CIRCULATION POTPOURRI

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TOPICS:

DATA REFRESH UPDATE, TABLE CHANGES, REPORTS UPDATES, ETC…

SYSTEM REFRESH

Aleph TEST database was refreshed with current data on Sunday, March 11, 2018.

This takes about 24 hours to finish.
The production systems (Aleph, Primo, SFX and database authentication) are not affected by these procedures on test.

Future "refresh" are planned January & July timeframes

WHAT'S COMING UP?

- Patron Delete Project will begin in April 2018 ODIN Office will contact everyone when it is their time Reminder that cir-77 daily runs will automatically delete patrons once their links (loans, cash, etc.) are taken care of because of the TO-DEL note is in tab2 of the Global Patron Information node After the delete project is done for your library you may request that cust-48 (Remove Delete Flag from Patrons) be run so the TO-DEL note is removed from tab2 of the Global Patron Information node

Tab 25 – Item Material Types

BOOK Book
BLU Blu-Ray
BRAIL Braille
CASST Cassette
CDISC CD
CDROM CD ROM
CHART Chart
DIGIT Digital
DIORM Diorama
DVD DVD
DVDRM DVD-ROM
EAUDO Electronic Audiobook
EBOOK Electronic Book
ECOMC Electronic Comic
EJRNL Electronic Journal
EMUSC Electronic Music
EQUIP Equipment
EVIDO Electronic Video
FILML Film Loop
FILMS Filmstrip
FLSHC Flash Card
GAME Game
GLOBE Globe
INTER Internet Resource

ISSUE Serial
ISSBD Bound Issue
ISSUM Micro Issue
KEYS Keys
KIT Kit
LAPTP Laptop
LPREC LP Record
LRGPT Large Print
MANUS Manuscript/archives
MAP Map
MFORM Microform
MPICT Motion Picture
OTHER Other
PCOPY Photocopy
POSTR Poster
REALI Realia
RESV Reserves
ROOM Room
SLIDE Side
SOUND Sound Recording
SCORE Score
SOFTW Software
TRNSP Transparency
UNAVL Unavailable
VIDEO Video

RTA REAL TIME AVAILABILITY IN PRIMO

Tab 14
Item Reshelving Time
There had been many tickets on things not showing as available and it was sometimes due to the time set in Tab14

Ex:
! 1   2 3 4 5
!!!!!-!!!!!-!!-!!-!!!!
01 ## 0015
05 ## 0015
10 ## 2359
11 ## 0015
15 ## 0015

Or…
Cataloging done on the current day
A record will show in ODIN Classic the same day after it goes through indexing but it takes publishing to process that record on Primo

Tab31 defines default privileges for the patron based on the patron status.
*Patron expiration dates are set here
Basically these are setup as you would like but at times policies might change and now you decided to allow your patrons to place holds on items or for items on shelf or renew permission .

Patron statuses (default settings) (MPS50\tab - tab31)

1. Sublibrary	2. Patron status	3. Loan permission	4. Photo permission	5. Override permission	6. Multiple hold permission	7. Check loan	8. Hold permission
ALEPH	##	N	N	Y	N	Y	N
#####	09	Y	Y	Y	N	Y	Y
#####	10	Y	Y	Y	N	N	Y
#####	05	N	N	N	N	Y	N
#####	02	N	N	N	N	Y	N
#####	63	Y	N	Y	N	Y	Y
#####	64	Y	N	Y	N	Y	Y

1. Tab31 needs to be changed
2. ODIN will run a report to find all patrons that are not flagged for this
3. ODIN will change those existing patrons that need to be changed
4. New patrons would get the new default as you load them in

Questions???

I installed Aleph on a new computer and no longer get the following:

Display List of Hold Requests
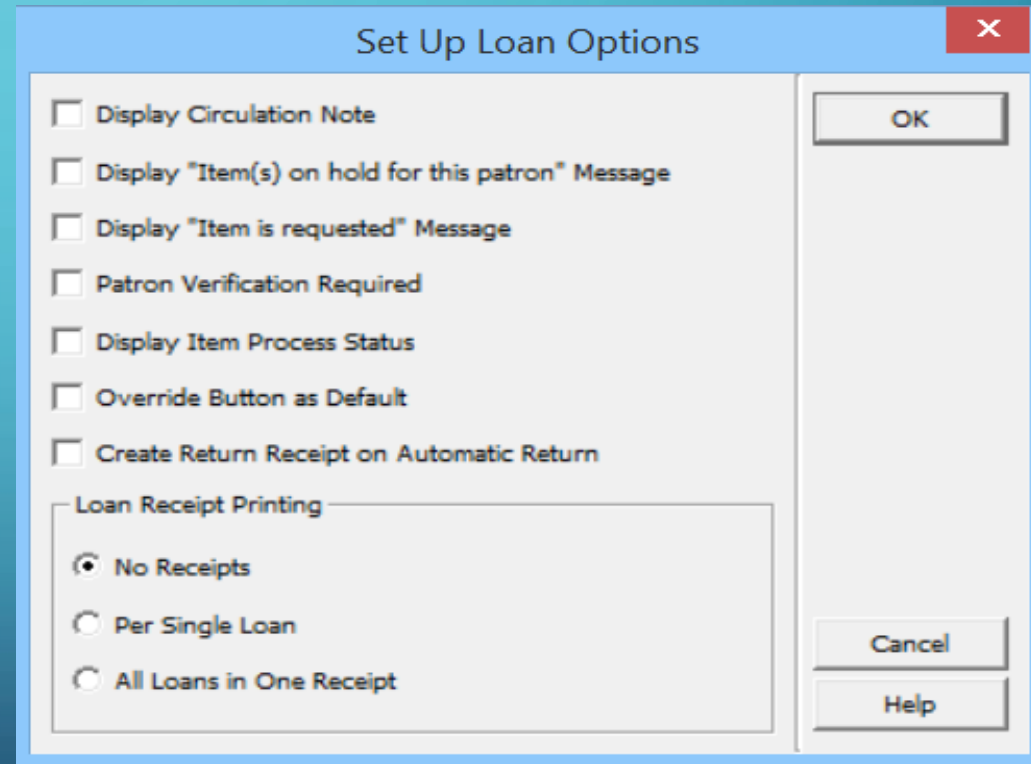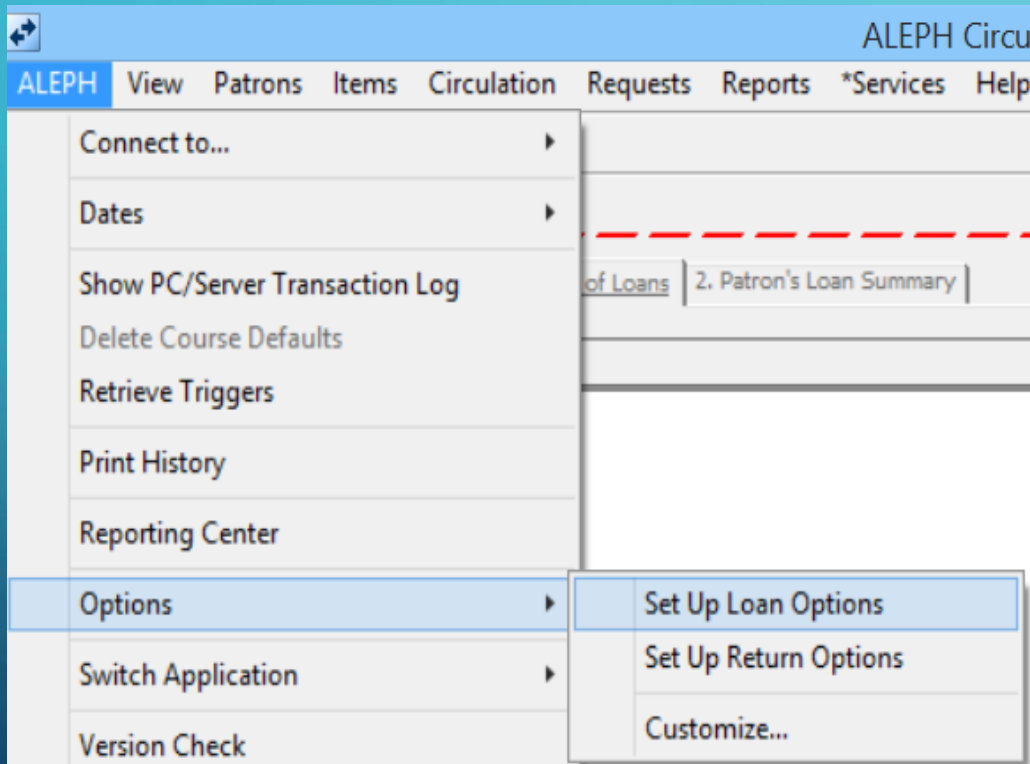Print Circulation Receipts
Display Circulation Note
Display Item Process Status
Loan and Return message

***Reset the Loan and Return Options

LOAN OPTIONS

DETERMINE CERTAIN ASPECTS OF CIRCULATION FUNCTIONALITY WHEN PERFORMING TRANSACTIONS
THE LOAN OPTIONS ARE UNIQUE TO EACH COMPUTER, AND MUST BE RESET ANYTIME A NEW CLIENT IS DOWNLOADED
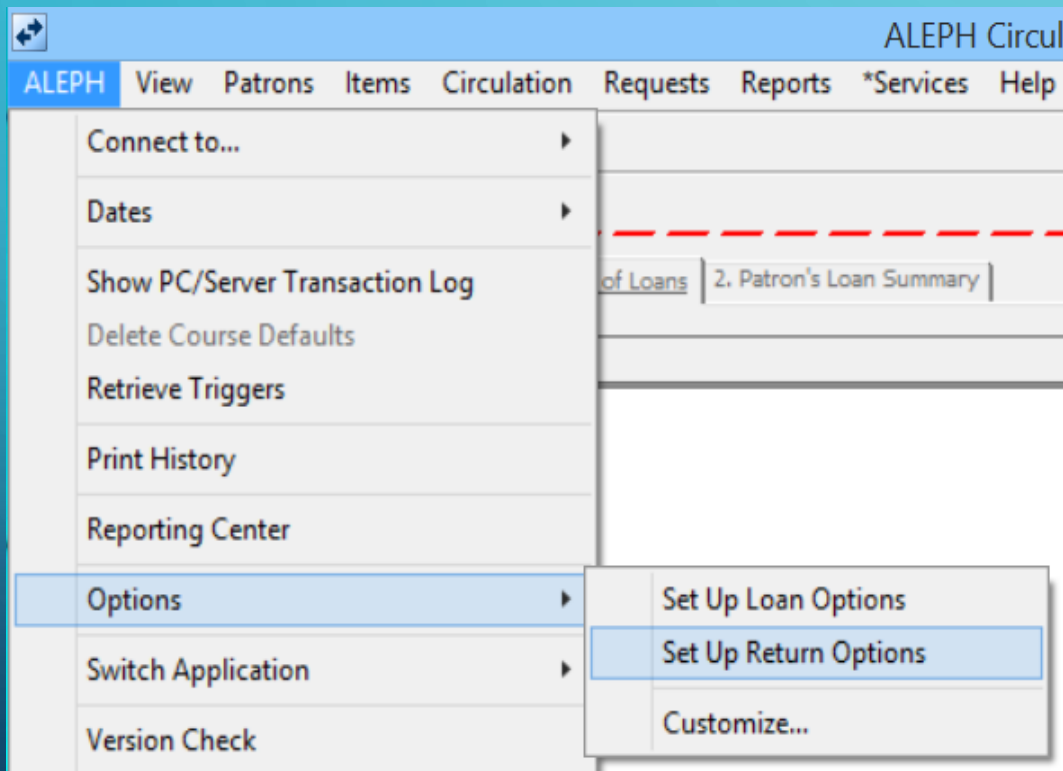
RETURN OPTIONS

DETERMINE CERTAIN ASPECTS OF CIRCULATION FUNCTIONALITY WHEN PERFORMING TRANSACTIONS
THE RETURNS OPTIONS ARE UNIQUE TO EACH COMPUTER, AND MUST BE RESET ANYTIME A NEW CLIENT IS
DOWNLOADED
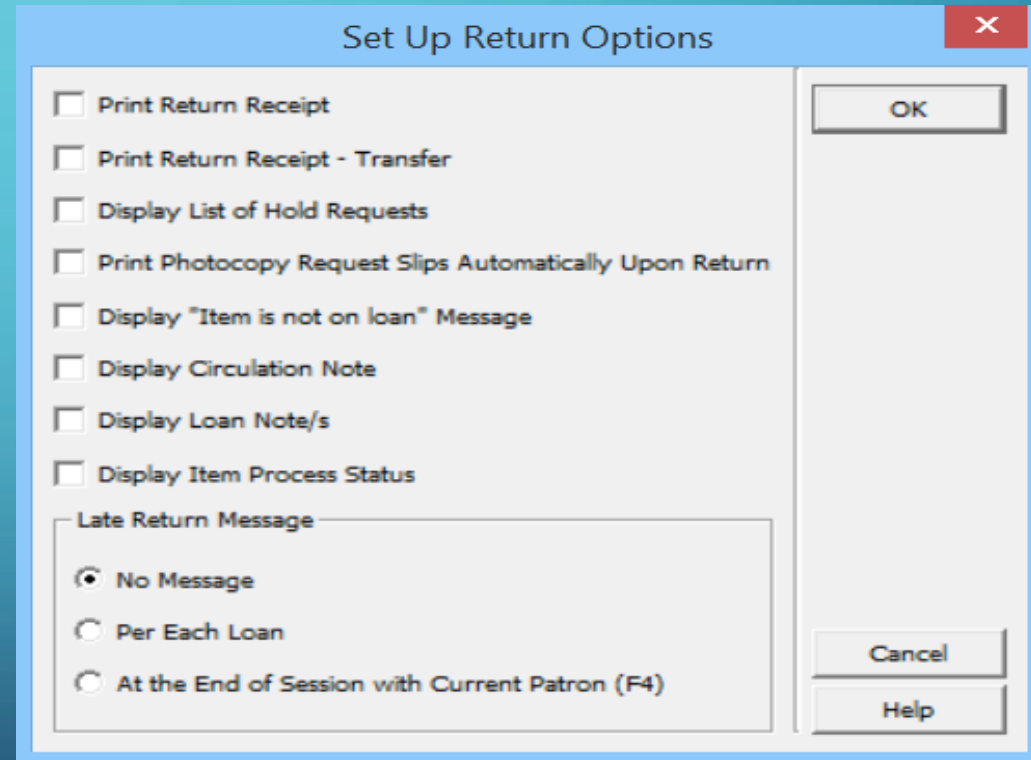
List of New and Enhance Reports

We hope that these reports help you with your needs!

Please do not hesitate to ask us for help when running these or if you any questions.

ODIN Custom –Usage and Statistics
Report of Loans Created or Returned on Date (cust-240)

Now it can get a list of loans returned on a specific date as well as created

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ODIN Custom – Usage and Statistics
Titles/Items with Circ Events by Call Number/Date Range – cust 215

New title report - enter dates and get a list of new titles, must have an item attached.
New item report - includes stats broken down by patron type and status.
NDS item report – lists all items without the circ stats.

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ODIN Custom – Usage and Statistics
Average Hold Fill Time (cust-409)

Now it can be limited to collections and includes Material types

ODIN Custom-Patron

List blocks, activity, or holds for a specific Patron ID (cust-85)

A report that lists items loaned to a patron that have holds on them. It was written because a library uses a special patron for missing items, but you could look at any patron.

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ODIN Custom –Items

Lost Loans Report (cust-460)

Enhances cir-04, includes the number of additional copies of the lost item

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ODIN Custom –Items

Item Count on a specific date (cust-13)

Collection count by date – Now excludes ILL items.

Example: Item Count on a specific date (cust-13)

```
*********************************************************************
Item Count on a specific date - by Collection (cust-13)
*********************************************************************
Library: NGF50
Sub-libary: ALL
Date: 20171222

Note: If you used the total delete in the catalogoing client this
count will be off. The total delete does not create an item history
record. Records deleted that way will not be included in this count.
*********************************************************************
SubLib Collection       Count    Items Collection Name
------ ----------       -------  --------------------
 NGFMA                    235    The collection name was not defined
 NGFMA   3WKNR            39     Adult Computer Software
 NGFMA   ADBO            4591    Adult Biography
 NGFMA   ADCD           13416    Adult Compact Disc
 NGFMA   ADVD            8685    Adult DVD
 NGFMA   AFICT          31623    Adult Fiction
 NGFMA   AFM             8961    Adult Mystery
 NGFMA   AFMSS             2     Adult Mystery Short Story
 NGFMA   ANONF          25373    Adult Nonfiction
 NGFMA   AOVER            585    Adult Oversize
 NGFMA   APAM             259    Adult Pamphlets
 NGFMA   ART               54    Artwork
 NGFMA   ASF             4060    Adult Science Fiction
 NGFMA   AWEST           2513    Adult Western
 NGFMA   CALD             182    Caldecott
 NGFMA   CAUDI            443    Childrens Multimedia
 NGFMA   CBRD             544    Childrens Board Books
 NGFMA   CDVD            6893    Childrens DVD
 NGFMA   CEB              639    Childrens Easy Biography
 NGFMA   CENF            4994    Childrens Easy Nonfiction
 NGFMA   CER             3647    Childrens Easy Readers
 NGFMA   CFC             2311    Childrens First Chapter
 NGFMA   CFICT          10246    Childrens Juvenile Fiction
 NGFMA   CHLDY            107    Childrens Holiday Collection
 NGFMA   CHRN            1682    Childrens Graphic
 NGFMA   CHSK               2    Childrens Story Kit
 NGFMA   CJB              893    Childrens Juvenile Biography
 NGFMA   CNONF           6993    Childrens Juvenile Nonfiction
 NGFMA   COVER            404    Childrens Oversize
 NGFMA   CRCD            1232    Childrens CD
 NGFMA   CRPER            414    Childrens Periodical
 NGFMA   CRREF            221    Childrens Reference
 NGFMA   EAUD            7649    Electronic Audiobook
 NGFMA   EBOOK          16624    Electronic Book
 NGFMA   EFIC           14575    Easy Fiction
 NGFMA   ELEC            9353    Electronic Books
```

ODIN Custom – Bib records

Average Publication date by Dewey Call number or Collection (cust-10)

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This report is done in the ILL module.

ODIN Custom Reports

ILL Requests by patron Status by date range (cust-68)

Added the ILL unit to output.

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This reports is done in ACQ

ODIN Custom

Budget Number Order Group Report (cust-212)

Report on amounts spent from a budget split by vendor and order groups.

Example: ILL Requests by patron Status by date range (cust-68)

```
Total Stats for ALL by Patron Status 20170406 - 20180406

IUnit  PStat  Total  ToBePr  Pend  Cancel  No Sup  Filled  Filled %
-----  -----  -----  ------  ----  ------  ------  ------  --------
NGFUT  26       102       0     2       4      15      81     81.00
       46       714       0     2      34     258     420     58.99
       48        73       0     2       0      18      53     74.65
       57        26       0     0       2      10      14     53.85
       58        41       0     0       1      16      24     58.54
       NoSta      4       0     0       0       2       2     50.00
       t

       Total    960       0     6      41     319     594     62.26


Returnable Stats for ALL by Patron Status 20170406 - 20180406

IUnit  PStat  Total  ToBePr  Pend  Cancel  No Sup  Filled  Filled %
-----  -----  -----  ------  ----  ------  ------  ------  --------
NGFUT  26       100       0     2       4      15      79     80.61
       46       710       0     2      34     256     418     59.04
       48        71       0     2       0      17      52     75.36
       57        26       0     0       2      10      14     53.85
       58        41       0     0       1      16      24     58.54
       NoSta      4       0     0       0       2       2     50.00
       t

       Total    952       0     6      41     316     589     62.26


Non-Returnable Stats for ALL by Patron Status 20170406 - 20180406

IUnit  PStat  Total  ToBePr  Pend  Cancel  No Sup  Filled  Filled %
-----  -----  -----  ------  ----  ------  ------  ------  --------
NGFUT  26         2       0     0       0       0       2    100.00
       46         4       0     0       0       2       2     50.00
       48         2       0     0       0       1       1     50.00
       Total      8       0     0       0       3       5     62.50
```

There are some reports in Circulation that are in html format, so as they say…..

Copy/paste in Excel in order to make them readable.

Right click and choose "Select All" – right click again and choose "Copy". Paste the results in Excel, and the report will appear in a formatted spreadsheet. Because of the number of columns the report contains, this is the *Preferred* method of viewing these reports.

Circulation Reports in HTML code

ODIN Custom Patrons
Patron List by Patron Type (cust-04)

ODIN Custom Patrons
Remove Delete Flag from Patrons (cust-48)

ODIN Custom Patrons
Patron Address Report (cust-03)

ODIN Custom Patrons
Patron Empl-ID Report – Type 2 email (cust-06)
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ODIN Custom – Usage and Statistics
Titles/Items with Circ Events by Call Number/Date Range (cust-215)

ODIN Custom – Usage and Statistics
Report of Loans Created on Date (cust-240)

ODIN Custom - Items
Collection Material Statistics (cust-02)

ODIN Custom – Items
Lost Loan Report (cust-460)

ODIN Custom – Bib Records
Bib Records and Holdings (cust-55)

ODIN Custom – Bib Records
Titles and Doc Numbers by Call Number Range (cust-216)

HOW TO PRINT HOLD SLIP AND EMAIL HOLD LETTER

- **The IP address of the computer sending email** notices needs to be 'white listed' in order for notices to be sent. Your campus IT department will be able to assist with the following steps.
  It is recommended to set-up only one computer to send hold notices,
  It is best to have a static IP address for this computer.

- Assure that your patron records are 'email ready.'

  - In the patron's primary address record, the email field must contain a valid email address.

  - In the patron's global patron record, the mail attachment type must be set. This field determine how the information in the email will be presented (as an attachment, in the body of the email, etc.) It is recommended that all records be globally updated when initially beginning the email notification process to assure that all records have a value set. A global change of these records can be conducted by the ODIN office. Possible values for this field include H (Attachment Only), P (Email Body Only), B (Attachment and Email Body, or L (HTML Body Only).

HOW TO PRINT HOLD SLIP AND EMAIL HOLD LETTER

Assure your Aleph client is email ready!

!MailServer=il-mail.Corp.Exlibrisgroup.com

MailServer=ndusprntserv1.ad.ndus.edu

!FromAddress=webmaster@exlibris.co.il

FromAddress=jama77@ndus.edu

!BccAddress=

!MailerName=ALEPH 500 Administrator

MailerName=ODIN Circulation Department

For NDUS Libraries, the mailserver is PO3.NDUS.edu [Sample: MailServer=PO3.NDUS.edu

Open the .\CIRC\tab\print.ini file

Check the lines for HoldLetter## and ReturnHold01 have col.4 (mail default) configured as

B (for print and email) or M (for only email)

P is used for printing

ReturnHold01	00 N M rethold.prn
HoldLetter01	00 N M holdltr.prn
Hold Letter02	00 N M holdltr.prn
Hold Letter03	00 N B holdltr.prn

Highly recommended that only one computer be used to send email notifications

How to change Item Process Status (IPS)

In Circulation Services, you will change the IPS's whenever an item leaves the library for a reason other than check out. For example, if a book needs to be sent to Mending upon return, it will be given a IPS of 'ME', and sent to Mending. Other times that an IPS should be used include when an item is lost, missing, withdrawn, or claimed returned.

In the Circulation module, select "Items" from the top menu bar.
Select "Item Process Status" from the Items drop down menu.
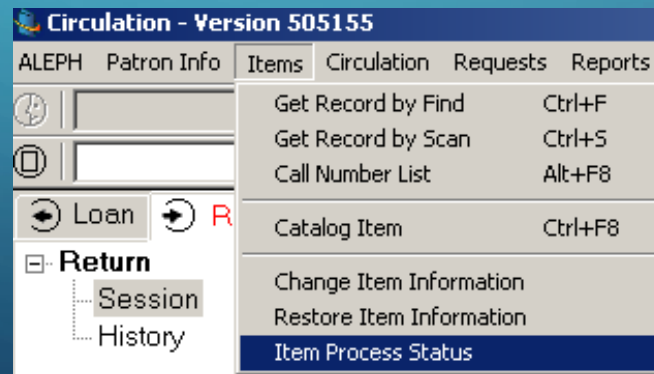
This will bring up a new window box, labeled "Update Item Process Status"
Click on the right arrow next to the box labeled "Process Status:"

Select the appropriate status for the action being taken for that particular item (e.g., if sending an item to Cataloging then select CT), and double click on that code.

Short cut keys can be helpful and fun (:

To open a loan session click on the loan tab or press **F5**

To open a return session – Click on the Return tab or press **F6**

To clear a patron screen – Press **F4**

To get to the search screen – Press **F9**

To bring up the patron box – Press **F7**

To bring up the help menu in the patron or item – Press **F1**

Fast Cataloging a record and creating an item Circulation
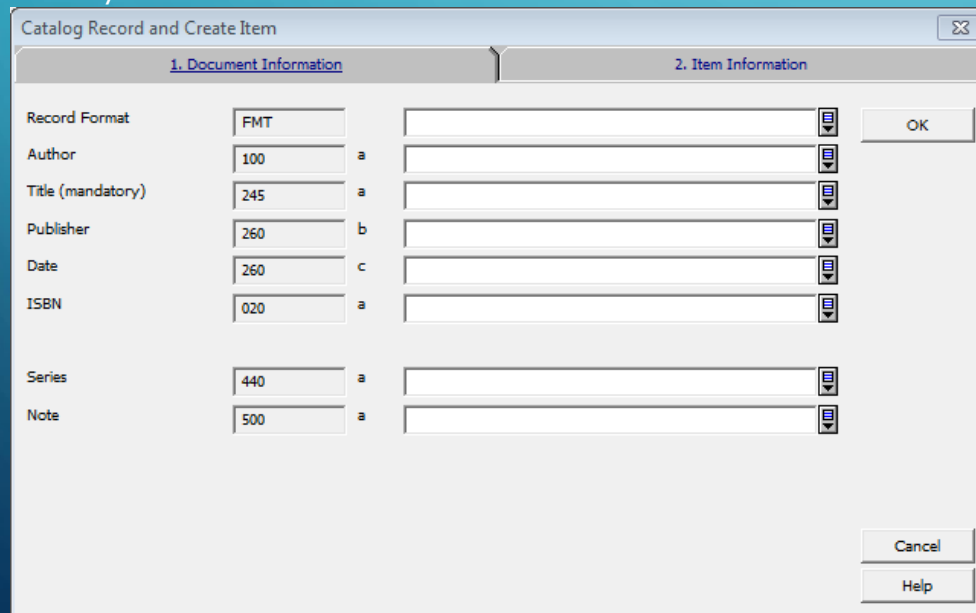
1. On the menu bar, select Items | Catalog Record and Create Item. Alternatively, Ctrl+F8 will also bring up the workform.
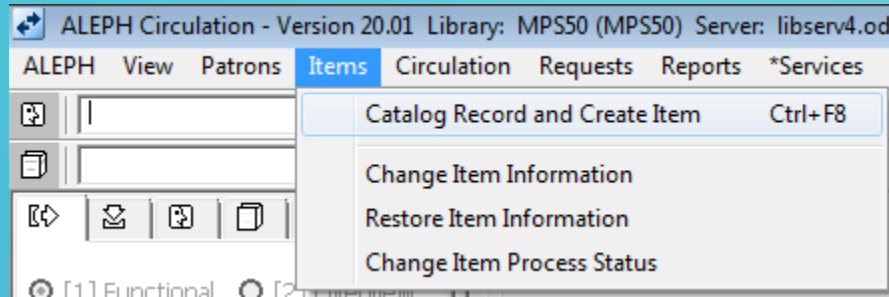
A dual-tabbed work form appears. Fill out both tabs as completely as necessary and/or desired

First tab is for the bibliographic information, you will see that Marc tag and its delimiter is filled in.

Record format – entered the 2 character format of the item if left blank BK (book) is used by the system

Author – Enter by using Last name, First name format

Title (mandatory)

Enter Publisher, Date (copyright), ISBN, Series, Note

Catalog Record and Create Item

1. Document Information | 2. Item Information

Open Date: 04/06/18
Item Barcode:
Sublibrary:
Item Status:
Call Number Type: Call Number:
2nd Call Number Type: Second Call Number:
Description:
OPAC Note:
Internal Note:
Circulation Note:
Copy Number:

Sequence Number: 000000
Material Type:
Collection:
Item Process Status:

OK
Save Def.
Cancel
Help

Open date is automatically filled in with current date

Sequence Number is automatically filled in.

Item Barcode (mandatory) Enter one or if left blank the system will create a dummy barcode.

Material Type (mandatory) choose one from dropdown menu

Sublibrary (mandatory) choose one from dropdown menu

Collection: Choose one from the dropdown menu.

Item status (mandatory) Choose the item status from the drop down menu.

Item Process Status: If necessary choose one from the drop down menu.

Call number Type: If assigning a call number, select the appropriate call number type from drop down menu.

Call Number: Enter the call number using the $$h/$$i protocol. For example, a Dewey call number of 343.56 CAN would be entered as $$h343.56$$iCAN

2nd Call number

Description

OPAC Note

Internal Note

Circulation Note – enter one if desired

Copy Number – enter one if necessary

If you had seen this error?

Remote Service Error (c0902 change 20)

It means that the item record is not linked to a HOL (holding record)

This was discovered when trying to add the item process status to it.
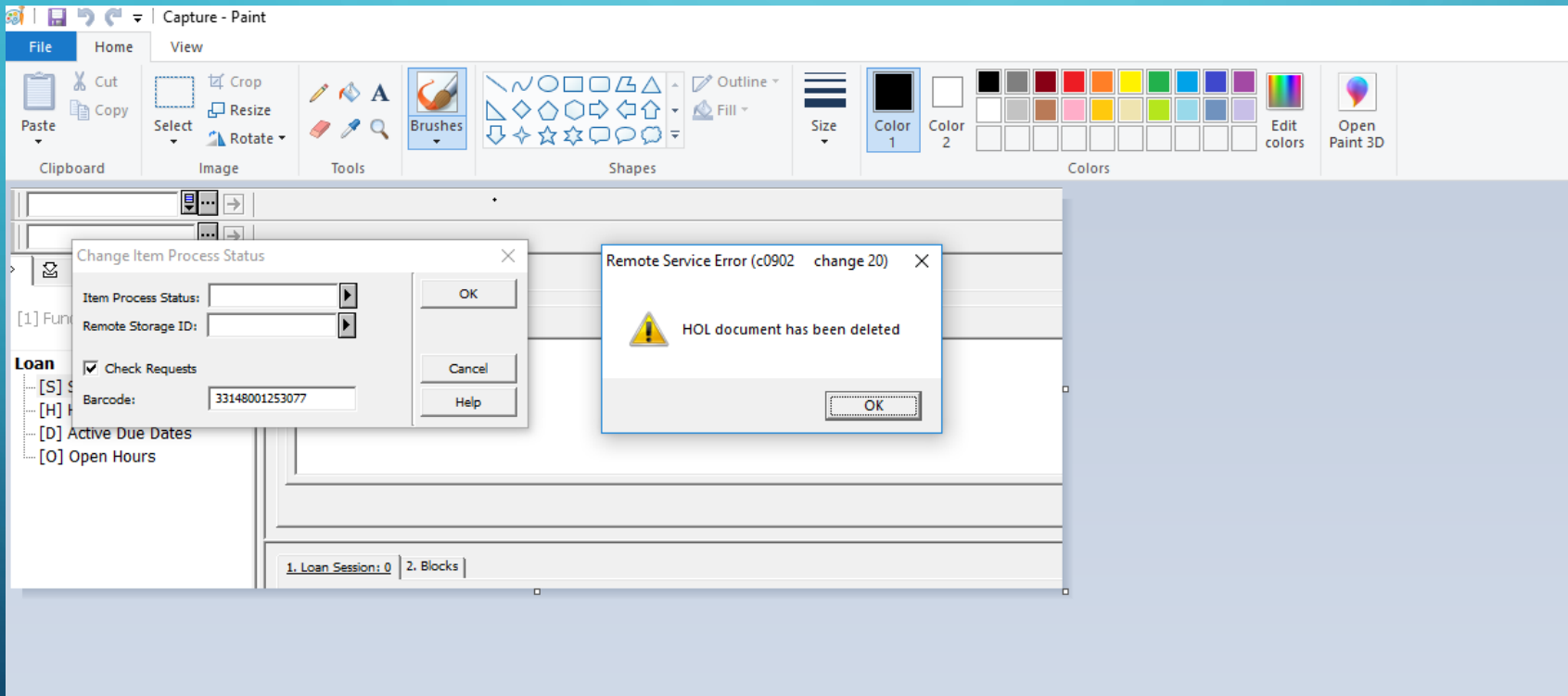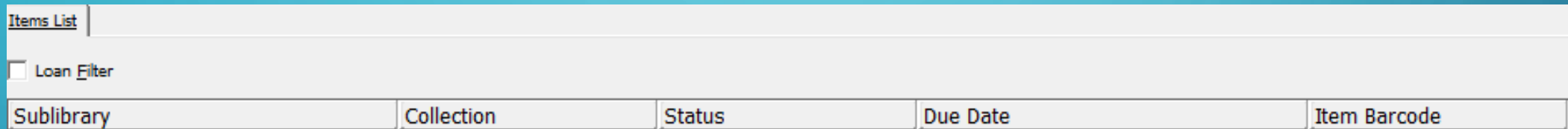
How to set up your Aleph toolbar: Items List

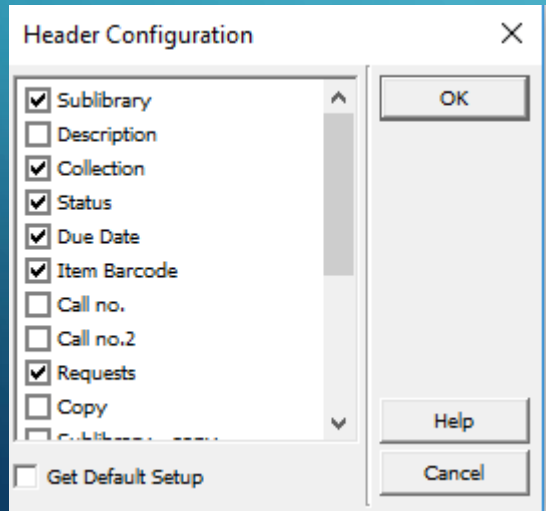Click on the 'Item' tab, and bring up an item record (scan in a barcode, or search for an item).
Right click on the taskbar and select the following:
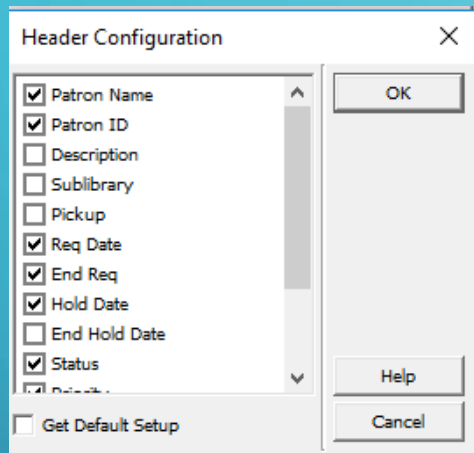Sublibrary, Collection, Status, Due Date, Item Barcode, Requests.

How to set up your Aleph toolbar: Item – Hold Request

Click on the 'Item' tab, and ensure that 'Hold Requests' is highlighted.
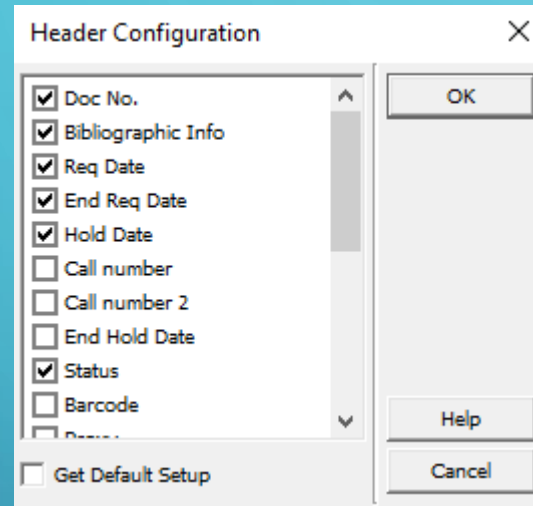
Right click on the taskbar

and select the following:

Patron name, Patron ID, Req Date, End Req, Hold Date, End Hold Date, Status
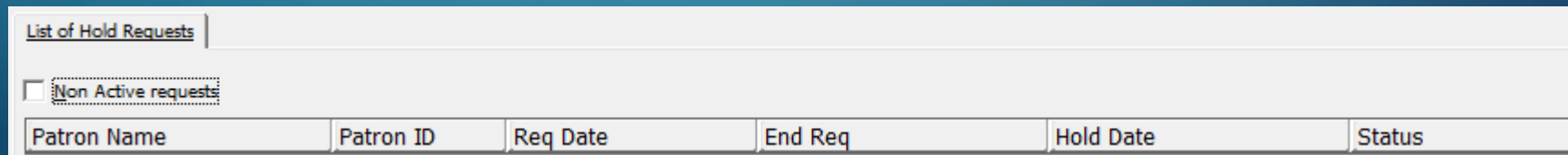
How to set up your Aleph toolbar: Patron – Hold Requests

Click on the 'Patron' tab, bring up a patron record and click on Hold Requests.

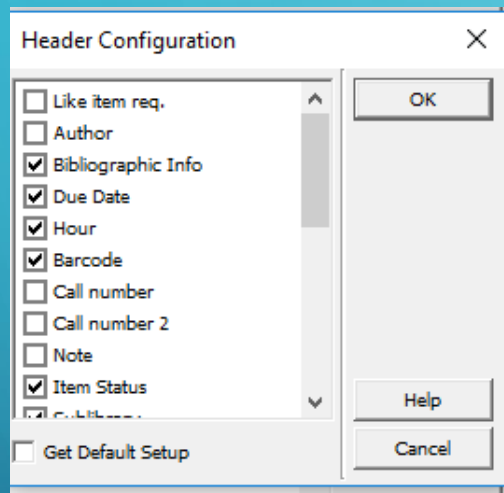Right click on the taskbar

and select the following:

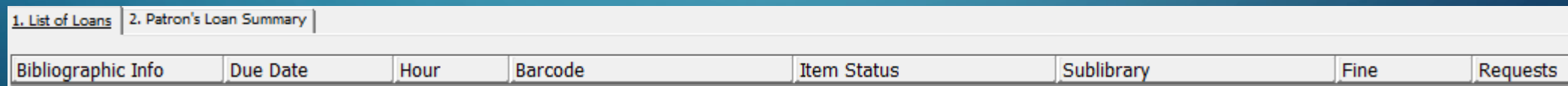Doc No. Bib Info, Req Date, End Req Date, Hold Date, Call number, Status

How to set up your Aleph toolbar: Patron – Loans

Click on the 'Patron' tab, bring up a patron record and ensure that Loans is highlighted.

Right click on the taskbar

and select the following:

For attending my session and please enjoy the rest of the conference!