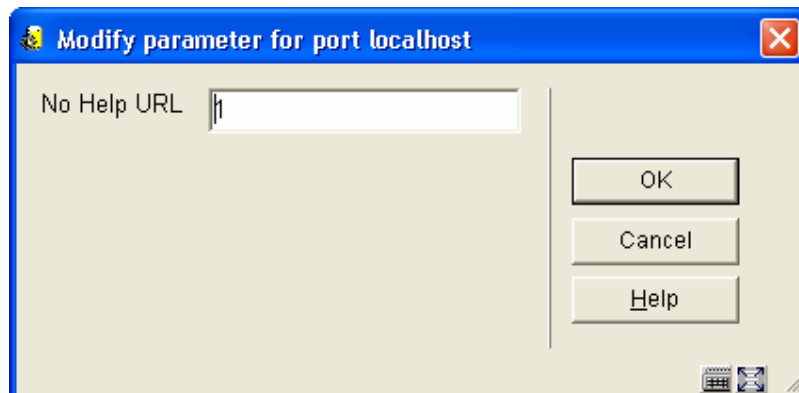
It is possible to combine more than one set of parameters in one report.

5.9.7 AFO 612 – Communications bandwidth

To minimise the communications bandwidth an extra parameter is introduced in AFO 612 (option 36: No Help URL). This can be useful for instance for mobile libraries, with slower communication lines.



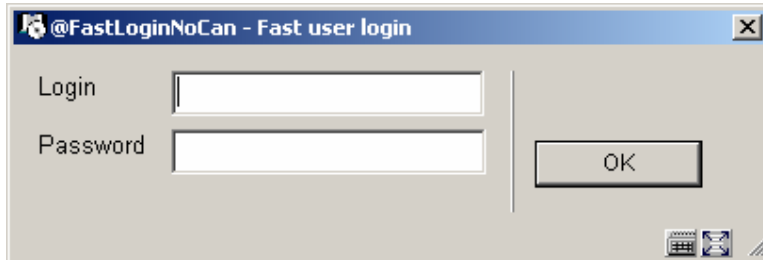
When set to 1, the server will **never** send a help-url string. This saves an approximate 100 bytes on every form, update in grid, and update on screen.



Note that when this feature is enabled, the client can't open the helpfiles. The user should use a shortcut on the desktop.

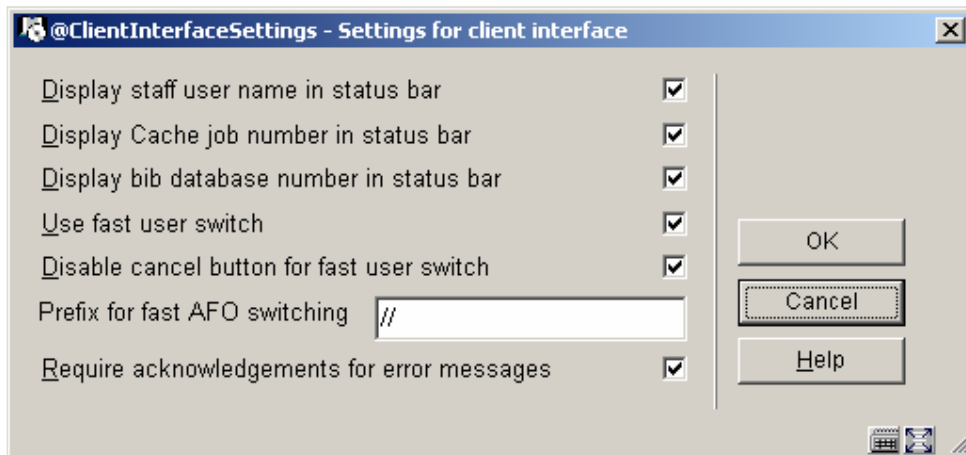
5.9.8 AFO 623 – Fast user switch

If the option to use the “fast user switch” is turned on then the “New login” command simply offers a very simple login screen



This allows the user to login again with a new login and password.

A new option has been added to this functionality in AFO 623:



Disable cancel button for fast user switch.

If this option has been set then effectively the Fast User switch is a Log-off, and any user returning to that screen **MUST** explicitly log-in. (There is absolutely no escape from this - a user must log-in at this point to continue with any function.)

5.9.9 WebPreferences - Bread crumb

In Preferences, page Options per profile, there is a new section at the bottom of the page for bread crumb. With this option you can specify whether or not the search path must be shown at the top of the screen as well as the wording of the search path elements.

BREAD CRUMB	
Show path to this page (Bread crumb):	Yes ▾
URL to start page (option):	
Text for URL to start page:	Start search
Text for URL list index terms level 1:	Terms level 1
Text for URL list index terms level 2:	Terms level 2
Text for URL record list:	Record list
Text for URL full description:	Full Descr.
Style class for bread crumb:	

Here you can define:

- show bread crumb or not. Default is not
- url for start page before the first search page in Vubis. E.g. the library home page. The url is language dependant. Only if a url is defined, the "Home" part is displayed.
- texts for the index lists, record list and full description
- style class for how to display the bread crumb

The settings in the above example would look like this on the display of a full bibliographic record:

Search -> Terms level 1 -> Terms level 2 -> Record list -> FullDescr

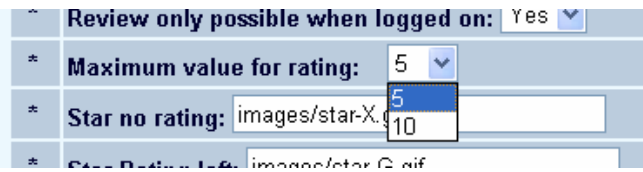
Note

This option was already available in build 16 for release 2.4.1.

5.9.10 WebPreferences – Rate & Review

In patch 17 there are some changes to the Rate & Review functionality in the WebOpac.

1. It is possible to give not only a rating from 1-10 as before, but you can configure the system so that a rating from 1-5 can be given. This is configurable per WebOpac profile. You can switch between the two any time. See the screen dump below for the way to configure this in Preferences



The screenshot shows a configuration interface with several rows. The first row is labeled "Review only possible when logged on:" with a dropdown menu set to "Yes". The second row is labeled "Maximum value for rating:" with a dropdown menu set to "5". The third row is labeled "Star no rating:" with a text input field containing "images/star-X." and a dropdown menu set to "5". The fourth row is partially visible, showing "Star no rating:" with a text input field containing "images/star-G.gif".

2. If it is mandatory to log on before you can add a review, until now it was possible to edit your name. From this version on this is not possible anymore.
3. Probably the most important enhancement of the review functionality in this patch is that it is possible now to edit and delete reviews. If the borrower id of the person who added the review is known and the same borrower is logged on again, he has the option to edit or delete his own review. It is also possible to define one or more administrators who have the authority to edit or delete all reviews. Those administrators can be added with the Preferences:














The screenshot shows a configuration interface with a row labeled "Administrator(s) allowed to delete reviews (Institution.borrowerId[,Institution.borrowerId]):" with a text input field.

I.E CIRC.123456789,CIRC.999999999

Note that Rate and Review data elements have also been added to the SSP module to allow for reporting.

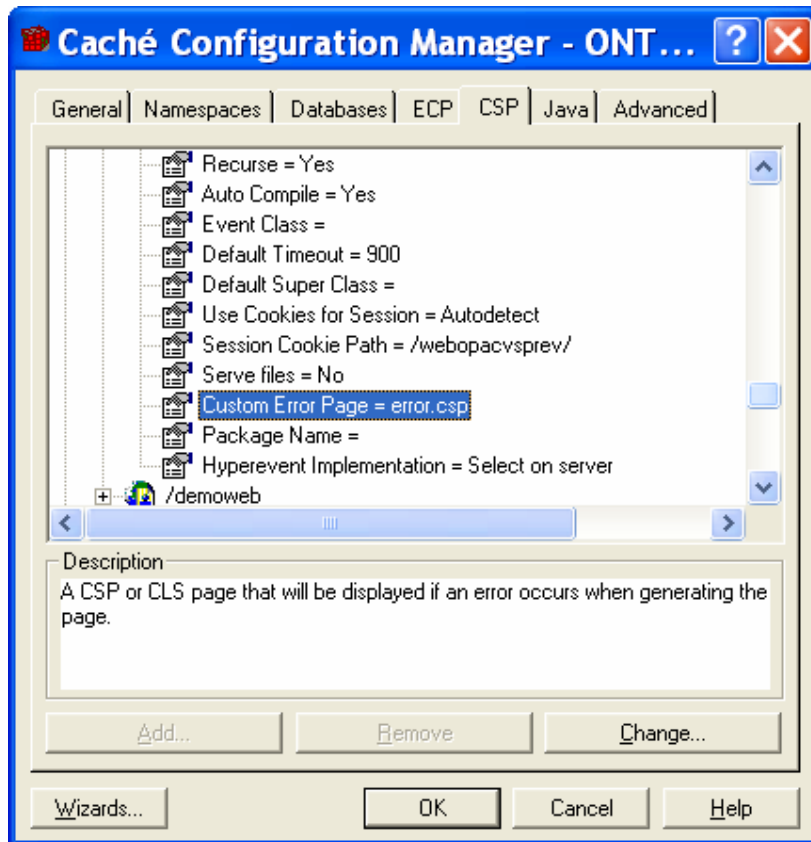
5.9.11 WebPreferences – Suppressing CSP error message

Under *Options and Text* a new option has been added to allow for suppression of the CSP error messages (second line of error messages).

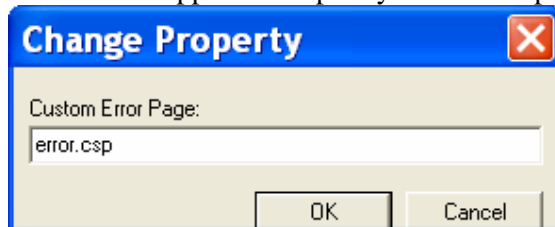
Error messages	
	Search string may not contain the same string twice
	An unexpected error has occurred. We are unable to process your request ...
	You must select at least one database.
	No results found
	You have to type a search term
	Nothing is selected
	Nothing was found due to the given restrictions
	A search term with truncations must contain at least one string of three characters.
	The search string is incorrect
	At least two terms were not found
	Nothing found, due to the given restrictions

You also have the option to customise the csp-error pages, with the option “An unexpected error has occurred. We are unable to process your request ...”. This text is of course language dependant.

You have to activate the error.csp page via the Caché control panel:



For the CSP application specify the error.csp as its error page



Instead of getting the CSP message with all the details, the WebOpac user will see:



For other smaller enhancements delivered with the 2.4.1.17 patch release, please consult the On-line Help documentation.

On-line Help for the following AFO's has been updated:

124, 133, 141, 151, 243, 271, 278, 411, 412, 413, 415, 423, 431, 441, 442, 462, 469, 481, 482, 483, 492, 611, 612, 651.

A complete set of On-Line Help documents for all sections of the Web Preferences has been added. These documents are accessible from within the Web Preferences. The set also includes some general information on the Web Preferences.


Lastly some general documentation has been added on the following subjects: Borrower Import (technical specifications), Credit Card payments, Pay Stations, Electronic ID. Please note that some of these features require additional licensing.

6. Answerlink defect/enhancement list covered with 2.4.1.17

Following is a summary of customer reported defect fixes and enhancements requests introduced with patch 2.4.1.17, by Module/AFO.


111-Cataloguing records

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
99392	Program Error	Authority search software error [when the current subfield is linked to a "list" type authority database.]	Customer	1655510
102991	Program Error	AFO111, copying records from PCC: The relations in the local record will be lost	Other	
103031	Program Error	AFO111 Number of volumes is not displayed - The data was displayed in 2.2.1.4	Customer	1724748
103352	Program Error	AFO111. Specific display length in bib description makes record editor inaccessible (duplicate section numbering).	Customer	1730211
103352	Program Error	AFO111. Specific display length in bib description makes record editor inaccessible (duplicate section numbering).	Customer	1733367
103352	Program Error	AFO111. Specific display length in bib description makes record editor inaccessible (duplicate section numbering).	Customer	1737051
103770	Enhancement	Allow browse on ISBN	Other	
103884	Enhancement	AFO 111 - Item summary - add a new icon (double red trash can) that allows deletion of all displayed items	Customer	


113-Authority management

3- High


Defect Number	Type 	Short Description	Reported By	Linked Case
102619	Program Error	Authority relations lost in authority merge.	PSO	
103086	Program Error	Modify an authority record works ok, search on old term is still possible	Customer	1723604

123-Global change holdings

1- Production Down


Defect Number	Type 	Short Description	Reported By	Linked Case
101673	Program Error	AFO123 - Incorrect screen refresh when terminal running TCPIP mode - Select options gets Runtime error 5 - Invalid procedure call or arguement	Other	

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
102117	Program Error	next and back button don't function in AFO123, conversion reports	Customer	1707922


126-Print shelfmark labels

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
101762	Translation	AFO126 - misleading translation for Copy Number (Dutch translation)	Other	


131-Input from file

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
101654	Enhancement	ENHANCEMENT - Load of bibliographical fields that match a rejected form of an authority	PSO	
102396	Program Error	Record number confusion with authority load may lead to empty records in database	Customer	
102496	Program Error	Pre-defined authority link-id's do not result in relationship for new records	PSO	


132-Output to file

5- Medium


Defect Number	Type 	Short Description	Reported By	Linked Case
103922	Design Issue	Individual items are not exported when there is a summary holding	Other	

141-SSP management


3- High

Defect Number	Type 	Short Description	Reported By	Linked Case
90990	Enhancement	AFO141 - Rate and Review reporting - Require components for WebOpac rate and review reporting as described by requirement 13 (section 4.1.13)	Other	
103381	Program Error	AFO 141 : selection in the file items with the criterion 'Loan; date third overdue sent' doesn't work	Customer	1728500
103389	Program Error	AFO141 - Problems formatting Community Information data for publishing Require means of placing Linefeed into published reports for Format Group/ elements	Customer	1696832
103554	Program Error	AFO141 Classes Currency class - Cannot define GBP symbol	PSO	
103571	Program Error	AFO141 Borrower "Membership fee: Last activity date" causes endless loop during run	PSO	

5- Medium


Defect Number	Type 	Short Description	Reported By	Linked Case
97024	Program Error	AFO141 Les paniers automatiques pour les autorités ne sont pas fiables [Authority auto savelists are missing rejected forms--see references]	Customer	1544778
98187	Enhancement	SSP - Allow Classes for amounts similar to those for dates and time. - Introduce currency classes for monetary values	Customer	1634018
101970	Program Error	AFO141 SSP retrieving wrong data for Payment type transactions	Customer	1697916
102012	Program Error	Update SSP Borrower dictionary to use currency data type on fines and payment	Other	
102170	Program Error	AFO141 Publish statistics restrictions and date classes not working	Other	1701973
102186	Knowledge	AFO141 - In 'Holdings per bibliographic' record, the data element 'Volume' does not return the correct information - Add info to DETAILS button on how to extract information.	Customer	1684777
102365	Enhancement	AFO141 - Select - status has no LIST button functionality - See also 89676	Customer	1627041
102429	Program Error	AFO141 SSP Grouping - Edit checks to preventing errors for improper definitions	Other	
102977	Program Error	AFO141 - Deletion of user AAA savelists should be checking for AFO141 SYS! privileges. Currently there is no security check on removing records / savelist belonging to Automatic Item Added savelists	Other	
103029	Program Error	AFO141 - Grouping Table Automatic principle Hours values not displaying in correct order	PSO	
103397	Configuration Error	AFO141 Selections Application Items Criterion Barcode:Barcode only selects replaced barcodes - may require wording change	PSO	
103529	Knowledge	AFO141 New items application does not return expected results	PSO	
103585	Program Error	Maintenance of the Webopac savelists does not work (see also 102789 and 102784)	Customer	1730043
103597	Enhancement	AFO141 Enhancement to intercept / interpret <CrLF> from within AFO151 Logical Elements or Group Profiles of Bibliographic format and output linefeed carriage return within the publish reports	Other	
103786	Program Error	AFO 141 - Statistical profiles which has the criteria of a repeatable field the data is counted multiple times	Other	
103817	Program Error	Syntax error when creating an SSP Statistical Snapshot which includes [Renewal] Item Id	Customer	1737133
103831	Program Error	AFO141 - Selection from Borrowers - Technical : Status (0 or 1) returns no result	Other	
104293	Program Error	AFO141 SSP - Association between Item and Bibliographic data is wrong in Circ. Trans. reports when item data has been deleted.	Customer	1745432

6- Low


Defect Number	Type 	Short Description	Reported By	Linked Case
89676	Enhancement	AFO141 - Items - Status - Add LIST button for possible values.---After refreshing enter and leave afo 469, Item definition settings.	Other	
97058	Enhancement	Login Ids are displayed instead of the name of user in SSP module and transaction history for the details of the transaction (displayed as raw data)	PSO	
97367	Knowledge	"new item" where does this information come from	Customer	1572962
102030	Design Issue	AFO141 - List for User ID displays login code and description for name. Should be Only the description of the name	PSO	1695140
102784	Program Error	AFO141 Not able to delete WebOPAC savelists - Needs a message to state why the savelist cannot be deleted (i.e in use on searchtree / page)	Customer	1718624

151-Data dictionary for records

5- Medium


Defect Number	Type 	Short Description	Reported By	Linked Case
102081	Program Error	AFO151. Need additional index mechanism (or guidance) for limiting length of an index key. - Modifications for number indexes	Other	

6- Low

Defect Number	Type 	Short Description	Reported By	Linked Case
99600	Configuration Error	AFO151 Some repeatable MARC fields configured to be non repeatable	Customer	1659415


152-Data dictionary for authorities

3- High

Defect Number	Type 	Short Description	Reported By	Linked Case
101776	Program Error	Incompatibility between authority relationships 'normal' and thesaurus	PSO	
102615	Program Error	Fixer program needed for sites which have been running without Marc21/A punctuation removal.	Other	

157-Indexing records

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
101840	Enhancement	Allow restart in partial indexes	Other	

211-Order entry

5- Medium

Defect	Type 	Short Description	Reported	Linked
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Number			By	Case
102178	Program Error	AFO211 - Order detail. When an order is printed from AFO211 the order header is not getting the status of Sent. It is set to Blocked.	Other	
102286	Program Error	Supplier discount not written to order header in AFO211.	Customer	1710557
103508	Program Error	AFO211 - the contents of the Tax code and Source fields in ^AW 4 node are reset every time you add/update/delete a partial order.	Customer	

216-Multi-title order entry

3- High

Defect Number	Type	Short Description	Reported By	Linked Case
102755	Program Error	AFO216 Cannot add barcode on receipt - new automatic savelist for item additions being created from Acquisitions.	Customer	1686729
103323	Design Issue	AFO216 Cancelled orders still showing as on order	Customer	1730011

231-Invoice control

3- High

Defect Number	Type	Short Description	Reported By	Linked Case
101536	Program Error	AFO231 expenses not being apportioned out amongst funds when prorate tax not applied to all lines	Customer	1695545
102965	Program Error	AFO231 Expenses + Discount all loaded onto first budget found	Customer	1695545

232-Invoice summary

5- Medium

Defect Number	Type	Short Description	Reported By	Linked Case
102538	Program Error	AFO232 - order details can disappear from invoice when bibliographic records are merged	Customer	1679094
102538	Program Error	AFO232 - order details can disappear from invoice when bibliographic records are merged	Customer	1709045

235-Print an invoice

5- Medium

Defect Number	Type	Short Description	Reported By	Linked Case
102507	Program Error	AFO 235 issues reported by CODA	Other	

241-Suppliers

3- High

Defect Number	Type	Short Description	Reported By	Linked Case
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103321	Program Error	AFO241 - Add supplier - needs edit checks - Language / country code not filed with record causing incorrect data storage or disconnect	Customer	1730008
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243-Budgets

5- Medium

Defect Number	Type	Short Description	Reported By	Linked Case
101675	Program Error	AFO 243 - the green arrow for next page is active when it should not be. Using the next page will display a bogus entry on the new page.	Customer	1688866

252-Check temporary print file

3- High

Defect Number	Type	Short Description	Reported By	Linked Case
103269	Program Error	AFO 252 cancellation notices generate final print file has a software problem when the customer is set up so that commitment is updated at time of receipt instead of when the invoice is paid	Customer	1724085
104060	Program Error	TESTOMGEVING :When using AFO 252 printing regular order forms only prints the line 'regular order forms'.	Customer	1725218

254-Urgent printouts

5- Medium

Defect Number	Type	Short Description	Reported By	Linked Case
102934	Program Error	AFO254 Cancel from Urgent printouts gets error <UNDEFINED>READPRCA+9^VWINDOWS	Customer	

256-Print modified supplier records

5- Medium

Defect Number	Type	Short Description	Reported By	Linked Case
102936	Program Error	AFO256 Cancel from Print modified supplier records gets error <UNDEFINED>READPRCA+9^VWINDOWS	Customer	


261-Archive non-cancelled orders

3- High

Defect Number	Type	Short Description	Reported By	Linked Case
104404	Program Error	Archiving orders in VUBIS fails if an EDI order	Customer	1747320


262-Archive cancelled orders

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
103492	Program Error	AFO261/262 Archiving process did not check if all lines in a multi-title order could be archived.	Other	


271-Print parameters control

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
103800	Program Error	AFO271 Postcode appears before City using \$\$LEVERANCIER	Customer	1736849


275-Archive parameters control

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
100396	Design Issue	AFO261 Cannot view all orders which are to be processed	Customer	1599136


282-EDI Message Files Loading

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
102498	Program Error	AFO282 EDI quotes message seems to have amended existing authorities	Customer	1714270
103675	Program Error	Quotes loader should convert incoming order number to Upper Case	Customer	1730704


283-EDI Message Processing

3- High

Defect Number	Type 	Short Description	Reported By	Linked Case
101319	Program Error	Quotes order creation does not use the supplier discount default	Customer	1680965
101319	Program Error	Quotes order creation does not use the supplier discount default	Customer	1720522
103332	Program Error	EDI invoice loader error trapping routine produced incorrect links	Customer	1727934


311-Receive issues

3- High


Defect Number	Type 	Short Description	Reported By	Linked Case
98580	Design Issue	Missing red color waste bin for option to delete all issues (requires Client and 2.4.2 for default install)	Customer	1640806

411-Loans


3- High

Defect Number	Type 	Short Description	Reported By	Linked Case
102707	Program Error	AFO411 Not getting any error message in Loans when exceeding the subtotal defined in AFO481 Maximum numbers, Subtotals	Customer	1719428
103223	Program Error	C-fly functionality does not work in 411 if custom barcodes in effect and the entered barcode matches the pattern of custom barcode.	Customer	1723084
103896	Program Error	AFO 411 ; accept payment and print receipt per location gives as result on the payment slip sometimes zero or sometimes as full amount when not all monies have been paid	Customer	1714754
104394	Program Error	AFO411 - If you delete an item using the - and you only type the - (no line number) the program crashes. <SUBSCRIPT>OBJE11+57^UUL	Customer	1745326

5- Medium


Defect Number	Type 	Short Description	Reported By	Linked Case
101844	Program Error	AFO411 - Loan slip / return slips prints title from current database record instead of the title connected to the item barcode when more that one database associated with checkouts	Other	
102105	Program Error	AFO411- Some of the Login restrictions set in 611 are not functioning when meta institution <> institution	Other	
102879	Program Error	AFO411 Modify default due date not working correctly after first loan	Customer	1719341
103593	Program Error	AFO 411 - What is the meaning of number of renewals eng:1 (fixed in 2.4.1.17 - see call 99168 for details)	Customer	1732755
103665	Performance	Reduction of communication bandwidth for the busses that use UMTS communication - AFO612 - Port definition allows for optional deactivation for online help to reduce bandwidth,	Other	

6- Low


Defect Number	Type 	Short Description	Reported By	Linked Case
102110	Design Issue	Loan history error message is not clear for users with no override permissions	PSO	1707743

412>Returns

3- High


Defect Number	Type 	Short Description	Reported By	Linked Case
100672	Program Error	AFO412 Item identified for circulating stock whilst on loan does not display transit message or routing slip when returned.	Customer	1675121
101849	Program Error	AFO412 Incorrect fines calculation when both Fixed and Variable closed days are set	Customer	1691049

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
103845	Program	Fines calculation is not correct - Fine	Customer	1737016


	Error	calculations are not respecting the maximum fine amounts specified. see also duplicate previously corrected in 103582		
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6- Low

Defect Number	Type 	Short Description	Reported By	Linked Case
103806	Program Error	AFO412 - Detailed description of items on loan does not match that of current list after a return has been done	Customer	1732807


414-Accept payments

5- Medium


Defect Number	Type 	Short Description	Reported By	Linked Case
102512	Program Error	AFO414 Crash when doing more than about 70 payments at once (SUBSCRIPT error)	Customer	
102513	Enhancement	AFO414: Display invoice number after text "Invoice" in the comments field. This effectively allows for sorting by invoice by sorting on the Comments header.	Customer	
103176	Enhancement	AFO414 : Miscellaneous changes for PayStation	Other	

418-Reservations review


3- High

Defect Number	Type 	Short Description	Reported By	Linked Case
102692	Program Error	Reservations not found in Picklist - Entries sometimes incorrectly removed when items returned via SelfCheck devices	Customer	1718251
103132	Program Error	AFO418 Reservations overview Cancelled on reservation shelf, need a means to identify the associated item - Add trapped barcode to beginning of status message	Customer	1694016

5- Medium


Defect Number	Type 	Short Description	Reported By	Linked Case
93865	Enhancement	Require the ability to Reprint Reservation Slips	Customer	
101985	Enhancement	AFO418: Reservation Messaging - Option so that system does not wait for a service point to open when no items at that service Poing	Other	1698485
102495	Program Error	AFO418 Trap screen for Reservation messages and Picklist is greyed out if there are no reservations to display in those screens	Customer	1694033

6- Low


Defect Number	Type 	Short Description	Reported By	Linked Case
102401	Program Error	AFO418 Header for "Reservations overview" not updating.	Customer	1712202

421-Place reservations

3- High


Defect Number	Type 	Short Description	Reported By	Linked Case
99973	Enhancement	AFO421 "On order" status does not distinguish between orders have been sent and may be reserved and orders that have not been sent and may not be reserved.	Customer	1660603
103258	Documentation	New items can be reserved whereas settings should block any reservation	PSO	1596886

5- Medium


Defect Number	Type 	Short Description	Reported By	Linked Case
100585	Enhancement	AFO421 Titles that were on order where order is now cancelled still show as on order in 421. Reservations continue to be permitted as if item was on order.	Customer	1666057
103579	Program Error	AFO 421 : status wrong with type 2 descriptions. ["No items in stock" when there are items]	Customer	1728509
103579	Program Error	AFO 421 : status wrong with type 2 descriptions. ["No items in stock" when there are items]	Customer	1735107

423-Edit items

3- High

Defect Number	Type 	Short Description	Reported By	Linked Case
101957	Program Error	AFO423 Edit items. User with no permissions for Acquisitions can archive an order	PSO	
103022	Program Error	AFO 423 : error if manager is an offline manager and the shelfmark has been changed	Customer	1723703
103022	Program Error	AFO 423 : error if manager is an offline manager and the shelfmark has been changed	Customer	1725735
103380	Program Error	AFO423 Catalogue search - 2 users cannot view the same record at the same time	Customer	1730681

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
102341	Program Error	AFO423 - Edit Items. If you turn off the "in use" flag for the AFO469 item settings for the Notes Codes you will get an undefined in BuildScreen+231^UItemMain.	Customer	1707918


431-Borrower maintenance

3- High

Defect Number	Type 	Short Description	Reported By	Linked Case
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101765	Program Error	AFO431 - If Site defined membership Payment type used (Cash code type 41 or 42) then the UTR transaction is stored as an 86 (WAIVE) instead of a Payment	Other	1698351
102723	Program Error	AFO431 When search for a borrower retrieves more than one screen of borrowers use of Next screen / page forward option throws you back to main menu	Customer	1719964
103146	Program Error	AFO431 Cannot always remove circulation notes, get invalid message. Message text has trailing spaces which you cannot see.	Customer	1716231
103378	Program Error	AFO 431 : display following page in a list of names is not possible	Customer	1728499
103580	Program Error	AFO431 : Login ID is visible in details transaction type 'Borrower record modified'	Customer	1728512
104151	Program Error	AFO 431 : fines after renewal is not calculated per location (pymts by loc. ON) ** Doc note If both fines and Fees applied to 1 item, and use different charge locations, txn applied to FINES local	Customer	1743386
104322	Program Error	Borrower is deleted and then brought back to live. There is a message that the borrower was deleted. Message should be suppressed	Customer	1745523
104458	Program Error	Next page option in 431 does not produce the remainder of the list of borrowers	Customer	1748736

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
102193	Program Error	Payment screens - the save settings for payment types is not used. Default is cash.	Customer	1709190
103420	Design Issue	AFO431 - Automatic PIN-code generation doesn't recognize DOB format DDMM - It only does the full dates . Enhance to allow DDMM as well	PSO	
103581	Program Error	AFO431 - If an item is returned late and the barcode contains a period, the barcode is displayed incorrect	Other	1674861


435-Borrower collection agency

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
103239	Enhancement	AFO 435 - provide interface to Collection agency reporting	Other	

441-Import borrower data

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
102875	Enhancement	AFO446 - Improve the reporting from the borrower import (AFO441-442).	Other	

451-Setup borrower notices and batch maintenance


3- High

Defect	Type 	Short Description	Reported	Linked
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Number			By	Case
100768	Program Error	Question concerning due letters per loan location must only be asked for AFO 451 option 1	Customer	
102442	Program Error	AFO452 Check block status of borrowers shows as stopped	Customer	1712981

452-Start print jobs

3- High


Defect Number	Type 	Short Description	Reported By	Linked Case
101916	Program Error	Branch address and/or borrower's address missing from overdue notices	Customer	1701444
102154	Program Error	Accepgiros - Kenmerk string is not correct, should be like 1234 5678 9012 3456	Other	
103374	Design Issue	Overdues via E-mail - Borrowers receive one email per overdue item instead of all on one email notice	Customer	1724853
103374	Design Issue	Overdues via E-mail - Borrowers receive one email per overdue item instead of all on one email notice	Customer	1730759
103412	Program Error	The data for CODA was not correctly printed, one item was too long and shifted to following items.	Customer	
103781	Program Error	AFO452 Defined free text is not being displayed on some overdue notices - These should be coming from the 3 character language code (borrower) and if not defined use system language.	Customer	1736889

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
100153	Program Error	AFO452 Reprint method selection: e-mail is send, even when only printing is selected.	Customer	1668934
101416	Program Error	On invoices incorrect due date and/or date of loan is printed	Customer	
102062	Enhancement	Send email notices etc. directly to email server, not through local email client	Other	1698125
102062	Enhancement	Send email notices etc. directly to email server, not through local email client	Other	1717539
102153	Program Error	ENDOFFMESSAGE last e-mail - Can this be suppressed when sending messages	Customer	1708017
102176	Program Error	AFO452 - Email on server based. - Sent email (copy) is not reading the CC option in AFO651 - ** This will require a documentation change as well)	Other	
103938	Enhancement	AFO452 - Reprint option for notices where multiple methods used- Should be a way to redo just one of the types in the group instead of all of them. Currently only an OK button exists.	Other	
104171	Program Error	AFO452 Branch address (\$\$ADLOC) missing from overdue notices when the borrower barcode has been replaced	Customer	1709009
104171	Program Error	AFO452 Branch address (\$\$ADLOC) missing from overdue notices when the borrower barcode has been replaced	Customer	1748156


454-Borrower notice statistics

3- High


Defect Number	Type 	Short Description	Reported By	Linked Case
99906	Program Error	AFO454 No statistics for acceptgiro's	Customer	1663463

462-Item transfer (modify shelfmark)

3- High


Defect Number	Type 	Short Description	Reported By	Linked Case
102499	Program Error	AFO462 Send Items Output option does not check item against database but only record number, resulting in output of wrong titles when multiple databases are in use.	Customer	1709863
103595	Program Error	Circulating stock lists not completely transferred when over 96 items in your set	Customer	1732963
104059	Design Issue	AFO462 Circulating stock process needs to be restricted by login - Move to AFO469	Customer	1742404

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
102225	Program Error	AFO462 Item in transit to and from SMA "Problems during processing of items" error when trying to receive	Customer	1709253
103960	Program Error	AFO462 If Circulating stock list includes deleted item - can't transfer list.	Customer	1741219


466-Inventory control

5- Medium


Defect Number	Type 	Short Description	Reported By	Linked Case
103491	Program Error	AFO466 - Details for the comparison - Special Admin managers / other status are not being grouped as expected with the new status item codes - New lines to accommodate Item status required	Other	

469-Item management parameters


1- Production Down

Defect Number	Type 	Short Description	Reported By	Linked Case
104033	Program Error	AFO469 Circulating stock rules schedule has not worked for week number	Customer	1742373

3- High


Defect Number	Type 	Short Description	Reported By	Linked Case
103774	Program Error	AFO469/462 Circulating Stock premature stop if MultiCopy selected	Customer	1732884
103776	Program Error	AFO469/462 Circulating stock "Days at location" not recorded	Customer	1732884

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
102433	Program Error	AFO469 Cannot remove Sublocation code from the Data to be entered	Customer	1713590
102688	Enhancement	Added a new field to Item definition: "Loan and return via SelfCheck not permitted" for further enhancements to Sip2	Other	


478-Library defined loan statistics

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
104286	Program Error	AFO478 cannot do statistics in AFO 478 - 321 button is not enabled	Customer	1744693


481-Main circulation parameters

3- High


Defect Number	Type 	Short Description	Reported By	Linked Case
87423	Enhancement	AFO469 *ENHANCEMENT* Require an AFO option to be able to add Item statistical categories. We can add Borrower statistical categories in 482 but item statistical categories have to be done	Customer	1633531
87423	Enhancement	AFO469 *ENHANCEMENT* Require an AFO option to be able to add Item statistical categories. We can add Borrower statistical categories in 482 but item statistical categories have to be done	Customer	1648952
87423	Enhancement	AFO469 *ENHANCEMENT* Require an AFO option to be able to add Item statistical categories. We can add Borrower statistical categories in 482 but item statistical categories have to be done	Customer	1655535
87423	Enhancement	AFO469 *ENHANCEMENT* Require an AFO option to be able to add Item statistical categories. We can add Borrower statistical categories in 482 but item statistical categories have to be done	Customer	1684513
87423	Enhancement	AFO469 *ENHANCEMENT* Require an AFO option to be able to add Item statistical categories. We can add Borrower statistical categories in 482 but item statistical categories have to be done	Customer	1748952
98539	Enhancement	AFO481. Print parameters. No commas between data for spreadsheet: Excel opens in one cell.	Customer	1638438
99770	Program Error	2.4.1 : settings 3 and 4 Renewal for all locations malfunction (show all items, limit renewal to location / institution)	PSO	1652259
102007	Program Error	AFO481 Printing matrices loanpolicy not readable. Needs formatting	Customer	1705280
102754	Program Error	AFO481 Reservations, Miscellaneous the behaviour of the Allow scoping parameters is not right.	Customer	1718920
103179	Program Error	Not possible to indicate the postage for a reservation notice by post / email if placed via the client	Customer	1726379

103582	Program Error	AFO 481 : Parameter total maximum fine does not work - Maximum per item is OK	Customer	1728515
104017	Program Error	AFO481 Loan policies are not being applied correctly at all locations. (see also 102602 corrected for 2.4.1.17)	Customer	1720192

5- Medium


Defect Number	Type 	Short Description	Reported By	Linked Case
90180	Program Error	AFO481 - Ability to print off and review newer parameters is missing... 481 Fields after 14 are not available in the output for review and should be included.	Other	
90800	Enhancement	AFO481 - General *Enhancement*- Require the ability to print out details of parameter settings other than loan matrices for the location. (deposits, loan plans, blocking, membership etc)	Other	
97181	Design Issue	print parameters - The new 'Loan plan' parameters are not printed when you select print option in AFO 481.	Customer	1618390
103343	Enhancement	AFO 481 - print parameters enhancement	Other	
103586	Program Error	AFO481 - Loan policies test loan rules does not work for dates specified in the start / end period. The current policy is applied to all dates entered.	Customer	1728530
103959	Program Error	Administratiekosten verlengen worden wel getoond maar niet geboekt - When a renewal is done in the WebOpac there are administrative renewal fees, but these are not visible	Customer	1693874

6- Low

Defect Number	Type 	Short Description	Reported By	Linked Case
102216	Program Error	AFO500 administrative costs renewals - WebOpac parameter set is not being used when set. Always reading the general set instead.	Customer	1709091
102700	Program Error	AFO481 Maximum numbers, Subtotals, if the number of borrower categories related to a table exceeds one line they will not display in the header pane.	Customer	1719428

482-Borrower file parameters

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
85131	Enhancement	Count of abnormal returns (NNTs) needs to be counted on a rolling basis, say for the preceding 12 months, not just over the lifetime of the borrower record. Server version 1.3(vstest), client	Other	1548883
103849	Program Error	AFO482 Automatic borrower categories determine incorrect category when borrower will reach new category within month of registration	Customer	1739276


6- Low

Defect	Type 	Short Description	Reported	Linked
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Number			By	Case
102134	Program Error	AFO482 Copy function in block borrowers (overdue items and period after sending overdues) does not copy information from all tabs	PSO	1708253


483-Circulation notice parameters

3- High


Defect Number	Type 	Short Description	Reported By	Linked Case
99368	Enhancement	AFO483 SSP format Block/Column value "Pickup location" displays inst/loc code rather than text on notice output	Customer	1630852

486-WinCirc

3- High


Defect Number	Type 	Short Description	Reported By	Linked Case
102695	Program Error	WinBus export record delimiter for patrons and items not correct under Unix	Other	

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
102506	Design Issue	Borrower export for WinBus does not fill "first name" field	PSO	
102607	Program Error	AFO486 WinCirc load of transactions with AFO633 fines amnesty activated creates runtime error <SUBSCRIPT>CheckIn+32/JCircOfflineProcess	PSO	1717778
103698	Program Error	Error NOLINE in CheckFormat+5^JCircOfflineProcess after addition of new managers	PSO	
103925	Enhancement	ENHANCEMENT - export membership note, card note and suspension note for display in WinBus client	PSO	


495-Invoices

5- Medium


Defect Number	Type 	Short Description	Reported By	Linked Case
101913	Program Error	AFO495 sorting not correct - Monetary values are not sorted correctly.	Customer	1714262
102481	Program Error	Money columns not sorting correctly numerically by 2 decimal places of precision	Customer	1714262
102547	Program Error	Overview of invoices: Errors when making a selection on the form UKASRA.1 (limit by type or status retrieved all for display Details from the filter applied)	Customer	1731896
102547	Program Error	Overview of invoices: Errors when making a selection on the form UKASRA.1 (limit by type or status retrieved all for display Details from the filter applied)	Customer	1742371
103481	Program Error	AFO495. Type=BOOK DMG for all overdue items Should be Item fees	Customer	1731530


500-WebOpac

1- Production Down


Defect Number	Type 	Short Description	Reported By	Linked Case
102925	Program Error	AFO500 When updating Borrower data, Borrower Category is always set to the default borrower category	Customer	1722553

3- High


Defect Number	Type 	Short Description	Reported By	Linked Case
93538	Enhancement	no possibility to delete reviews from customers entered via the WebOpac - See also 93845	PSO	
93845	Enhancement	Reviews : how to edit / delete reviews? Currently no method is available *** See also 93538	PSO	
96581	Enhancement	WebOpac Rate and Review does not allow deletion of reviews	PSO	1610353
99202	Knowledge	AFO500 change borrower information does not function if Port for WebOpac not assigned	Customer	1651785
102006	Design Issue	Rate and Review Libraries should have the possibility to delete some reviews (see also 96581 96580 93538 93845 90955 90990)	PSO	1705848
102006	Design Issue	Rate and Review Libraries should have the possibility to delete some reviews (see also 96581 96580 93538 93845 90955 90990)	PSO	1707475
102033	Program Error	AFO500 WEBOPAC Content enrichment / Neilson Book Covers has disappeared	Customer	1705306
102040	Program Error	Message "Item already renewed today" shown incorrectly	Other	1696230
102040	Program Error	Message "Item already renewed today" shown incorrectly	Other	1720192
103161	Program Error	Webopac - Multi-database and Multi-index problem	Customer	1725749
103164	Program Error	WebOpac - Next page problem on multi-database search	Customer	1725749
103166	Program Error	WebOpac - Switch tab with Multi-index and Multi-database	Customer	1725749
103183	Program Error	Administration costs charged per item instead of per renewal action	Customer	

Defect Number	Type 	Short Description	Reported By	Linked Case
103501	Program Error	WebOpac - Renewals - The webopac profile is not stored in the ^UTR global	Customer	1732336

5- Medium


Defect Number	Type 	Short Description	Reported By	Linked Case
93420	Program Error	WebOpac error.csp - Javascript message available only in Dutch and is not language controlled. Will be overwritten by upgrade. Text should be site definable/configurable.	Customer	1578029
97829	Program Error	Z3950 Portal searching / multiple databases cannot start up without an index called "Index1, Index2 Index3" etc. for each of your multiples	Other	
98399	Program Error	Restriction language. If language added to AFO113, should it not be visible in Webopac too?	Customer	1637810
100662	Program Error	AFO500 Can place WebOpac reservation on title with no copies and no active orders	Customer	1673070
101500	Knowledge	Webopac - How does one set a location restriction for a profile other than No Preferences - Nothing seems to save	Customer	1695255
102005	Program Error	WebOpac First search text field should get focus on startup screen - Duplicate of 101558	Customer	
102025	Translation	Web preferences, main screen after logging in, untranslated option - Way of Storing IP	Other	
102532	Design Issue	WebOpac = Client-blocked borrowers cannot access SDI functions when the block for WebOpac is in-use and clear	PSO	1716666
102935	Program Error	Some small changes in Rate & Review	Customer	
102945	Program Error	WebOpac User Activities - Update borrower record form - Data in Drop down lists not retained initially... Resets to first in list - Some fields reset after rejection of data (error message)	Other	
103541	Program Error	AFO500 - User Activities - If the Renewal Administration charges are to be charged, they should appear on the Confirm extensions summary page as a line item along with the individual charges	Other	
103551	Program Error	Webopac. If a reservation has been made on one volume or issue of a title, you cannot reserve another. 'You already made a reservation for this record.'	Other	
103592	Program Error	Webopac - cursor is not positioned in search text box by default. One needs to click in the field in order to enter a search term	Customer	1732746
103846	Enhancement	Guest registration. Add option to NOT send the pincode in confirmation email to the User Activities Preferences	Customer	
103889	Enhancement	Enhancement to allow for table of contents, descriptions and covers to be displayed for Neilson Book Jackets	Other	
104042	Program Error	WebTree: restriction number of pages defaults to 0-50 in Preferences - Searchtree restrictions are sometimes reset.	Customer	

6- Low

Defect Number	Type 	Short Description	Reported By	Linked Case
101558	Feature Regression	WebOpac - no cursor present on search forms - was there for 2.3 - See duplicate 102005	Customer	1696767
102273	Design Issue	Street number is not shown in personal data, when it is defined as separate borrower field	Customer	


611-Password

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
102658	Enhancement	Login name should accept more than 10 characters as well as punctuation characters	Other	


616-Interfaces to other systems

3- High

Defect Number	Type 	Short Description	Reported By	Linked Case
102998	Program Error	Melding 23 wordt niet getoond op zelfservice-apparaat - Not all the messages are properly displayed in the SSD	Other	1713382


622-Calendars

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
103694	Program Error	AFO622 Calendar definitions cannot be deleted get error message ...in use	Customer	1720157


623 Settings for Client Interface

5- Medium


Defect Number	Type 	Short Description	Reported By	Linked Case
103589	Program Error	Fast user switch: login usercode data is visible (High) (we should not see data typed in..... Also labels in Dutch are not correct (see also 103737)	Customer	1730656

631-Global Change

3- High


Defect Number	Type 	Short Description	Reported By	Linked Case
102085	Program Error	AFO631- Specifying in a Bib profile to or copy a whole tag. Action is not done when dealing with authorized tags	PSO	
102541	Design Issue	Incorrect information between conversion report and the real result in the bib record - Changing publication types - ** Removed from list of values available for global change ***	PSO	1715759

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
99581	Program Error	AFO631 Global Change. It is possible to delete an authority link subfield, but relations remain on both bib and authority records.	Other	1663962


Not applicable

6- Low


Defect Number	Type 	Short Description	Reported By	Linked Case
104552	Enhancement	AFO411 Items with a status of missing cannot be lent in SelfCheck	Customer	1748855

TBA


3- High

Defect Number	Type 	Short Description	Reported By	Linked Case
103409	Program Error	Once "Fast User Switch" activated previous user should no longer be logged in.	Customer	1730208

5- Medium


Defect Number	Type 	Short Description	Reported By	Linked Case
103780	Program Error	Connection through port 1974 (TCP/IP) gives disconnect when License Management (global ^SysLicense) is activated	PSO	

3- High

Defect Number	Type 	Short Description	Reported By	Linked Case
86867	Enhancement	*ENHANCEMENT*Need to be able to output data for PLR (Public lending right). Specific formatted output may be worked on as PS but data needs to be available within Vubis Smart. See details f	Customer	1718867
86867	Enhancement	*ENHANCEMENT*Need to be able to output data for PLR (Public lending right). Specific formatted output may be worked on as PS but data needs to be available within Vubis Smart. See details f	Customer	1745027
86867	Enhancement	*ENHANCEMENT*Need to be able to output data for PLR (Public lending right). Specific formatted output may be worked on as PS but data needs to be available within Vubis Smart. See details f	Customer	1745965
100403	Translation	New texts to translate cannot be found in LanguageManagement	Other	
102648	Enhancement	Ability to get an optional field defined to send a message to SIP2 that this item is not for automatic checkout	Customer	
102772	Program Error	Fixes related to "Tobias fines calculation - Closed days" - Fines may optionally	Other	

		exclude closed days for a time period		
103205	Program Error	Incomplete global change on authority records: ^DataAuthRef and browse display headings.	PSO	1727423

5- Medium

Defect Number	Type 	Short Description	Reported By	Linked Case
100569	Enhancement	Enhancement to manage claimed returned and other loan statuses	Other	1472903
100569	Enhancement	Enhancement to manage claimed returned and other loan statuses	Other	1584903
100569	Enhancement	Enhancement to manage claimed returned and other loan statuses	Other	1633252
100569	Enhancement	Enhancement to manage claimed returned and other loan statuses	Other	1692660
100569	Enhancement	Enhancement to manage claimed returned and other loan statuses	Other	1698002
101875	Enhancement	Modifications for Acquisitions Receipt printing - Allow Receipt printing on only one slip	Other	
101923	Enhancement	The lis of controllers for a certain option does display location too (The wording display for managers should be limited to non-online location managers)	Other	
103197	Enhancement	New AFO142 - Title Accession History reporting	Other	
103204	Program Error	Sip2 permits loan if item is in transit to offline manager	Customer	1726828
103373	Program Error	MARC21B 008 Visual Format 3-digit "Running Time" cannot be authorized in AFO111 Field Form	Customer	1730813
103857	Enhancement	*ENHANCEMENT* - add Webopac preferences and general topics help to the preferences toolbar	Other	