Services that Enhance Public Library Workflows

Jason DeShaw, Fargo Public Library & Ellen Kotrba, ODIN Technical Support

2013 UMWUG Conference Roseville, MN October 29, 2013 2:15-3:15 pm

AGENDA

(Other UMWUG sessions regarding Public Libraries: "Ex Libris & Public Libraries" and "Finding a Better Way")

- Loading Brief Vendor Records
- Set item process status on Billed LOST loans so they can be suppress in the opac (cust-40)
- Deleting weeded items via item-11 and identify OCLC #'s to delete from OCLC WorldCat
- Deleting serial items to delete (cust-45) and then delete via item-11
- Custom Reports for Evaluation (cust-05; ret-adm-01; item-05; cust-01; cust-27; cust-13; cust-15; cust-17 cust-403)
- Holds & Outstanding Holds (cir-11; cir-06)
- Cash reporting to reconcile cash drawers with funds received (cust-34 in combination with cust-74)
- ILL reports (cust-78; cust-43)

JASON DESHAW

Fargo Public Library

Loading Brief Vendor Records

- We have a lot of “On Order” items
  - 3,000+ items added per month
- Patrons need to place holds on “On Order” Items
  - 3,000+ holds place on any given day
- Conclusion: We need an efficient way to create “On Order” items

Loading Brief Vendor Records

- Diverse selection responsibilities
  - 18 selectors; 3 locations; 3 primary vendors; approximately 80 different vendor carts each month
- Previously, data for each individual title in each vendor cart was manually entered in Acquisitions > Orders > Catalog Orders
  - Obviously time consuming and tedious

Loading Brief Vendor Records

- There has to be a better way
- Development of the ODIN custom record loading
- An automated process to load brief bib records with “On Order” items attached, ready for holds to be placed

Loading Brief Vendor Records

- The Process
  1. Notification of carts ordered
  2. Download .mrc records from vendor site
  3. Upload .mrc records to ODIN site
  4. Move .mrc records to proper folder
  5. Load .mrc records by material type

ABOUT ODIN | WEBSITE INFO

ODIN
Ohio Dakota Information Network

Search Site : Go

Operated by North Dakota University System

HOME | LIBRARY STAFF | ODIN LIBRARIES | DATABASES

YOUR LIBRARY

Fargo Public Library (165.234.255.19)

- My Account
- My Library
- Downloads
- Posting My Library News/Events
- Library File Upload
- Log out from the system

MY FAVORITES

ADD TO MY FAVORITES

ODIN NEWS & EVENTS

- **ebrary's H1N1 Information Center has been added**
- **Website Menu Change**
- **EBSCO H1N1 Database Available**
- **ODIN Web site update & changes**

more

Library File Upload

This interface allows users to upload files (.txt, .mrc, .csv...) to the server for use in various Aleph services. 'Browse' and add up to five files at a time, then click 'Submit' to transfer the file(s) to the server. After uploading, the service Move a File into an Input Directory (cust-90) must be run in order to transfer the file to the appropriate location on the server so it is available for the service to be run.

IMPORTANT: make note of your file name(s) as it will be needed to run the cust-90 service!

File to Upload: *
Choose File No file chosen

Additional File to Upload:
Choose File No file chosen

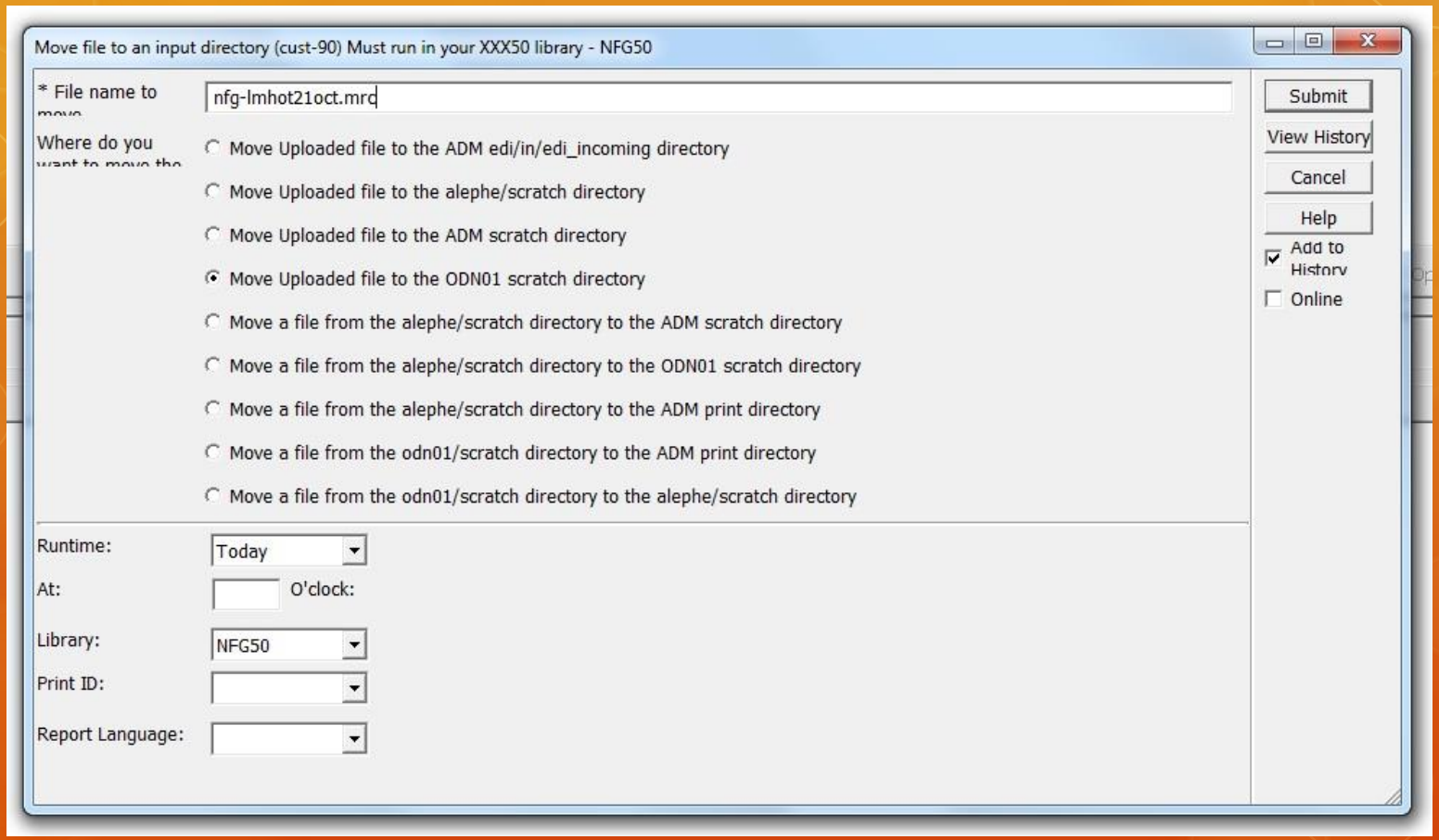
Additional File to Upload:
Choose File No file chosen

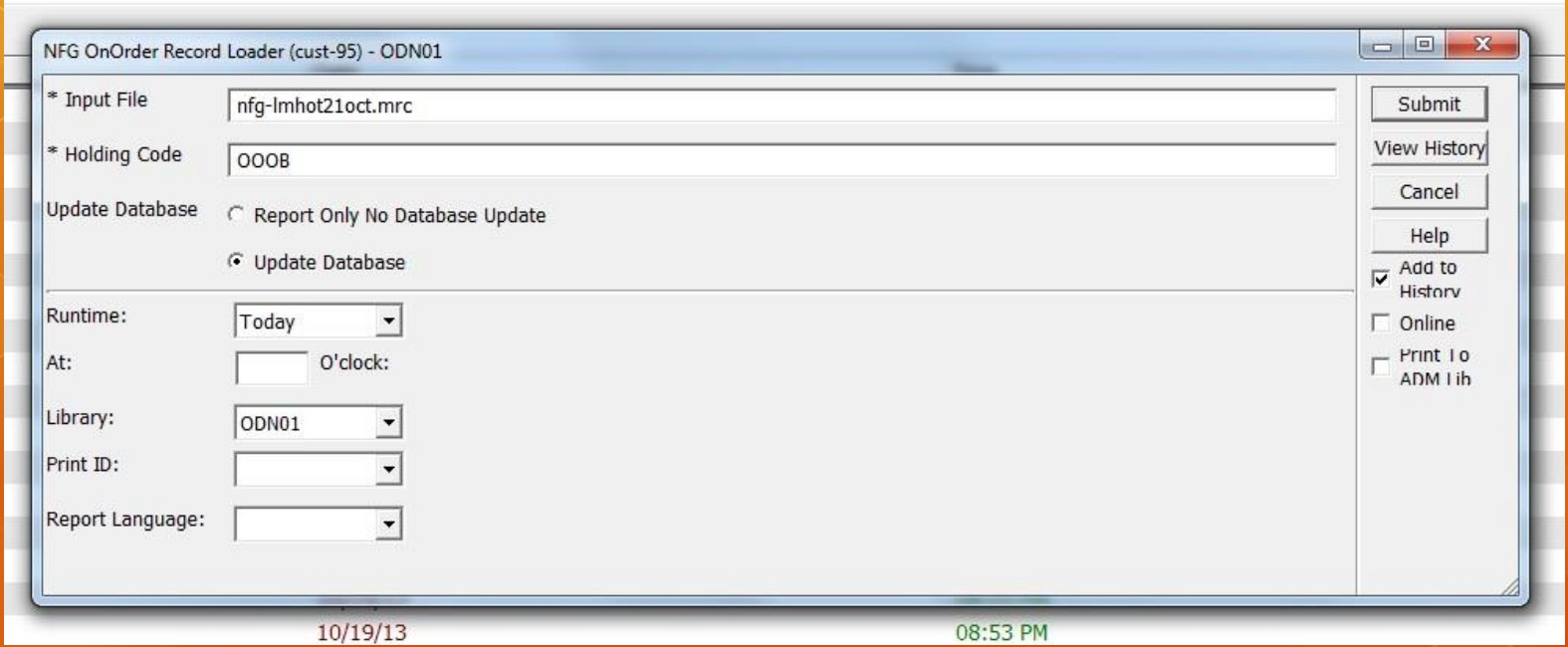
Additional File to Upload:
Choose File No file chosen

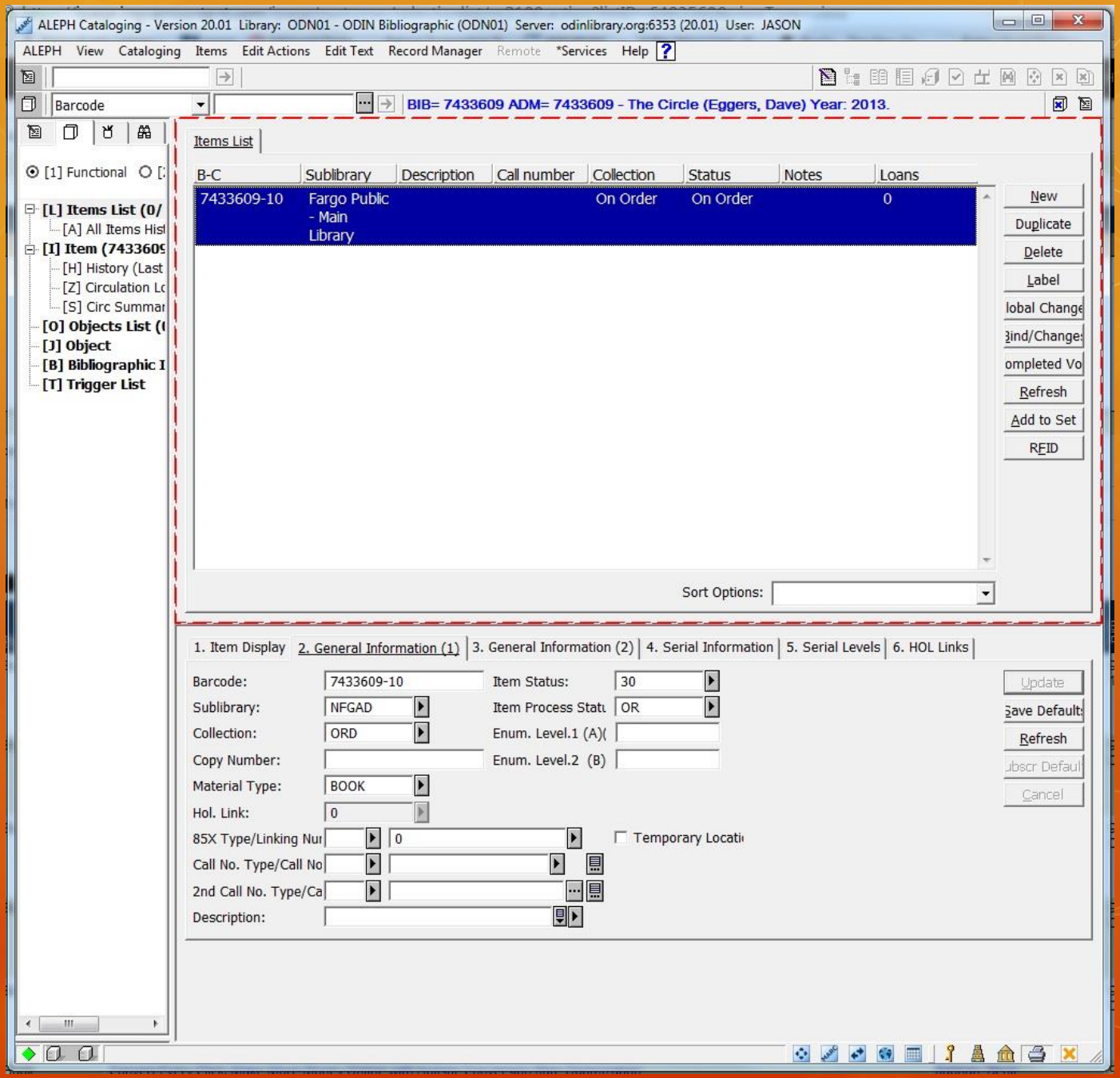
Additional File to Upload:
Choose File No file chosen

SUBMIT

File Upload Process (9_12_12).doc 327 KB


Move file to an input directory (cust-90) Must run in your XXX50 library - NFG50
* File name to move
nfg-lmhot21oct.mrc
Where do you want to move the
Move Uploaded file to the ADM edi/in/edi_incoming directory
Move Uploaded file to the alephe/scratch directory
Move Uploaded file to the ADM scratch directory
Move Uploaded file to the ODN01 scratch directory
Move a file from the alephe/scratch directory to the ADM scratch directory
Move a file from the alephe/scratch directory to the ODN01 scratch directory
Move a file from the alephe/scratch directory to the ADM print directory
Move a file from the odn01/scratch directory to the ADM print directory
Move a file from the odn01/scratch directory to the alephe/scratch directory
Runtime:
Today
At:
O'clock:
Library:
NFG50
Print ID:
Report Language:
Submit
View History
Cancel
Help
Add to History
Online


NFG OnOrder Record Loader (cust-95) - ODN01
* Input File
nfg-lmhot21oct.mrc
* Holding Code
OOOB
Update Database
Report Only No Database Update
Update Database
Runtime:
Today
At:
O'clock:
Library:
ODN01
Print ID:
Report Language:
Submit
View History
Cancel
Help
Add to History
Online
Print To ADM Lib
10/19/13
08:53 PM


ALEPH Cataloging - Version 20.01 Library: ODN01 - ODIN Bibliographic (ODN01) Server: odinlibrary.org:6353 (20.01) User: JASON
ALEPH View Cataloging Items Edit Actions Edit Text Record Manager Remote *Services Help
Barcode
BIB= 7433609 ADM= 7433609 - The Circle (Eggers, Dave) Year: 2013.
[1] Functional
[L] Items List (0/
[A] All Items Hist
[I] Item (743360
[H] History (Last
[Z] Circulation Lc
[S] Circ Summar
[O] Objects List (
[J] Object
[B] Bibliographic I
[T] Trigger List
Items List
B-C
Sublibrary
Description
Call number
Collection
Status
Notes
Loans
7433609-10
Fargo Public - Main Library
On Order
On Order
0
New
Duplicate
Delete
Label
lobal Change
Bind/Change
ompleted Vo
Refresh
Add to Set
RFID
Sort Options:
1. Item Display
2. General Information (1)
3. General Information (2)
4. Serial Information
5. Serial Levels
6. HOL Links
Barcode: 7433609-10
Sublibrary: NFGAD
Collection: ORD
Copy Number:
Material Type: BOOK
Hol. Link: 0
85X Type/Linking Nur
Call No. Type/Call No
2nd Call No. Type/Ca
Description:
Item Status: 30
Item Process Statu OR
Enum. Level.1 (A)(
Enum. Level.2 (B)
Temporary Locati
Update
Save Default
Refresh
Subscr Defaul
Cancel

Loading Brief Vendor Records

- Benefits
  - Staff time saved
  - Automatically checks for duplicate items
  - “On Order” items in OPAC for patrons to place holds very shortly after item is ordered

Cust-40

- We have a lot of items in “Lost” status
  - 100+ items a month are lost
  - Currently 10,000+ items in “Lost” status
- If not suppressed, they display in the OPAC*
- Conclusion: We need an efficient way to suppress our Lost items in the OPAC using Item Process Status SO (Suppressed in OPAC)

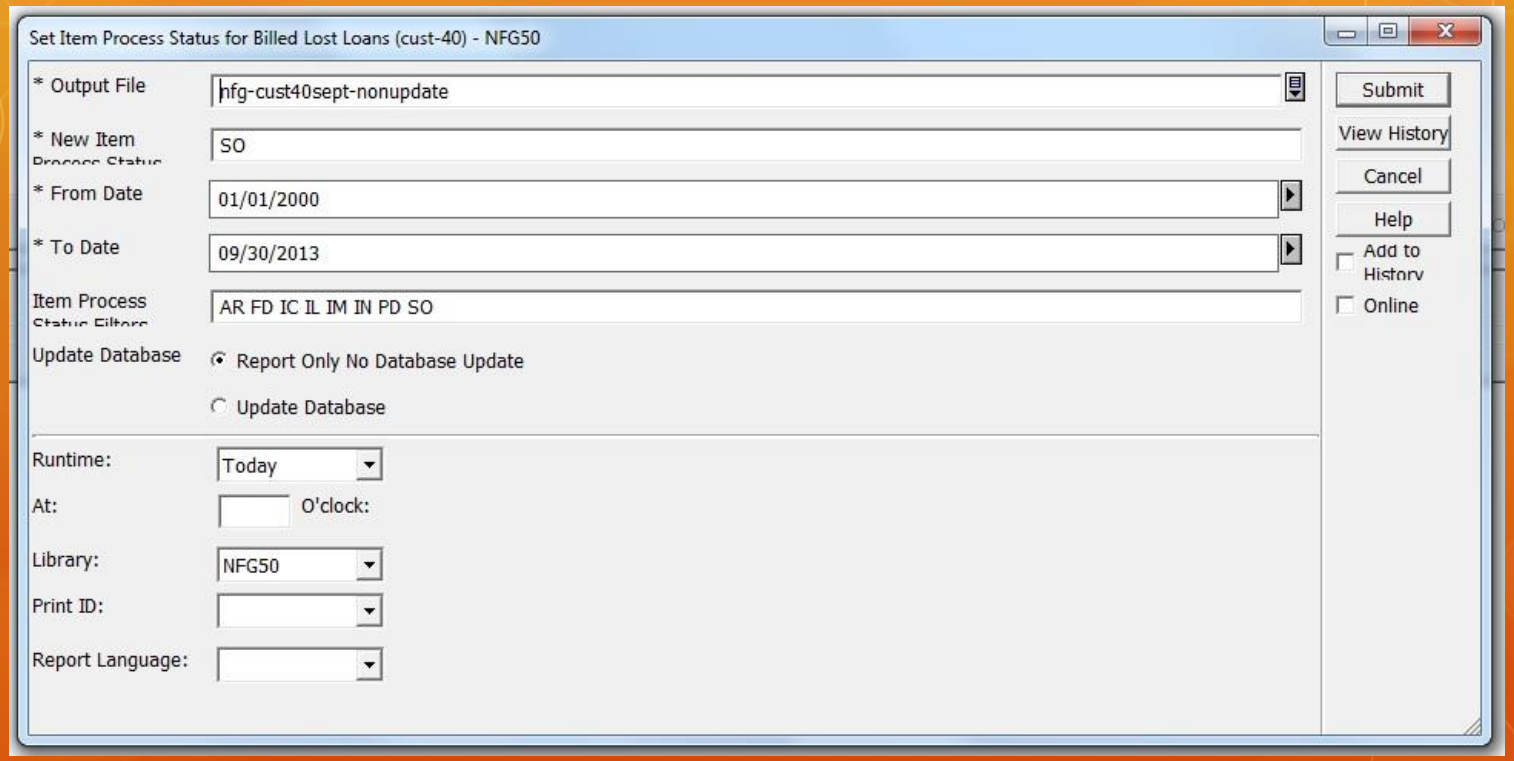
*We first set Item Process Status SO to not display in the OPAC by going to tab15 and setting column 10 do N

Cust-40

- A couple problems:
  - "Lost" is a loan status, so we cannot use General Retrieval Form/Update Item Records
  - Even if we could, there are certain Item Process Statuses we do not want to change to SO (Suppressed in OPAC), such as PD (Paid)

Cust-40

- Development of custom service “Set Item Process Status for Billed Lost Loans” (cust-40)
  - Choose Item Process Status: SO
  - Select a date range
  - Filter out Item Process Statuses we do not want changed
    - At this time, those statuses are: AR (Archives), FD (Flood Material)s, IM (Item Mix-Ups), PD (Paid) & SO (Suppressed in OPAC)
- Allows us to suppress lost items quickly and easily in the OPAC – the client continues to show correct status
- Note: if the item being suppressed is the last copy, bib record will still display in OPAC with no items visible
  - In Classic ODIN : “The library does not have accessible items”
  - In UFind : No items visible
  - In Primo : “Check Holdings” - ILL option only, no items tab


Set Item Process Status for Billed Lost Loans (cust-40) - NFG50
* Output File
nfg-cust40sept-nonupdate
* New Item
SO
* From Date
01/01/2000
* To Date
09/30/2013
Item Process
AR FD IC IL IM IN PD SO
Update Database
Report Only No Database Update
Update Database
Runtime:
Today
At:
O'clock:
Library:
NFG50
Print ID:
Report Language:
Submit
View History
Cancel
Help
Add to
Online

Cust-40

- In January of each year, any item still in LOST that is older than the current and previous two years is DELETED
  - Example: in January 2013, we deleted everything from 2010
    - If it was the last copy, the bib & hol was deleted also
- For patrons who have fines over $150, we wait longer to delete their items as a collection agency works longer on those accounts
- A note is added to each patron account who had a lost item that was deleted
  - "Lost items have been deleted but fines are still due"
- Fines are waived on other patrons who had fines that were deleted
- A report is saved in Excel format for circ staff to use for finding title/author of an item that was deleted in case a patron returns the item or asks what they owe money for!

ELLEN KOTRBA

ODIN Office

Deletion Scenarios for weeded items

- Barcode item is to be deleted where item is the **only** item attached to holding, but other holdings and items exist and are attached to bibliographic record
  - Action: Retain bibliographic record > Retain other holdings > Delete item > Delete related holding

- Barcode item is to be deleted where item is **not** the only item attached to holding, but other items exist and are attached to shared holding, and other holdings and items exist and are attached to bibliographic record
  - Action: Retain bibliographic record > Retain shared holding > Delete item only

- Barcode item is the last item and holding attached to the bibliographic record
  - Action: Capture OCLC # from bibliographic record to remove holdings in WorldCat > Delete barcode item > Delete holding > Delete bibliographic record

Aleph Deletion Process for weeded items

- Previously, items were weeded one barcode at a time in order to capture OCLC#s when necessary to delete from WorldCat
- "There has to be a better way" moment

- Aleph Services > Items > Delete Item Records (item-11)

Deleting weeded items in Aleph

- CREW method - Continuous Review Evaluation and Weeding
  - https://www.tsl.state.tx.us/ld/pubs/crew/index.html
    - A weeding manual for modern libraries developed by the Texas State Library and Archives Commission

- Libraries choose how to find items to weed
  - They may run Aleph reports by sublocation and collection, then sort on
    - Date of Last Circulation
    - Number of Circs
    - Open Date

Aleph Delete Item Records (item-11)

- Step 1: Generate a list of items to be deleted using Aleph Services > Items > General Retrieval Form (ret-adm-01)

- Step 2: Use Output File name from Step 1 as Input File Name for Aleph Services > Items > Delete Item Records (item-11)
  - Select 035 Tag Report Format option to capture OCLC #s of Last Items
  - Select "No" to Update Database and "None" for Record Management to review report before action and capture OCLC#s of Last Items

Aleph Delete Item Records (item-11)

Step 3: Copy and Paste data from Deleted Items Report to Excel spreadsheet

- Sort data by column “Last Item”
- For those indicated as Yes for “Last Item”, copy OCLC #s from column “035 Tag” to delete in WorldCat

Step 4: Use Output File name from Step 1 as Input File Name for Aleph Services > Items > Delete Item Records (item-11)

- Select 035 Tag options
- Select “Yes” to Update Database and “Delete” for Record Management to so that bibs and hols of “last items” may also be deleted from Aleph

item-11 – Weeding Deletes

- There is a need to compare the "last items" from the "update" report to the "last items" of the "non-update" report.
  - The reason for this is because the process will not catch every single "last item" in the system.
    - This happens because when more than one item is being deleted from a record (for example, weeding two copies of an item and they are the only two copies), the process does not see this as a "last item." Since there is another item on the record (even if it is in weeding), it can't determine that it is a "last item." Luckily, when the report is run with update database, Aleph sees this (since the first one is deleted, the second one becomes the last item). But because of this, you now have to check this list against the first list and grab any OCLC#s that were missed.
      - This step could be skipped if the final report displayed OCLC#s, but it does not because that bib record is deleted. If there were some way for item-11 to grab the OCLC# before the bib record is deleted, that would be fantastic, but currently we have to double check between the two lists. You can do this fairly easily in Excel by highlighting duplicates.

Deleting Serial Items

- Added item process status to custom-45 to aid in figuring out which items to mark for deletion in item-11
- Item-11 is also used for periodical deletions at end of the year.
  - For example, in Dec 2013, a public library may delete all of 2011 (with the exception of items with process statuses Archive, Suppressed in OPAC, and Paid).
- Procedure
  - Run a cust-45 for each periodical collection & include all sublibraries.
  - Enter the 'less than' date as the year prior to the one being deleted.
  - Enter the 'greater than' date as an earlier date. (2000 is a good date to use for ODIN as it catches any old items that may still be hanging around).
  - Put the results in Excel and delete any lines for items that should NOT be deleted -- this is where the item process status column is helpful.
  - Save the file that now contains only items to be deleted.
  - File is sent to ODIN Office for processing with cir-11
- ODIN concatenates the items to be deleted & places file in the library's xxx50 scratch directory.
- ODIN then runs cir-11 in non-update mode for librarian to check
- ODIN then runs cir-11 in update mode and deletes all the items in the file (leaving BIBs & HOLs unless it's the last item being deleted)

Custom Reports for Evaluation

- The cust-05
  - some libraries run via joblist on the 1st of every month
  - Able to input time period and sub-divisions
    - by collection

      then by item status,

      then by material type)
  - used to compile circulation statistics for board reports. It counts simple loans, returns and renewals.
  - used to compile statistics on returns of items not on loan to get an idea, for example, of how many magazines are browsed during a specific time period by patrons in the library.

Print Preview

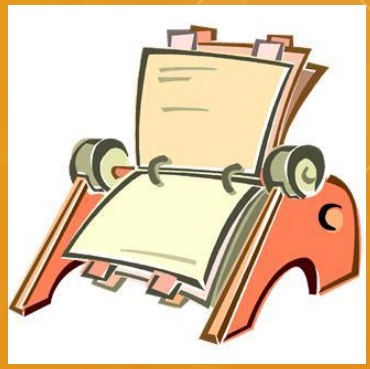
Circulation Transactions (cust-05) between 20090101 and 20110101

COLLECT	ITEMSTAT	MATERIAL	Creating New ILL Request E-31	Simple Loan E-50	Reading Room Loan E-51	Offline Loan E-52	Advance Booking Loan E-53	Routing List Loan E-54	ILL Loan E-55	Transfer Loan E-56	Remote Storage Loan E-57	Delete loan E-58	Maintance loan E-59	Return E-61
AUDF	25	BOOK		10										8
		CASST		53										56
		CDISC		236										234
	********													
	SubTotal			299										298
********														
Total				299										298

Web Renewal E-62	PC Renewal E-63	Batch Renewal E-64	Item Declared Lost E-65	Item Claimed Returned E-66	Expand Hold Req Available Item E-71	Non-Exp Hold Req Available Item E-72	Expand Hold Req Nonavail Item E-73	Non-Exp Hold Req Nonavail Item E-74	Reserve Advance Booking Item E-75	In-house Use E-80	Photocopy Request E-81	Return of Item Not on Loan E-82	Received at Pickup Location E-96
												1	
	24											5	
1	66											10	
1	90											16	
1	90											16	

PBFIC	25	BOOK	2,051									2,016			
	********														
	SubTotal		2,051									2,016			
********															
Total			2,051									2,016			
PBNF	25	BOOK	23									23			
	********														
	SubTotal		23									23			
********															
Total			23									23			
G.Total			24,240					4		8		24,045	32		

Custom Reports for Evaluation



- Many statistics about the collection (including number of loans for fiction) are pulled from ret-adm-01 (General retrieval form).
- Item-05 (Shelf list) also provides number of loans for non-fiction)
- Cust-01 (Collection statistics)

ret_adm_01

Print Preview

10/09/2013
general-retrieval-form-02

General Retrieval Form

Sorted By: Call Number

Call No.	Barcode	Collection	Author	Title	Description	Year Published	Open Date	Last Returned Date	# Loans
F ADA	33158000026655	Fiction	Adams, Douglas, 1952-2001.	Life, the universe, and everything /		1982	04/17/2007		000
F ADA	33158000026713	Fiction	Adams, Douglas, 1952-2001.	The restaurant at the end of the universe /		1980	04/17/2007		000
F ADA	33158000026770	Fiction	Adams, Douglas, 1952-2001.	The long dark tea-time of the soul /		1988	04/17/2007		000
F ADA	33158000026838	Fiction	Adams, Douglas, 1952-2001.	So long, and thanks for all the fish /		1984	04/17/2007		000

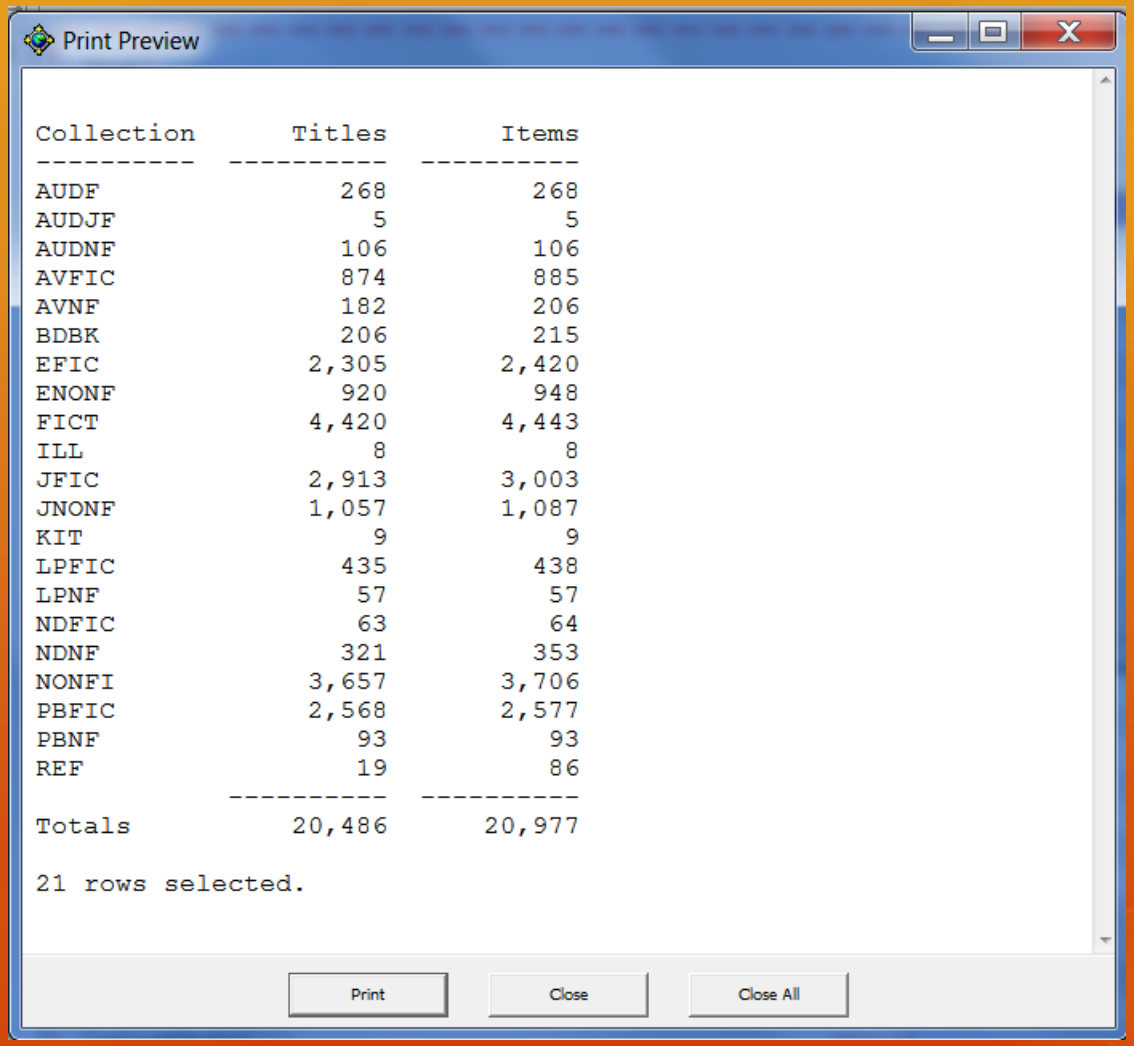
Item_05

Print Preview

10/09/2013
shelf-list-04

Shelf List

Call No	Barcode	Item Process Status	Collection	Author	Title	Description	Year Published	Open Date	Date Last Returned	Process Status Date	# Loans
001.64 SPI	33158000000627	Mending	Nonfiction	Spicer-Jacobson, Ellen Sue.	Computer ease : a beginner's guide to personal computing /		2000	03/02/2007	03/09/2012	07/02/2013	004
001.9 MYS	33158000000494	Mending	Nonfiction	Marshall, Richard.	Mysteries of the unexplained /		1982	03/02/2007	03/08/2012	07/02/2013	003
001.9 MYS	33158000000551	Not in process	Nonfiction	Time-Life Books.	Mysterious creatures /		1988	03/05/2007	01/25/2012		002
001.9 STR	33158000000676	Not in process	Nonfiction	Alway, Carol.	Strange stories, amazing facts : stories that are bizarre, unusual, odd, astonishing, and often incr		1976	03/02/2007	02/09/2012		001
001.9 UFO	33158000000254	Not in process	Nonfiction	Time-Life Books.	The UFO phenomenon /		1988	06/27/2007	01/25/2012		003
001.9 UNS	33158000000619	Not in process	Nonfiction	Reader's Digest Association.	Unsolved mysteries of the past.		1991	06/27/2007			000
004.16 COM	33158000213360	Not in process	Nonfiction	United States. Small Business Administration.	Computing 1.		2008	10/11/2010	11/16/2011	10/11/2010	003
004.6 GAT	33158000178779	Not in process	Nonfiction	Gates, Bill, 1955-	The road ahead /		1995	09/15/2008			000
005.4 HAR	33158000000023	Not in process	Nonfiction	Harvey, Greg.	Windows 3.1 for dummies quick reference /		1994	03/02/2007	11/03/2008		002
005.54 HAK	33158000237161	Not in process	Nonfiction	Hakola, Trisha	Microsoft Excel 2007.Level 1 of 3 /		2007	05/01/2012		05/01/2012	000


Print Preview
Collection Titles Items
AUDF 268 268
AUDJF 5 5
AUDNF 106 106
AVFIC 874 885
AVNF 182 206
BDBK 206 215
EFIC 2,305 2,420
ENONF 920 948
FICT 4,420 4,443
ILL 8 8
JFIC 2,913 3,003
JNONF 1,057 1,087
KIT 9 9
LPFIC 435 438
LPNF 57 57
NDFIC 63 64
NDNF 321 353
NONFI 3,657 3,706
PBFIC 2,568 2,577
PBNF 93 93
REF 19 86
Totals 20,486 20,977
21 rows selected.
Print
Close
Close All

Custom Reports for Evaluation

- Some other custom reports used frequently:
  - Cust-27 (Circulation by date/hour) to determine what the busiest days and times are for staffing purposes.
  - Cust-13 (Item count on a specific date) and Cust-20 (Circulation statistics) to determine item turnover rates.
  - Cust-15 (Patron count based on expiration date)
  - Cust-17 (New patrons by open date)
  - Custom-403 (Patrons owing money-more than a specific amount) together with Cash-06 (Notices to patrons owing money) for a quarterly list of patrons with fines of $150 and more to send to a collection agency.

Print Preview

cust-27

Circulation Statistics by Date/Hour (cust-27) 20111001 - 20120101

Sub-Library	Date	Hr	Loans	Renewals	Holds	Returns
LEAMA	20111001	09	2	0	1	4
		10	21	2	0	9
		11	21	0	1	4
		12	8	0	1	4
	20111003	08	0	0	0	7
		09	16	0	0	0
		10	10	0	1	38
		11	6	0	1	11
		12	23	1	0	20
		13	7	1	0	14
		14	13	0	0	13
		15	13	0	0	14
		16	26	0	0	23
		17	13	0	0	1
		18	6	0	0	23
	20111004	09	11	1	1	65
		10	52	4	1	15
		11				
		12			17	17	1	0	13
		13			18	2	0	0	3
		14							
		15		20111230	08	0	0	0	3
		16			09	13	0	0	6
		17			10	14	0	0	6
		18			11	0	0	0	1
					12	16	0	0	11
					13	0	0	0	3
	20111005	09			14	12	0	0	11
		10			15	20	0	4	3
		11							
		12		20111231	09	0	0	0	9
		13			11	3	0	0	0
		14			12	7	0	0	2
		15							
		16	*******	********		----------	----------	----------	----------
		17	sum			8,612	863	214	8,922
	20111006	08							
		09							
		10	TOTAL Circ Stats for SubLibrary: ALL 20111001 - 20120101						
		11							
		12	TOTAL Loans	TOTAL Renewals	TOTAL Holds	TOTAL Returns			
		13	----------	----------	----------	----------			
		14	8,612	863	214	8,922			
		15							
		16							

Print Preview

```
******************************************************
Item Count on a Specific Date - Collection (cust-13)
******************************************************
Sub-Library: ALL
As of 20110214
******************************************************
```

Collection	Sub-Total
ACASS	299
ACD	1,020
ADVID	446
AFICT	4,817
AMUCD	22
ANONF	6,467
AOVER	108
APAP	2,193
AREF	266
ASTCO	252
CLASS	254
DVD	363
EZFIC	4,878
JCASS	149
JCD	72
JDVD	344
JFGRN	58
JFIC	2,069
JMUCD	38
JNONF	4,206
JPAP	1,606
JREF	36
JSTCO	50
JVID	392
KIT	117
LPFIC	668
LPNF	91
LPSC	10
NDNF	335
NDREF	49
PAPEZ	635
YAAV	4
YACD	4
YAF	378
YAGRN	39
YAN	30
YAPAP	411
Total	33,176

Print Preview

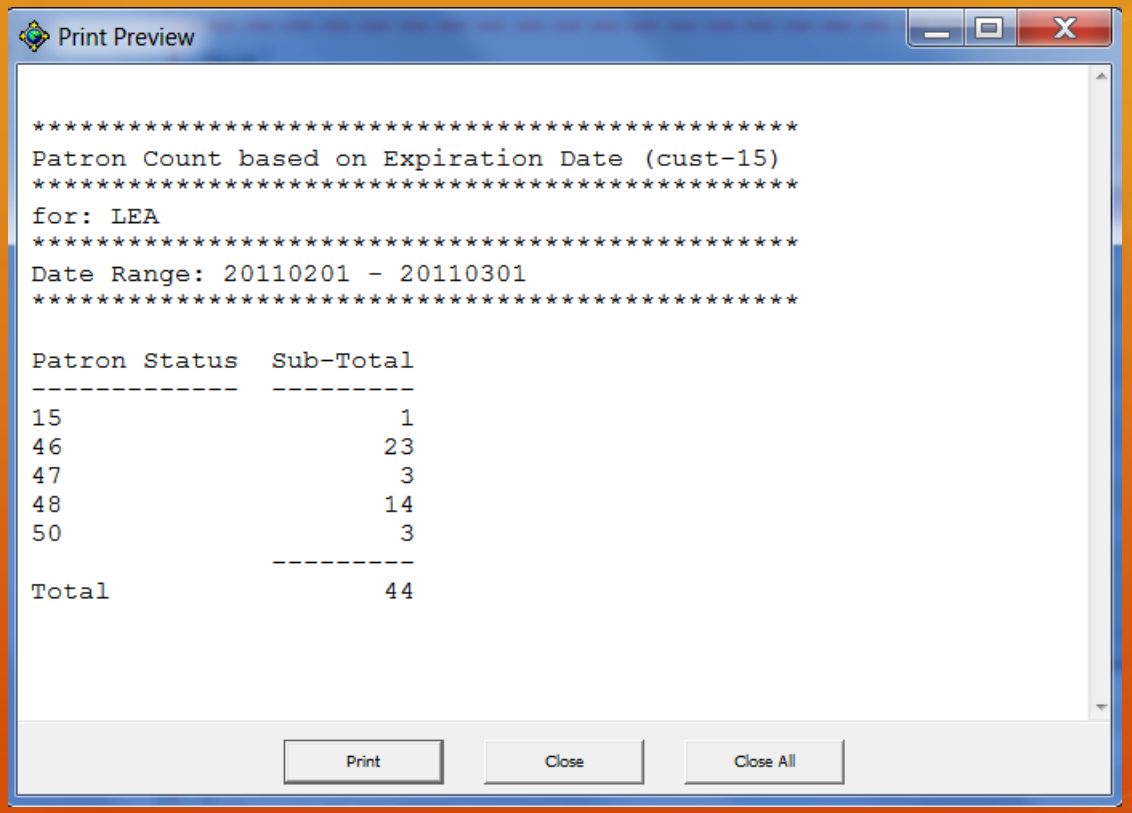
```
******************************************************************************
Circulation Statistics (cust-20)
******************************************************************************
Sub-Library: ALL
Date Range: 20110201 - 20110301
******************************************************************************
tab_events Key:
31: New ILL Request
50: Simple Loan
51: Reading Room Loan      64: Batch Renewal
52: Offline Loan           65: Item Declared Lost
53: Advance Booking Loan   66: Item Claimed Returned
54: Routing List Loan      71: Hold Request, Available Item(Expansion)
55: ILL Loan               72: Hold Request, Available Item(No Expansion)
56: Transfer Loan          73: Hold Request, Item Not Available(Expansion)
57: Remote Storage Loan    74: Hold Request, Item Not Available(No Expansion)
58: Delete Loan            75: Reserve Advance Booking Item
59: Maintenance Loan       80: In-House Use
61: Return                 81: Photocopy Request
62: Web Renewal (OPAC)     82: Return of Item Not on Loan
63: GUI/PC Renewal         96: Item Is Received at Pickup Location
******************************************************************************
```

Collection	Event Type	Total
LPFIC	82	4
NDNF	50	7
NDNF	61	18
NDNF	63	5
NDNF	82	2
NDREF	82	1
PAPEZ	50	83
PAPEZ	61	85
PAPEZ	63	11
PAPEZ	82	6
YAF	50	41
YAF	61	34
YAF	63	8
YAF	74	1
YAF	82	4
YAGRN	50	1
YAGRN	61	4
YAN	50	1
YAPAP	50	38
YAPAP	61	36
YAPAP	63	6
YAPAP	74	1
YAPAP	82	1
	50	112
	61	112
	63	5
	82	10

TOTAL Circulation Statistics

Total Loans 50-59	Total Renewals 62-64	Total Holds 71-74	Total Browse 80,82	Total Returns 61
2,602	318	73	179	2,525

cust-15


Print Preview
****
Patron Count based on Expiration Date (cust-15)
****
for: LEA
****
Date Range: 20110201 - 20110301
****
Patron Status Sub-Total
15 1
46 23
47 3
48 14
50 3
Total 44
Print
Close
Close All

cust-17

Print Preview

```
****************************************
Patron Count based on Open Date (cust-17)
****************************************
for: LEA
****************************************
Date Range: 19890101 - 20120101
****************************************

HomeLib    PS      Count
--------   --   --------
CAVMA      64          1
********      --------
SubTotal               1


CPLMA      64          1
********      --------
SubTotal               1


DIVEL      64          1
********      --------
SubTotal               1


DIVMA      64          1
********      --------
SubTotal               1
```

```
LEAMA      15         72
           26         12
           46      2,410
           47        914
           48        942
           49        205
           50        377
           51         40
           61         38
           63          3
           64          1
********      --------
SubTotal           5,014
```

```
WLBMA      64          1
********      --------
SubTotal               1


           46         20
           47          8
           48          7
           61          1
********      --------
SubTotal              36


           --------
Total          5,111
```

Print Preview

****
Patrons Owing Money - More than $10 (cust-403)
****

Patron Id	Balance
LEA000001313	495.90
LEA000000586	472.93
ID40630	427.00
LEAID1425	383.00
LEAID849	269.00
LEA000001742	221.98
LEA000000793	208.00
NDSUT	205.00
LEA000001494	187.70
LEA000001071	175.90
LEA000001603	175.90
LEAID1621	162.00
LEA000001592	159.00
LEA000000677	155.68
LEA000002283	153.95
LEA000001578	151.94
LEA000001941	147.00
LEA000001688	142.00
LEA000002192	132.98
ID19725	130.90
LEA000000936	127.42
LEA000001560	126.00
LEA000002144	126.00
LEAID1156	124.00
LEA000002015	124.00
LEAID979	120.00
ID32498	118.00
LEA000001218	117.00
LEA000000355	117.00
LEA000001924	114.00
LEA000002344	113.95
LEA000002265	113.90
LEA000001577	109.98
ID85446	108.00
LEAID295	108.00
LEAID912	106.00
LEA000002327	105.00
LEAID241	105.00

cust-403

Print Preview

LEAID882	15.00
ID30544	15.00
ID89895	15.00
LEA000001571	15.00
LEA000002173	15.00
LEAID1043	15.00
LEAID1499	15.00
LEAID190	15.00
LEAID271	15.00
LEAID507	15.00
LEAID512	15.00
LEAID526	15.00
LEAID65	15.00
LEAID706	15.00
LEAID864	15.00
ID18777	15.00
ID26749	15.00
ID10368	14.95
LEA000000673	14.95
LEA000001777	14.95
LEAID530	14.00
ID77261	14.00
LEA000001304	13.99
ID64986	13.00
ID82850	13.00
ID83941	13.00
LEAID893	13.00
LEA000001908	13.00
LEA000002107	13.00
LEAID762	13.00
ID24116	13.00
ID24779	12.00
ID31868	12.00
ID61339	12.00
ID72066	12.00
ID76257	12.00
ID84329	12.00
LEAID729	12.00
LEA000002045	12.00
LEA000002053	12.00
LEA000002335	12.00
LEAID1091	12.00
LEAID277	12.00
LEAID297	12.00
LEA000000639	12.00
LEA000001954	11.99
LEA000002369	11.25
ID58333	11.00
LEAID589	11.00
LEAID1500	11.00
LEAID288	11.00
LEA000001341	11.00

Holds/Outstanding Holds process –

pick-up location was added to cir-11

Outstanding holds:

- Patrons need to be allowed to place holds on available items.
- In some case, there may be branch pick-up locations for patrons or staff to choose from when placing the hold.
- The cir-11 (Outstanding Holds) service runs via the joblist
  - Some of our libraries run twice daily – once in the morning and once in the afternoon
  - If library has branches, this is also run for each branch
- Items on the 'picklist' are pulled from the shelves at each location and scanned so the item goes 'on hold'.
  - Items from each branch are shuttled to the correct pick-up location. Items are put on the hold shelf.
  - Items received from the branches are re-scanned at the correct pick-up location so they go on hold for the patron.
- All items are placed on the hold shelf at correct pick-up locations

Regular holds:

- Cir-06 runs via the joblist to determine what items on the hold shelf have reached the end of the hold period and need to be pulled from the shelf.
  - If library has branches, cir-06 is also ran for them
- Normally run daily!
- The service also deletes the hold automatically.
- Circ staff scan the items so they go on hold for the next patron if one is indicated in the report.
- Items on hold are shuttled to the correct pick-up location if branches exist

Cash Reporting – Reconciling Cash Drawers

- Use cust-34 in combination with cust-74
- The cust-34 – Cash receipts by location and date range runs via joblist
  - Normally Monday through Friday (the Monday report includes Friday, Saturday and Sunday).
- Manually compare the total fine report to the actual cash and credit that is turned in from each location. A small variance is acceptable. If there is a larger variance then a cause must be determined
  - If more than one location, a workflow is determined
- The daily reports with reconciliation figures are kept on spreadsheets in case they every need to be produced
- The cust-74 (Cash waived by date range) also runs Monday through Friday via joblist
  - used internally to monitor the reasons that fines are waived
  - Staff are required to initial any fine waives
  - A group of unacceptable fine waives might result in an agenda item for future staff training sessions.

cust-34

Print Preview

```
*****************************************************************
Cash Receipts by Location and Date Range -  (cust-34)
*****************************************************************
Location:   ALL
Date Range: 20110101 - 20110401
*****************************************************************

Location  PAY TYPE  Date      Time  BARCODE         PS  NAME                    FINE         SUM  Receipt #
--------  --------  --------  ----  [illegible]  [illegible]  [illegible]  -----  -----------  ------------
165.234.  00        20110103  1614  [illegible]  [illegible]  [illegible]  0         2.00  6363
100.112
                    20110103  1614  [illegible]  [illegible]  [illegible]  0         2.00  6363
                    20110103  1614  [illegible]  [illegible]  [illegible]  0         1.00  6363
                    20110103  1614  [illegible]  [illegible]  [illegible]  0         1.00  6363
                    20110103  1614  [illegible]  [illegible]  [illegible]  0         1.00  6363
                    20110103  1614  [illegible]  [illegible]  [illegible]  0         2.00  6363
```

Print Preview

```
                    20110329  1820  [illegible]  46  [illegible]  23         0.00  6516
                    20110329  1820  [illegible]  46  [illegible]  40         0.00  6516
                    20110329  1820  [illegible]  46  [illegible]  40         0.00  6516
                    20110329  1820  [illegible]  46  [illegible]  41       -30.00  6516
                    20110329  1820  [illegible]  46  [illegible]  41       -26.00  6516
                    20110329  1820  [illegible]  46  [illegible]  41        30.00  6516
                    20110329  1820  [illegible]  46  [illegible]  41        26.00  6516
                    20110331  0950  [illegible]  48  [illegible]  3         1.00  6517
                    20110331  0950  [illegible]  48  [illegible]  22         0.00  6517
                    20110331  0950  [illegible]  48  [illegible]  22         0.00  6517
                    20110401  1205  [illegible]  49  [illegible]  3         5.00  6518
                    20110401  1205  [illegible]  49  [illegible]  21         0.00  6518
                    20110401  1205  [illegible]  49  [illegible]  23         0.00  6518
                    20110401  1205  [illegible]  49  [illegible]  40         0.00  6518
                    20110401  1205  [illegible]  49  [illegible]  41       -23.00  6518
                    20110401  1205  [illegible]  49  [illegible]  41        23.00  6518
            ********                                                  -----------
            Type SUM                                                       331.00

            01      20110129  1107  [illegible]  47  [illegible]  3         2.00  6413
                    20110129  1107  [illegible]  47  [illegible]  3         2.00  6413
                    20110129  1107  [illegible]  47  [illegible]  40         0.00  6413
                    20110129  1107  [illegible]  47  [illegible]  40         0.00  6413
                    20110129  1107  [illegible]  47  [illegible]  41       -20.00  6413
                    20110129  1107  [illegible]  47  [illegible]  41        20.00  6413
                    20110129  1107  [illegible]  47  [illegible]  41       -20.00  6413
                    20110129  1107  [illegible]  47  [illegible]  41        20.00  6413
                    20110329  1809  [illegible]  46  [illegible]  3         1.00  6515
                    20110329  1809  [illegible]  46  [illegible]  3         1.00  6515
                    20110329  1809  [illegible]  46  [illegible]  3         3.00  6515
                    20110329  1809  [illegible]  46  [illegible]  3         1.00  6515
                    20110329  1809  [illegible]  46  [illegible]  3         1.00  6515
            ********                                                  -----------
            Type SUM                                                        11.00

            30      20110127  1831  [illegible]  48  [illegible]  0         1.00  6411
                    20110127  1831  [illegible]  48  [illegible]  0         1.00  6411
                    20110127  1831  [illegible]  48  [illegible]  40         0.00  6411
                    20110127  1831  [illegible]  48  [illegible]  41        31.00  6411
                    20110127  1831  [illegible]  48  [illegible]  41       -31.00  6411
            ********                                                  -----------
            Type SUM                                                         2.00

    ********                                                          -----------
    Locn SUM                                                               344.00

                                                                      -----------
    Total                                                                  344.00
```

Print Preview

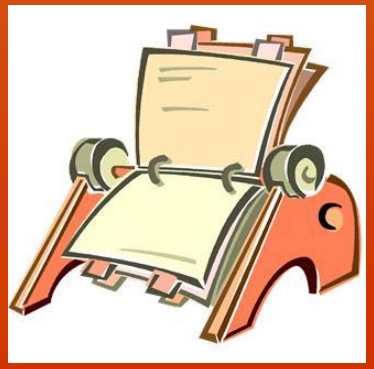
```
*****************************************************************
Cash Waived by Date Range -  (cust-74)
*****************************************************************
ADM Library: LEA50
SubLibrary:  ALL
Time Period: 20110101 - 20110401
*****************************************************************
```

SubLib	DATE	BARCODE	PS	NAME	TYPE	SUM	REASON
LEA50	20110120	23132000065403	50	[illegible]	0	2.00	SECOND BILL - waive
	20110120	23132000065403	50	[illegible]	0	1.00	lost material notice - waive
	20110125	23132000062566	50	[illegible]	0	1.00	lost material notice - ok
	20110322	23132000093439	46	[illegible]	0	1.00	ILL fee due on this item - ok
******						----------	
SubTot						5.00	
LEAMA	20110104	23132000065577	46	[illegible]	3	4.00	Late return <0005 0000 F 4.00> - w
	20110104	23132000065577	46	[illegible]	3	4.00	Late return <0005 0000 F 4.00> - w
	20110104	23132000065577	46	[illegible]	3	4.00	Late return <0005 0000 F 4.00> - w
	20110110	23132000080378	46	[illegible]	3	1.00	Late return <0002 0000 F 1.00> - w
	20110110	23132000080378	46	[illegible]	3	1.00	Late return <0002 0000 F 1.00> - w
	20110110	23132000084826	47	[illegible]	3	2.00	Late return <0003 0000 F 2.00> - w
	20110110	23132000084826	47	[illegible]	3	2.00	Late return <0003 0000 F 2.00> - w
	20110110	23132000084826	47	[illegible]	3	2.00	Late return <0003 0000 F 2.00> - w
	20110113	23132000056667	46	[illegible]	3	1.00	Late return <0002 0000 F 1.00> - ok
	20110113	23132000056667	46	[illegible]	3	1.00	Late return <0002 0000 F 1.00> - ok
	20110304	23132000079560	50	[illegible]	3	1.00	Late return <0002 0000 F 1.00> - ok
	20110308	23132000065643	48	[illegible]	3	1.00	Late return <0002 0000 F 1.00> - ok
	20110308	23132000091144	50	[illegible]	42	1.00	Lost material - Notice - ok
	20110310	23132000065858	46	[illegible]	3	4.00	Late return <0007 0000 F 5.00> Waived 1.00 of original 5.00 (net.).
	20110314	23132000085955	47	[illegible]	3	2.00	Late return <0003 0000 F 2.00> - waive
	20110314	23132000085955	47	[illegible]	3	2.00	Late return <0003 0000 F 2.00> - waive
	20110314	23132000085955	47	[illegible]	3	2.00	Late return <0003 0000 F 2.00> - waive
	20110314	23132000076129	46	[illegible]	3	1.00	Late return <0002 0000 F 1.00> - ok
	20110314	23132000076129	46	[illegible]	3	1.00	Late return <0002 0000 F 1.00> - ok
	20110315	23132000039895	48	[illegible]	3	2.00	Late return <0003 0000 F 2.00> - 1.00
	20110315	23132000039895	48	[illegible]	3	2.00	Late return <0003 0000 F 2.00> - 1.00
	20110317	23132000046460	46	[illegible]	3	1.00	Late return <0002 0000 F 1.00> - ok
	20110317	23132000046460	46	[illegible]	3	1.00	Late return <0002 0000 F 1.00> - ok
	20110317	23132000046460	46	[illegible]	3	1.00	Late return <0002 0000 F 1.00> - ok
	20110317	23132000024244	46	[illegible]	3	5.00	Late return <0006 0000 F 5.00>
	20110322	23132000093439	46	[illegible]	3	4.00	Late return <0006 0000 F 5.00> Waived 1.00 of original 5.00 (net.). -
	20110322	23132000093439	46	[illegible]	3	4.00	Late return <0006 0000 F 5.00> Waived 1.00 of original 5.00 (net.).
	20110324	23132000084982	50	[illegible]	3	1.00	Late return <0002 0000 F 1.00> - ok
	20110328	23132000059000	46	[illegible]	3	3.00	Late return <0004 0000 F 3.00>
	20110328	23132000059000	46	[illegible]	3	3.00	Late return <0004 0000 F 3.00>
	20110328	23132000059000	46	[illegible]	3	1.00	Late return <0002 0000 F 1.00> - w
	20110329	23132000076566	47	[illegible]	3	2.00	Late return <0003 0000 F 2.00> - ok
	20110329	23132000076566	47	[illegible]	3	2.00	Late return <0003 0000 F 2.00>
******						----------	
SubTot						153.00	

Total						158.00	

Custom ILL Reports

- ILL cust-78 (which includes media format types) is used to determine how long it takes an item to reach a patron from the time it was requested. This is primarily for determining staffing needs. It is also used for a count of requested items by media type.
- ILL cust-43 is run quarterly to determine if any items are in such demand that they should be purchased.



cust-78

Print Preview

```
************************************************
ILL Borrowing Receive Time for LEA40 (cust-78)
************************************************
For Dates: 20110101-20130401
************************************************

Requested Media          Count  Average
--------------------  -------  -------
L-AUDIO                     58    2.172
L-PRINTED                  688    2.612
L-VIDEO                     14    3.571


Requested Media          Count  Average
--------------------  -------  -------
Totals                     760    2.596
```

cust-43

Print Preview

```
*********************************************************************
ILL Items Borrowed more than once
*********************************************************************
Dates: 20110101 to 20110401
*********************************************************************

ISBN              Count  Title                                  Author
----------------  -----  -------------------------------------  ------------------------
0375502238            7  Blessings : a novel / Anna Quindlen.   Quindlen, Anna.
0974637009            7  Waiting for white horses : a novel / Nat Jorgenson, Nathan.
0688170528            4  The pact : a love story / Jodi Picoult.  Picoult, Jodi, 1966-
0679419810            3  Strip tease : a novel / by Carl Hiaasen.  Hiaasen, Carl.
                      2  GLORY IN DEATH.                        ROBB, J D

5 rows selected.
```

Thank you for your attention!

Jason DeShaw – jdeshaw@cityoffargo.com
Ellen Kotrba – ellen.kotrba@ndus.edu