Circulation Back to the basics

GINNY MILLETTE

TECHNICAL SUPPORT SPECIALIST

701-777-4069

VIRGINIA.MILLETTE@NDUS.EDU

AGENDA

- Patron Delete Project started in April 2016

- cust-86 is run daily – patron expiration date sync

- Defining Aleph Level Patrons – what does that mean?

- Item Process Statuses - available vs unavailable

- Loan and Return Options

- Email notices

PATRON DELETES

Patron Delete Project will begin in April 2016

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

PATRON EXPIRATION DATES
cust-86

- This service is run to synchronize Aleph expiration dates to the latest ADM local expiration date

- If patron has local privileges in more than one library, the most current patron expiration is used on the Aleph level

Aleph level patrons

- 90 - higher ed
- 91 - K-12 student
- 92 - Public Library Patron
- 93 - Faculty
- 94 - Staff
- 95 - Local User
- 96 - ILL User
- 98 - Other

Aleph level local patron is necessary component for proper running of the online catalog.

Patron library detection on My Account page in the OPAC

Patron expiry date recognition in the OPAC and Primo

Block recognition in the OPAC and Primo

When logging into the resources the ALEPH level permissions are looked at. The patron status for the ALEPH level is 95 - local user . Local users are not given access to resources when outside of the library.

Guess what?

- You don't need to worry about the Aleph level patron

- You always should assign the patron privileges to the xxx50 patron

- Remember you don't need to touch the sublibrary level

ex. xxxMA

Circulation loan & Return Options

Just a reminder!

Loan Options and Return Options in Aleph circulation determine certain aspects of Circulation functionality when performing transactions, such as if a hold letter should display, if a receipt should print. The loan and returns options are unique to each computer, and must be reset anytime a new client is downloaded.

For more information on the loan and return options please go to:

http://www.odin.nodak.edu/node/14

Tab 100 setting: DEFAULT-ADDRES

DEFAULT-ADDRESS

Determines which address type and validity range will be used as default when a new patron is created. The variable format is TT DDD, meaning:

- TT - Two digits representing the default patron address Type

- DDD - A three digit number, representing the number of days for which the default address is to be valid after its creation date. When this variable is set to 999, it is interpreted by the system as permanently valid. ex. DEFAULT-ADDRESS=02 999

- For example, setting the variable to 03 090 means that the default address type is 03 and it is valid for 90 days.

    The variable's default is 01 030.

- tab_bor_address can not be in use when using this tab100 setting.

Item Process Statuses available vs unavailable

Currently we have 19 available and much more that are unavailable

Because of a line limit, we can only have 19 available statuses

Current available item process statuses are: AL, BL, CH, CS, DI, DT, EN, EX, FL, NB, NE, NM, NW, OD, RE, RG, SD, ST, TA, TO, TS

To see all the item process statuses go to http://www.odin.nodak.edu/staff/ODIN_Master_List_of_Item_Process_Statuses.pdf

If a library is experiencing the incorrect available/unavailable status in Primo because of this problem, please send in an ODIN Help Desk ticked ASAP.

Email notice setup

With the proper set-up, it is possible to email Aleph messages, including overdue notices to patrons.

- First and foremost, it is important that your patron records be "email ready"

- In the patron's primary address record, typically type 2 'mailing address', the E-mail field must contain a valid email address.

- In the patron's global patron record, the appropriate mail attachment setting should be selected. There is an option to select sending emails as attachments, entered as the email body or both.

- The ODIN office can help in making a global change to patron records so they all adhere to the schema of your choice.

- This setup is ONLY valid on the computer you implemented those steps on. While it is recommended you configure only one machine in your library for email, if you do desire to send email from more than one computer, please remember to follow the same process on each one you decide to setup.

- Service pack upgrades/version updates conducted by the ODIN Office have a great potential to OVERWRITE or wipe-out your these settings so it may be necessary to input them again after any upgrade such as those occur.

Email configuration

- For great documentation on how to setup email notices please visit the ODIN Staff page

- http://www.odin.nodak.edu/node/209

- Once you are ready to use the email function the ODIN will create a TEST file to play with to verify the email server and process.

pc_server_defaults

Currently we have 6 pc_server_defaults defined in the system.

Most of the ADM's are defined with 6333 for access. This one has the most common defaults.

The next two slides will show you different types of defaults, please contact the ODIN Office if you have any questions on these.

- 6313
- 6323
- 6333
- 6343
- 6353
- 6363

Default hold expiration

- The current default is 6 months, if you decided you wanted it be set to 12 months you can request to be on port 6353.

- setenv pc_z37_date_to   M012

- The variable determines the default period between the placing of a hold request from the GUI and the end of the period of interest. If this variable is not defined, or is defined incorrectly, the default "date to" will be three months.

Default for recall type

The current default is 03 no recall, if you decided you wanted it be set to 01 regular recall you can request to be on port 6313.

This variable sets the default value for Recall Type field in the Hold Request screen in the Circulation module. Possible values:

▶ **01 = regular recall**

▶ 02 = rush recall

▶ 03 = no recall

If no value is defined, the system defaults to "03" (= No Recall).
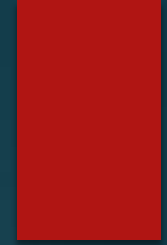
PLIF procedure update – presentation at 2:00 room 217

New material type was added for electronic videos – you should see it in the dropdown labeled as EVIDO

Listserv list is available at:
http://www.odin.nodak.edu/lib_staff/MoreThingsToCheck

Do you need to download the client? go to this link: Make sure you put your ADM code at the end of this url: http://www.odin.nodak.edu/download/UND

Custom services for all modules http://www.odin.nodak.edu/node/18

If you add a new collection in tab40.eng - please make sure you update pc_tab_exp_field.eng as well in the collection-code area. For example the Item List by Collection, Item Class and Date Range (cust-33) you have the option to pick All collections or choose which ones you want to be included in this report.

Tab31 if you have an actual specified date for expiration make sure you update that when needed.

Tab16 – if you change due dates please note the changes go into effect the following day unless you notify us for an immediate change.

Aleph test client - test.odinlibrary.org:6333 or use the other available ports.