

NAAUG 4th Annual Meeting

Notes on the Circulation Roundtable Discussion held Sunday 1 June 2003

recorded by Larry Deck, Chair, Circulation Enhancement Committee - larry.deck@mcgill.ca

Present from ExLibris were Susan Marshall and Judy Levy

ENHANCEMENT PROCESS 2002-2003

Larry summarized the results of the 2002-2003 enhancement process, pointing out that one of five shortlisted circulation enhancement requests had been voted through to the final list, CIR-2002-01-F, "improvement in cash transaction functionality".

Larry mentioned that the request to fix the 'overnight loans' functionality had narrowly missed getting through to the final list. Susan Marshall mentioned, apropos of this, that setting the due time to 00 in tab16 for these statuses might work in some versions.

SPLIT TAB16?

An attendee asked the ExLibris representatives about the status of the proposal to split tab16 - did they have any details about how that would be done, when, etc. Susan did not have details but speculated that the recall functions might be removed to a separate table.

Larry introduced some topics suggested by respondents to his email request:

- NOTES FOR CASH TRANSACTIONS

- a suggestion that some sort of note be attached to cash transactions

- an attendee mentioned that NOTIS had transferred loan notes to related cash transactions

- Susan agreed that a note field for cash transactions might be a good idea, but did not think every loan note should be copied over to cash

- CIR-2002-01-F might respond to some of these issues

- PROBLEMS WITH 'RENEW ALL' in the WEB-OPAC

"renew all" in the web-OPAC should "renew selected" so that patrons do not have to renew recent loans

this may come as part of ICAU's enhancements, which also address the problem of inadequate error messages in online renewals: i.e., message should indicate which loans could not be renewed and why

an attendee pointed out that 'renew all' in the GUI client should also renew all and not just loans visible on screen

another attendee thought it should be clarified which enhancement committee - circulation or OPAC - handles issues related to 'My Account' in the web-OPAC interface (consensus says circulation)

ILL TOOLS and ALEPH

An attendee asked whether anyone had had any success getting interaction between an ILL network tool such as CLIIO and ALEPH - had anyone got it so that registering a positive response in CLIIO caused the item to be checked out in ALEPH. ExLibris representatives said that external applications authorized to use ALEPH's SIP2 interface could initiate loans, but nobody present had actually succeeded in getting this to work.

RESERVES REPORTS

An attendee asked if the 'remove from reserves' report in the reserves module could be fixed to indicate whether an item on the 'remove' list for one course was also on reserves for another active course (i.e., so that it will not be removed). Larry mentioned that McGill is in the process of testing such a report, Margie Fiels mentioned that Boston College has a report, part of their Crystal Reports interface, that serves this purpose.

RESERVES MOVING INTO GUI?

An attendee asked if there was any more talk of moving the reserves module into the circ GUI client. ExLibris reps had no news on that subject.

PROBLEMS WITH TASK MANAGER EMAILS?

An attendee asked about an intermittent problem with emails from the Task Manager getting a date header of '1947'. Jerry Specht has apparently posted a PRB about this problem, which may also be limited to certain types of email routers.

INTERACTIONS BETWEEN ALEPH and EXTERNAL ACCOUNTS SYSTEMS?

An attendee asked whether anyone had had success getting ALEPH to interact with external accounts payable systems, e.g., for transferring open fines the a university's accounts payable department and getting information on paid transactions, etc., back into ALEPH.

Some libraries report to university administration on, e.g., students owing more than a certain amount. But nobody reported interaction in both directions as described in the question.

ExLibris is working on a standardized XML-based interface for such exchanges, but the problem of uniquely identifying a transaction so that, e.g., a credit can be matched to the original debit, remains a problem.

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Please accept my apologies if I've forgotten or misrepresented
comments you made during the discussion.
Please email me with any corrections/additions you think are
appropriate.
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