

ADVANCE

Circulation Management Guide

(Release 6.82)

September 2000

NOTE: To navigate in this manual, you can click on:

- *table of contents headings*
- *index entry page numbers*
 - *blue cross-references*
- *Acrobat bookmark list headings, at the left.*

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11 Allstate Parkway, Suite 300
Markham, Ontario, CANADA L3R 9T8
Tel: (905) 475-0525
Fax: (905) 475-3847

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Software Described ADVANCE Library System
Release 6.82 (September 2000)

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Contents

Chapter 1: Introduction

Chapter 2: Overview

Circulation Overview	2-2
Circulation Setup	2-3
System Setup	2-4
Basic Setup	2-7
Special Setup	2-8
Circulation Menu	2-9

Chapter 3: Configuration Codes

Configuration Codes Menu (CCCM)	3-2
Circulation Control Table (CCT)	3-3
Checkout Control Table (COCT)	3-11
Hold/Recall/Trace Control (CHRT)	3-15
Self-Checkout Control (SCCT)	3-17
Picking List Control (CPICK)	3-19
Holds Control (CHOLD)	3-21
Holds Control Codes (CHLDC)	3-22
Holds Report Control Codes (CHLDP)	3-27
Hold Shelf Messages (CHSHELF)	3-30
Qualifier Codes (CQUAL)	3-32
Port Control	3-35
Checkout Port Control (CPCC)	3-36
Checkin Port Control (CIPC)	3-40
Hold Port Control (CPH)	3-43
Block and Fine Description (CPBF)	3-46

Chapter 4: Loan Periods

Loan Periods Menu (CLPM)	4-2
Holding Codes Setup	4-5
Holding Setup Menu (CHSM)	4-7
Institution Codes (CHIC)	4-10

Sublocation Codes (CHSC)	4-16
Collection Codes (CHCC)	4-24
Call Number Prefix Codes (CHPC)	4-29
Classification Codes (CHNC)	4-33
Default Price (CDPT)	4-38
Circulation Codes (CCC)	4-39
Circulation Codes Charges	4-51
Material Group Codes (CCGC)	4-53
Create Material Group Code	4-54
Patron Type Codes (CPC)	4-57
Patron Group Codes (CPGC)	4-63
New Group Codes	4-65
Linking Circulation Codes to Patron Group Codes	4-70
Library Calendar Setup (CLCM)	4-80
Loan Matrix (CBLM)	4-86
Printing Loan Matrix (CPLM)	4-88

Chapter 5: Output Production

Notice Production Menu (COPM)	5-2
General Notice Controls (CNCT)	5-3
Notice Type Codes (CNTC)	5-5
Contact Method Codes (CCMC)	5-8
Notice Codes (CNC)	5-12
Second Screen	5-16
Production Codes (COPC)	5-18
Build Due Date Table	5-25
Production Charges (COPG)	5-27
Notice Headers (CNHD)	5-29
Notice Print Format Codes (CNFC)	5-30
Notice Information Source Codes (CISFC)	5-36
Notice Production Sequences (COPS)	5-40
Notice Headers by Location (COPN)	5-43
Holiday Periods by Institution (CIHP)	5-45

Chapter 6: Payment Collection

Payment Collection Menu (CPCM)	6-2
--------------------------------------	-----

Fund Codes (CPFC)	6-3
Fund Transaction Codes (CPFB)	6-6
Register Location Codes (CPRL)	6-9
Register/Port Codes (CPRP)	6-11
Payment Codes (CPTC)	6-14
Receipt Header (CRHD)	6-17
Fine Rules Codes (CFRULE)	6-18

Chapter 7: Item Control Codes

Introduction	7-2
Item Control Codes Menu (CICM)	7-4
Status Control Codes (CIS)	7-5
Status Calendar Codes (CISC)	7-11
Editing Status Calendar Codes	7-14
Action Control Codes (CIA)	7-18
Editing Action Control Codes	7-19
Action Calendar Codes (CIAC)	7-22
Status/Action Calendar Access Codes (CSAC)	7-28

Chapter 8: General Codes

Circulation General Codes Menu (CGCM)	8-2
Transaction Control (CTC)	8-3
Hold Codes (CHC)	8-7
Recall Codes (CRC)	8-12
Administrative Hold Messages (CADM)	8-15
Sendmail Path (SMAIL)	8-16

Chapter 9: Output Control

Calendar Processor Menu (OCP)	9-2
Accessing Retained Reports	9-5
Register Reports (ORR)	9-8

Appendix A: Using ADVANCE

The Parts of a Screen	A-2
-----------------------------	-----

Selecting Menu Items	A-4
Selecting Screen Options	A-5
Editing in Data Fields	A-7
Editing in Windows	A-10

Appendix B: Glossary

Appendix C: Importing Patron Records

Patron Importing Menu (UPIM)	C-2
Defining Valid Patron Fields (DVPF)	C-3
Patron Importing (UPIR)	C-5
Creating a Load Profile	C-7
Editing a Load Profile	C-8
Beginning the Patron Load	C-14
Indexing Patron Records	C-17
Start Indexing	C-18
Patron Purge (CPFM)	C-23
Patron Purge Completion (CPPD)	C-29

Appendix D: User Permissions

Introduction	D-1
Permission List by Permission ID Number	D-3

Appendix E: Patron Memberships

Introduction	E-1
Database Conversion	E-3
Membership Control Table (CMEM)	E-5
Patron Type Codes (CPC)	E-6
Patron Membership Codes (CPMC)	E-7
Linking Circulation Codes to Patron Membership Codes	E-17
Patron Membership Group Codes (MEMGRP)	E-18

Notice Production Sequences (COPS)	E-21
Checkout Port Control (CPCC)	E-22
Transaction Control (CTC)	E-23
Patron Registration (CPR).....	E-25
Adding a Patron	E-28
Adding and Editing Memberships	E-30
Checkout (COUT)	E-35

[Screen Index](#)

[General Index](#)

[Reader Comments](#)

1

Introduction

Purpose

The ADVANCE Circulation Module supports multiple agency libraries, each with their own set of circulation parameters which are locally maintained. These include patron types, patron groups, holding location codes, item loan status codes, loan privileges, thresholds for system-generated restrictions and blocks, operator alerts and messages, requirements for overriding system blocks, timing and contents of notices, and fine policies.

The *Circulation Management Guide* explains how to set up and maintain your circulation system.

Contents

- *Configuration Codes* defines default parameters for the checkout, checkin and holds functions.
- *Loan Periods* provides guides to defining general, collection-specific, and patron group-specific loan policies. Holdings information is described with text and screens and discusses the various designation levels of local holding locations. This chapter also shows menu routes for access to the screens needed. Patron Codes are discussed for individual and group patron codes.
- *Output Production* illustrates customization procedures for notice types and production control options.
- *Payment Collection* deals with security control and transaction types for fine accounting.
- *Item Control Codes* demonstrates the use of status, action and calendar codes.
- *General Codes* describes circulation block, hold and recall codes.

- *Output Control* describes the Circulation Calendar Processor and Register Reports menu.

Appendix A provides general instructions on accessing screens and editing fields in ADVANCE.

Appendix B is a general ADVANCE glossary.

Appendix C describes how to import patron records.

Appendix D discusses user permissions.

Appendix E describes the optional, Patron Memberships version of ADVANCE.

Other Documentation

Consult other guides for related information:

- The *Circulation User's Guide* is an operational/procedural guide intended for library staff who perform day-to-day circulation tasks.
- The *Utilities Management Guide* describes general ADVANCE setup and management: port definitions, access control, the background processing calendar, the Report Writer, and so on.

Typographical Conventions

Two special text styles are used in this guide:

1. The screen identifiers, the text that you can enter, and screen messages are in a **monospace font** style. Examples: "ORDA", "Y", "REG", "Item on temporary hold by staff".
2. The names of screen fields and options, and cross-references to section or manual titles, are in **italics**. Examples: "*UNIT COST*", "*Exit*", "see *Handling Subscriptions*".

Angle brackets around the name of a key mean press the key. For example, "<ENTER>" means press (or pressing) the ENTER key.

Generic Examples

Because system behaviour can be tailored by the library's system managers to meet local needs, the screens and options shown in this document may not match exactly the ones at your library.

Some sample screens may be shown shorter than they actually are. This occurs when blank lines have been deleted to reduce space requirements.

2

Overview

This document is a set up or customization guide for the ADVANCE library system's *Circulation Module*. Each chapter covers one area of library system setup necessary for conducting circulation tasks. The chapter headings follow the pattern of the options shown on the *Circulation Codes Menu* (see the heading *Circulation Codes Menu* at the end of this chapter).

Circulation Overview

The circulation module provides libraries with the following major functions:

- Checkout, checkin, holds, traces, recalls, and renewals
- Patron record management
- Item status and action control
- Fine management and accounts receivable
- Customized circulation report generation
- Reserve book room

To perform any of the above functions, system and policy parameters must be established first. These parameters are drawn from your library's existing policies and procedures. The parameters include grouping conventions for collections and patrons, definition of locations and transaction procedures, specification of display and printing formats, definition of security control procedures, and, most importantly, interrelationships among those sets of parameters.

For instance, to check out an item, patron group and collection types, as well as institutions, must be identified to determine the loan period for a given item. To control individual items in the collection, the system must first identify all potential statuses and actions pertaining to the items and how those statuses and actions are linked together. Establishment of all these parameters is the primary task of *Circulation Setup*.

Circulation Setup

The purpose of *Circulation Setup* is to translate your library circulation policies and procedures into system parameters. This step must be completed before any circulation transactions can take place. The ADVANCE circulation setup process occurs at three levels:

- System as in access control, command vocabularies, menu configuration, and help message definition.
- Basic as in loan period, holding, patron, and item codes.
- Special as in payment transaction and notice production codes.

System Setup

System-level setup defines the global settings for your entire ADVANCE system, including the online catalogue, circulation, cataloguing, acquisition, and serials control modules. System setup must be completed before an individual module can be defined. Major system-level concerns are access control, command vocabularies, menu configuration, help message definition and the background processor.

Access Control

ADVANCE is designed for use in an environment where data security, privacy, and access control are critical. The ADVANCE circulation module uses a system-wide multi-level security control system to protect the computer system and data from unauthorized access. There is also a validity-checking system to help ensure all item and patron information is accurate and properly added to the database.

All circulation staff on the ADVANCE system are assigned individual IDs and passwords. The combination of the two determines their access levels. Since each function in the system has an access level requirement, the circulation staffs' access level determines what functions they may perform. The circulation supervisor, for example, may have an access level high enough to allow them to perform every function in the module. A circulation clerk, on the other hand, may be given access only to those screens useful for the type of job they normally perform.

Menu Configuration

The ADVANCE circulation module is **menu-driven**. Commands are logically grouped together on a series of menus organized in a tree structure. Each time an operator uses the menus to perform a function, they follow a given path from the top of the tree down to the bottom and back up again. The default menu tree is based upon standard circulation practices and, in most cases, can be used without any modification.

In some situations, however, it may be desirable to reconfigure the default menu system to be consistent with the existing organizational structure of your library or to reduce the number of hierarchical levels. The ADVANCE setup routines provide the capability to customize menus. The system administrator may define new menu headings, the number of menu command options, the menu screen layout, and the tree structure of the menu system.

Screen Identifiers

To meet the requirements of the expert user, the ADVANCE system has the option of operating as a **command-driven** system using **screen identifiers or keywords**. Screen identifiers are acronyms of a screen's title. For example, the *General Circulation Menu* has the acronym GCM as a screen identifier. When an operator types an identifier, the system responds directly by performing a given task through a preprogrammed sequence of computer instructions, by-passing the normal sequence of menus. This process is much faster than the menu-driven method but it requires the memorizing of commands or, more accurately, menu screen identifiers.

On all ADVANCE menus, the character strings that lie between the entry number and the description of the entry are menu command keywords. A menu itself can be identified by a unique command keyword; when the menu command keyword is entered, the corresponding menu is displayed.

ADVANCE command keywords can be selected from menus, or entered directly. The latter is particularly useful when an operator reaches a certain degree of familiarity with the system, and wants to get away from the rigidity of the menu structure. The direct use of menu command keywords instead of menus allows rapid execution of circulation functions.

Customized Commands

ADVANCE allows the circulation staff to define their own command keywords or command vocabularies. These customized vocabularies can refer to menus, system commands, and locally-created programs. For security, each command has an access level attached to it. Only authorized staff are allowed to define command vocabularies.

Customizing Help Messages

ADVANCE includes default help messages for most data and command prompts. Prompts on many circulation module data entry screens also contain information on what should be entered. Circulation staff can ask for online assistance simply by entering a single question mark,?, at any prompt. A list of specific examples or code options are displayed when a pair of question marks,??, are entered. Help messages may include explanations of prompts, examples of input, or a complete listing of all possible options. If necessary, help messages may take several screens.

The default help messages are already incorporated into the system. However, authorized staff can create new help messages, and modify or delete existing messages to suit particular system configurations and library practices.

Through-out the system you will find a **Help** command available. This command is intended to enable your system manager to provide custom help messages to assist your work. When a help message has not been provided, the following message will appear:

```
Online help not available, please refer to
documentation. Press <ENTER>.
```

When this message appears, consult this manual and the other documents provided with the ADVANCE system.

Background Processor

The ADVANCE system circulation module has a background processor, some times called the phantom processor, to enable routine functions to be performed automatically. You have the option of using this processor or switching it off. When the processor has been activated by your system manager, you will be able to have the production of such jobs as notice printing, invoice production, and statement production, done at optimum times.

If you want to process such jobs manually at some point, use the screen identifier OCP to access the Circulation Calendar Processor menu. This menu gives you the option to produce notices or run reports other than at the scheduled time. The system manager must access, the Circulation Background Processor (PCIR) to de-activate it before notices or other reports can be run outside of their scheduled time.

The background processor checks for the next production date on the control code record, for information about when to run circulation jobs. To set the dates and time when the background processor will process your jobs, see the chapter *Output Production*.

Basic Setup

The second level, and the core of circulation setup, is the establishment of loan policy codes. These codes are the borrowing rules for a given item and patron. Standard loan policies include rules on loan periods, holds, recalls, renewals, notices, and transaction charging criteria. These policies are determined by three major factors:

1. Collection groups
2. Holding locations
3. Patron types

Circulation codes, which are based primarily on collection types, are the backbone of the loan policy setup. The collection group code is used to bring together several collection types whose circulation policies are the same. Loan policy codes are further grouped along two lines:

Holding location codes (There are five levels: institution/sublocation/collection/call number prefix/class number) which are attached to individual items.

Patron group codes which are attached to individual patrons.

When an item is checked out to a patron, the borrowing rules are determined by the policy codes in the item record and those in the patron record. The determination of loan policy varies from institution to institution but policy usually centres around patron types. In other words, most loan policy related codes are ultimately brought together through patron group codes.

Security Control

A major category of basic circulation setup involves security control or, more specifically, port definition. Through physical and logical port definition, one can include or exclude a given port from performing a function or set of functions. Typical circulation functions controlled by port definitions are:

- Checkin
- Checkout
- Hold placement
- Register location for payment of fines

Special Setup

The third level of circulation setup is concerned with notice production. Notice production is done in cycles, beginning with overdue or recall notices and ending with invoices and statements. Notice production is related to other circulation activities, including checkout, holds and recalls. Notice production is mostly calendar-driven, and production is largely controlled by the background processors. Setting up notice production involves building a chain of notices, one invoking another.

Item Status and Action Codes

A major category of special circulation setup is item status and action codes. These are powerful features that allow tracking of individual items. These codes bear almost no relationship with other codes in the circulation module. Status/action codes are interconnected. In the definition of each status/action code, forward (status/action codes to be followed) and backward (status/action codes to be deleted) links are included. The logical sequences of status/action codes form an integral network within which all items are located.

Circulation Menu

MM ADVANCE Master Menu

CIRC Circulation Master Menu

GCM General Circulation Menu

- CCM Circulation Codes Menu
 - CCCM Circulation Configuration Codes
 - CCT Circulation Control Table
 - COCT Checkout Control Table
 - CMEM Membership Control Table
 - CHRT Hold/Recall/Trace Control
 - SCCT Self-Check Control Table
 - CPICK Pick List Control Table
 - CHOLD Holds Control
 - CHLDC Holds control codes
 - CHLDC Holds Reports control codes
 - CHSHELF Hold Shelf Messages
 - CQUAL Qualifier Codes
 - CPCC Checkout Port Control
 - CIPC Checkin Port Control
 - CPH Hold Port Control
 - CPBF Block/Fine Description Codes
 - CLPM Loan Periods Menu
 - CHSM Holding Setup Menu
 - CHIC Institution Codes
 - CHCS Sublocation/Building Codes
 - CHCC Collection Codes
 - CHPC Call# Prefix Codes
 - CHNC Class Number Codes
 - CDPT Default Price Tag
 - CLCM Library Calendars
 - CCC Circulation Codes
 - CCGC Material Group Codes
 - CPC Patron Type Codes
 - CPGC Patron Group Codes
 - MBP Materials Booking Patterns
 - CBLM Build Loan Matrix
 - CPLM Print Loan Matrix
 - COPM Output Production Menu
 - CNCT General Notice Controls
 - CNTC Notice Type Codes

	CCMC	Contact Method Codes
	CNC	Notice Codes
	COPC	Output Prod. Codes
	COPG	Output Prod. Charges
	CNHD	Notice Headers
	CNFC	Notice Print Format Codes
	CISFC	Notice Print Information Source Code
	COPS	Notice Production Sequences
	COPN	Notice Headers by Location
	CIHP	Holiday Periods by Institution
	CPCM	Payment Collection Menu
	CPFC	Fund Codes
	CPFB	Fund/Transaction Codes
	CPRL	Register Location Codes
	CPRP	Register/Port Codes
	CPTC	Payment Type Codes
	CRHD	Receipt Header
	CFRULE	Fine Rules
	CICM	Item Control Codes Menu
	CIS	Item Status Control Codes
	CISC	Item Status Calendar Codes
	CIA	Item Action Control Codes
	CISC	Item Action Calendar Codes
	CSAC	Status/Action Calendar Access Codes
	CGCM	General Codes Menu
	CTC	Transaction Codes
	CHC	Hold Codes
	CRC	Recall Codes
	CADM	Administration Stop Messages
	SMAIL	Sendmail Path
	CLVIS	LVIS Codes
	CLVT	LVIS Control Times
	CLVL	LVIS Contact Language Codes
SCM		Standard Circulation Menu
	COUT	Checkout
	CIN	Checkin
	PHONER	Telephone Renewals
	HRT	Holds by patron
	CHQ	Hold Queue by Title
	CREL	Recall
	MB	Materials Booking

- PCM Patron Control Menu
 - CPR Patron Registration
 - CTU Transaction Update
 - CAR Accounts Receivable
 - CPSS Patron Second Screen Definition
 - HPH Housebound Patron History
 - MEMGRP Patron Membership Groups
 - PAC Patron Address Control
 - PAD Patron Address Descriptions
 - CRPM Reset Patron Memberships

- ICM Item Control Menu
 - CEH Edit Holdings
 - CEHD Holdings Default Definitions
 - CAHD Action on Holdings Deletion
 - CHMF Holdings Maintenance Functions
 - CCA Change Actions
 - CCS Change Status
 - PHYI Physical Inventory Control
 - CLPD Last Access Patron History Display
 - CLPC Last Access Patron History Clear
 - CFHC Flagged Hold Cancellations

- OCM Output Control Menu
 - OCP Calendar Processor
 - ORR Register Reports
 - OVR Voice Processing Utilities

- CILL ILL Maintenance
 - CIRE Request Entry/Update
 - CICS ILL OPAC/CAT Setup
 - CIRTE Request Template Editor
 - CIRT Request Types
 - CILC Supplying Library Codes
 - CAPD AVISO Patron Download

- RCM RBR Circulation Menu**
 - CRSM Reserve Setup Menu
 - CRLC Temporary Location Codes
 - CRBNI Add a New Instructor Record
 - CRBNC Add a New Course Record
 - CRBI Rebuild RBR Indexes
 - CRBC Check RBR File Consistency
 - CREM Reserve Processing Main Menu
 - CRLM Reserve Linking Menu

CRUM Reserve Unlinking

CRM Circulation Reporting Menu

CCR System Reports
Patron Registration Reports
Patron Accounting Reports
Patron Blocks Reports
Physical Inventory Reports
Checkout and Status/Action Reports
Holds and Booking Picklists/Alerts
Reserve Book Room Reports
Circulation Checkin Statistics
Circulation Recall Statistics
Circulation Checkout Statistics
Circulation Renewal Statistics
Circulation Hold Statistics
Physical Inventory Reports
RW Report Writer
CRGC Report Group Codes
RPC Report Prompt Codes

CBM Circulation Backup Menu

LBFCM Live to Backup File Creation Menu
CFPA Create Full Abbrev. Patron
CFPE Create Full Abbrev. Pieces
DAFT Dump Abbrev. Files to Tape
CBLF Load Tape Files from Backup
BLU Backup to Live Update
CBCT Circulation Backup Control Table
CBFC Clear Backup & Report Files
CCRB Reports Menu

CPFM Circulation Purge Files Menu

CPPR Patron File Purge Report
CPPD Patron File Purge
CPMBP Materials Booking Pattern Deletion

UTIL Utility Menu

UTLM Import/Export Menu

- UPIM Patron Importing Menu
- UPIR Import Patron Records
- UIPR Index Patron Records
- DVPF Define Valid Patron Fields

3

Configuration Codes

This chapter allows you to choose among a number of options which will tailor the system to your library's checkin, checkout, and holds processing practices. Choosing among the parameters will define how these essential Circulation procedures operate, as well as establish security control for these functions.

Configuration Codes Menu (CCCM)

To select the CIRCULATION CONFIGURATION CODES menu enter CCCM, from the Circulation Codes Menu.

```
11 OCT 19YY          Geac ADVANCE Library System (##)          DEFAULT AU
 10:02              Your Library Name

CIRCULATION CONFIGURATION CODES

1. CCT   Circulation Control Table
2. COCT  Checkout Control Table
3. CMEM  Membership Control Table
4. CHRT  Hold/Recall/Trace Control Table
5. SCCT  Self-Check Control Table
6. CPICK Pick List Control Table
7. CHOLD Holds Control
8. CQUAL Qualifier Codes

9. CPCC  Checkout Port Control
10. CIPC Checkin Port Control
11. CPH  Hold Port Control

12. CPBF Block/Fine Description Codes

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help.
Press <ENTER> to return to previous level :
```

For a description of the Membership Control Table (CMEM), see *Patron Memberships* on page E-1.

Circulation Control Table (CCT)

Use this table to:

- determine how patron records are accessed
- control bibliographic display at checkout
- set a threshold for printing invoices.

Access

Select the CIRCULATION CONTROL table enter CCT from the Circulation Configuration Codes menu.

Page 1

```

                                CIRCULATION CONTROL

Control record : CIRC.CONTROL
------( Page 1 of 2 )
1. Multi line display for patron browse (1=yes,2=No phones) : 1
2. Verify checkout after database retrieval (1=yes)           : 0
3. Keep patron history (1=yes)                               : 1
4. Minimum amount for invoices                              : 1.00
5. Allow Charge on Charge (1=Yes)                           : 1
6. Make Patron ID mandatory (1=Yes)                          :
7. Detail Display at Checkout (1=Yes)                        : 1
8. Detail Display at Checkin (1=Yes)                         : 1
9. User level required to view patron name (0-99)            : 80
10. Default for charging fines at checkin (1=Yes)            : 0
11. Assess fines when lost book block added (1=Yes)          : 0
12. Waive LB charge removes item from history list (1=Yes)  : 0
13. Round hourly fines up or down (1=Up)                     : 1

Options:
Forward ? help # line Line by line Print Exit

```

1. Multi line display for patron browse [0, 1, or 2]

Determines the data fields displayed when a list of patron's is displayed. (See example screens.)

0 Displays patron name and barcode only.

- 1 Displays patron name, barcode, address, zip/postal code, and phone number.
- 2 Displays patron name, barcode, address, and zip/postal code.

Example Screens

```
Enter Patron Name or Barcode: smith, 1
-----
 1 SMITH, LINDA MARIE                20000002001752
   513 FINLEY HALL
   PIONEER TRAIL CA  97331          758-9623
 2 SMITH, LINDSAY JEAN              20000002003523
   340 NW 26TH ST
   ANAHEIM CA 97330                753-6631
```

```
Enter Patron Name or Barcode: smith, 1

 1. SMITH, KEVIN LANCE                20000002001254
 2. SMITH, LAUREL ANNE                20000002003282
 3. SMITH, LINDA MARIE                20000002001752
 4. SMITH, LINDSAY JEAN              20000002003523
 5. SMITH, LORRIE ANN                 20000002002866
```

2. Verify checkout after data base retrieval [0 or 1]
After searching the online catalogue to retrieve an item during checkout, the system redisplay the Checkout (COUT) screen and shows the retrieved item's barcode number.
 - 0 (no) Retrieves the item checked out without the verification prompt.
 - 1 (yes) The system prompts: Checkout this item Y/N:.. This insures that the retrieved item's barcode number matches the one on the item before checking the item out.
3. Keep patron history [0 or 1]

- 0 (no) The system does not maintain patron history.
- 1 (yes) Keeps patron history in the following two circumstances. Note that the system requires that fields be answered Y in two places in order to track patron history in CCT **and** in one, or both, of the following:
- If a patron's registration record (see Patron Registration [CPR]) **also** has the *Housebound* field answered Y, the system keeps track of all the items previously checked out by the borrower. This enables the library to avoid sending the same item more than once to a housebound patron, or to develop profiles of titles preferred by a housebound patron. If an item is checked out again to a Housebound patron you will be prompted at checkout:

Item has been previously taken out on 22 APR 19YY by this housebound patron.

Do you wish to checkout this item? (Y/N):
 - If the Circulation Code (CCC) in the item record, or the Circulation Code (CCC) associated with the Patron Group Code (CPGC), **also** has Keep Patron History answered Y, the system keeps track of the most recent borrower of an item. This feature enables the library to track damaged items to the previous borrower. Only one previous borrower is retained. This information can be manually cleared, and/or a block can be put on the patron record. (See *Last Access Patron History Display* [CLPD] and *Last Access Patron History Clear* [CLPC]).
4. Minimum amount for invoices [Blank or amount in format nn.nn]
Enter the minimum amount that an invoice will be generate for by the Invoice (I) processing job. Only current invoice amounts are considered in making this comparison.
5. Allow Charge on Charge [0 or 1]
- 0 (no) Prevents staff from checking out an item that is already checked out to a different borrower. Staff would have to go to the *Checkin* (CIN) function, and check the item in, before checking it out to the current borrower.
- 1 (yes) Allows staff to checkout an item that is already checked out to a different borrower. The system warns that the item is checked out, names the

borrower who has it, and asks whether or not to proceed with the checkin/checkout.

6. Make Patron ID mandatory [0 or 1]
- 0 (no) Does not require a personal ID for Patron Registration (CPR).
 - 1 (yes) Requires that a personal ID is entered in Patron Registration (CPR).

7. Detail Display at Checkout [0 or 1]
- 0 (no) Suppresses the display of the title of the item at checkout.

```
ITEM          DUE
1. 39999000124430 04-30-93 06:00PM
```

- 1 (yes) Displays the display of the title of the item at checkout.

```
ITEM          TITLE          DUE
1. 39999000124430 Japanese aid 04-30-93
                                06:00PM
```

8. Detail Display at Checkin [0 or 1]
- 0 (no) Suppresses the display of the title at checkin.

```
10:34AM          CIRCULATION CHECKIN          14 FEB 96

Command or Item Barcode: 39999000108080          Charging Fines: Yes
                                                Amount:
```

1 (yes) Displays the title of the item at checkin

10:31AM	CIRCULATION CHECKIN	14 FEB 96
Command or Item Barcode:		Charging Fines: Yes
(Detailed Display Mode)		Amount:
ITEM	TITLE	
39999000108080	Our native ferns and their allies; with synoptical descript	

9. User level required to view patron name [0 – 99]
 Enter the minimum User ID privilege level required to see any information in the *Patron* field of the Main Online Catalogue PIECES DETAIL screen. This is checked against the privilege level of the module the user is currently in. For example, if the Enter Access Codes (EACC) privilege level for a user in Circulation is 90, and for Cataloguing is 50 but the user level for this field in this table is 50, the user will see the patron information from the Circulation display but not from Cataloguing.
10. Default for charging fines at checkin [0 or 1]
 0 (no) Overdue fines are not assessed (e.g. during an amnesty week).
 1 (yes) Overdue fines are assessed as usual.
11. Assess fines when lost book block added [0 or 1]
 0 (no) Overdue fines assessed if and when the lost item is found and checked in.
 1 (yes) Overdue fines assessed at the time an item is marked lost.
12. Waive LB charge removes item from history list [0 or 1]
 0 (no) Lost items are left on the screen's list until staff remove them.

- 1 (yes) Lost items are automatically removed from the ITEMS CHECKED OUT AND LOST screen when the lost items are found and checked in.

- 13.Round hourly fines up or down [0 or 1]
 - 0 Round hourly fines *down* to a whole number of hours.
 - 1 Round hourly fines *up* to a whole number of hours.

Page 2

```
                                CIRCULATION CONTROL

Control record : CIRC.CONTROL
------( Page 2 of 2 )
1. Output notice if BFR generated (1=Yes)                : 1
2. Recalled fine rates apply to WHOLE overdue period(1=Yes) : 0
3. Patron lookup - Always browse, even when there       : 0
   is an exact string match (0 = No, 1 = Yes)
4. Ignore Closed days and Holidays for loans using MBP   :
   0 - check for both, 1 or 3 - ignore Closed, 2 or 3 - ignore Holidays
5. Define Remote Renewal Types                          : 2,3,4,5,6
   1=Backup,2=SelfCheckout,3=OPAC,4=GeoXXX,5=Phone,6=Lvis
6. Field number for mailing name if used                 :
7. Suppress ZIP code check in CPR (1=Yes)               :
8. Show Patron's Name & Previous Charges in Checkin (1=Yes) : 1
9. Restrict access to patron details from OPAC (1=Yes)   : 1

Options:
Backward  ? help  # line  Line by line  Print  Exit
```

- 1. Output notice if BFR generated [0 or 1]
 - 0 (no) Generate Bill for Replacement *invoices*, which end the notice cycle and start an invoice cycle.
 - 1 (yes) Generate Bill for Replacement *notices*. You can use the Notice Print Format Codes table (CNFC) to design the BFR notice using the print information source code S34 (replacement charge). NOTE: If you create a replacement charge online rather than letting the “C” Notice Production job create it, a BFR notice is not generated.

2. Recalled fine rates apply to WHOLE overdue period [0 or 1]
Special fines for recalled items can be defined on the Circulation Code Charges screen, which is accessed from the Patron Group Codes (CPGC) table.
- 0 (no) Apply the recalled item fine rate only to the period after which the item was recalled.
- 1 (yes) Apply the recalled item fine rate to the entire period that the item was overdue, including the period before it was recalled.
3. Patron lookup - Always browse, even when there is... [0 or 1]
Determine whether the patron browse list is displayed even if there is a direct hit for your search key.
- 0 (no) Display the patron browse list only when there is no direct hit.
- 1 (yes) Always display the patron browse list.
4. Ignore Closed days and Holidays for loans using MBP [0, 1, 2, or 3]
Determine whether items loaned according to a materials booking pattern are affected by closed days and holidays.
- 0 Check for closed days and holidays.
- 1 Check for holidays only.
- 2 Check for closed days only.
- 3 Do not check for closed days or holidays.
5. Define Remote Renewal Types [One or more codes (1, 2, 3, 4, 5, or 6) separated by a comma, or blank]
Specify which types of renewals are handled as remote renewals. Override parameters for remote renewals are defined by the circulation code renewal rules accessed from the Circulation Code screen linked to a Patron Group Codes table (CPGC) – see [Circulation Code Renewal Rules](#) on page 4-76.
- 1 Circulation Backup (MBU) renewals are considered remote renewals.
- 2 Self-Check renewals are considered remote renewals.

- 3 Online Catalogue renewals are considered remote renewals.
 - 4 GeoWeb and GeoPac renewals are considered remote renewals.
 - 5 Renewals requested by telephone but done by staff (PHONER renewals) are considered remote renewals.
 - 6 LViS telephone renewals are considered remote renewals.
6. Field number for mailing name if used [Any patron record field number]
- The field, such as an Extra Field created by the Patron Loader, to use when printing the patron name in notices. For example, this might be an uninverted form of the patron's name, such as "Mr. John Brown".
- Leave this field blank to have the usual name field used in notices.
7. Suppress ZIP code check in CPR [0 or 1]
- 0 (no) Do not validate the information entered in the Zip/Postal Code field on the PATRON REGISTRATION screen, and do not provide the CITY - STATE/ PROVINCE - ZIP/POSTAL CODE EDIT screen.
 - 1 (yes) Validate the information entered in the Zip/Postal Code field on the PATRON REGISTRATION screen and, when necessary, display the CITY - STATE/PROVINCE - ZIP/POSTAL CODE EDIT screen.
8. Show Patron's Name & Previous Charges in Checkin [0 or 1]
- 0 (no) Do not show the patron's name and total previous charges in Checkin.
 - 1 (yes) Show the patron's name and total previous charges in Checkin.
9. Restrict access to patron details from OPAC [0 or 1]
- 0 (no) Do not show patrons their patron details (address and so on) in the Online Catalogue.
 - 1 (yes) Show patrons their patron details (address and so on) in the Online Catalogue.

Checkout Control Table (COCT)

Use this table to set up checkout displays and due date/time calculations.

Access Select the CHECKOUT CONTROL table enter (COCT), from the Circulation Configuration Codes menu.

```

                                CHECKOUT CONTROL

CHECKOUT CONTROL CODE : CIRC.CHKOUT.CTL
-----
1. Patron display: 0=barcode, 1=barcode + name, 2=name      : 1
2. Due date can be > patron expiration date (1=yes)        :
3. Patron barcode required for checkout (1 = Yes)          :
4. Calendar is used to calculate due date (1 = yes)         : 1
5. If closed when Item is due then allow return            : 90
   how many minutes into the next day. (DUE SAME DAY)
6. If closed when Item is due then allow return            : 90
   how many minutes into the next day. (NOT DUE SAME DAY)
7. Default institution opening time                         : 07:30:00
8. Default institution closing time                         : 21:00:00
9. End of Day (For daily cycle loans)                       : 21:00:00
10. Calculate Overdue fines from (0 = Grace Period)         : 1
     (1 = Due Date )
11. Calculate fines for library closed hours (1 = Yes)      : 0
12. Timeout for checkout ports (in seconds)                 : 60
Options : _____
        ?? help      ## line      PRT=Print      FI=File      E=Exit

```

1. Patron display [0, 1 or 2]

Determines the what information is displayed after a patron has been identified at checkout.

```

0 Enter Patron Name or Barcode : 20000002003070

1 Enter Patron Name or Barcode : 20000002003070  SNELLING, JOHN
  CRAIG

2 Enter Patron Name or Barcode : SNELLING, JOHN CRAIG

```

2. Due date can be later than patron expiration date: [0 or 1]
- 0 (no) Prevents a due date later than the patron's library card expiration date. The system allows the checkout, if the card has not yet expired, but the due date will be equal to the expiration date.
- This patron's card will expire on 04-22-93.
- The above date will also be the due date for this item.
- 1 (yes) Allows a due date to extend beyond the expiration date in the patron record. The system does not alert you that the patron's registration will expire during the checkout period.
3. Patron barcode required for checkout. [0 or 1]
- 0 (no) Allows use of a system generated negative barcode number (example -98653) for a patron *registering on the fly*. This permits the patron to check out books with only a brief registration record, and no permanent barcode. The barcode number is assigned at a later time in Patron Registration (CPR). Both Checkout (COUT) and Accounts Receivable (CAR) check to determine if any processing is permitted for patrons with negative barcodes.
- 1 (yes) Requires a patron to register with the system before checking out any materials, in other words, a valid barcode number must be assigned first.
4. Calendar is used to calculate due date. [0 or 1]
- 0 (no) A calendar is **not** used to calculate due dates, the system prompts, **at every checkout**, for loan period (Days, Hours, Minutes), and due date. Only in unusual circumstances would the library not have a calendar for determining due dates and times. Also, if you answer 0 (no) then you must fill in lines 7, 8, and 9 of this table to calculate the due time of daily loans.
- NOTE: For hour-based loans, the system calculates the due time without regard for library closing times. The next two fields are used to accommodate hourly loans which fall during hours the library is closed, by providing grace periods. Also see field 11 for hourly loan fine calculation.

1 (yes)	Uses the calendar specified in the CHECKOUT PORT CONTROL (CPCC) table for calculating due dates. If that table does not have a calendar specified, the system sets due times to 11:59 pm.
5. If closed when item is due, then allow return how many...	[1-1440] Sets a grace period for items with hourly loan periods that are checked out close to, or at, the library's closing time. For example, with a grace period of 90 minutes, if an item is checked out for three hours at 7:30 pm and the library closes at 10:00 pm, a grace period of 30 minutes will be assigned, and the patron has 60 minutes after library opening to return the material.
6. If closed when item is due, then allow return how many...	[1-1440] Similar to the field above, except the grace period is applied to items that are due the following day.
7. Default institution opening time.	Time in system format (for example, HH:MM:SS) NOTE: this field has an effect <i>only</i> if the field: <i>Calendar is used to calculate due date</i> is answered 0 (no). Lines 7 and 8 need to be completed in order to provide default opening and closing times for use in calculating due dates/times in the event that no calendar is specified.
8. Default institution closing time.	Time in system format (for example, HH:MM:SS) NOTE: this field has an effect <i>only</i> if the field: <i>Calendar is used to calculate due date</i> is answered 0 (no).
9. End of Day (For daily cycle loans).	NOTE: this field has an effect <i>only</i> if the field: <i>Calendar is used to calculate due date</i> is answered 0 (no). If you have answered 1 (yes) to field 4, then the calendar specified in CHECKOUT PORT CONTROL (CPCC) sets the due time. If field 4 was answered 0 (no), then field 9 enables you to set a due time for daily loans that is different from the library's closing time. For example, if the library normally closes at 11:00 PM, you may want to have all the daily loan items returned by 10:00 PM. Entering 22:00 in this field will not allow any due times to be later than 10:00 PM. NOTE: the system applies this daily due time to all the days of the week. If some days have earlier closing times, the system will not adjust but will apply the time in field 9 to these days too. If in the above example, the library closes at 5:00 PM on Saturdays and Sundays the system

assigns the 10:00 PM due time to those days also. In this case it might be preferable to specify a calendar to control variable closing times, by answering 1 (yes) in field 4, and then putting the calendar name into the CHECKOUT PORT CONTROL (CPCC) table.

10. Calculate Overdue fines from...

[0 or 1]

If your library provides a grace period for patrons (set up in the CIRCULATION CODES [CCC] tables), determines whether the overdue fine is calculated:

- 0 after the grace period ends, or
- 1 from the original due date.

11. Calculate fines for library closed hours

[0 or 1]

- 0 (no) Do not charge fines while the library is closed.
- (1) yes Continue to charge fines for days or hours that the library is closed.

12. Timeout for checkout ports (seconds)

[0-?? seconds]

- 0 (no) Prevents timeout message from displaying.
- 1 - ?? Provides a prompt to prevent staff from checking out items to the wrong patron. If a time out is specified in number of seconds, and this time elapses at a terminal left at the Item barcode prompt in Checkout (COUT), the following message is provided:
Keyboard timeout, Is the Patron ID still valid (Y/N) ?

Hold/Recall/Trace Control (CHRT)

Use the HOLD/RECALL/TRACE CONTROL table to set up default parameters for recall and trace activities. Use the commands available at the option line to modify and print the table.

Access To select the HOLD/RECALL/TRACE CONTROL table enter CHRT, from the Circulation Configuration Codes menu.

```

                                HOLD/RECALL/TRACE CONTROL

HOLD/RECALL/TRACE CONTROL CODE : HRT.CONTROL
-----
1. Auto. hold on trace (1=yes)           : 0
2. Auto. hold on recall (1=yes)          : 1
3. Override due date on recall (1=yes)   : 0
4. Loan reduce if user also has hold (0=no,1=yes,2=ask) : 1

Options:
? help  # line  Line by line  Print  Exit

```

1. Auto. hold on trace [0 or 1]

0 (no) The system leaves you at the PIECES SUMMARY (Holds) screen after you place a *trace*, so that you may trace or recall another item. Select *Prior screen* to return to the HOLD DETAIL screen. In the *Hold Scope* field of the HOLD DETAIL screen, a *title level hold* will be shown. If you *Exit*, the system deletes the title level hold but leaves the trace in effect. If you *Commit* the hold, the system retains a title level hold for the patron.

1 (yes) The system automatically returns you to the HOLD DETAIL SCREEN after you place a *trace* at the PIECES SUMMARY (Holds) screen in the HOLDS BY PATRON (HRT) and HOLD QUEUE BY TITLE (CHQ) functions. In the *Hold Scope* field of the HOLD DETAIL screen, a *copy level hold* will be shown. If you *Exit*, the system deletes the copy level hold but leaves the trace in effect. If you *Commit* the hold, the system retains the copy level hold for the patron.

2. Auto. hold on recall [0 or 1]
- 0 (no) The system leaves you at the `PIECES SUMMARY (Holds)` screen after you place a *recall*, so that you may trace or recall another item. Select *Prior screen* to return to the `HOLD DETAIL` screen. In the *Hold Scope* field of the `HOLD DETAIL` screen, a *title level hold* will be shown. If you *Exit*, the system deletes the title level hold but leaves the recall in effect. If you *Commit* the hold, the system retains a title level hold for the patron.
 - 1 (yes) The system automatically returns you to the `HOLD DETAIL SCREEN` after you place a *recall* at the `PIECES SUMMARY (Holds)` screen in the `HOLDS BY PATRON (HRT)` and `HOLD QUEUE BY TITLE (CHQ)` functions. In the *Hold Scope* field of the `HOLD DETAIL` screen, a *copy level hold* will be shown. If you *Exit*, the system deletes the copy level hold but leaves the recall in effect. If you *Commit* the hold, the system retains the copy level hold for the patron.
3. Override due date on recall [0 or 1]
- 0 (no) Does not allow you to override the new due date assigned by the system when you recall items using the *Recall (CREL)* function.
 - 1 (yes) Allows you to override the new due date assigned by the system when you recall items using the *Recall (CREL)* function. This setup field has no effect on recalls done in the `HOLDS BY PATRON (HRT)` function.
4. Loan reduce if user also has hold [0, 1, or 2]
- Specifies the loan period used at checkout when outstanding holds exist for the item.
- 0 The normal loan period is used. The Held Circ Code is not.
 - 1 The Held Circ Code is used to determine the loan period. You should enter a Held Circ Code in the `Circulation Codes` table (CCC) and link the Circ Code to the Patron Group Code (CPGC) to ensure that the Held Circ Code will be used.
 - 2 The system prompts you to reduce the loan period: `Pending Hold(s) : - reduce loan period (Y/N)?`: Answer Y to use the Held Circ Code to reduce the loan period. Answer N to use the normal loan period.

Self-Checkout Control (SCCT)

This table is only available to sites that have the Self-Check add-on product. The Self-Check add-on product currently supports the 3M Self-Check System and the Knogo EXPRESS System.

Access Select the SELF CHECKOUT CONTROL (SCCT) table to define the self-checkout policy for the library.

```

                                SELF CHECKOUT CONTROL

                                SELF CHECKOUT CONTROL CODE : SC.POLICY
                                -----
                                1. Self Check In allowed (0,1)           : 1
                                2. Self Check Out allowed (0,1)          : 1
                                3. Self Renewal allowed (0,1)           : 1
                                4. SC Patron Blocks allowed (0,1)        : 1
                                5. SC Offline working allowed (0,1)      : 1
                                6. Timeout in tenths of a second        : 99
                                7. Maximum retries allowed               : 10
                                8. Magnetic media - Circ Code           : AV1,AV2
                                9. Use In Library Only - Circ Code      : AV2

Options:
? help # line Line by line Print Exit

```

1. Self Check In allowed [0 or 1]
- 0 Self-checkin is not allowed.
 - 1 Allows self-checkin.

NOTE: Self-check units use self-checkin to cancel a previous self-checkout transaction if the unit was used improperly.

2. Self Check Out allowed [0 or 1]
- 0 Self-checkout is not allowed.
 - 1 Allows self-checkout.

3. Self Renewal allowed [0 or 1]
- 0 Self-checkout renewal transactions are not allowed.
 - 1 Allows self-checkout renewal transactions.
4. SC Patron Blocks allowed [0 or 1]
- 0 Ignores patron blocks.
 - 1 Applies patron blocks.
5. SC Offline working allowed [0 or 1]
- 0 Does not allow offline processing. (Not currently implemented.)
 - 1 Allows offline processing;
6. Timeout in tenths of a second [1 - 999]
- Specifies the length of time that the self check unit waits before a transaction timeout occurs.
7. Maximum retries allowed [1 - 999]
- Enter a number. Specifies the number of communication protocol retries attempted before a transmission failure occurs.
8. Magnetic media - Circ Code [Circulation codes, separated by commas, no spaces]
- Notifies the selfcheck unit if an item to be checked out is magnetic media, such as a computer diskette which could be damaged if desensitized.
9. Use In Library Only - Circ Code [Circulation codes, separated by commas, no spaces]
- Notifies the selfcheck unit if an item to be checked out is intended for *In Library Use Only*. The self check unit will not desensitize the magnetic security strip in the item.

Picking List Control (CPICK)

Use the Picking List Control table to set the parameters for generating picking lists for holds, materials booking, and RBR bookings.

Access Select the PICK LIST CONTROL (CPICK) from the Circulation Configuration Codes menu

```

                                PICKING LIST CONTROL

                                PICKING LIST CONTROL CODE : PICKLIST
                                -----
                                1. Picking list for Holds required (0-No, 1-Yes)      : 1
                                2. Picking list for Bookings required (0-No, 1-Yes)    : 1
                                3. Report bookings active within how many days ?     : 4
                                4. Picking list for RBR bookings required (0-No, 1-Yes) : 1

Options:
? help # line Line by line Print Exit

```

Selecting (1) yes specifies that the Picking List is required. Note that you must execute the specified report to generate the list.

1. Picking list for Holds required [0 or 1]
- 0 (no) Does not generate Holds picking list.
 - 1 (yes) Generates a Holds picking list.

The list reports items that are available to fill outstanding holds. It shows the call number, author, title, pickup location, and item barcode.

To generate the list, select report # 199 *Hold Pick List (Active Holds)* from the Holds and Booking Picklists/Alerts screen of the Circulation Reports Menu.

2. Picking list for Bookings required

[0 or 1]

0 (no) Does not generate a Booking picking list.

1 (yes) Generates a Bookings picking list.

The list reports items that are required to fill outstanding bookings made in the materials booking add-on product. It shows the item description, the barcode, and any charging information. It also shows the pick-up location or delivery point, if appropriate.

To generate the list, select report # 198 *Listing of Active Bookings* from the Circulation Reports Menu.

3. Report bookings active within how many days?

[number of days]

Refers to field 2. The report lists items required for materials booking within the specified number of days. In this example, all the items needed within the next four days will be listed on report 198.

4. Picking list for RBR bookings required

[0 or 1]

0 (no) Does not generate an RBR picking list.

1 (yes) Generates a RBR picking list.

The list reports items that are required for the Reserve Book Room. It shows the start date and time, author, title, item barcode, reserve location, and due date and time. This report can be restricted by date range and sorted by location or call number.

To generate the list, select report # 197 *Picking List for RBR* from the Holds and Booking Picklists/Alerts screen of the Circulation Reports Menu.

Hold Control (CHOLD)

Hold Control codes enable you to set conditions on the functioning of patron holds. Specifically, these codes control where holds can be placed, routed, and picked up, as well as specialized qualifiers on how holds are to be filled.

Access Enter CHOLD from the Circulation Configuration Codes menu to select the HOLDS CONTROL table.

```

DD MMM YYYY          Geac ADVANCE Library System (##.##)          XXXXX YY
HH:MM                Your Library Name

                        HOLDS CONTROL CODES

                        1. CHLDC   Holds control codes
                        2. CHLDP   Holds Reports control codes
                        3. CHSHELF Hold Shelf Messages

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help.
Press <ENTER> to return to previous level :

```

Hold Control Codes (CHLDC)

Select Holds control codes (CHLDC) to set parameters on conditions affecting pickup of captured holds. The HOLDS CONTROL screen appears.

```
                HOLDS CONTROL

HOLDS CONTROL CODE : HOLD.CONTROL
-----
----- ( Page 1 of 2 )
1. Default routing of held items to patron's home locn.(1=yes) : 1
2. Allow routing of held item to another institution           : 1
   (0=no,1=staff only,2=staff and patrons)
3. Allow routing of held item to another sublocation          : 2
   (0=no,1=staff only,2=staff and patrons)
4. Default to No routing if other pickups at same locn.      : 1
   (P qualifier : 0 - No, 1 - Yes)
5. Use no routing when pickup matches at                      : 2
   (0=no check,1=institution level,2=sublocation level)
6. Default to Local patrons have priority                    : 0
   (H qualifier : 0 - No, 1 - Yes)
7. Use local patron's hold when locations match at          : 2
   (0=no check,1=institution level,2=sublocation level)

Options:
Forward  ? help  # line  Line by line  Print  Exit
```

```
                HOLDS CONTROL

HOLDS CONTROL CODE : HOLD.CONTROL
-----
----- ( Page 2 of 2 )
1. Security measures on patron holds/cancellation            :
   Patron must know their barcode plus :
   (1=password,2=Personal ID,3=Phone #,4=first 3 letters of surname)
   (e.g. 1234 means patron must know all 4)
2. Check for items on shelf when placing hold at            : 2
   (0=no check,1=institution level,2=sublocation level,3=anywhere)
3. Suppress Pickup Location option for OPAC Holds (0=No,1=Yes) : 0

Options:
Backward ? help  # line  Line by line  Print  Exit
```

The first three codes in this table define whether the default pickup location for a hold may be changed. The default pickup location is set for each port in HOLD PORT CONTROL (CPH), but may be changed based on the settings in this table.

- | | | |
|--|-------------|---|
| 1. Default routing of held items to patron's home... | [0 or 1] | |
| 0 (no) | | Prevents routing of an item to the patron's home institution/sublocation as specified in <i>Home Inst</i> and <i>Home Subl</i> fields on the Patron Registration. |
| 1 (yes) | | The pickup location will default to the patron's home institution/sublocation; if the home institution/sublocation is not specified in <i>CPR</i> , the system will use the default pickup in <i>CPH</i> . |
| 2. Allow routing of held item to another institution | [0, 1 or 2] | |
| 0 | | No routing. When a hold is placed the system will not prompt you with a list of institutions and sublocations. |
| 1 | | Holds must be placed by staff from the Holds by Patron (HRT) menu. The system displays the routing locations list when the title is retrieved. The system only allows a change of institution from <i>Holds</i> , <i>Recalls</i> , <i>Traces</i> (CHRT) not OPAC. |
| 2 | | Holds can be placed by staff from the Holds by Patron (HRT) menu or by patrons from the OPAC holds option. The system displays the routing locations list when the title is retrieved. |
| 3. Allow routing of held item to another sublocation | [0, 1 or 2] | |
| 0 | | No routing. When a hold is placed the system will not prompt you with a list of institutions and sublocations. |
| 1 | | Holds must be placed by staff from the Holds by Patron (HRT) menu. The system displays the routing locations list when the title is retrieved. The system only allows a change of sublocation from <i>Holds</i> , <i>Recalls</i> , <i>Traces</i> (CHRT) not OPAC. |

- 2 Holds can be placed by staff from the Holds by Patron (HRT) menu or by patrons from the OPAC holds option. The system displays the routing locations list when the title is retrieved.
4. Default to 'No routing if other pickups at same... [0 or 1]
- This field defines whether the **P-holds fill qualifier** is the default. (See *Circulation User's Guide: Holds, Recalls, Traces: Hold Detail's* second screen, Fill Rules).
- 0 Holds at the current location are not filled preferentially. That is, holds are filled in the normal manner without regard to Pickup Location.
- 1 P will be the default in the *Fill rules* field of the Holds Full Detail screen. This prevents items from being routed to other locations when there are holds at the item's current location to be filled. (See field 5 to define what the system considers to be a *current* location).
5. Use no routing when pickup matches at... [0, 1 or 2]
- This field determines when the item should be given a status of *on route*:
- 0 Ignore pickup location.
- 1 Do not route if pickup and checkin location match at the institution level.
- 2 Do not route if pickup and checkin location match at the sublocation level.
6. Default to 'Local patrons have priority'... [0 or 1]
- This field determines whether the **H-holds fill qualifier** is the default. (See *Circulation User's Guide: Holds, Recalls, Traces* for information on Hold Detail's second screen, Fill Rules).
- 0 Do not use the home location as priority (institution or sublocation as defined in field 7 of this table).
- 1 H will be the default in the *Fill rules* field of the HOLDS FULL DETAIL screen. This will cause items located at the same location as the patron to take priority, example, patrons belonging to the same location as the item will take priority. (See field 7 of the Holds Control Codes [CHRTE]).

NOTE: Only one, or neither, of these fields can be set to 1. The default cannot be *BOTH H* and *P*. If neither field is set to 1 the default will be blank - no fill qualifier.

If field 4 is set to 1 (yes) for a *P - Fill qualifier default*, then field 6 determines how the *current* location is defined, example, by institution or by sublocation.

The *Hold Fill Qualifier* (P, H or blank), will display as *Fill rules*, on the second screen (HOLDS FULL DETAIL SCREEN), of the HOLDS BY PATRON (HRT) function, and can be changed at that screen.

7. Use local patron's hold when locations match at...

[0, 1 or 2]

If field 6, *Default to Local patrons have priority* of the `HOLDS PICKUP` control codes (CHPCK) table, is set to 1 (yes) for an *H - Fill qualifier default*, then field 3 of this table, `CHRTE`, defines what a *local* patron's location means, for example, same institution or same sublocation.

- 0 Do not use the H hold fill qualifier.
- 1 The patron institution must match the checkin port institution.
- 2 The patron sublocation must match the checkin port sublocation.

Second Screen Holds Control

1. Security measures on patron holds/cancellation...

[blank, 1, 2, 3, and 4 (no spaces or commas)]

The system can require up to four types of security information (in addition to the patron barcode number) before allowing a patron to place, cancel, or view his or her hold lists in the Online Public Catalogue. This security controls access to the HOLDS DETAIL SCREEN and the Holds by Patron screen. The system checks the information entered from OPAC against the information stored in the patron's registration record.

1=password, 2=personal ID, 3=phone number, 4=first 3 letters of surname. Any combination of these can be entered, for example, 14 for personal ID and first 3 letters of surname. (If a last name has only two characters, then two characters are sufficient for the security check.) The sequence specified in this record determines the sequence in which the user will be prompted for the security information. For example, 41 indicates the patron will be asked for the first three letters of their surname and then their password. The patron has

three chances at each prompt. Any three consecutive failures at any prompt will terminate the patron identification.

2. Check for items on shelf when placing hold at...

[0, 1, 2, or 3]

The system can check, and notify the staff, that there are copies with a status of *on the shelf* that could be loaned to the patron, and that are *geographically* close (i.e., at that institution, or sublocation). This field defines whether the check should be made at all, and what is defined as the *current* location.

0 No check is made.

1 Any items at the current institution will be checked.

2 Any items at the current sublocation will be checked.

NOTE: if the *port* to which a patron is connect is defined to be a Dial Up port, it is assumed that the patron is accessing the system remotely and no check is made.

3 Any items, anywhere.

3. Suppress Pickup Location option for OPAC holds

[0 or 1]

This parameter affects only the ports for which the *Type of hold function allowed* parameter in the Sublocation Codes table (CHSC) is set to 2 to allow Online Catalogue users to access the Hold Queue Display via the **Holds** option at the Brief or Detail Display of a title.

0 Do not remove the *Pickup Location* option from OPAC.

1 Remove the *Pickup Location* option from OPAC. This prevents patrons from changing the hold pickup location or extending the hold expiry date in OPAC.

Hold Report Control Codes (CHLDP)

Select Holds Reports control codes (CHLDP) to set parameters for holds related reports and for automatically triggering recalls.

```

                                HOLDS REPORT CONTROL

HOLDS REPORT CONTROL CODE : HOLD.REPORTS
-----
1. Purchase alert after how many days (0 = none)           : 1
2. Holds : Copies ratio at which to report                 : 3
3. Report on holds which may not be filled (0-No, 1-Yes)   : 1
4. Ratio of holds to pieces to trigger recall               : 0
   (0 = recall on 1st appropriate hold)
5. Recalls. Days overdue after which to ignore items       : 10
6. Recalls. Days on loan before consideration for recall   : 1
7. Clear reports file before the run (0-No, 1-Yes)         : 1
   (otherwise only NEW entries will be reported)

Options:   Enter specified line number
? help   # line   Line by line   Print   Exit
  
```

This table determines the processing done by the HOLDS overnight processor. See OUTPUT PRODUCTION CODES [COPC] in the *Output Production Menu* [COPM].

- | | | |
|---|--------------------|--|
| 1. Purchase alert after how many days | [0, or any number] | Report any holds whose average number of days outstanding exceeds this value. |
| | 0 | Report all holds. |
| | [number] | These are holds which have been outstanding (unfilled) for a number of days defined by this field. |
| 2. Holds: Copies ratio at which to report | [any number] | Report any titles for which the ratio of holds to copies is large, as defined by this field. |

3. Report on holds which may not be filled [0 or 1]
- 0 Do not report.
- 1 Produce a report on holds that cannot be filled (for example, copies withdrawn). This report is produced if field 3 is set to 1 (yes) **and** if the library uses the *Autocancel flag* set to YES in the HOLDS FULL DETAIL (second) screen. If field 3 in CHLDP is set to 0 (no), then no Flagged Hold Cancellation report can be produced, regardless of the *Autocancel flag* setting in the individual holds record. The list produced by this program is accessed from Flagged Hold Cancellation (CFHC), under the Item Control (ICM) menu.
- (See *Circulation User's Guide: Holds, Recalls, Traces: Autocancel holds option*, and *Item Control: Flagged Hold Cancellation [CFHC]*).
4. Ratio of holds to pieces to trigger recall [any number]
- Automatically recall the first appropriate piece for the first hold in the queue once a title's ratio of holds to pieces is large, as defined by this field. Note that items beyond the hold scope are not recalled.
- 0 Recall an item as soon as a hold is placed.
- blank Do not automatically recall items.
5. Recalls. Days overdue after which to ignore items [any number]
- Do not recall items that are long overdue – that is, overdue more than the number of days specified in this field. These items may be considered lost.
6. *Recalls. Days on loan before consideration for recall* [any number]
- Do not recall items that were recently checked out – that is, on loan less than or equal to the number of days specified in this field.
7. Clear reports file before the run [0 or 1]
- Produces a list of all holds/titles with the conditions specified above and they will accumulate.
- 0 (no) The system does not clear the reports file before processing. Therefore previously reported holds and titles and NEW holds and titles are listed.

- 1 (yes) The system does clear the list and therefore only NEW holds and titles are listed.

Hold Shelf Messages (CHSHELF)

Select Hold Shelf Messages (CHSHELF) to define the status message shown on the Holds by Patron screen for items that have been captured to the hold shelf and are awaiting pickup.

```
Hold Shelf Descriptions

CODE : HOLDSHELF
-----
Descriptions for Holds by Patron - Status 530

1. Staff desc. for THIS patron      : Pickup by <L>
2. Staff desc. for OTHER patron     : Held until <L>
3. OPAC desc. for THIS patron       : Pickup by <L>
4. OPAC desc. for OTHER patron      :

Use <L> for lapse date or <T> for lapse date or time if today

Options:
? help # line Line by line Print Exit
```

Leave a field blank if you wish to use the default status message instead:
:- Held -.

- 1. Staff desc. for THIS patron

[up to 14 characters, with <L> or <T>]

Enter a status message to display on the *staff* Holds by Patron screen if the item is on the hold shelf *for the patron shown*. Add <L> to display the Hold Lapse Date. Add <T> to display the Hold Lapse Date only if it is other than today, and otherwise display the Hold Lapse Time.

Leave the field blank if you wish to display the default status message instead: :- Held -.

- 2. Staff desc. for OTHER patron

Same as field 1, except display this status if the item is on the hold shelf *for a different patron than the one shown*.

3. OPAC desc. for THIS patron Same as field 1, except display this status on OPAC's Holds by Patron screen.

4. Staff desc. for OTHER patron Same as field 2, except display this status on OPAC's Holds by Patron screen.

Qualifier Codes (CQUAL)

This table is called OPAC Qualifier Codes because the same table is used by the OPAC and Circulation modules. In OPAC, codes from the table control the scope of a search entered by a patron; in Circulation they control the locations which can satisfy a hold.

This table defines the *Hold Scope* appropriate for holds placed at a particular port. This table is particularly useful in multi-institution, multi-library systems. A code selected from this table can be entered into the *Default Hold Scope* field of the HOLD PORT CONTROL (CPH) table. There are two ways to define a scope which will include all items in the system:

- If an “*” is placed in the *Default Hold Scope* field for a Hold port (CPH), then the system treats the scope as system wide.
- The library can create a Qualifier Code of ALL and define it as including all institutions in the system.

NOTE: If you change or add Qualifier Codes (in CQUAL or MQUAL), you must run Qualifier Code Posting (PQAL) from the QUALIFIER MAINTENANCE MENU in Utilities to update the system. This process may take several hours to complete. Execute this process only when all users are logged off.

Access Select QUALIFIER CODES (CQUAL) to access the table which establishes codes used by the *Hold Scope* function.


```

                                OPAC QUALIFIER CODES

Number of records : 10
Code                   Description of code
-----
1. A/VA/V             Items in system
2. ALII              Items in ALII
3. ALL               ALL ITEMS IN SYSTEM
4. AU               Items in AU
5. AUAV            AV items in AU
6. BRA1            Items in BRA1
7. BRA2            Items in BRA2
8. BRA3            Items in BRA3
9. CAM1            Items in CAM1
10. CAM123         Items in CAM1,2,3

Options:
? help  Add item  # line  Print  Forward  Backward  Search jump
Exit
    
```

Select a code from the list to define its scope.

```

                                OPAC QUALIFIER CODES

QUALIFIER CODE : CAM123
-----
1. Description                : Items in CAM1,2,3
2. Institutions                : AU
3. Sublocations                : CAM1,CAM2,CAM3
4. Collections                : CIRC,DOCS,PER
5. Callno Prefixes            :
6. Classifications            :
7. Use qualifier for Holds Processing? : 1
   (1=Yes, 0=No)
8. Next Wider scope for Holds Processing: AU = ALL ITEMS IN AU
    
```

1. Description [text]

Free text description of the code.

Fields 2-6 [any appropriate code or blank]

Use these fields to define one or more Institutions, Sublocations, Collections, call number prefixes, and classifications, which will satisfy holds placed at this port. If any field is left blank, all holdings codes defined in

the HOLDING SET-UP MENU (CHSM) for that field will satisfy the hold. If holding setup codes are entered, then only items belonging to those holding codes can be used to satisfy a hold. In a multi-agency, multi-library system, this will allow libraries to control what materials can satisfy holds. The library can have holds filled only with material from the local collection, rather than materials belonging to another member library.

7. Use qualifier for Holds Processing [0 or 1]
- 0 (no) Use this qualifier only for narrowing a search.
- 1 (yes) Use this code as qualifier in holds as a hold scope. Only Qualifier Codes which have this field set to 1 may be used in the scope field in HOLDS BY PATRON (HRT).
8. Next Wider scope for Holds Processing [Valid qualifier code, * or, blank]
- Defines a larger scope, should the default scope not produce any items which can satisfy the hold. This scope is used when holds are automatically upgraded by the holds background processing job.
- [blank] Limits scope to first level only.
- [*] Sets scope to system-wide.
- [Qualifier Code] Expands the search to the institution defined by this qualifier.

Port Control

The ADVANCE system controls default values for individual ports using a variety of Port Control tables. Each of these tables is explained in the appropriate section of this chapter. The initial codes list is common to each of these port control tables.

- CHECKOUT PORT CONTROL (CPCC) – see *Checkout Port Control (CPCC)* on page 3-36.
- CHECKIN PORT CONTROL (CIPC) – see *Checkin Port Control (CIPC)* on page 3-40.
- REGISTER PORT CONTROL (CPRP) – see *Payment Collection Menu (CPCM)* on page 6-2.
- HOLD PORT CONTROL (CPH) – see *Hold Port Control (CPH)* on page 3-43.
- HOLDINGS DEFAULT DEFINITIONS (CEHD) – see the chapter on the Item Control Menu (ICM) in the *Circulation User's Guide*.

Ports are primarily set up in Port Definitions (PORT) under the *Systems Utilities* menu. (See the *Utilities Management Guide*.) Any new ports defined in the Port Definitions (PORT) menu will have a corresponding entry in each of the *Port Control* tables listed above. However, port *records* can only be created, and port records can only be deleted, from the *Systems Utilities* module. Regardless of where a port is added, all fields associated with a particular control table will be blank until the record is accessed from the corresponding function.

The port code and description can be specific to a location, or a function, and are free text fields entered when the record is created in *System Utilities* for port description, or other modules for port code. See the *Utilities Management Guide* for further information on physical and logical ports.

Checkout Port Control (CPCC)

Access To access the port control table enter CHECKOUT PORT CONTROL (CPCC) which defines defaults and location information for the Checkout function.

```

                                CHECKOUT PORT CONTROL

                                Number of records : 61

Code          Description of code
-----
1. 000        System Console
2. 001        Line 1 - system printer
3. CIRC1      Circ Checkin 1
4. CIRC2      Circ Checkin 2
5. COUT1      Circ Checkout 1
6. COUT2      Circ Checkout 2
7. CIRCSUP    Circ Sup. office
8. HOLDS      Holds desk
9. REF1       Ref. Desk 1
10. REF2      Ref. Desk 2
11. PUB1      Public Terminal 1
12. PUB2      Public Terminal 2
13. PUB3      Public Terminal 3
14. RBR1      RBR 1

Options:
? help # line Print Forward Backward Search jump Exit
```

To modify Checkout Port Codes, enter the line number at the *# line* prompt. The system displays existing information as shown below. Checkout port codes are updated the same way as all other codes.

```

                                CHECKOUT PORT CONTROL

CHECKOUT PORT CONTROL CODE : COUT1
-----
Description                    : CIRC Checkout 1
2. Checkout Calendar Name      : MCAL
3. Checkout Institutions       : AU
4. Checkout Sublocations       : CAM1
5. Checkout Collections        : CIRC = Circulation Desk
6. Checkout receipt (1 = Yes)  : 0
7. Produce inserts (1 = Yes)   : 1
8. Default Bibliographic Format :
9. Default Circulation code    : GEN1=General Collection Books
10. Collection required (1 = Yes):
11. Default Sublocation        :
12. Default Collection         :
13. Required Membership Groups :

Options:
? help # line  Line by line  Copy   Print   Exit

```

- | | |
|--|---|
| Description | [text]

The free text description of a port can only be added, or modified in the Port Definition (PORT) menu of the System Utilities (UTIL) menu. |
| 2. Checkout Calendar Name | [Any code from the Library Calendar Maintenance (CLCM) table]

Indicates to the Circulation system what days and hours the library is open. This information is used to calculate due dates and fines. See Library Calendar Setup (CLCM) on page 4-80. |
| 3.-5. Checkout Institutions;
Sublocations;... | [Blank, or any valid code, or multiple codes separated by commas, no spaces]

Fields 3, 4, and 5 enable you to specify where items can be checked out within the library system. Leaving these fields blank will broaden the number of ports that can checkout a given item. Entering information will restrict the ports from which an item can be checked out. For example, a library may require that videotapes may be checked out only from the port at the videotape desk. You can use these three fields to specify that the videotape desk's port could only accept items with a collection code of videotapes. |

6. Checkout receipt [0 or 1]
- Specifies whether a receipt, a list of items out and their due dates for a single checkout session, is printed for the patron. The printout goes to the printer specified in your PORT record (Port Definition (PORT) table in the SYSTEMS UTILITY MENU).
- 0 (no) Do not print checkout receipts from this port.
- 1 (yes) Print checkout receipts from this port.
7. Produce inserts [0 or 1]
- Specifies whether an insert note, to be attached to an item, is printed. The inserts produced by CHECKOUT are caused by conditions set by the library in status and action codes; for example, an insert would be produced if a book with a return to cataloguing action is checked out, and the insert flag is set to 1 (yes) in Item Action Control Codes (CIA).
- Inserts can print at the terminal logged on to this port using an auxiliary printer. For these inserts to print correctly the corresponding Port Definition (PORT) table in the SYSTEMS UTILITY MENU must be set up to indicate Yes to auxiliary printer.
- 0 (no) Do not print inserts.
- 1 (yes) Print inserts.
- Fields 8-12
- These fields enable you to set up the default information that appears on the *Conversion-on-the-Fly* screen. The information you enter in fields 8, 9, 11, and 12 will appear on the Conversion-on-the-Fly screen in the related fields exactly as you enter it here. Field 10 enables you to specify that the Collection field be completed when the Conversion-on-the-Fly screen appears.
8. Default Bibliographic Format [Any valid Format Code]
- Use format codes as defined in MARC Format Codes (MFC) on the MARC Codes Menu.

-
9. Default Circulation code [Any valid Circulation Code]
Use a circulation code as defined in Circulation Codes (CCC) on the Loans Periods Menu.
10. Collection required [0 or 1]
- 0 (no) On-the-fly record can be processed without a collection code.
- 1 (yes) A collection code must be entered before an on-the-fly record can be processed.
11. Default Sublocation [Blank or Sublocation Code]
Use a sublocation code as defined in Sublocations/Building Codes (CHSC) on the Loans Periods Menu.
12. Default Collection [Blank or Collection Code]
Use a collection code as defined in Collection Codes (CHCC) on the Loans Periods Menu.
13. Required Membership Groups [Blank or Membership Group Code]
If the library has not implemented Patron Memberships, leave this field blank. If the library has implemented Patron Memberships, see [Checkout Port Control \(CPCC\)](#) on page E-22.

Checkin Port Control (CIPC)

Access Enter CHECKIN PORT CONTROL (CIPC) to access the port control table which defines defaults and location information for the Checkin function.

The initial port table is the same as that which appears for CPCC. Checkout port codes can be modified, and new codes added. To modify codes, enter the line number at the *# line* prompt. The system displays existing information. Checkout port codes are updated the same way as all other codes.

```

                                CHECKIN PORT CONTROL

CHECKIN PORT CONTROL CODE : CIRCL
-----
Description                      : Circ Checkin 1
2. Checkin Calendar Name          : MCAL = MAIN LIBRARY CALENDAR
3. Checkin Institutions           : AU = ADVANCE University
4. Checkin Sublocations           :
5. Checkin Collections            :
6. Only checkin item checked out here:
   (1 = Yes)
7. Item must return to here      : 1
   (1 = Yes)
8. Checkin receipt (1 = Yes)     : 0
9. Produce inserts (1 = Yes)    : 1

Options:
? help # line  Line by line  Copy  Print  Exit
    
```

Description [text]

The free text description of a port can only be added, or modified in the PORT DEFINITION (PORT) menu of the SYSTEM UTILITIES (UTIL) menu.

2. Checkin Calendar Name

[Any code from the Library Calendar Maintenance (CLCM) table]

Indicates to the Circulation system what days and hours the library is open. This information is used to calculate due dates and fines. See

Library Calendar Setup (CLCM) on page 4-80. You should use the same calendar for checkin as you use for checkout.

Fields 3-5

[Blank, or any valid code, or multiple codes separated by commas, no spaces]

Specifies where items can be checked in within the library system. Leaving these fields blank will broaden the number of ports that can checkin a given item. Completing them restricts the ports from which an item can be checked in. For example, a library may require videotapes be checked in only at the port at the videotape desk and this port could be specified to accept videotapes only.

Fields 3 to 5 allow the library to define one or more institution codes, sublocation codes, and collection codes, whose items can be checked in at this port. If left blank, then items for institutions, sublocations or collections within the system can be checked in at this port. If you wish to be restrictive about where materials can be checked in then codes should be entered into these fields.

6. Only checkin item checked out here

[0 or 1]

Here refers to the port as defined in the SYSTEMS UTILITY menu PORT DEFINITION (PORT) table.

0 (no) Allows checkin of items that were not checked out from this port.

1 (yes) Only items that were checked out at this port can be checked in at this port.

7. Item must return to here

[0 or 1]

Here refers to the port as defined in the SYSTEMS UTILITY menu PORT DEFINITION (PORT) table.

0 (no) Allows checkin of items that were not checked out from this port.

1 (yes) Items checked out at this port must be routed back to this port if checked in elsewhere in the system. This setting is used if field 6 under SUBLOCATION/BUILDING CODES (CHSC) is set to 2.

8. Checkin receipt [0 or 1]

Specifies whether a receipt is printed for the patron. The printout goes to the printer specified in your PORT record (Port Definition (PORT) table in the SYSTEMS UTILITY MENU).

0 (no) Do not print checkin receipts from this port.

1 (yes) Print checkin receipts from this port.

9. Produce inserts [0 or 1]

0 (no) Do not print inserts from this port.

1 (yes) Print inserts from this port.

Specifies whether an informational insert note is printed for attachment to the item. The inserts produced by CHECKIN are caused by conditions set by the library in status and action codes; for example, an insert prints if a book with a return to cataloguing action is checked out, and the insert flag is set to 1 (yes) in Item Action Control Codes (CIA).

If an item has a hold, has been declared Lost or Claimed returned, if it needs to be routed to an owning location, or has any other status or action code containing a *produce inserts* flag, you will be alerted and an insert produced.

Inserts can print at the terminal logged on to this port using an auxiliary printer. For these inserts to print correctly the corresponding PORT DEFINITION (PORT) table in the SYSTEMS UTILITY menu (USUM) must be set up to indicate Yes to auxiliary printer.

Hold Port Control (CPH)

Access Enter HOLD PORT CONTROL (CPH) to access the port control table which defines defaults and information for the *Holds* function.

The initial port table is the same as that which appears for CPCC. Hold port codes can be modified, and new codes added. To modify codes, enter the line number at the *# line* prompt. The system displays existing information. Hold port codes are updated the same way as all other codes.

```

                                HOLDS PORT CONTROL

HOLDS PORT CONTROL CODE : CAM3
-----
Description                   : CAM3 CIRC PORT
2. Default Hold code           : HCD = Default Hold Code
3. Default Pickup Institution  : AU = ADVANCE University
4. Default Pickup Sublocation  : CAM3 = University Lib #3
5. Default Hold scope          : CAM3 = ALL ITEMS IN CAM3
6. Default Hold priority       : 67
7. Allow PICKUP WHERE FOUND    : 0

Options:
? help # line  Line by line  Copy   Print  Delete  Exit

```

Description [text]

The free text description of a port can only be added, or modified in the PORT DEFINITION (PORT) menu of the System Utilities Menu (UTIL).

2. Default Hold code [Hold code or blank]

This default code is assigned to each hold as it is placed, and can be changed in the HOLDS BY PATRON (HRT) function on the Hold Detail Screen. This hold code is defined in the HOLD CODES (CHC) table of the GENERAL CODES MENU (CGCM). See *Item Control Codes* on page 7-1.

[blank] If this field is blank and there is no hold code in the patron group code, when a patron in OPAC tries to place a hold, the system prompts: No copies of this title may be held. From Holds by Patron (HRT), staff get the same message but also are prompted: Continue (Y/N)?

- 3-4. Default Pickup Institution;
Sublocation [Institution/Sublocation code, <P>, or blank]
- These fields will usually be the same as the default locations for the port itself. But they can be different. If the patron is placing a hold from a port defined as a remote dial-up port, then the default institution and sublocation might be another location in the library system. (See SUBLOCATION/BUILDING CODES (CHSC): HOLDING SET-UP MENU (CHSM), and Holds Pickup Control Codes (CHPCK) found under HOLDS CONTROL(CHOLD), on the CONFIGURATION CODES MENU (CCCM) for parameters controlling a patron's ability to change default pickup locations).
- To set the location where the item is found as the default pickup location, enter <P> in the Default Pickup Institution parameter, blank in the Default Pickup Sublocation parameter, and 1 in the Allow PICKUP WHERE FOUND parameter.
5. Default Hold Scope [blank, *, or any qualifier code]
- If a default hold scope is defined in this table, it will be used in all holds placed at this port. The default scope can be changed on the HOLD DETAILS screen of HRT *Holds by Patron*.
- [blank] If you leave the default hold scope field blank, the system prompts: There are NO copies of this title that may be held.
- [*] Indicates a system-wide hold scope.
- [qualifier code] Select a code from the QUALIFIER CODES (CQUAL). Use a code defined for holds scoping. See [Qualifier Codes \(CQUAL\)](#) on page 3-32.
6. Default Hold priority [1 - 99]
- If a default hold priority is **not** set for the patron in the PATRON TYPE (CPC) table, then the system will look for a default hold priority here. The default will be used in all holds placed at this port and can be changed at the Holds Detail Screen in HOLDS BY PATRON (HRT). This affects the patron's ranking in the hold queue.
- See the *Circulation User's Manual: Holds, Recalls, Traces*, for more information on the effects of changing these defaults while placing a hold for a patron.

7. Allow PICKUP
WHERE FOUND

[0 or 1]

Specifies whether the system allows a hold to be placed with a pickup location that will be set to the location at which the item is found.

NOTE: This parameter has an effect only if the “Default routing of held items to patron’s home locn” parameter in Holds Control Codes (CHLDC) found under HOLDS CONTROL(CHOLD) is set to 0 (no).

0 (no) Do not allow option of pickup where found.

1 (yes) Allow option of pickup where found.

If the system offers a choice of pickup locations, this option is displayed as Collect the held item from the library where found.

To set the location where the item is found as the *default* pickup location, also enter <P> in the Default Pickup Institution parameter and blank in the Default Pickup Sublocation parameter.

For a hold set to be picked up where found:

- The Pickup field on the HOLD DETAIL SCREEN shows (Pickup where held) until the item is captured.
- If the hold is cancelled before it has been captured, the Notice Agency in the Cancellation Notice is set to the location at which the hold was placed because an actual pickup location has not yet been assigned.

Block and Fine Description (CPBF)

This code displays on the blocks screen for those blocks which show summary of charges, for example, Production Charges.

Access Enter CPBF, to select the Block/Fine Description Codes from the Circulation Configuration Codes menu.

```
                                BLOCK FINE DESC

Number of records : 2
Code  Description of code
-----
1. 1   Production charge for photocopying.
2. 2                               Total Due:

Options:
? Help  Add item  # line  Print  Forward  Backward  Search jump
Exit
```

Select a code to change the description or use the *Add item* option to create a new code.

```
                                BLOCK FINE DESC

BLOCK FINE DESC CODE : 1                               *** New Record ***
-----
1. Code                : Production charges for photocopying.

Options:
? help  # line  Line by line  Copy  Print  Delete  Exit  File
```

1. Code

[text]

Enter a description of the code.

4

Loan Periods

Loan period codes are used to specify borrowing privileges for different types of materials, and groups of patrons. This chapter describes the steps necessary for defining loan periods and establishing policies for these different groups in the library system. The following types of loan codes are described:

- **Holdings Codes** or records define different owning and/or shelving locations which control certain borrowing rules, for example, the institution, the sublocation (library or its branches), the owning collection (department within a library), or the shelving location (call number prefix, or classification).
- **Circulation Codes** are general loan policies affecting a collection, or type of material.
- **Patron Type Codes** are general loan policies affecting a type of borrower.

Patron Group Codes are tables combining the Circulation Codes and Patron Type Codes to create more specific loan rules and policies

In addition to describing these codes, this chapter also explains how to *Setup Library Calendars* and build the *Loan Matrix*.

Loan Periods Menu (CLPM)

Select Loan Periods Menu (CLPM) from the Circulation Codes Menu (CCM) to access these tables.

```
DD MMM YYYY          Geac ADVANCE Library System (#.##)          XXXXX YY
HH:MM                Your Library Name

CIRCULATION LOAN PERIODS

1. CHSM  Holding Setup Menu
2. CLCM  Library Calendars

3. CCC   Circulation Codes
4. CCGC  Material Group Codes
5. CPC   Patron Type Codes
6. CPGC  Patron Group Codes
7. MBP   Materials Booking Patterns

8. CBLM  Build Loan Matrix
9. CPLM  Print Loan Matrix

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help.
Press <ENTER> to return to previous level :
```

The Materials Booking Patterns (MBP) menu only displays for those libraries using the optional Materials Booking module.

Loan Policy Codes and Tables

On the Circulation Loan Periods menu, five of the entries deal with specific groups of codes. Each of the menu entries is dealt with in detail in its own section of this chapter. The five groups of codes are as follows:

- **Holdings Codes** specify the physical location of an item. There is a hierarchy of five levels of holdings records, providing an ever-increasing specificity of location description. The five levels are grouped under their own menu entries on the Holding Setup Menu (CHSM).
- **Circulation Codes** are generic loan policies for a single collection or type of material. These policies include: length of borrowing period, grace period, renewal periods, and limits on numbers of

items which can be checked out or renewed. They are used in conjunction with Patron Types to create more specific loan policies which allows variation depending on the type of patron borrowing this type of material.

- **Material Group Codes** define common loan policies which may apply to several collection types. These codes are broadest in scope and can be considered as very general loan policies which function at the system level; for example, in the unlikely situation that no other more specific code is defined for an item or a patron, the system looks here for basic loan rule information.
- **Patron Type Codes** identify patrons by categories which the library wishes to use for descriptive, and/or statistical, purposes. A few loan policies are established for individual Patron Types; for example, whether they can allow additional borrowers to checkout material on their cards, default hold priority, number of holds to which they are entitled, and expiration dates, if appropriate. However, most of the specific loan policies are established at the Patron Group Code (CPGC) level.
- **Patron Group Codes** are used to cluster patron types into groups which are given the same circulation privileges/constraints. Additional defaults and parameters are established for this grouping of patron types, but the primary function of the Patron Group Code is seen when used in conjunction with a Circulation Code. This combination defines the greatest level of specificity for due dates, fine policies, and patron limits.

Library Calendars

The menu entry, *Library Calendars* (CLCM), enables you to access and set up the calendars for each institution, location, or department in the system. These calendars are used by the system in calculating due dates and fine amounts. For example, the calendar prevents the assignment of due dates that fall on days the library is closed. The calendar is also accessible from the Online Public Access Catalogue, to advise patrons of library/departmental hours.

Loan Matrix

The last two menu items deal with the *Loan Matrix*. When building the loan matrix the system gathers together all the various tables and codes which control circulation rules and creates the matrix it will use to determine loan periods, and associated circulation rules.

Materials Booking

If your library uses the optional Materials Booking Module, a menu option is displayed which allows you to establish Materials Booking Patterns.

Holding Codes Setup

There are three major types of information that an automated library system stores about material in the collection:

- Authority records, which may have one or more bibliographic records linked to them (example, LC name and subject authority headings).
- Title-specific bibliographic records.
- Item or copy-specific *holdings records*.

This section describes setup procedures for **holdings records**, which includes institution, sublocation, collection, call number prefix, and classification codes. The Holding Setup Menu (CHSM) can be accessed from either the circulation, or the cataloguing module. In the Cataloguing Module the Holding Setup Menu (CHSM) is found under the Cataloguing Holdings Menu (CHM).

Holding Code Records

Holding Code records indicate the locations of items. Items held at different institutions, buildings, or locations within a building, often have different circulation policies. This policy differentiation, based upon holding location, is especially important in a multi-agency or network environment, where the collections of several institutions are stored in the same system and shared by all patrons.

Typical network situations are multi-campus university systems, university or public library systems with multiple branches, or a consortium where totally different library types (public and academic) are on the same computer system. These networks may share their resources but, at the same time, maintain an independent status for each member library. Holding level codes are not essential for defining circulation policies in a **single** institution system. Circulation policies for a single institution system can be defined by Circulation Codes/Patron Group codes only. In such a situation the Holding level codes would indicate physical shelving locations only.

Holding code setup allows the you to define and maintain multi-level designations of holding locations. Up to five possible levels of holding location codes are allowed:

- institution
- sublocation or building

- collection
- call number prefix
- classification codes

The structure is hierarchical, with institutions at the top and classification codes at the bottom. Overlapping among groups is likely to occur at the level of collection, call number prefix and classification codes where boundaries are not clearly defined. For example, a variety of classifications, call number prefixes or collections may be valid for any given sublocation or institution. Or, all collections might have valid call number prefixes such as folio or Ref.

Removing Holdings Codes

It is not advisable to remove Holdings Codes once they have been used on a Piece. Only remove a Code once you are absolutely sure that nothing references it.

Holding Setup Menu (CHSM)

Access Enter Holding Setup Menu (CHSM) on the Loan Periods Menu (CLPM) to display the Holdings Setup Menu.

```

DD MMM YYYY          Geac ADVANCE Library System (#.##)          XXXXX YY
HH:MM                Your Library Name

                                HOLDING SETUP MENU

                                1. CHIC Institution Codes
                                2. CHSC Sublocation/Building Codes
                                3. CHCC Collection Codes
                                4. CHPC Call# Prefix Codes
                                5. CHNC Class Number Codes
                                6. CDPT Default Price Tag

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help.
Press <ENTER> to return to previous level :

```

The only entry on this menu which is not related to Holding Codes is the Default Price Tag.

The various hierarchical Holding Codes interact with Circulation Codes, and also control activities associated with particular ports. Once the Holding Codes, and their associated default values are defined here, the codes are entered into various tables throughout the system. For example, to identify the location and permitted activities of a port. (See [Checkout Port Control \(CPCC\)](#) on page 3-36, [Checkin Port Control \(CIPC\)](#) on page 3-40, and [Hold Port Control \(CPH\)](#) on page 3-43.

Depending on the level of the Holding Code, various parameters are also set which control circulation activities. For example, at the Sublocation/Building Codes level many of the parameters relating to holds processing are defined, and control holds functions at any terminal/port associated with that Sublocation/Building.

These codes also display on all item record detail display screens, at all staff search screens, and in the OPAC (if item level access is permitted for patrons). Only in these item records do both the codes and their descriptions appear. In all other screens it is only the code. The System Administrator can control which of these Holdings Codes display and in what sequence. (See Online Catalogue Guide). The codes assigned to each of these levels must be sufficiently descriptive to assist patrons and staff in locating material.

Fields Common to all Levels

Three of the most important fields in this hierarchical scheme are used in all Holding Code levels. At each Holding Code level a default Material Group Code, Circulation Code and Loan Code Override Level can be entered which controls some loan and fine rules for terminals assigned to that location.

Material Group Code

Each of the five levels contains a field for Material Group Code default. The Material Group Code can define common loan policies applicable to a group of collections, in the same manner that a Circulation Code defines loan policies for one collection of material. Unless your library has specific needs for creating multiple Material Group Codes, one system established default can be used for all Holding Code levels, (normally defined as Default Circulation Group Code [DCGC]). This code is defined in *Material Group Codes* (CCGC). The Material Group Code is broad in scope and can be considered as identifying very general loan policies which function at the system level, for example, in the unlikely situation that no other more specific code is defined for an item or a patron, the system looks here for basic loan rule information.

Fine amnesty can be controlled by alternate use of Material Group Codes. A Material Group Code affects all levels of Holding Codes in which that Material Group Code is defined as the default. If you change its rules and its Loan Code Override Level to 99, so that it always takes precedence, you will cause a change in all items associated with that Material Group Code through the various levels of Holding Codes. (Material Group Codes normally have a very low Loan Code Override Level, even 0, to prevent this very general code from determining loan rules.) If you wish to suppress fines for a period of time you could change every individual Circulation Code in the system; a time consuming task in a large institution. Or you can change the fields in the Material Group Code affecting fines and its Override level, and that will affect all lower levels of Holding Codes. Note that the field 7 (Only Holding level) in the Institution codes (CHIC) table which tells

the system not to look beyond the item's Circulation Code, which is the lowest level of the hierarchy, for loan rules would have to be temporarily changed to no, for this to take effect. See *Institution Codes (CHIC)* on page 4-10.

Loan Code Override Level

This is a number assigning a priority level from 99, highest, to 0, lowest. Using this number, the library determines which Holding Code level is considered most important in determining loan rules. When a patron checks out a book, the system looks at all levels of holding codes appearing in the item record, starting from classification number, and going up to institution, to find the one with the highest Loan Code Override Level. It then takes the Circulation Code default for that Holding Code and, in conjunction with the Patron Type, determines the loan rules. See *Patron Group Codes (CPGC)* on page 4-63. For fields common to both Material Group Codes (CCGC) and Circulation Codes (CCC), the system uses the values based on the higher loan code override level, for example, maximum renewals.

Circulation Code

A subsequent section of this chapter details what system activities are controlled by Circulation Codes (See *Circulation Codes (CCC)* on page 4-39), but in general, they define generic loan policies for a single collection or type of material. Once the system has found a Circulation Code for this type of material, it then looks to the Patron Type and finds rules for how this material is to be loaned to this type of patron. (See *Patron Group Codes (CPGC)* on page 4-63.)

Holding Codes and Circ Codes in Item Records

All levels of Holding Codes can be assigned to item records (though not all **have** to be assigned) to identify the ownership and shelving location of that item. In addition, Circulation Codes can also be entered directly into item records. This most specific, or lowest, level is the one the system looks to first to find the circulation rules to be applied. If a Circulation Code is added to an item record, it automatically gets a loan code override level of 98, meaning it takes highest priority in determining loan policies. If no Circulation Code appears in the item record then the system looks to each higher Holding Code level in turn to find the one with the highest priority, which then indicates the default Circulation Code to be used. From the perspective of system processing, it is most efficient to have Circulation Codes specified directly in the item records.

Institution Codes (CHIC)

Access Enter Institution Codes (CHIC), on the Holding Setup Menu (CHSM) to display the Institution Codes screen. The screen shows a list of sample institution codes. Institution codes are the broadest level of holdings designation in ADVANCE.

INSTITUTION CODES TABLE	
Number of Records:4	
Codes	Description of codes
1. APL	ADVANCE Public Library
2. AU	Alberta University
3. GOV	Government Library
4. PUB	Local Public Library

Options:
? help Add item # line Print Forward Backward Search jump
Exit

Editing Institution Codes Institution codes can be added, modified, deleted and printed. To modify or delete existing codes, first enter the number corresponding to the desired institution from the above screen. The system displays all pre-defined information.

INSTITUTION CODES

INSTITUTION CODE : AU

```

-----
1. Institution Name           : ACADEMIC LIBRARY STANDARDS
2. Name Displayed In OPAC(max. 6 ch.): ACAD
3. 049 Institution Prefix    : ALS
4. Loan Code Override Level (1-99) : 80
5. Circulation Code (Default #5)   : GEN1 = GENERAL COLLECTION LOANS (2+
6. Material Group Code (Default #5) : DCGC = DEFAULT MATERIAL GROUP CODE
7. Only Holding level (1 = Yes)    :
   Loan periods
8. Disable Rebuild of (1 = Yes)    :
   Loan Tables During Checkout
9. Notice Header for Institution.   :
10. Suppress display from OPAC (1=Yes): 0
11. NUC Symbol for this institution : CaOMain

Valid Sublocations/Buildings      : CAM2,CAM1,CAM3,LRC,NEW2,ALII

```

Options:

```
? help # line Line by line Copy Print Delete Exit
```

To edit a code record field, enter the line number. Use the *Delete* command to remove the code record permanently from the system. To save changes, use the *File* command. Use the *Exit* command to exit without saving any changes.

To add new institution codes to the existing list, use the *Add item* command. The system prompts:

```
Enter the code you wish to add. :
```

Enter one to 13 characters for the institution code to be created. The following blank definition screen is generated when an institution code is entered.

```

                                INSTITUTION CODES

INSTITUTION CODE : new                                     *** New Record ***
-----
1. Institution Name                                         :
2. Name Displayed In OPAC(max. 6 ch.):
3. 049 Institution Prefix                                  :
4. Loan Code Override Level (1-99)                       :
5. Circulation Code (Default #5)                         :
6. Material Group Code (Default #5)                     :
7. Only Holding level (1 = Yes)                          :
   Loan periods
8. Disable Rebuild of (1 = Yes)                          :
   Loan Tables During Checkout
9. Notice Header for Institution.                         :
10. Suppress display from OPAC (1=Yes):
11. NUC Symbol for this institution                       :

Valid Sublocations/Buildings                             :
```

Enter the definition for each field of the record. When the last field is completed or skipped, the command options appear at the bottom of the screen. Remember to save newly-created codes by using the *File* command. Definition of valid Sublocation/Buildings codes are explained in *Sublocation Codes*; they can not be modified from this screen.

- 1. Institution name [text]

Displays the Institution name along with the Institution code, on item records, or displays the Institution name when an Institution code is selected from a browse list.
- 2. *Name Displayed in OPAC* [6 characters]

This field allows an abbreviated descriptive name for display in the OPAC Brief and Summary displays. This name is also displayed on summary screens defined by Holdings Display Definition (HDD) and by OPAC Holdings Display (OHD).
- 3. 049 Institution Prefix [Bibliographic utility code or blank]

Identifies the MARC holding code which identifies this Institution in your cataloguing utility (OCLC, RLIN, etc.). When tapeloading or down-loading records from the utility, ADVANCE generates one item record for

each occurrence of this Institution prefix in the 049 field. If your library uses the 852 field for item specific data while cataloguing, ADVANCE uses the Institution Prefix from that field.

4. Loan Code Override Level

[1 - 99]

See *Fields Common to all Levels* on page 4-8. The number entered into this field determines the priority of this Holding code when compared with other levels of Holding codes assigned to the same item record. Within holdings setup, the level with the highest number determines the Circulation code chosen to determine loan periods. (See field 5 for default Circulation Code). Every level of the Holding Code hierarchy allows a Loan Code Override Level to be set. If the level is high (99 is the highest), the Circulation Code defaulted at that level will always be selected. If the level is low (0 is the lowest), the Circulation Code at this level will always be overridden by one with a higher priority. If the library puts Circulation Codes in the item record directly (for example, rather than having them derived from Holding code), that level is automatically set to 98. Generally, the level where the library wants the Circulation policy to be determined is the one given the highest priority. This might be at the Sublocation (example, Branch level), or the Collection (example, departmental level), or at the Call number prefix (example, format or shelving location level). Usually the library wants circulation policies established at a more specific location/level than the Institution, so the value in the Loan Code Override Level field of Institution is often lower than that of other Holding Code levels.

5. Circulation Code (Default#5)

[Any circulation code]

Use a circulation code as defined in Circulation Codes (CCC) on the Loans Periods Menu.

6. Material Group Code (Default #5)

[Any Material Group Code, usually DCGC, or blank]

Displays the default Material Group Code (Default #5) and its description for this Institution. The actual codes must be entered when modifying or adding code records. Available codes can be displayed by entering two question marks (??). These codes define circulation policies and rules, rather than where the material is shelved. See *Material Group Codes (CCGC)* on page 4-53.

7. Only Holding level loan periods (yes or no) [0 or 1]
- 0 (no) If a circulation code occurs on the item record, the system checks the loan matrix for a circulation code that supersedes it.
- 1 (yes) If a Circulation Code is found on the item record, it does not have to check all the higher levels. Normally at checkout, the system checks all Holding Code levels to determine which level has the highest priority and uses that level's *Default Circulation Code*.
8. Disable rebuild of Loan Tables During Checkout [0 or 1]
- 0 (no) The loan matrix is rebuilt each time a patron checks out an item whose circulation code is not linked to that patron group code.
- 1 (yes) Usually this field is set to 1. The system builds the loan matrix once — the first time a patron of a Patron Group Code checks out an item assigned to a Circulation Code not linked to the Patron Group Code.
9. Notice Header for Institution [Any Notice Header Code]
- This field accepts a code defined in *Notice Headers by Location (COPN)*, under the *Output Production Menu (COPM)*. Available codes can be displayed by entering two question marks (??). The *Notice Headers by Location (COPN)* table allows you to create a four line display of library name, address, telephone number, and/or message which prints at the top of all patron notices produced for this institution. Individual notice header codes can also be specified for sublocations within Institutions. See *Sublocation Codes (CHSC)* on page 4-16.
10. Suppress display from OPAC [0 or 1]
- Suppresses the display of holdings for a bibliographic item.
- 0 (no) All holdings are shown on the OPAC item display (Brief or Full Display Screens).
- 1 (yes) All holdings (both monographs and serials) in the location are suppressed from the OPAC item display (Brief or Full Display Screens). Staff searches from the other modules are unaffected.

11. NUC Symbol for
this institution

Alphanumeric.

Enter the USMARC code that identifies this institution. To obtain these codes, see *Symbols of American Libraries* which is maintained by the Library of Congress. This code identifies the holdings of this institution and is exported in the 852 \$a field.

Valid Sublocations/
Buildings

This field cannot be edited from this screen. The valid Sublocations/Buildings associated with this Institution Code are automatically derived from the Institution Codes specified for the Sublocation/Building codes defined in the next table.

Sublocation Codes (CHSC)

Sublocation codes define units within an institution. They may refer to a building or complex. An institution may have many sublocations. Sublocation code definition includes:

- the institution to which the sublocation belongs,
- the loan code override level,
- the default circulation and material group codes,
- how items are allowed to be circulated, routed, or returned,
- various parameters to control the OPAC holds function.

Access Enter Sublocation/Building Codes (CHSC), on the Holding Setup Menu (CHSM) to display the Sublocation Codes screen. The screen shows a list of sublocation codes.

SUBLOCATION CODES TABLE	
Number of Codes	Records : 7 Description of codes
1. ALII	AU Main Library & Info. Center
2. BRA1	Public Library Branch #1
3. BRA2	Public Library Branch #2
4. CAM1	University Campus #1
5. CAM2	University Campus #2
6. LAWS	University Law Library
7. MAIN	Main Public Library

Options:
 ? help Add item # line Print Forward Backward Search jump
 Exit

Sublocation codes can be added, modified, deleted, and printed. To modify or delete existing codes, enter the number corresponding to the desired sublocation from the screen.

The system displays all of the predefined information.

SUBLOCATION CODES

SUBLOCATION CODE : CAM1

- ```

1. Sublocation Description :
2. Name Displayed In OPAC :
3. Institution/Agency :
4. Loan Code Override Level (1-99) :
5. Circulation Code (Default #4) :
6. Material Group Code (Default #4) :
7. Return to Original (1=subl. ; 2=port) :
8. Route to Original Sublocation (1=yes) :
9. Type of hold function allowed :
 (0=none,1=title hold,2=holds screen)
10. Display names on holds (0=No, 1=yes) :
11. Allow patrons to CANCEL holds (0=No,1=Yes) :
12. Block codes that prevent holds (e.g. 2,6) :
13. Notice header code for this location :
14. Suppress display from OPAC (1=Yes) :

```

## Options:

```
Forward ? help # line Line by line Copy Print Delete Exit
```

To change a field of an existing code record, select the line number option and enter the specific line number. Use *Delete* to permanently remove a code record from the system. To save a change made, use the *File* command. Use the *Exit* command to exit without saving changes. To add new sublocation codes to the list, use the *Add* command on the screen listing existing Sublocation/Building codes. The system prompts:

```
Enter the code you wish to add. :
```

Enter one to thirteen characters for the new sublocation code record. When you enter the new code, the system displays a blank definitions screen.

## First Page

```

 SUBLOCATION CODES

SUBLOCATION CODE : CAM1
------(Page 1 of 2)
1. Sublocation Description : Academic Library MAIN +
2. Name Displayed In OPAC : CAM1
3. Institution/Agency : AU = ACADEMIC LIBRARY +
4. Loan Code Override Level (1-99) : 80
5. Circulation Code (Default #4) : GEN1 = GENERAL COLLECT+
6. Material Group Code (Default #4): DCGC = DEFAULT MATERIA+
7. Return to Original (1=subl. ; 2=port) :
8. Route to Original Sublocation (1=yes) : 1
9. Type of hold function allowed :
 (0=none,1=title hold,2=holds screen)
10. Display names on holds (0=No, 1=yes) :
11. Allow patrons to CANCEL holds (0=No,1=Yes) : 1
12. Block codes that prevent holds (e.g. 2,6) :
13. Notice header code for this location :
14. Suppress display from OPAC (1=Yes) : 0

Options:
Forward ? help # line Line by line Copy Print Delete Exit

```

Enter the definition for each field of the record. Save newly created codes by using the *File* command.

- |                            |                                                        |                                                                                                                                                                                                                                                                                      |
|----------------------------|--------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Sublocation Description | [text]                                                 | This free text description appears, along with the Code, on all browse screens from which this code can be selected. It also appears on the detailed item record for items with this sublocation. It does not appear on public or staff search screens, only the code appears there. |
| 2. Name Displayed In OPAC  | [text]                                                 | This field allows an abbreviated descriptive name for display in the OPAC Brief and Summary displays. This name is also displayed on summary screens defined by Holdings Display Definition (HDD) and by OPAC Holdings Display (OHD).                                                |
| 3. Institution/Agency      | [Institution code to which this sublocation is linked] |                                                                                                                                                                                                                                                                                      |

This field links sublocation codes to institution codes. When a valid Institution Code is entered here, the sublocation code automatically displays in the *Valid sublocation/building* list of the Institution record. Many sublocations can refer back to the same Institution.

4. Loan Code Override  
Level

[1 - 99]

Determines whether the Circulation Code, if any, associated with this Sublocation should take priority over any other level of Holding Code entered into an item record. Within holdings setup, the level with the highest number determines the loan period. If the level is high (99 is the highest), the code may never be overridden. If the level is low (0 is the lowest), the code may always be overridden. If the library sets circulation policies at the Sublocation level (example, Branch, rather than a department within a Branch) then this field should be higher than that in **lower level** holdings codes. If the library sets circulation policies at more specific levels, for example for individual departments, or shelving locations, then this field should be set at a lower level to allow the more specific location to take priority.

5. Circulation Code

[Any Circulation Code or blank]

A Circulation Code can be entered for each Sublocation. The system uses this circulation code as the default for all materials associated with this Sublocation, if the Loan Code Override Level is high enough. If the library does not want the Sublocation to serve as the controlling location for defining circulation rules then this field should be blank, or the Loan Code Override level be set very low, for example to 10.

6. Material Group Code

[Any Material Group Code, usually DCGC, or blank]

Each Sublocation should have a default Material Group Code. In most cases, there will be a single system default of `Default Material Group` (DCGC) code for all Sublocations in the system.

7. Return to Original  
(1=subl.; 2=port,  
blank)

[1, 2, or blank]

This field, and the one which follows, control the system's activities when a checked out item is returned.

[blank] The item can be returned to any sublocation.

[1] Return to original sublocation. The item must be checked in at the items sublocation.

[2] Return to original port. The item must be checked in at the checkout port.

8. Route to Original Sublocation (1=yes) [0 or 1]

[0] Do not produce a route-to slip for items from other sublocations that are returned to this port.

[1] Produce a route-to slip. Items belonging to this sublocation should be routed to this sublocation when checked in at a different sublocation.

Fields 9 - 12

These fields control how patrons place holds from OPAC. If the library does not permit patrons to place their own holds, then these fields can be set to 0 (no). These options are controlled by the sublocation of the port where the patron is placing the hold (See *Systems Utility Menu* PORT Definition [PORT]), rather than the sublocation entered into the item record, which identifies who owns, or shelves, the item. Patrons at a given sublocation can view and, if allowed, place holds on items owned by other sublocations.

9. The Type of hold function allowed: [0, 1, or 2]

[0] Answer 0 (none) to prevent Online Catalogue users from placing holds.

[1] Allow Online Catalogue users to place holds quickly from the **Hold title** option at the Brief or Detail Display of a title. The `Hold Queue` screen is not accessible to patrons if this field is set to 1. Patrons can select the title, receive confirmation of their hold (or exception messages as appropriate), and be informed of a default hold expiration date.

[2] Allow Online Catalogue users to access the Hold Queue Display via the **Holds** option at the Brief or Detail Display of a title. They can then place holds in the same manner noted above using the **Hold** option. This screen also allows users to view their own `Hold Queue` via the *Show/Cancel* option. Patrons can also cancel their own holds using this option.

10. Display names on holds [0 or 1]

- This field has an effect only if field 8, to allow Online Catalogue users to access the Hold Queue Display, is answered 2.
- 0 (no) Suppresses the display of patron names in the hold queue, when it is accessed from OPAC. Most libraries answer 0 (no) to maintain patron privacy.
- 1 (yes) Show the names and barcodes or users with holds in the Hold Queue Display. This setting affects access to the Hold Queue Display from OPAC only. Staff always have access to patron names and barcodes when placing/searching for holds from the Circulation module.
- 11.Allow patrons to CANCEL holds [0 or 1]
- This field has an effect only if field 8, to allow Online Catalogue users to access the Hold Queue Display, is answered 2.
- 0 (no) Prevents Online Catalogue users from cancelling their own holds, even if they otherwise have access to the Hold Queue Display and to their own Holds by Patron list.
- 1 (yes) Allow Online Catalogue users to cancel their own holds. At the Hold Queue Display patrons would be allowed to select the Show/Cancel option to see their own Holds by Patron screen. From there they would be able to select the Cancel # or Cancel all options.
- 12.Block codes that prevent holds [Any Transaction Code or blank]
- The library can specify (by block code number) which patron blocks (from the Circulation Transaction Code [CTC] table), should prevent an Online Catalogue user from placing or cancelling holds. (See [Transaction Control \(CTC\)](#) on page 8-3.) These codes also prevent a user from accessing the HOLD DETAIL SCREEN, and their own Holds by Patron screen. Multiple block codes can be specified. Administrative blocks always prevent user access.
- 13.Notice Header code for this location [Any Notice Header Code]
- This field accepts a code defined in Notice Headers by Location, under the Output Production Menu (COPM). Available codes can be displayed by entering two question marks (??). The Notice Headers by Location (COPN) table allows you to create a four line display of library name, address, telephone number, and/or message which prints

at the top of all patron notices produced for this sublocation. (See *Notice Headers by Location (COEN)* on page 5-43.)

14. Suppress display from OPAC

[0 or 1]

Suppresses the display of holdings for a bibliographic item.

- 0 All holdings will be shown on the OPAC item display (Brief or Full Display Screens).
- 1 All holdings (both monographs and serials) in the location will be suppressed from the OPAC item display (Brief or Full Display Screens). Staff searches from the other modules are unaffected.

**Second Page**

```
 SUBLOCATION CODES

SUBLOCATION CODE : CAM1
------(Page 2 of 2)
1. Default status override - barcoded :
2. Default status override - not barcoded :

Options:
Backward ? help # line Line by line Copy Print Delete Exit
```

Enter the definition for each field of the record. Save newly created codes by using the *File* command.

1. Default status override - barcoded

[text]

This default status text will be displayed for barcoded pieces at this sublocation, in place of the default status text defined on the Pieces Description screen of the OPAC Holdings Display table (OHD). This may be useful at branches that are not fully automated or are using only the Cataloguing module.

2. Default status  
override - not  
barcoded

[text]

This default status text will be displayed for non-barcoded pieces at this sublocation, in place of the default status text defined on the Pieces Description screen of the OPAC Holdings Display table (OHD). This may be useful at branches that are not fully automated or are using only the Cataloguing module.

## Collection Codes (CHCC)

The collection codes describe an accumulated group of library materials contained within institutions and sublocations. Various collections within a library may have different circulation policies. The right column lists the default circulation code and material group code for each Collection Code. For instance, the default codes for RBR are RESD and DCGC.

**Access** Enter Collection Codes (CHCC), on the Holding Setup Menu (CHSM) to display the Collection Codes screen.

| COLLECTION CODES TABLE |                         |      |      |
|------------------------|-------------------------|------|------|
| Number of Records : 5  |                         |      |      |
| Codes                  | Description of codes    |      |      |
| 1. A/V                 | Audio-Visual Collection | AV1  | DCGC |
| 2. DOCS                | Documents Collection    | SPEC | DCGC |
| 3. MUSC                | Music Collection        | GEN2 | DCGC |
| 4. RBR                 | Reserve Book Room       | RESD | DCGC |
| 5. SPEC                | Special Collections     | SPEC | DCGC |

Options: \_

? help   Add item   # line   Print   Forward   Backward   Search jump

Exit

Collection codes can be added, modified, deleted, and printed. To modify or delete existing codes, enter the number corresponding to the desired collection code. The system displays the following screen.



## COLLECTION CODES

```

COLLECTION CODE : Large Print *** New Record ***

1. Collection Description :
2. Name Displayed In OPAC :
3. Valid Sublocations/Buildings :
4. Loan Code Override Level (1-99) :
5. Circulation Code (Default #3) :
6. Material Group Code (Default #3) :
7. Institution/Campus (No sublocations) :
8. Return to Original :
 (1=collection; 2=port)
9. Route to Original Collection (1=yes) :
10. Suppress display from OPAC (1=Yes) :

```

To change a field of an existing code record, select the line number option and enter the specific line number. Use *Delete* to permanently remove a code record from the system. To save a change, use the *File* command. Use the *Exit* command to exit without saving changes. To add new sublocation codes to the list, use the *Add item* command on the screen listing existing Collection Codes. The system prompts:

```
Enter the code you wish to add. :
```

Enter one to thirteen characters for a code for the record to be created. The system displays a blank definition screen. Enter the definition for each field of the record. Save newly-created codes with the *File* command.

```

 COLLECTION CODES

COLLECTION CODE : A/V

1. Collection Description : Audio-Visual Collection
2. Name Displayed In OPAC : A/V
3. Valid Sublocations/Buildings : ALII,CAM1,CAM2,CAM3,LRC
4. Loan Code Override Level (1-99) : 80
5. Circulation Code (Default #3) : AV1 = AUDIO VISUAL 1
6. Material Group Code (Default #3): DCGC = DEFAULT MATERIAL GRO+
7. Institution/Campus (No sublocations) : AU = ACADEMIC LIBRARY STAND+
8. Return to Original : 1
 (1=collection; 2=port)
9. Route to Original Collection (1=yes) :
10. Suppress display from OPAC (1=Yes) : 0

Options:
? help # line Line by line Copy Print Delete Exit

```

- |                                     |                                                                                                                                                                                                                                                                                  |
|-------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Collection Description           | <p>[text]</p> <p>Appears along with the Code on all browse screens from which this code can be selected. It also appears on the detailed item record for items with this collection code. It does not appear on public or staff search results, only the code appears there.</p> |
| 2. <i>Name Displayed In OPAC</i>    | <p>[text]</p> <p>This field allows an abbreviated descriptive name for display in the OPAC Brief and Summary displays. This name is also displayed on summary screens defined by Holdings Display Definition (HDD) and by OPAC Holdings Display (OHD).</p>                       |
| 3. The valid sublocations/buildings | <p>[blank or one or more sublocation codes separated by commas, no spaces]</p> <p>This field relates collection codes to sublocations codes defined previously.</p>                                                                                                              |
| [blank]                             | <p>If this collection is valid in all sublocations then the field should be left blank.</p>                                                                                                                                                                                      |

- [sublocation code(s)] If this collection is only valid at specific sublocations enter the valid sublocation(s). Several Sublocation/Building codes can be entered, separated by commas, no spaces.
4. Loan Code Override Level [1 - 99 or blank]  
Determines whether the Circulation Code, if any, associated with this Collection code should take priority over any other level of Holding Code entered into an item record. Within holdings setup, the level with the higher number determines the loan period. If the level is high (99 is the highest), the policy may never be overridden. If the level is low (0 is the lowest), the policy may always be overridden. If the library sets circulation policies at the Collection level (for example, the shelving location, rather than a department or a Branch) then this field should be higher than other holdings codes. If the library sets circulation policies at higher levels (for example for Branches or departments) then this field should be set at a lower level to allow the more general location to take priority.
5. Circulation Code [Any Circulation Code or blank]  
A Circulation Code can be entered for each Collection. The system uses this Circulation Code as the default for all materials associated with this Collection, if the Loan Code Override Level is high enough.
- [blank] If the library does not want the Collection to serve as the controlling location for defining circulation rules then this field should be blank, or the Loan Code Override level be set very low, for example to 10.
6. Material Group Code [Any Material Group Code, usually DCGC, or blank]  
Each Collection should have a default Material Group Code. In most cases, there will be a single system default of Default Material Group Code (DCGC) for all Collections in the system.
7. Institution/Campus [One Institution Code or blank]  
A **Collection** can only be associated with one Institution in the system. Enter the code for the Institution to which this collection belongs. If you have specified a valid sublocation (field 3) you do not need to enter anything in this field.

8. Return to Original  
(1=collection.;  
2=port) [1, 2, or blank]
- This field, and the following, control the system's activities when a checked out item is returned.
- 1 If the library requires that an item be checked in only when it reaches its owning collection, then this field should be set to 1 (return to original collection)
  - 2 If the library considers the item to be checked in when it reaches the checkout port, then this field should be set to 2 (return to original port).
- [blank] An item can be returned to any collection.
9. Route to Original  
Collection (1=yes) [0 or 1]
- If checked in at a different collection, route the item to this collection.
- 0 (no) Does not assign a status.
- 1 (yes) Assigns a status of `on route` to the item and produces a route-to slip.
10. Suppress display  
from OPAC [0 or 1]
- Suppresses the display of holdings for a bibliographic item.
- 1 (yes) All holdings (both monographs and serials) in the location will be suppressed from the OPAC item display (Brief or Full Display Screens). Staff searches from the other modules are unaffected.
- 0 (no) All holdings will be shown on the OPAC item display (Brief or Full Display Screens).

## Call Number Prefix Codes (CHPC)

Call number prefix codes are used to identify classes of items more narrowly than collections. Examples of Call number prefix codes are PER for periodical, F for folio/oversize, and REF for reference. These might be collections identified by format (Video), by size (folio), or by shelving location (Rare Books, or Reference). Depending on the library's policies these Call number prefixes can be used to identify only shelving location, or circulation policies, or both. Note that more than one Call number prefix can share the same Circulation Code.

**Access** Enter Call Number Prefix Codes (CHPC) on the Holding Setup Menu (CHSM) to display the Call Number Prefix Codes screen.

On the screen, the far right columns display Circulation and Material Group Codes. For example, the default circulation and material group codes for code 2 (FOL) are GEN1 and DCGC, respectively.

```

 CALL NUMBER PREFIX

Number of records : 11
Code Description of code

1. FED FED GEN1 DCGC
2. FOL Folio GEN1 DCGC
3. FSTRIP Film Strip AV1 DCGC
4. N/C N/C N/C DCGC
5. RARE RARE RARE DCGC
6. REF REFERENCE ITEMS REF DCGC
7. VIDEO VIDEO AV1 DCGC

Options:
? help Add item # line Print Forward Backward Search jump
Exit

```

Call number prefix codes can be added, modified, deleted, and printed. To modify or delete existing codes, enter the number corresponding to the desired call number prefix code. The system displays the following screen.

```
CALL NUMBER PREFIX

CALL NUMBER PREFIX CODE : FOL

1. Call# Prefix Description : Folio
2. Valid Collections :
3. Loan Code Override Level (1-99) : 40
4. Circulation Code (Default #2) : GEN1 = GENERAL COLLECTION L+
5. Material Group Code (Default #2) : DCGC = DEFAULT CIRC GROUP C+
6. Sublocations/Buildings (No collection) :
7. Institution/Campus (No subcollections) : AU = University of Alberta

Options:
? help # line Line by line Copy Print Delete Exit
```

To change a field of an existing code record, select the line number option and enter the specific line number. Use *Delete* to permanently remove a code record from the system. To save a change made, use the *File* command. Use the *Exit* command to exit without saving changes. To add new Call number prefix codes to the list, use the *Add item* command on the screen listing existing Call number prefix codes. The system prompts:

Enter the code you wish to add. :

Enter one to twenty characters to represent the code record to be created. The system displays a blank definition screen similar to the following example for RARE.

```
CALL NUMBER PREFIX

CALL NUMBER PREFIX CODE : RARE *** New Record ***

1. Call# Prefix Description :
2. Valid Collections :
3. Loan Code Override Level (1-99) :
4. Circulation Code (Default #2) :
5. Material Group Code (Default #2) :
6. Sublocations/Buildings (No collection) :
7. Institution/Campus (No subcollections) :
```

1. Call # prefix Description [text]
 

This field, which may duplicate the code entered in the Call Number Prefix Code field, is a free text field to describe the Call number prefix. This description appears, along with the code, on all browse screens associated with this code table. It does not appear on public or staff search results, only the Code appears there.
  
2. Valid Collections [Collection Code(s) or blank]
 

The collection(s) specified in this field, by code, are those for which this call number prefix is valid.

Collection Codes(s) If this call number prefix is only valid at specific collections, you can control that by entering only the valid collection(s) into this field. Several Collection codes can be defined if they are separated by commas, no spaces.

[blank] This call number prefix is valid in all collections on the system, i.e., this call number prefix applies generally.
  
3. Loan Code Override Level [1 - 99 or blank]
 

Determines whether the Circulation Code, if any, associated with this Call number prefix code should take priority over any other level of Holding Code entered into an item record. Within holdings setup, the level with the higher number determines the loan period. If the level is high (99 is the highest), the policy may never be overridden. If the level is low (0 is the lowest), the policy may always be overridden. If the library sets circulation policies at the Call number prefix level (example, the shelving location, rather than a department or a Branch) then this field should be higher than other holdings codes. If the library sets circulation policies at higher levels (example, Branches, collections or departments) then this field should be set at a lower level to allow the more general location to take priority.

[blank] If the library does not want the Call number prefix to serve as the controlling location for defining circulation rules then this field should be blank, or the Loan Code Override level be set very low, for example to 10.

4. Circulation Code [Any Circulation Code]  
A Circulation Code can be entered for each Call number prefix. The system uses this Circulation Code as the default for all materials associated with this Call number prefix, if the Loan Code Override Level is high enough.
5. Material Group Code [Any Material Group Code, usually DCGC, or blank]  
Each Call number prefix should have a default Material Group Code. In most instances, this will be a single system default of `Default Material Group Code (DCGC)` for all Call number prefixes in the system.
6. Sublocation(s)/ Building(s) [Sublocation code(s) or blank]  
Specifies the sublocation code(s) for which the Call number prefix is valid.
- [Sublocation Code] If this call number prefix is only valid at specific sublocations, enter the valid sublocation(s). Several Sublocation/Building codes can be defined, separated by commas, no spaces.
- [blank] If this call number prefix is valid in all sublocations on the system then the field should be left blank; that is, this call number prefix applies generally.
7. Institution  
If you wish to specify that only certain defined institutions can have this as a valid Call number prefix, enter the code for the Institution in field 7. If this Call number prefix is valid for all institutions defined in the system, leave this field blank.
- NOTE: If you have entered a valid collection (field 2), fields 6 and 7 can be left blank.



## Classification Codes (CHNC)

Classification codes are the lowest level of the five-tier hierarchy of location codes. They may be truncated LC or Dewey Decimal classification numbers, such as H or HD, 6 or 699, or they may define items by format.

**Access** Enter Class Number Codes (CHNC), on the Holding Setup Menu (CHSM) to display the Classification Codes screen.

| CLASSIFICATION CODES TABLE |                                                    |
|----------------------------|----------------------------------------------------|
| Number of records:48       |                                                    |
| Codes                      | Description of codes                               |
| 1. CDISK                   | Compact disk                                       |
| 2. FILM                    | Film reels, movie                                  |
| 3. FILMSTRIP               | Film strip                                         |
| 4. KIT                     | Kit containing various related items               |
| 5. MICROCARD               | Microcard                                          |
| 6. MICROFICHE              | Microfiche                                         |
| 7. MICROFILM               | Microfilm                                          |
| 8. MICROPRINT              | Microprint                                         |
| 9. NEWSP                   | Newspaper                                          |
| 10. PHONODISC              | Phonograph disc                                    |
| 11. SLIDE                  | Slide cartridge                                    |
| 12. TAPE                   | Tape cassette                                      |
| 13. TRANSPARENCY           | Overhead projector transparency                    |
| 14. VIDEOTAPE              | Videotape cassette                                 |
| Options:                   |                                                    |
| ? help                     | Add item # line Print Forward Backward Search jump |
| Exit                       |                                                    |

Classification codes can be added, modified, deleted, and printed. To modify or delete a code, enter the number from the screen above, for example, enter 2. The system displays the current information for the code, FILM, in the format of the following screen.

```
CLASSIFICATION CODES TABLE

CLASSIFICATION CODE : FILM

1. Classification : FILM
2. Average Cost of Item : 45.00
3. Valid collections : AV= Audio-Visual Collection
4. Loan Code Override Level (1-99) : 90
5. Circulation Code (Default #1) : AV2= Audio Visual2
6. Material Group Code (Default #1) : DCGC=DEFAULT CIRC GROUP CODE
7. Sublocations/buildings (No collection:
8. Institution/campus (No subcollections:

Options:
? help # line Line by line Copy Print Delete Exit
```

To edit a field, enter the line number.

To add a new classification code to the list, use the *Add item* command at the initial browse list. The system prompts:

Enter the code you wish to add :

Enter one to twenty characters to represent the code record to be created. The system displays a blank workform. Note that this field is not limited in length, but for display purposes, 20 characters is recommended.

```
CLASSIFICATION CODES TABLE

CLASSIFICATION CODE : MFILM **** New Record ****

1. Classification : _____
2. Average Cost of Item :
3. Valid collections :
4. Loan Code Override Level (1-99) :
5. Circulation Code (Default #1) :
6. Material Group Code (Default #1) :
7. Sublocations/buildings (No collection:
8. Institution/campus (No subcollections:
```

1. Classification [text]
 

This field, which may duplicate the Classification code entered above, is a free text field to describe the Classification Code. This description appears, along with the Code, in item records having this classification code, and on all browse screens associated with this code table. It does not appear on public or staff search results, only the code appears there.
  
2. Average Cost of Item [Price in the format nnn . nn, i.e., numbers separated by a decimal point, no currency symbol]
 

Used to calculate costs for lost or damaged items. The entry `Default Price Tag (CDPT)` allows the system to supply a default value from the MARC bibliographic record for the Actual Cost field in new pieces/item records. If, however, the library wishes to assess an average price for materials in a particular classification (example, to assess a higher price for art books), the amount can be entered into this field. A general replacement cost can also be entered into `Circulation Codes (CCC)`. If there is a value in the pieces record it takes precedence.
  
3. Valid collections [Collection code(s), multiple codes separated by commas, no spaces, or blank]
 

Defines the collection code(s) for which this classification is valid.

If this classification is only valid at specific collections, enter the valid collections(s). Several collection codes can be defined in this field, separated by commas, no spaces.

[blank] If this classification is valid in all collections on the system then the field should be left blank.
  
4. Loan Code Override Level [1 - 99 or blank]
 

Determines whether the Circulation Code, if any, associated with this Classification code should take priority over any other level of Holding Code entered into an item record. Within holdings setup, the level with the higher number determines the loan period. If the level is high (99 is the highest), the policy may never be overridden. If the level is low (0 is the lowest), the policy may always be overridden. If the library sets circulation policies at the Classification level (example, the shelving location, rather than a department or a Branch) then this field should be higher than other holdings codes. If the library sets circulation policies at higher levels, example: Branches, collections or departments, then this

field should be set at a lower level to allow the more general location to take priority.

[blank] If the library does not want the Classification Code to serve as the controlling location for defining circulation rules then this field should be blank, or the Loan Code Override level be set very low (such as 10).

5. Circulation Code [Any Circulation Code]

A Circulation Code can be entered for each Classification code. The system uses this circulation code as the default for all materials associated with this Classification code, if the Loan Code Override Level is high enough.

6. Material Group Code [Any Material Group Code, usually DCGC, or blank]

Each Classification Code should have a default Material Group Code. In most instances, this will be a single system default of `Default Material Group Code` (DCGC) for all Classification Codes in the system.

7. Sublocation(s)/ Building(s) [Sublocation Code(s), multiple codes separated by commas, or blank]

The codes specified in this field are those for which this Classification Code is valid.

[Sublocation Code(s)] If this Classification code is only valid at specific sublocations, enter the valid sublocation(s). Several Sublocation/Building codes can be defined, separated by commas, no spaces.

[blank] If this Classification Code is valid in all sublocations on the system then the field should be left blank.

8. Institution/campus [Institution Code or blank]

If you wish to specify that only certain defined institutions can have this as a valid classification code, enter the code for the Institution. Multiple institutions can be entered separated by commas.

[blank] If this Call number prefix is valid for all institutions defined in the system, leave this field blank.

NOTE: If you have entered a valid collection (field 3), fields 7 and 8 can be left blank.

When the fields are completed the command option appears at the bottom of the screen. Save newly created codes by using the *File* command.

Options:

? help # line Line by line Copy Print Delete Exit File

## Default Price (CDPT)

This table allows the system to supply a default value from the MARC bibliographic record for the Actual Cost field in new pieces/item records.

**Access** Select Default Price Tag (CDPT) from the Holding Setup Menu.

```
 DEFAULT PRICE TAG

CODE : PRICE.TAG

1. TAG number for default price : 20
2. Subfield : c
```

The system uses the first occurrence of the specified field and subfield. The dollar sign is ignored and .00 is supplied if the data does not contain a decimal point. For example, each of the following five values:

123       \$123       123.00       \$123.00       123 (\$30 pbk)

from tag 20, subfield c, provide the default value 123.00, which is displayed with a dollar sign in the front on the *Actual Cost* field of the pieces/item record.

## Circulation Codes (CCC)

Circulation codes are used to determine the loan policy status of all items in a collection, or for a type of material. Loan policy specification for material includes the length of loan, grace and renewal periods, item replacement costs, hold, recall and notice codes, and restrictions on the number of items checked out, possessed and renewed at one time. Circulation codes need to be defined for each collection, or type of material, that has distinct loan requirements.

When a Circulation code is created from this menu option, its parameters are **generic**. In a subsequent step this generic Circulation code is linked to a Patron Group code. During the linking process the library will use the Circulation Code as a template and modify the generic information to create loan policies specific to that type of patron/type of material combination. One *template* Circulation Code can be attached to many Patron Groups and be modified specifically for each one. In other words, a given Circulation Code can cause different loan policies depending on which kind of patron is checking out books of that type. Faculty members checking out books from the general collection might get a three month loan, while students checking out books from the same general collection might get a two week loan.

### Setting Up Circulation Codes

When the Circulation Codes (CCC) option is selected, the first screen for setting up new circulation codes is a blank workform. To modify an existing circulation code, enter the code at the first prompt, or enter (??) to browse available codes. Select the desired code from the list using the *# line* option.

**Access** Enter Circulation Codes (CCC) on the Loan Periods Menu (CLPM) to create and edit Circulation Codes.

```
Circulation Code

Number of records = 11
Codes Description of codes

1. AV1 AUDIO VISUAL 1
2. AV2 AUDIO VISUAL 2
3. GEN1 GENERAL COLLECTION LOANS 1
4. GEN2 GENERAL COLLECTION LOANS 2
5. N/C NON-CIRCULATING
6. RARE RARE BOOK
7. REF REFERENCE
8. RESD RESERVE DAYS
9. RESH RESERVED HOURS
10. SPEC1 SPECIAL COLLECTION LOANS #1
11. SPEC2 SPECIAL COLLECTION LOANS #2

Options:
? help # line Print Forward Backward Search jump Exit
```

To create a new circulation code record, enter a code at the prompt (up to 12 characters long). For the following example, the word `Test` is used as a Circulation Code:

```
Circulation Code : Test
```

ADVANCE displays the following:

```
Table not found. Do you wish to create a new entry
(Y/N)? ___
```

Enter `Y` to confirm. A blank workform displays.



| CIRCULATION CODE                 |             | DD MM YY                       |
|----------------------------------|-------------|--------------------------------|
| Circulation code :               |             |                                |
| 1) Description                   | :           |                                |
| 2) Loan Code Override Level      | :           |                                |
| 3) Use Period                    | :           |                                |
| 4) Length of Use Period          | :           | 13) Hold Code :                |
| 5) Grace Period                  | :           | 14) Recall Code :              |
| 6) Length of Grace Period        | :           | 15) Notice Code :              |
| 7) Override Use Period (Y/N) : N | :           | 16) Held Circ Code :           |
| 8) Renewal Period                | :           | 17) Max. Items Checked/Time :  |
| 9) Length of Renewal Period      | :           | 18) Max. Items in Possession : |
| 10) Replacement Cost             | :           | 19) Max. Renewals :            |
| 11) Surcharge                    | Trans. Code |                                |
| _____                            | _____       |                                |
| 12) Period/Rule                  | Length      | Amounts                        |
| _____                            | _____       | _____                          |
|                                  | Trans.Code  | Min.Charge                     |
|                                  | _____       | _____                          |
|                                  |             | Max.Charge                     |
|                                  |             | _____                          |
|                                  |             | Recall?                        |
|                                  |             | _____                          |

Fields not applicable can be left blank and skipped over by <ENTER> key without entering data. As you move down through the fields, a Valid Entries prompt appears at the bottom left of the screen. This prompt indicates what data the field accepts.

The option command line appears after the last field has been completed or skipped.

To edit a field, enter the line number. To change the contents of several fields, use the *Line by line* command. Save changes with the *File* command.

The Circulation Code being defined at this point is generic. Once this Circulation code is attached to a Patron Group, its fields will be adapted to fit that group of patrons. Adults have different rules when they checkout an item with a given Circulation code than children; or faculty compared to students. Do not become specific, or restrictive, until the point where the Circulation Code is being attached to the Patron Group.

```

 CIRCULATION CODE DD MMM YY

Circulation code : GEN1

1) Description : GENERAL COLLECTION LOANS 1
2) Loan Code Override Level : 79 13) Hold Code : HCD
3) Use Period : D 14) Recall Code : RCD
4) Length of Use Period : 28 15) Notice Code : CND
5) Grace Period : D 16) Held Circ Code :
6) Length of Grace Period : 7
7) Override Use Period (Y/N) : N
8) Renewal Period : D 17) Max. Items Checked/Time : 10
9) Length of Renewal Period : 28 18) Max. Items in Possession : 10
10) Replacement Cost : 25.00 19) Max. Renewals : 10

11) Surcharge Trans. Code
 _____ _____

12) Period/Rule Length Amounts Trans.Code Min.Charge Max.Charge Recall?
++ D 1 0.25 14 0.25 25.00 ++
Options:
? help # line Line by line Delete File Exit
Additional parameters

```

1. Description

[text]

**Required.** Allows a free text description of the place, or type of material, whose loan rules are being defined, for example. the General Collection, Reference Collection, Adult fiction.

2. Loan Code Override Level

[0 - 99]

This field sets priority levels. It is not related to the Loan Code Override Levels described in the previous section. In Holding Codes, the Override Level determines which of the five Holding code levels has the highest priority within that hierarchy. A default Circulation code is defined within each of those Holding Codes and will be selected if its holding code's override level is the highest for that given item.

The Loan Code Override Level has a narrower purpose. Since each Circulation code has two forms (this generic one, and the one you will define more specifically when attaching it to a Patron Group) the system must be told which form of the Circulation code to use. Always set the Loan Code Override Level for this generic Circulation code to 0, and assign a higher level once the code is attached to one or more Patron

Groups. That insures that the modifications you make to tailor this code to a particular type of patron will be the one used by the system.

### 3. Use Period

[D, H, M, C, or B]

Enter as (D)ays, (H)ours, (M)inutes, (C)ontinuous. Defines the periodicity of the loan. NOTE: Continuous is not recommended.

Alternatively, enter as (B) to use a materials booking pattern as the period. This value is available at libraries that have installed the optional Materials Booking module. A (B) use period enables the library to have fixed loan periods, such as having “SHORTLOAN” items checked out between 9:00 am and 1:00 pm due at 1:00 pm, the ones checked out between 1:00 and 5:00 due at 5:00, and the ones checked out after 5:00 due at 9:30 am the next day. NOTE: You can enter (B) for non-bookable material – that is, even though the circulation code’s *Booking Type* additional parameter is blank.

### 4. Length of Use Period

[nn or nn/hh:mm whole number, or whole number followed by a slash and time, or any materials booking pattern code]

With a numeric value, this field defines the length of the *Use Period* defined above, such as 28 (D)ays, 48 (H)ours, or 60 (M)inutes. For Hours or Minutes use periods, you can optionally follow the numeric entry by a time in the form /hh:mm. This controls the way items are checked out when these (H)ours or (M)inutes use periods cause the loan period to extend **overnight**, example, Use Period: H, Length of Use Period: 12/10:00. This implies that if the 12 hour loan period takes the due time into a period when the library is closed, then the item will be due back at 10:00 am the next (open) day. If the time option is omitted then the loan period is **rolled over** into the next day. Using the 12 hour loan period example above, if the checkout was at 1:00 pm, and the library closed at 7:00 pm, the item would be due back 6 hours after opening time the next day.

If the entry is input as simply a number of hours or minutes, such as 6 hours, then the data will interact with Circulation Checkout Control (COCT):

- If the COCT field 4 (Calendar is used to calculate due date) is set to 0, then 6 hours will simply be added on to the Checkout date without testing for whether the library is open or not.

- If the COCT field 4 is set to 1, then the system checks whether the due time so calculated is after closing time on the due date. If so, then the system increments the due date to the next open day and sets the due time to a number of minutes after opening time on that day.
- The number of minutes to set is given by the COCT parameter fields 5 or 6, depending on whether the loan period has rolled over a single day or whether it was for more than a single day.

This means that if the “/” is used in this field, there will be no interaction with COCT. If the “/” is **not** used, the system relies on COCT for due time.

Alternatively, you can enter a valid materials booking pattern code for a (B) use period. These codes are defined in the Materials Booking Patterns table (MBP). For more information, see Appendix C, “Materials Booking”, in the *Circulation User’s Guide*.

5. Grace Period

[D, H, or M]

The system permits a grace period to be applied to items returned after the due date/time. The grace period can be (D)ays, (H)ours, or (M)inutes. In the Checkout Control Table (COCT), on the Configuration Codes Menu (CCCM), you specify whether overdue fines are calculated from the original due date, or from the end of the grace period. The parameter set in that table is for the whole system. This Grace Period can be different for different types of material, as well as varied for any Circulation Code once linked to a Patron Group Code.

6. Length of Grace Period

[nn or nn/hh:mm whole number or whole number followed by a slash and time]

This numeric field defines the length of the grace period defined above. For Hours or Minutes grace periods you can optionally follow the numeric entry, by a time in the form /hh:mm. This controls the way items are considered **checked in within the grace period** if the grace period expires while the library is closed. The system will continue the grace period into the next open day, to the time specified. If the time option is omitted, then the grace period is **rolled over** into the next day.

7. Override Use Period (Y/N)

[Y or N]

- Y Every time you checkout an item, the system displays the loan period and asks if you wish to override the due date.

Loan period : D7 Date Due : 04 MAY 1998 Due Time : 11:00PM  
 Do you wish to override this due date? (Y/N/(A)bort) :

Since loan periods are normally calculated for the patron type/material type combination using the Patron Group Code/Circulation Code (CPGC), answering Y to this option will unnecessarily slow down the checkout process for most operations. Also, the generic Circulation Code being created here is not the one which would normally calculate due dates. **It is strongly recommended that this field be set to N for all generic Circulation Codes.**

However, there are situations in which this field could be set to yes when you are modifying this Circulation Code in Patron Group Codes (CPGC). For example, books with a Circulation Code of REF circulate to faculty, but not to students, except with permission of a librarian. The REF Circulation Code attached to the Patron Type: Faculty would have a loan period specified. The REF Circulation Code attached to the Patron Type: Student would have a length of use period of 0 (meaning it does not circulate). However, if you also set the Override Use Period to Y in the Circulation Code for students, each time a student attempted to check out a Reference book staff would be advised that this item did not circulate to this patron type, but would also provide an override option.

- N The system allows you to check out items based on the controls established in this table. For exceptions to these rules, use the **DUE** command at checkout.

8. Renewal Period [D, H, M, B, or blank]

If an item can be renewed, specify the Renewal Period in this field in the same manner as the Use Period defined above, possibilities are (D)ays, (H)ours, (M)inutes, or (B) materials booking pattern. See [3. Use Period](#) on page 4-43.

[blank] No renewal.

9. Length of Renewal Period [nn or nn/hh:mm whole number, or whole number followed by a slash and time, or any materials booking pattern code]

This field can be specified as a numeric value, optionally followed by / hh:mm for Hours or Minutes Renewal Periods. Alternatively, this field can be specified as a valid materials booking pattern code. See [4. Length of Use Period](#) on page 4-43.

10. Replacement Cost [Price in the format nnn . nn, that is, numbers separated by a decimal point, no currency symbol]
- Enter the cost of items with this Circulation Code. When items are declared Lost, or are overdue to the point of invoicing, the system looks for a cost to bill the patron. If the system does not find a price in the *Actual Cost* field of the item record, it looks for a Replacement Cost in field 10 of the Circulation Code (as attached to the Patron Group). If no price is listed there, it looks in the *Average Cost of Item* field in the Classification Code table for the item's classification. It is advisable to leave field 10 blank for generic Circulation Codes, and only enter a dollar amount when the circulation codes are being adapted to the individual Patron Groups.
11. Surcharge, Trans. Code [Fee-for-use charge in the format nnn . nn, that is, numbers separated by a decimal point, no currency symbol]
- Because charges and fine amounts are normally specified for particular groups of patrons, it is recommended that fields 11 and 12 be left blank. See [Patron Group Codes \(CPGC\)](#) on page 4-63.
12. Period/Rule, Length, etc.
- When you access this field, the `Circulation Code Charges` screen appears so that you can examine or edit the fine calculation definitions. See [Circulation Codes Charges](#) on page 4-51.
- Because charges and fine amounts are normally specified for particular groups of patrons, it is recommended that fields 11 and 12 be left blank. See [Patron Group Codes \(CPGC\)](#) on page 4-63.
13. Hold Code [Any Hold Code or blank]
- This hold code is never applied to a hold. A Hold Code entered in this field indicates that an item can be held even if there is no Hold Code entered in the Default Hold Code field on the `Hold Port Control (CPH)` or the Hold Code field on the `Patron Group Codes (CPGC)` menu. While a default Hold Code can be entered here, a different hold code, specific to a patron type, can be entered when the Circulation Code is attached to a Patron Group in `Patron Group Codes (CPGC)`. This field is used to indicate whether or not items of this Circulation Code are *holdable* by borrowers of that patron group. For example, it is possible to configure the system such that items may be loaned to borrowers but may not be *held*. Examples of this might be when material may only be booked or when items are reserved for use in the library only.

[blank] If a patron attempts to place a hold on an item that has no Hold Code entered in the *Default Hold Code* field on the Holds Port Control (CPH) or the *Hold Code* field on the Patron Group Codes (CPGC) menu and no Hold Code is entered in this field then a hold cannot be placed. The system warns No copies of this title may be held.

#### 14. Recall Code

[Any Recall Code or blank]

The codes are derived from the Recall Codes (CRC) table found under the General Codes Menu (CGCM) of the Circulation Codes Menu (CCM). These codes control whether a new due date is calculated (and how long the loan period will be) when items are recalled from patrons, as well as what recall and courtesy notices patrons receive. While a default Recall Code can be entered, a different recall code, specific to a patron type, can be entered when the Circulation Code is attached to a Patron Group in Patron Group Codes (CPGC). See *Recall Codes* (CRC).

[blank] A recall cannot be issued for this item.

#### 15. Notice Code

[Any Notice Code or blank]

This field specifies which notice is the first to be mailed to patrons when items become overdue. The codes are derived from the Notice Codes (CNC) table found under the Output Production Menu (COPM) of the Circulation Codes Menu (CCM). For faculty it might be a courtesy notice, for students it might be an overdue notice warning of fines. While a default Notice Code can be entered, a different Notice code, specific to a patron type, can be entered when the Circulation Code is attached to a Patron Group in Patron Group Codes (CPGC). See Notice Codes (CNC) table.

#### 16. Held Circ Code

[Any Circulation Code or blank]

By specifying a valid Circulation Code in this field, the system uses **THIS** code to determine how the due date is to be calculated **if there are other outstanding holds on the item**. This special purpose circulation code affects the way an item is checked out and renewed. For example, the library may want to limit the loan period or prevent renewals for items for which there is a hold queue.

17. Max. Items Checked/Time [0 or any whole number]  
This field sets a limit on the number of items a patron can check out at one time. For this generic Circulation Code the next three fields are required and should be set quite high, for example to 1,000. This provides flexibility when the specific parameters are set in Patron Group Codes (CPGC).
18. Max. Items in Possession [0 or any whole number]  
This field sets a limit on the number of items a patron can have in his or her possession, after a number of checkout sessions. For this generic Circulation Code this field is required and can be set quite high, for example 1,000, to provide flexibility when the specific parameters are set in Patron Group Codes (CPGC).
19. Max. Renewals [0 or any whole number]  
0 No renewals allowed.  
This field sets a limit on the number of times a patron can renew a particular item. The length of the renewal period is specified in fields 8 and 9. For this generic Circulation Code this field is required and can be set quite high, for example to 1,000, to provide flexibility when the specific parameters are set in Patron Group Codes (CPGC).

Once these fields have been defined (or left blank), the system provides an option line to allow you to file or edit the screen.

```
Options:
? help # line Line by line Delete File Exit
Additional parameters
```



## Additional Parameters

The *Additional parameters* option presents four more fields that control other Circulation Code functions. For features that the library does not use, leave the entries blank or set them to N.

```

 CIRCULATION CODE DD MM YY
Circulation code : GEN1
Description : GENERAL COLLECTION LOANS 1
1) Booking Type : H2
2) Fast Track (Y/N) : N
3) Dynamic stock (Y/N) : N
4) Keep Patron History (Y/N): Y

```

These Additional Parameters are only set in the *generic* Circulation Codes. They apply to all Patron Groups associated with these Circulation Codes.

### 1. Booking Type

[Any booking pattern or blank]

This code links the Circulation Code of the item to the Materials Booking module. It is used by libraries that have installed the optional Materials Booking module. The Booking pattern code describes the parameters for the length of the booking, and controls its use. Even for libraries with Materials Booking, some types of materials do not qualify for bookings, therefore this field would be left blank.

[blank] This circulation code cannot be booked.

### 2. Fast Track

[Y or N]

Y Items with a Circulation Code flagged as *Fast Track* satisfy such holds preferentially. Only when there are no other *Fast Track* holds will such items be allowed to *fill normal* holds. This flag allows the library to allow patrons who pay a fee for holds to have preferential hold treatment. The *Fast Track* qualifier is set in the Holds Full Detail (second screen) of the Holds by Patron (HRT) function.

N Holds are not filled preferentially.

3. Dynamic Stock [Y or N]

Y Items with this Circulation Code change their holdings information to reflect their checkin port location. The items may be checked in at any location (regardless of other parameter settings) and their holding codes will be updated to those associated with the **current** or checkin location. This field is usually implemented for rapidly moving, perhaps temporary stock. For example, it might be used for mass paperback collections when the library buys many copies and expects them to circulate rapidly, but they would not have a long shelf life. See the *Circulation User's Guide: Item Control, Mass Holdings Update (CMHU)*.

N Do not update holdings to the current location at checkin time.

4. Keep Patron History [Y or N]

Y If this field and field 3 of the Circulation Control Table (CCT) `Keep Patron History` are both set to Y, the system retains a record of the last borrower of an item, after the item has been checked in. This feature can help the library track damaged items back to the last borrower. See *Configuration Codes*, and the *Circulation User's Guide: Item Control* under `Last Access Patron History Display (CLPD)` and `Last Access Patron History Clear (CLPC)`.

N The system will not keep track of the previous borrower for materials in this Circulation Code.

## Circulation Codes Charges

When you access field 12 (Period/Rule, Length, etc.) on the Circulation Code screen, the Circulation Code Charges screen appears so that you can examine or edit the overdue fine calculation definitions.

| CIRCULATION CODE CHARGES                             |              |          |            |            |            |         | DD MMM YY  |
|------------------------------------------------------|--------------|----------|------------|------------|------------|---------|------------|
| Circulation code : GEN1 with the Patron Group Code : |              |          |            |            |            |         |            |
| Description : GENERAL COLLECTION LOANS 1             |              |          |            |            |            |         | Fine rates |
| Period/Rule                                          | Length       | Amounts  | Trans.Code | Min.Charge | Max.Charge | Recall? |            |
| 1. D                                                 | 1            | 0.25     | 14         | 0.25       | 25.00      | N       |            |
| 2. RECALL                                            |              |          | 14         | 0.25       | 25.00      | Y       |            |
| Options:                                             |              |          |            |            |            |         |            |
| # line                                               | Line by line | Add item | Delete #   | Accept     | Exit       |         |            |

*Period/Rule* [D, H, M, C, or Fine Rule Code]

Enter a unit for the period, as (D)ays, (H)ours, (M)inutes, or (C)ontinuous, and enter length and amount values in the following two fields.

Otherwise, enter a Fine Rule Code, as defined in Fine Rule Codes (CFRULE) on the Payment Collection Menu. Enter question marks (??) to see a list of valid codes.

*Length* [nn (whole number)]

Enter a whole number that represents the length of the fine period. For example, to charge a fine of 0.10 every 2 hours, set the charge period to H, set the length to 2, and set the amount to 0.10.

|                    |                                                                                                                                                                                                                                                                                                                                   |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Amounts</i>     | [Amount in the format nnn . nn, that is, numbers separated by a decimal point, no currency symbol]<br><br>Enter an amount that represents the amount charged per period of time.                                                                                                                                                  |
| <i>Trans. Code</i> | [Any Transaction Code]<br><br>Transaction Codes as defined in <i>Circulation Transaction Codes (CTC)</i> on the <i>General Codes Menu</i> .                                                                                                                                                                                       |
| <i>Min. Charge</i> | [Amount in the format nnn . nn, that is, numbers separated by a decimal point, no currency symbol]<br><br>Enter the smallest amount you want to charge a patron. For example, if you enter the minimum amount as 0.50 and your daily fine is 0.10, anyone who returns an item that is one to four days late will be charged 0.50. |
| <i>Max. Charge</i> | [Amount in the format nnn . nn, that is, numbers separated by a decimal point, no currency symbol]<br><br>Enter the amount that represents your maximum fine. If you leave this field blank, the system continues assessing fines for every period overdue. A long overdue item could accrue a fine of hundreds of dollars.       |
| Recall?            | [Y, N, or blank]                                                                                                                                                                                                                                                                                                                  |
| Y                  | The system assesses the charge on recalled items, over the period after they were recalled.                                                                                                                                                                                                                                       |
| N                  | The system assesses the charge on items that have not been recalled. The system also assesses the charge on recalled items, over the period before they were recalled.                                                                                                                                                            |
| [blank]            | The system assesses the charge on items regardless of whether they have been recalled or not.                                                                                                                                                                                                                                     |

## Material Group Codes ( CCGC )

Material Group codes are even more general than Circulation Codes. Unlike circulation codes, which are collection group-specific, material group codes may be used across collection groups. They can also be applied to only a subset of a given collection group by means of the default settings in the Holdings Code tables. This flexibility of application is particularly useful for handling unusual circumstances.

One example of use of an alternate Material Group Code is a fine amnesty. A Material Group Code affects all levels of Holding Codes in which that Material Group Code is defined as the default. If you change its rules, and its Loan Code Override Level to 99 so that it always takes precedence, you could cause a change in all items associated with it through the Holding Codes. If you wish to suppress fines for a period of time you could change every individual Circulation Code in the system, a time consuming task in a large institution. Or you can change the fields in the Material Group Code affecting fines and its Override level, and that affects all lower levels of Holding Codes. Note that the field in *Institution Codes (CHIC)* which tells the system not to look beyond the item's Circulation Code for loan rules would have to be temporarily changed to `no`, for this to take effect. See the *Institution Codes (CHIC)* on page 4-10.

These codes are broad in scope and can be considered as very general loan policies which function at the system level; in the unlikely situation that no other more specific code is defined for an item or a patron, the system looks here for basic loan rule information

Material group codes and circulation codes can supersede each other, depending upon their relative loan code override levels. If the material group codes have a lower loan code override level than that of circulation codes, they are used as the default definition only for all items that do not otherwise have a circulation code. If the material group codes have a higher loan code override level than that of loan period codes, the material group codes can be used to handle exceptions by superseding the circulation codes. **However, under normal circumstances the Material Group Code override level is set to 0 to allow the specific Circulation Code to determine loan rules.**

## Create Material Group Code

Select Material Group Codes (CCGC) from the Configuration Codes Menu (CCCM) to access the workform for this code. Modification and deletion of existing codes, and addition of new material group codes follow the same procedures as those for circulation codes.

To create a new material group code record, enter a new code at the Material Group Code: prompt.

```
Table not found. Do you wish to create a new entry
(Y/N)? : _
```

Enter Y to confirm. The blank workform re-displays with the cursor positioned at field number 1.

```

 MATERIAL GROUP CODE
 DD MMM YY

Material group code :

1) Description :
2) Loan Code Override Level :
3) Use Period : 13) Hold Code :
4) Length of Use Period : 14) Recall Code :
5) Grace Period : 15) Notice Code :
6) Length of Grace Period : 16) Held Circ Code :
7) Override Use Period (Y/N) : N
8) Renewal Period : 17) Max. Items Checked/Time :
9) Length of Renewal Period : 18) Max. Items in Possession :
10) Replacement Cost : 19) Max. Renewals :

11) Surcharge Trans. Code
 _____ _____

12) Charge Period Length Amounts Trans.Code Min.Charge Max.Charge
 _____ _____ _____ _____ _____ _____

```

Fields not applicable can be left blank and skipped over by <ENTER> key without entering data. As you move down through the fields, a Valid Entries prompt appears. This indicates the nature of the data the field accepts.

Once all the appropriate data has been entered, the option command line appears after the last field has been completed or skipped. To edit a field,

enter the line number. To change the contents of several fields, use the *Line by line* command. Save changes with the *File* command.

```
Options:
? help # line Line by line Delete File Exit
```

**Default Material Group Code**

The default which is supplied with the system on installation is Default Circ Group Code (DCGC).

```

MATERIAL GROUP CODE
DD MMM YY

Material group code : DCGC

1) Description : DEFAULT MATERIAL GROUP CODE
2) Loan Code Override Level : 0
3) Use Period : 13) Hold Code :
4) Length of Use Period : 14) Recall Code :
5) Grace Period : 15) Notice Code :
6) Length of Grace Period : 16) Held Circ Code :
7) Override Use Period (Y/N) : N
8) Renewal Period : 17) Max. Items Checked/Time : 50
9) Length of Renewal Period : 18) Max. Items in Possession : 50
10) Replacement Cost : 10.00 19) Max. Renewals : 50

11) Surcharge Trans. Code
 _____ _____

12) Charge Period Length Amounts Trans.Code Min.Charge Max.Charge
 _____ _____ _____ _____ _____ _____

Options:
? help # line Line by line Delete File Exit
```

This code is often set to match the library’s most common, or general Circulation Code, for example, GEN1. Should this Material Group Code need to be used to determine a loan period it will match the library’s **normal** situation.

1. Description                    **[text]**

**Required.** A free text description of this Material Group Code.

|                             |                                                                                                                                                                                                                                                                                                                                           |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 2. Loan Code Override Level | Should be set to 0. Only in unusual circumstances would the library want this general table to control loan rules. All other codes controlling circulation would take priority over this table.                                                                                                                                           |
| Fields 3, 4, 5, 6           | Control use periods and grace periods. Can be set to the library's most common rules.                                                                                                                                                                                                                                                     |
| 7. Override Use Period      | This field should be set to N. As noted in the previous section, this field is used only when the library wishes to have the default due date display at <b>every</b> checkout for verification.                                                                                                                                          |
| Fields 8 and 9              | These fields can be set to the library's most common rules, or can be left blank.                                                                                                                                                                                                                                                         |
| 10.Replacement cost         | Would normally be determined at a more specific level. See <i>Patron Group Codes (CPGC)</i> on page 4-63.                                                                                                                                                                                                                                 |
| Fields 11 and 12            | These fields control surcharges and fines for patrons and should be left blank at the Material Group Code level.                                                                                                                                                                                                                          |
| Fields 13, 14, 15           | These fields determine the Hold and Recall rules and notices, and the first notice a patron receives. These fields can be set to the library's most common code.                                                                                                                                                                          |
| 16.Held Circ Code           | Defines an overriding Circulation Code used when there are outstanding holds on items. Should be left blank at the Material Group Code Level.<br><br>The Additional Parameters option which appeared in Circulation Codes (CCC) does not appear on this screen. The additional parameters, do not apply at the material group code level. |
| Fields 17, 18, 19           | <b>Required.</b> These fields set limits on the number of items a patron can check out at one time, have in his/her possession, and the maximum number of times an item can be renewed. Values in this general table should be set quite high, example 1,000 and more specific values defined at the Patron Group Code (CPGC) level.      |



## Patron Type Codes (CPC)

The purpose of patron codes is to identify patron types and group them for descriptive and/or statistical purposes. Patron Types are then grouped together based on common circulation privileges to create Patron Group codes. This section provides an explanation of patron type and patron group codes. The relationship between patron group codes and circulation codes is also discussed.

Patron types at an academic environment, for example, may include undergraduates, faculty, graduate students, or the general public. Patron type codes identify patrons on the basis of characteristics such as age, status or occupation. Patron type codes are used for statistical analysis of such activities as circulation transactions.

The patron type code record contains information such as the patron group to which a patron type belongs, whether additional borrowers (such as student assistants) are allowed to checkout/place holds on the behalf of the patron, a default expiration date for the patron type, and the default priority for holds.

Patron type codes are preliminary used to classify patrons, and are not directly related to circulation policy. Circulation privileges and loan policies depend directly upon Patron Group codes.

**Access** Enter Patron Type Codes (CPC) from the Loan Periods Menu (CLPM), found under Circulation Codes Menu (CCM) to access the Patron Type Codes list.

```
PATRON TYPE

Number of records = 9
Codes Description of codes

1. F Faculty
2. G Graduate Student
3. ILL Interlibrary/Institutional
4. NR Non-resident
5. O Off campus borrowers
6. R Resident
7. S Student
8. STF Staff
9. U Undergraduate

Options:
? help Add item # line Print Forward Backward Search jump
Exit
```

### Patron Code Editing

Patron codes can be browsed, added and printed by using the options at the bottom of the screen. To edit or delete a patron type code, enter the number on the screen display. ADVANCE displays all existing information for that code. Enter the line number to edit a particular line of the code record.

To add a new patron code, use the *Add item* command at the browse screen. ADVANCE prompts:

```
Enter the code you wish to add. : _
```

Enter 1-12 characters to label the patron type. A patron type code definition screen is displayed.

## PATRON TYPE

PATRON TYPE CODE : F

```

1. Description : faculty and Associates
2. Patron Group Code : P2 = F
3. Additional Borrower (1 = Yes) : 1
4. Default Expiration Date (e.g. 01 Jun) : 30 MAY 1989
5. Maximum Number of Holds : 2
6. Number of years before expiration 1-99: 1
 (takes precedence over 4 above)
7. Default priority for Holds (1-99) : 98
8. Allow ILL (1 = Yes) : 1

```

Enter the appropriate definition for each prompt appearing at the bottom of the screen. When all entries are completed, the following command option line is displayed:

```
Options:
? help # line Line by line Copy Print Delete Exit File
```

To edit a line, enter the line number. Use the *Print* command to obtain a hard copy of the code record. Use the *File* command to save the record in the code table or the *Exit* command to exit without saving. To remove an entry, use the *Delete* option. However, make sure that the code is no longer in use before you remove it.

## 1. Description

[text]

This is a free text field to provide greater information on the characteristics of this type of borrower than can be included in the code. The code, and this description appears any time the patron type is selected from a browse list. It could also appear on statistical reports.

2. Patron Group Code [Any Patron Group Code]
- Links patron type code with a Patron Group code to define circulation rules. See *Patron Group Codes (CPGC)* on page 4-63. This code is a particularly important field in determining what circulation rules apply to this patron type. If you enter an invalid Patron Group code, or if you enter ??, a list of Patron Group Codes appears..
3. Additional Borrower [0 (No) or 1 (Yes)]
- 0 Additional borrowers are not allowed for this type of patron.
- Y Allows other people to check out books using the barcode of a registered patron having this patron type. This option applies to all borrowers of this Patron Type, however, it is also necessary to enter information about the additional borrowers in an individual patron's registration screen before this option takes effect. See *Circulation User's Guide: Patron Registration and Checkout*.
4. Default Expiration Date [Date or blank]
- Defines a common expiration date for this category of borrowers. This default is useful if an entire group of borrowers were registered for a limited time, for example a group of visiting scholars, or a special children's summer registration. When a patron is registered (See *Patron Registration [CPR]*) and a Patron Type code is entered into the record, the system uses this date as the default expiration date (it can be changed for a specific patron at the time of registration).
- Note that field 6, *Number of fields before expiration*, overrides the value entered in this field.
- [blank] If no date is entered in this field and field 6 is blank, the system checks the linked Patron Group Code (CPGC) for a default expiration date.
5. Maximum number of Holds [0, whole number, or blank]
- Specifies the number of holds this patron type is entitled to. You may set it very high for your primary clientele, and lower for short term, or specialized borrowers.
- 0 This patron type is not entitled to any holds; if a patron attempts to place a hold, the system displays a message.

blank No maximum.

6. Number of years  
before expiration

[1 - 99 . 9, or blank]

Specifies a period of time (added to the date on which the patron registers), rather than the fixed expiration date which appears in field 4. At the time of patron registration, when a Patron Type Code is entered, the system looks first to see if a number of years has been entered into this field, and uses that for the default expiration date. If no number is entered into this field, the system goes to field 4 and looks for a default expiration (fixed) date. If no date is entered there then the system looks to the Patron Group Code (CPGC) for an expiration date. If no date is found in any of these three fields, the system does not provide a default expiry date when you add a patron – you may either set a specific date for the individual patron, or leave that field blank so that the patron’s registration record never expires.

The number entered into this field may be a fraction (e.g. 1.5 means 18 months), but it cannot be a fraction less than one. For example, 0.5 is not accepted.

7. Default priority for  
holds

[1 - 99 or blank]

Specifies a number from 1-99 which establishes where patrons of this type fall in the hold queue. If all patrons have equal priority, for example, first hold placed, first in queue, then set this field to the same number for all patron types, for example 75. If certain types of borrowers, such as faculty, should have a higher priority then set this field to a higher number, for example 90. However, the default priority can be adjusted at the time the hold is placed, or from the Hold Detail Screen after the hold has been placed.

If a default priority for holds is not set here in Patron Type Codes (CPC), then the system looks at the Hold Port Control (CPH) table, found on the Configuration Codes Menu (CCCM). The default hold priority for patrons takes precedence, but default hold priorities can also be set for ports, for example **where** the hold is placed can determine the place in the queue. If, for example, any hold placed by staff using a Reserve Book Room port, should take priority then a higher value can be entered for those ports in the Hold Port Control (CPH) table.

[blank] Makes the system look to the Hold Port Control (CPH) table for a priority.

8. Allow ILL (1= Yes) [0 or 1]
- 0 Interlibrary loan access is not permitted.
  - 1 Interlibrary loan access is permitted.

## Patron Group Codes (CPGC)

Patron group codes are used to cluster patron type codes into groups with the same circulation policies. For instance, group code *P3* might include patron type codes *R* for Resident, *S* for Student, and *U* for Undergraduate, while *P1* only includes *F* for Faculty. The patron group code record defines the circulation privileges for all patron types in that group. Circulation codes are then attached to the Patron Group Codes to define, and customize, what circulation rules will be used when a patron from this group checks out an item with that circulation code.

General loan policies are defined on the basis of collection types (Circulation Codes [CCC]). Those codes are generic and do not take effect until they are linked to, and customized for, Patron Group Codes. Patron Group Codes allows further refinement of loan policies for individual patron groups. These policies are, however, based upon the generic, or template, circulation codes.

**Access** Select Patron Group Codes (CPGC) on the Loan Periods Menu (CLPM) to access the Patron Group Code functions. Patron group codes are created and edited the same way as other circulation codes.

```

 PATRON GROUP CODES DD MMM YY

Enter Patron Group Code : P1

Valid Patron Codes : AD,HS,JV,O,OG,OS,S
1) Default Expiration Date : 05-31-94
2) Frequency to Check Patron : 9000
3) Hold Code : HCD Default Hold Code
4) Notice Method Code : M Mail
5) Patron Limits : 90
6) Total Items Checked/Time : 20
7) Total Items in Possession : 30
8) Maximum Claimed Returns : 2
9) Maximum Items Overdue : 6
10) Maximum Outstanding Debt : 30.00
11) Holiday Notice Method Code :
12) Additional Borrowers (Y or N) :
Circulation Codes : AV1,GEN1,HELD,N/C,RARE,REF,SPEC1
Options:
? help # line Line by line Circ code Delete File Exit

```

Use the command options at the bottom of the screen to change or save the information.

### List Group Codes

The PATRON.GROUP CODES screen is obtained by entering two question marks (??) in the Enter Patron Group Code field when the initial blank workform appears.

```

 PATRON GROUP CODES

Number of records = 6

 Codes Description of codes
 ---- -
1. P1 F, G, ILL
2. P2 STF
3. P3 R,S,U
4. P4 NR,O

Options:
? help Add item # line Print Forward Backward Search jump
Exit
```

Select a code by using the *# line* option. The ADVANCE system displays all existing information for that code. Use the options at the bottom of the screen to change existing code definitions.



## New Group Codes

There are two ways to create new group codes,

- Enter a new code at the blank initial PATRON GROUP CODES screen.
- Select the *Add item* command option on the PATRON GROUP CODES screen which lists existing codes.

To create new group codes on the initial blank PATRON GROUP CODES screen, enter one to 13 characters at the prompt. (Note that the system imposes no limit on the number of characters, but for practical purposes, no more than 13 is recommended.) The system displays the following message:

```
Table is not found. Do you wish to create a new entry?
(Y/N) : _
```

Enter Y to proceed. The workform is displayed.

If you are on the PATRON.GROUP CODES screen with the listing of existing codes, select the *Add item* option.

```
Enter the code you wish to add. :
```

When you enter the code, the PATRON GROUP CODES screen appears. The code appears in the *Enter Patron Group Code*: field and the cursor is positioned at the *Default Expiration Date* field.

```

 PATRON GROUP CODES DD MMM YY

Enter Patron Group Code : TEST1

Valid Patron Codes :
1) Default Expiration Date :
2) Frequency to Check Patron :
3) Holds Code :
4) Notice Method Code :
5) Patron Limits :
6) Total Items Checked/Time :
7) Total Items in Possession :
8) Maximum Claimed Returns :
9) Maximum Items Overdue :
10) Maximum Outstanding Debt :
11) Holiday Notice Method Code :
12) Additional Borrowers (Y or N) :
Circulation Codes :
```

As you complete each field, <ENTER> to move the cursor to the next field. As you move from field to field, the system automatically displays valid values for each field.

Valid Patron Codes

This unnumbered field shows all Patron Type Codes attached to this group. The code list is automatically updated as each Patron Type Code, described in the previous section, has a Patron Group code entered into its record.

1. Default Expiration Date

[Any future date]

**Required.** Used in Patron Registration (CPR), only if no expiration information was entered in the Patron Type Code created earlier. See *Patron Type Codes (CPC)* on page 4-57.

2. Frequency to check patron

[Any whole number]

**Required.** Defined in number of days. Based on the value in this field, the system allows you to verify patron registration data on a regular basis. Each time a patron barcode, or name, is entered in a circulation function, the system checks to see if the record has been updated (checked) within the last  $x$  number of days. The system displays the message:

Patron record last update on *date*. Please press <ENTER>.

You do not need to take action on the patron's record, but you can confirm basic information such as address and telephone. If you have loaded patron data into ADVANCE from another source, this value could be set quite low, for example 30, to allow frequent verification of the new patron file. Later this value could be set to 180 which would permit verification approximately every 6 months. If you wish to effectively suppress this verification the field can be set to a maximum of five digits, for example 99999.

3. Hold Code

[Any Hold Code or blank]

Default Hold Code for the patron group. If a default is not set here, the system looks at the Hold Port Control (CPH) table for a port-determined Hold Code to use. If Hold Code is entered in CPH, the Hold Code in CPGC takes precedence over the Hold Port Control table.

Hold Codes are defined on the Hold Codes (CHC) table on the General Codes Menu (CGCM) of the Circulation Codes Menu (CCM).

## 4. Notice Method Code [Any Contact Method Code]

Defines the method by which patrons are contacted concerning overdues, invoices, recalls, holds, or other notices and obligations. The default is usually M for Mail, but other options are available. From this table notices can be generated using the *Address 2* of the patron record, or you may choose to telephone patrons first, then follow up with a mailed notice. These choices affect the form the output production program creates, for example a list for telephoning, or a finished notice for mailing. The notice methods are defined in the Contact Method Codes (CCMC) table found on the Output Production Menu (COPM), of the Circulation Codes Menu (CCM). Also see 11. Holiday Notice Method Code.

Note that contact methods defined for particular notices in Notice Codes (CNC) override the methods defined in this table or on the patron's PATRON REGISTRATION screen.

## 5. Patron Limits [Any whole number]

*Determines a priority on the two parameters: Total Items Checked/Time and Total Items in Possession. The relative priorities for this setting on the Patron Group Code (CPGC) and the Circulation Code (CCC) determine which limit is used.*

The system **always** uses the *Total Items* fields for the total items, regardless of Circulation Code; however, the value from this field will be used for the Individual Circulation Code limits if the priority is set high.

6. Total Items Checked/  
Time [Any whole number]

**Required.** Establishes a limit on the total number of items a patron belonging to this Patron Group can check out at one time. Care should be taken in establishing this limit. For each Circulation Code attached to this Patron Group, a limit is also set on the maximum number of items **with that Circulation Code** that can be checked out at one time. The library can establish an upper limit in either table. For example, if you wish to allow patrons a cumulative total which reflects the sum of each of the Circulation Codes, then the limit here in the Patron Group Code should be quite high. If you wish to limit the total number of items that can be checked out at one time, regardless of Circulation Code, then set this number no higher than the limit set for any of the individual Circulation Codes. The patron who checks out the limit on an individual

Circulation Code would be prevented from proceeding with any other checkouts.

7. Total Items in Possession

[Any whole number]

**Required.** Establishes a limit on the total number of items a patron belonging to this Patron Group can have in their possession, which is a cumulation of prior and current checkouts. As with the field above, this limit is set for the Patron Group, inclusive of items checked out from all Circulation Codes. A limit is also established for each Circulation Code individually. If the library wants to effectively have no limit on the number of items a patron has then this number can be set very high. The system accepts a number up to 5 digits (no commas).

8. Maximum Claimed Returns

[Any whole number]

**Required.** Sets a threshold on the number of times a patron from this Patron Group can claim to have returned an item which the system still shows as checked out to them. (See *Circulation Users Manual: Checkout*, for information on setting a Claim Returned flag on an item.) The number entered into this field can be up to 5 digits, effectively indicating no limit. For each patron group, however, the library can establish a threshold beyond which the patron will have a block on their record. See *General Codes* on page 8-1, *Transaction Control (CTC)* on page 8-3, for more information on controlling patron blocks.

9. Maximum Items Overdue.

[Any whole number]

**Required.** Sets a threshold on the number of items a patron from this Patron Group can have overdue before a block is placed on his/her record. The number entered into this field can be up to 5 digits, effectively indicating no limit. (See *Transaction Control (CTC)* on page 8-3, for more information on controlling patron blocks).

10. Maximum Outstanding Debt

[Number in the format nnnn.nn, no currency symbol]

**Required.** Sets a limit on the maximum amount of money a patron from this Patron Group can owe to the library before an administrative block is placed on his/her record. (See *Transaction Control (CTC)* on page 8-3, for more information on controlling patron blocks).

When fields are complete, these options appear.

```
Options:
? help # line Line by line Delete File Exit
```

### 11. Holiday Notice Method Code

[Any Contact Method Code]

Defines the method by which patrons are contacted *during the holidays* concerning overdues, invoices, recalls, holds, or other notices and obligations. The default is usually `M` for Mail, but other options are available. From this table notices can be generated using the *Address 2* of the patron record, or you may choose to telephone patrons first, then follow up with a mailed notice. These choices affect the form the output production program creates, for example a list for telephoning, or a finished notice for mailing. The notice methods are defined in the Contact Method Codes (CCMC) table found on the Output Production Menu (COPM), of the Circulation Codes Menu (CCM). Holiday periods are defined in the Holiday Periods by Institution (CIHP) table, also on the Output Production Menu (COPM).

Note that contact methods defined for particular notices in Notice Codes (CNC) override the methods defined in this table or on the patron's PATRON REGISTRATION screen.

### 12. Additional Borrowers

[Y or N]

This field has an effect only if the corresponding parameter was left blank in the registered patron's Patron Type Code (see *Patron Type Codes (CPC)* on page 4-57).

Y Allows other people to check out books using the barcode of a registered patron in this patron group.

It is necessary to enter information about the additional borrowers in an individual patron's registration screen before this option takes effect – see *Circulation User's Guide: Patron Registration*, and *Checkout*.

N Additional borrowers are not allowed for registered patrons in this patron group.

### Circulation Codes

This unnumbered field shows all Circulation Codes attached to this group. The code list is created as those codes are linked one-by-one from this screen.

## Linking Circulation Codes to Patron Group Codes

Patron group codes must be linked to all the appropriate circulation codes. If certain Patron Groups are not allowed to borrow material from a particular collection (as defined by a Circulation Code), then do not link that circulation code to that Patron Group.

To link circulation codes to a patron group code, select the *Circ code* option on the PATRON GROUP CODES screen and the system will prompt:

Please enter a circulation code :

Enter a valid circulation code. An invalid entry or entering double question marks (??) will give you access to a browse list of valid codes.

```
Circulation code

Number of records = 11
Codes Description of codes
--- -----
1. AV1 AUDIO VISUAL 1
2. AV2 AUDIO VISUAL 2
3. GEN1 GENERAL COLLECTION LOANS 1
4. GEN2 GENERAL COLLECTION LOANS 2
5. N/C NON-CIRCULATING
6. RARE RARE BOOK
7. REF REFERENCE
8. RESD RESERVE DAYS
9. RESH RESERVED HOURS
10. SPEC1 SPECIAL COLLECTION LOANS #1
11. SPEC2 SPECIAL COLLECTION LOANS #2

Options:
? help # line Print Forward Backward Search jump Exit
```

If you choose an unlinked circulation code from the browse list, the system displays the circulation code screen with a message in place of an options line.

```

 CIRCULATION CODE DD MMM YY

Circulation Code : GEN1 with the Patron Group Code : P1

1) Description : GENERAL COLLECTION LOANS (28 DAYS)
2) Loan Code Override Level : 80 13) Hold Code : HCD
3) Use Period : D 14) Recall Code : RCD
4) Length of Use Period : 28 15) Notice Code : ODD2
5) Grace Period : D 16) Held Circ Code :
6) Length of Grace Period : 7
7) Override Use Period (Y/N) : Y
8) Renewal Period : D 17) Max. Items Checked/Time : 10
9) Length of Renewal Period : 28 18) Max. Items in Possession : 10
10) Replacement Cost : 30.00 19) Max. Renewals : 5

11) Surcharge Trans. Code
 _____ _____

12) Period/Rule Length Amounts Trans.Code Min.Charge Max.Charge Recall?
++ D 1 0.10 14 0.20 10.00 ++
GEN1 is not attached to P1. Do you wish to attach it (Y/N)? ___

```

Answering **Y**, for yes, to the message at the bottom of the screen causes the system to display the Circulation Code *template*. The fields on the screen contain the information previously assigned to that circulation code in the Circulation Codes (CCC) program. As you proceed through these fields and change them, this generic Circulation Code is retained by the system and a new version is created and attached to this Patron Group Code. This process is repeated for every Circulation Code this Patron Group Code is allowed to check out each time a customized version of the Circulation Code is created. One reason for putting the most common values in the generic Circulation Code is to reduce the number of changes needed as this process is repeated for each Patron Group Code.

One Patron Group Code can have many, or few, Circulation Codes attached, depending on how much of the collection those patrons are permitted to borrow.

The cursor appears on the *Description* field. Each field should be reviewed for changes depending on the privileges/limits set for items with this Circulation Code when checked out by patrons from this Patron Group.

This customizing is the heart of the library's specific circulation policies and care should be taken in reviewing the loan periods, grace periods,

renewal periods, replacement costs, and limits appropriate to this Circulation Code/Patron Group Code link. If the generic values created for this Circulation Code are appropriate for this Patron Group <ENTER> accepts the default and moves on to the next field. Fields can be modified once the whole record has been reviewed and the option line appears at the bottom of the screen.

### 1. Description

Defaults to the same description that was entered into the generic Circulation Code. You can retain the default or modify it to describe this version of the Circulation Code as it is attached to the Patron Group, for example, General Collection 1 with Patron Group P2.

### 2. Loan Code Override Level

This field should be set to a recommended level of 90. This override level tells the system that the Circulation Code as attached to the Patron Code takes precedence over either the generic Circulation Code (whose loan code override level should be set to 0), or the Material Group Code (whose loan code override level should be set to 0).

Since each Circulation code has two forms (a generic one, and this one you are specifying by attaching it to a Patron Group) the system must be told which form of the Circulation code to use. Always set the Loan Code Override Level for the generic Circulation code to 0, and assign a higher level when the code is attached to one or more Patron Groups. This insures that the modifications you make to tailor this code to a particular type of patron will be used by the system.

### Fields 3 - 9

If the next series of fields are the same as the generic Circulation Code you may <ENTER> through them to retain the default. However, these loan periods, grace periods, and renewal periods may vary depending on the type of patron checking out material with this Circulation Code. As you attach the Circulation Code to each of the Patron Group Codes in turn, different values can be entered into these fields to generate loan periods specific to those patrons.

### 10. Replacement Cost

This field is not required. ADVANCE uses the following criteria to determine the replacement cost for an item:

1. If there is an entry in the *Actual Cost* field on the Holdings Display screen, this value is used.
2. If no value appears in the *Actual Cost* field, then ADVANCE examines two fields:



- a. the *Replacement Cost* field on the patron group/circulation code combination
- b. the *Average Cost of Item* field on the Classification Codes table.

If values appear in both *a* and *b* then the larger replacement cost is used. If a value appears in only one field that value is used.

If neither 1 or 2 exist then the system uses the value assigned to the *Default Cost of Transaction* field from the Lost Books record of Transaction Codes & Account table (CPFB - Fund/Transaction Codes).

If none of the above fields are defined, no charge will be levied for a lost book.

## 11. Surcharge

Allows the library to charge fees for certain kinds of transactions processed on behalf of a patron. These surcharges are linked to Transaction Codes defined in Circulation Transaction Codes (CTC). See [General Codes](#) on page 8-1.

For example, if the library wishes to assess a surcharge for lost cards, or mail returned, the dollar amount of the surcharge, and the corresponding transaction code number is entered. As these blocks are added to the patrons record the surcharge is invoked. These charges print on patron invoices, and are displayed (and paid or waived) using the Accounts Receivable (CAR) function.

This field is a window. While only one line of the window displays at any point, many surcharges and transaction codes can be included for this Circulation Code/Patron Group Code combination. **Avoid duplicate, or unintended, entries due to the limited display capabilities within the window.**

## Field 12

Defines fines, if applicable, applied when patrons from this Patron Group check out materials from this Circulation Code. If no fines are assessed to a patron group, such as faculty, then this field is left blank. But when attaching this Circulation Code to a Patron Group for students, then fine amounts should be entered.

This field is a window. While only one line of the window displays at any point, many fine rates and amounts can be entered for this Circulation Code/Patron Group Code combination.

- Fields 13 - 15      Hold Code, Recall Code, and Notice Code, define the specific types of hold and recall actions and notices appropriate for this Patron Group/ Circulation Code combination. The *Notice Code* field determines which notice is the first that this patron group will receive for overdue materials. For faculty it may be a courtesy notice, for students it may be an overdue notice warning of impending fines. If the library does not send overdue notices, this field might specify the **Invoice** as the first notice to be sent. Hold Codes and Recall Codes are set up in the Hold Codes (CHC) and Recall Codes (CRC) tables found on the General Codes Menu (CGCM), of the Circulation Codes Menu (CCM). Notice Codes are defined in the Notice Codes (CNC) table on the Output Production Menu (COPM), also under the Circulation Codes Menu (CCM).
- Fields 16 and 17      *Max. Items Checked/Time* and *Max. Items in Possession* are related to the *Total Items Checked/Time* and *Total Items in Possession* fields as discussed earlier for Patron Group Codes. The fields as defined here limit the number of items with this Circulation Code, that patrons in this Patron Group can check out at one time, and have in their possession. If these are set higher than the related fields in the Patron Group Code table, then that table will effectively serve as the limit. The fields in the Patron Group Code are cumulative of all the limits set for all Circulation Codes attached to that Patron Group Code. Care should be taken in comparing the individual Circulation Code limits with that set for the Patron Group.
18. Maximum Renewals      Defines the number of times patrons in this Patron Group Code can renew items with this Circulation Code.
19. Held Circ Code      By specifying a valid Circulation Code in this field the system uses THIS code to determine how the due date is to be calculated if there are other outstanding holds on the item. This special purpose circulation code affects the way an item with outstanding holds is checked out and renewed. For example, the library may want to limit the loan period, or prevent renewals for items for which there is a hold queue. This Held Circ Code is created in the same manner as all other Circulation Codes, but is only associated with a Patron Group Code by entering its code into this field.

When the fields are complete, these options appear.

## Options:

```
? help # line Line by line Special loans Delete File Exit
'Remote' renewals Check due date Check Fine Rule
```

## Special Loan Periods

The *Special loans* option on the CIRCULATION CODE screen allows loan periods to be set as a fixed date, rather than a *Use Period*, for example, to make all faculty books due at a certain date at the end of the semester. This option also enables you to set loan periods that are exceptions to the loan period rules specified on the circulation code screen.

For example, if the library wants to take inventory of the items defined by the circulation code, a special loan period can be set as shown in field 1 on the following screen.

```

 SPECIAL LOAN PERIODS

Description : General Collection Loans 1
Circ Code : GEN1
Priority : 90

Loan Period Description Start Date End Date Due Date
 1 Yearly Inventory of Collection 11-01-98 11-30-98 11-30-98
 2 Summer Loan Period 06-01-98 09-01-98 09-30-98
 3 Spring Exams Loan Period 03-01-98 03-15-98 03-30-98
 4 Christmas Exams Loan Period 12-01-98 12-25-98 12-15-98
 5
 6
 7
 8

Options:
 #=# line E=Exit FI=File ?=? help
```

In field 1, the special loan period is described as the *Yearly Inventory of Collection*. The *Start Date* and *End Date* fields specify to the system when the special loan period is in effect. In this example, the period begins on November 1, 1998 and ends on November 30, 1998. During that time all items controlled by the attached patron group and circulation codes are due on the date specified in the *Due Date* field, which in this case is November 30,

1998. This special loan period overrides the periods specified on the *Circulation Code* screen.

If faculty charges are always due at a fixed date at the end of the semester, this option can be used to control those dates. These can be set up for several years ahead. In order to ensure a minimum charge, for example, two weeks, the following sample can be applied:

| Description | Start Date | End Date | Due Date |
|-------------|------------|----------|----------|
| Fall 98     | 9-8-98     | 12-4-98  | 12-18-98 |
| Spring 99   | 12-7-98    | 5-7-99   | 5-21-99  |

The new start date can be earlier than the Due Date for the preceding time period. Shorter start, end and due dates can be defined for inter-session checkouts.

The *Priority* field will be the same as the Loan Code Override Level of the associated Circulation Code.

### Circulation Code Renewal Rules

The *'Remote' renewals* option on the Circulation Code screen allows you to control some features of the renewals done at **remote service points** such as OPAC, GeoWeb, SelfCheckout, and so on, as specified in the Circulation Control (CCT) table.

By defining a *last renewal* period, you provide an additional loan period to patrons who remotely renew items that could otherwise not be renewed. This additional period allows the patron a little more time to return the item without accruing overdue fines.

```

 CIRCULATION CODE RENEWAL RULES DD MMM YY

Circulation Code : GEN1 with the Patron Group Code : P1
Description : GENERAL COLLECTION LOANS (28 DAYS) Renewal Rules

1) Remote LAST Renewal Period : D
2) Length of LAST Remote Renewal Period : 3
3) Maximum Remote Renewals : 1

Options:
line Line by line Accept Exit

```

1. Remote LAST  
Renewal Period

[D, H, M, B, or blank]

Enter the period as (D)ays, (H)ours, or (M)inutes to define the periodicity of the last renewal. Enter (B) materials booking to use a materials booking pattern for the last renewal. For more information, see [3. Use Period](#) on page 4-43.

[blank]

The last renewal period is the same length of period as a normal renewal period.

2. Length of LAST  
Remote Renewal  
Period

[nn or nn/hh:mm whole number, i.e. whole number followed by a slash and time, or any materials booking pattern code, or blank]

This field defines the length of the last renewal period defined above, such as 28 (Days), 48 (Hours), or 60 (Minutes). For (H)ours or (M)inutes periods, you can optionally follow the numeric entry by a time in the form /hh:mm.

For (B) use periods, enter a valid materials booking pattern code here. See [4. Length of Use Period](#) on page 4-43.

[blank]

The last renewal period has the same length as a normal renewal period.

### 3. Maximum Remote Renewals

[Any whole number or blank]

This field specifies the number of times in a row that an item can be remotely renewed (for this patron group-circulation code combination). In this way, you can allow specific groups of patrons to remotely renew specific types of material. Enter 0 to not allow remote renewals.

[blank] Items can be renewed the same number of times remotely as they can at the library circulation desk.

### Checking Due Dates

Use the *Check Due Date* option on the Circulation Code screen to test the loan period rules. Enter test information in the fields that appear, such as shown in the following example.

```
Enter checkout date : 12 JUL 00 Enter checkout time : 14:58 Renewal(Y/N)?
```

The system provides results such as shown in the following sample screen.

```
Enter checkout date : 12 JUL 00 Enter checkout time : 14:58 Renewal(Y/N)?
Due key : CO*P1*GEN1* Due date : 09 AUG 00 Due time : 21:00
Grc key : CO*P1*GEN1* Grc date : 10 AUG 00 Grc time : 23:30
DUE DATES file : Due date : 09 AUG 00 Due time : 21:00
Calendar : MCAL Grc date : 10 AUG 00 Grc time : 23:30
Press <ENTER> to continue :
```

“Grc” refers to the grace period.

If the results include the message `No DUE DATES record found for this date`, you should run the `DUEDATE` process and then re-check the due dates here.

## Checking Fine Rules

Use the *Check Fine Rule* option on the Circulation Code screen screen to test the stored file rules. Enter test information in the fields that appear, such as shown in the following example.

Complete the following fields to test the fine rules :-

```

1. Check-out Date & Time : 01 JAN 00 12:15
2. Due Date & Time : 05 FEB 00 09:00
3. Grace Date &Time (def as 2) : 05 FEB 00 09:00
4. Check-in Date & Time : 16 MAY 00 10:05
5. Patron Membership : P1
6. Item Circ Code : GEN1
7. Checkin Calendar : MCAL
8. Recall Date (if used) :
```

The system tests each of the fine rules, providing results such as shown in the following example.

```
Fine Rule : 1
Days and seconds for calculating fines for Calendar MCAL
Days 86 Seconds 3557100 Seconds today 3900
Calculated fine is 860
End of processing for fine rule 1
Press any key to move onto next fine rule

Fine Rule : 2

Period "recalled GEN1" covers :
Start Date 05 FEB 2000 09:00:00
End Date 16 MAY 2000 10:05:00
End of processing for fine rule 2
All fines calculated - there are 1 transaction codes
Transaction type 14 - 860
Press any key to continue
```

## Library Calendar Setup (CLCM)

Calendars are used for a variety of circulation control purposes, including calculation of loan periods and overdue fines, and the automatic generation of notices. Normal hours of operation, as well as exceptions to these normal patterns, can be entered into the calendar. Holidays, and other days the library is normally closed, are also entered.

The Circulation Module can not operate without the creation of appropriate calendars. The Checkout Control Table (COCT), under the Circulation Configuration Codes Menu (CCCM), determines if a calendar is used to calculate due dates. If not, that table requires a variety of fields to be completed in order to calculate correct due times. However, the system still relies on a calendar to know what dates the library is closed.

There are no restrictions as to how far into the future the calendars can be created. When you enter CLCM on the Circulation Loan Periods menu the CIRCULATION CALENDAR is displayed.

**Access** Select Circulation Loan Periods menu from the CIRCULATION LIBRARY CALENDAR MAINTENANCE (CLCM) screen. ADVANCE allows libraries to define multiple calendars for various sublocations and collection types. These calendars are defined in the Port Control Tables, Checkout Port Control (CPCC), and Checkin Port Control (CIPC). See *Configuration Codes* on page 3-1.

|                         |                      |             |
|-------------------------|----------------------|-------------|
| 03:14PM                 | CIRCULATION CALENDAR | DD MMM YYYY |
| Calendar Name...: _____ |                      |             |

Each calendar is identified by a name. To examine the existing calendars, enter two question marks (??) in the *Calendar Name* field.



## CALENDAR CODES

Number of records = 5

| Code         | Description of codes       |
|--------------|----------------------------|
| 1. ACAL      | LE CALENDAR                |
| 2. CALENDAR4 | CALENDAR 4                 |
| 3. GCAL      | Documents Calendar         |
| 4. MCAL      | Main Library Calendar      |
| 5. RCAL      | Reserve Book Room Calendar |

Options

|        |        |       |         |          |             |      |
|--------|--------|-------|---------|----------|-------------|------|
| ? help | # line | Print | Forward | Backward | Search jump | Exit |
|--------|--------|-------|---------|----------|-------------|------|

**Modify An Existing Calendar**

To modify an existing calendar, use the *# Line* option with the line number of the desired calendar.

In a calendar, modify a particular line by first selecting the line number.

## LIBRARY CALENDAR

CALENDAR NAME.: MCAL

CALENDAR RANGE.: 05-11-98 to 12-31-98

- 1) Description.....: MAIN LIBRARY CALENDAR
- 2) Rebuild Start Date.: 05-11-98
- 3) Rebuild End Date...: 12-31-98

|                   | WEEKLY PATTERN | OPEN HR | CLOSED HR |
|-------------------|----------------|---------|-----------|
| 4) Monday.....:   |                | 08:30AM | 11:00PM   |
| 5) Tuesday.....:  |                | 08:30AM | 11:00PM   |
| 6) Wednesday....: |                | 08:30AM | 11:00PM   |
| 7) Thursday.....: |                | 08:30AM | 11:00PM   |
| 8) Friday.....:   |                | 08:30AM | 06:00PM   |
| 9) Saturday.....: |                | 10:00AM | 06:00PM   |
| 10) Sunday.....:  |                | 01:00PM | 11:00PM   |

Options:

|        |              |      |          |            |      |        |
|--------|--------------|------|----------|------------|------|--------|
| # line | Line by line | Exit | Holidays | Exceptions | Copy | Delete |
| File   | ? help       |      |          |            |      |        |

If the library is always closed on a certain day, for example Sunday, enter CLOSED, instead of open and closed hours, and this will display for all such days during the period for which the calendar is rebuilt.

The *Exceptions* option allows entry of specific dates when the library is open hours that are different from the normal pattern. This option cannot be used for closed days. Use the *Add* command to add new exceptions to the existing list. Use the *Change* command to change existing exceptions.

The *Holidays* option adds holidays to an existing calendar. Holidays are any days when the library is closed. Use the *Add* command to add new holidays to the existing list. Use the *Change* command to change existing holidays. When entering holidays the system asks for a description of the holiday, or closed day, however, this description does not appear on the resulting calendar display.

When adding, deleting, changing holidays/exception days, the dates must be within the calendar dates at the top of the screen. Save all changes, such as deletions, additions, or changes, by *Exiting* from the Holiday or Exception screen, and then using the *File* command which appears on the first screen of calendar entry. This *File* command causes the system to rebuild the calendar for the start and end dates noted at the top of the screen. Select lines 2 and/or 3 from the first screen of calendar entry to change the rebuild period.

```

 ENTER LIBRARY HOLIDAYS

Calendar Name : MCAL
Starting Date : 01 Apr 1998
Ending Date : 31 Dec 1998

--Date-- --Description-- --Date-- --Description--
25 May 1998 MEMORIAL DAY
04 Jul 1998 INDEPENDENCE DAY
07 Sep 1998 LABOR DAY
12 Oct 1998 COLUMBUS DAY
11 Nov 1998 VETERAN'S DAY
26 Nov 1998 THANKSGIVING DAY
25 Dec 1998 CHRISTMAS DAY

Options:
 Exceptions Add item Change Forward Backward Delete Exit
? help
```

The following screen shows a list of exception days.

```

 ENTER CALENDAR EXCEPTION DAYS

Calendar Name : MCAL
Starting Date : 01 JAN 1998
Ending Date : 31 DEC 1998

Date Open Hr Closed Hr Date Open Hr Closed Hr
17 FEB 1998 12:00AM 12:00AM 09 DEC 1998 08:00AM 01:00AM
19 FEB 1998 08:30AM 04:00PM 10 DEC 1998 08:00AM 01:00AM
20 FEB 1998 08:30AM 04:00PM 11 DEC 1998 08:00AM 01:00AM
21 FEB 1998 08:30AM 04:00PM 12 DEC 1998 08:00AM 01:00AM
22 FEB 1998 08:30AM 04:00PM 13 DEC 1998 08:00AM 01:00AM
23 FEB 1998 08:30AM 04:00PM 14 DEC 1998 08:00AM 03:00PM
13 APR 1998 08:30AM 12:00PM 21 APR 1998 02:00PM 08:00PM
30 APR 1998 08:00AM 01:00AM 21 AUG 1998 12:00AM 12:00AM
01 MAY 1998 08:00AM 01:00AM
02 MAY 1998 08:00AM 01:00AM
03 MAY 1998 08:00AM 01:00AM
21 NOV 1998 08:30AM 04:00PM

Options:
Holidays Add item Change Forward Backward Delete Exit ? help

```

## New Calendar

To add a new calendar to the system, enter a unique calendar name on the first field of the first screen. In the following example, the name is TCAL.

To copy an existing calendar, use the *Copy* option.

```

 LIBRARY CALENDAR

CALENDAR NAME.: TCAL
CALENDAR RANGE.: to

1) Description.....:
2) Rebuild Start Date.:
3) Rebuild End Date...:

 WEEKLY PATTERN OPEN HR CLOSED HR
4) Monday.....:
5) Tuesday.....:
6) Wednesday....:
7) Thursday.....:
8) Friday.....:
9) Saturday.....:
10) Sunday.....:

Options: Enter specified line number
line Line by line Exit Holidays Exceptions Copy Delete
File ? help

```

Complete the first screen as required. Define holidays and exception days as described in previous paragraphs. The Rebuild start date and Rebuild end dates define the period for which this calendar is valid. It can be set to many years into the future. Holidays and exceptions can only be entered for dates which fall within this range. If the library hours are consistent, and unusual days are predictable into the future, setting up the calendar once and building for several years in advance can save time. Save the newly-created calendar record using the *File* option.

It is also possible to use the Rebuild start and end dates to create additional **normal** patterns. For example, if the library has a regular calendar for most of the academic year, that primary pattern should be entered and the Rebuild Start and End dates should be inclusive of the entire year, or years into the future. Use the *File* option to build this basic pattern. This creates a long range of regular hours.

Smaller subsets of other normal patterns can be built within this longer range. For each secondary pattern, for example between semester hours, enter that weekly pattern, and Rebuild Start and End dates for just those few weeks. Using the *File* option will rebuild for just that time period. If this pattern repeats two or three times in the academic year, change the rebuild start and end dates and *File* each of those

changes. These subsets of the longer range of hours built earlier will be reflected in the public calendar display.

## Loan Matrix (CBLM)

Two options on the *Circulation Loan Periods* menu enable you to control an important aspect of the functioning of the system, the **Loan Period Matrix**. Circulation Build Loan Period Matrix (CBLM) enables you to build initially, and re-build subsequently, the loan period matrix. The loan period matrix interconnects the functions of the first six options on the *Circulation Loan Periods* menu. This interconnection allows the system to calculate loan periods. Because all of the options are interconnected, changes to one option affects the other five.

**Important!** **This means the loan period matrix must be re-built every time changes are made to any of the Loan Period options.** Otherwise the changes will be ignored by the system and not be used in loan period calculations.

To build or re-build the loan matrix, enter CBLM to display the LOAN MATRIX BUILDER screen.

```
LOAN MATRIX BUILDER

Do you wish to build loan tables? (Y/N) : __
```

To invoke the building process, answer **Y** for yes and the system will build or re-build the loan period matrix. The process should be done when there are no users on the system. The system prompts you again:

```
Do you wish to build the loan matrix? (Y/N) : Y
```

Answering **Y** for yes confirms your intention to build a new loan matrix and signals the system to proceed. The following screen illustrates what your screen will look like when the system is almost finished building the new matrix.

LOAN MATRIX BUILDER

Do you wish to build loan tables? (Y/N) : Y

Do you wish to build the loan matrix? (Y/N) : Y

PASS ONE — ITEM / CLASSIFICATION

PASS TWO — CALLNUMBER PREFIX

PASS THREE — COLLECTION

PASS FOUR — SUBLOCATION

PASS FIVE — INSTITUTION

PASS SIX — PATRON GROUPS

As soon as the building process is complete the system displays the Circulation Loan Periods menu.

## Printing Loan Matrix (CPLM)

At this point you may use the option `Print Loan Matrix (CPLM)` to make a **printout** of the information assembled in the loan period matrix. When you enter `CPLM`, the `LOAN MATRIX PRINT` screen appears. The following screen shows the sequence of prompts that appear one at a time when you enter the appropriate information.

```
LOAN MATRIX PRINT

Print in 80 or 132 format (Default = 80) : 80

Suppress the circulation code detail? (Y/N) : Y

Matrix number (Default = ALL) : ___

Do you wish to continue? (Y/N) : Y
```

If you suppress the `Circulation Code Detail` you only get a printout of the basic checkout control links, patron group/circulation code. Matrix number refers to the number of *passes* made to build the loan matrix. Enter a value from 1-6, with 6 being the most complete.

The last question confirms that you want to print the matrix. Answering `Y` will start the printing process. This printing job is quite long and should not be invoked without taking into account the time and system resources required. When you enter your choice at the last prompt, the system will send the job to the printer queue and display the `Circulation Loan Periods` menu. The printout will be sent to the system printer defined in the user's `PORT` record.



# 5

## Output Production

---

This chapter provides output production information for notice, invoice, and statement generation. Code definitions described are:

- notice type codes
- contact methods codes
- notice codes
- production control codes
- notice charge setup
- notice header definition
- holiday periods

Automatic notice generation is one of the standard features of the ADVANCE Circulation system. Various types of notices may be defined and produced. Examples are recall, overdue, invoice, and hold pickup notices.

Notices can be generated on demand or automatically by the control of the system calendar; either for all items or patrons, or only for selected ones. They can be either sent out to library patrons, or be used for internal administrative purposes. All notice headings and contact method codes are library-defined.

## Notice Production Menu (COPM)

From the Circulation Codes Menu found under the Circulation Codes Menu heading, select the Output Production (COPM) menu.

```
DD MMM YYYY Geac ADVANCE Library System (##.##) DEFAULT AL
HH:MM Your Library Name
```

CIRCULATION OUTPUT PRODUCTION

1. CNCT General Notice Controls
2. CNTC Notice Type Codes
3. CCMC Contact Method Codes
4. CNC Notice Codes
  
5. COPC Output Production Codes
6. COPG Output Production Charges
7. CNHD Notice Header
8. CNFC Notice Print Format Codes
9. CISFC Notice Print Information Source Codes
10. COPS Notice Production Sequences
11. COPN Notice Headers by Location
12. CIHP Holiday Periods by Institution

Enter the number of your selection and press <ENTER>  
or ? followed by <ENTER> for Help.  
Press <ENTER> to return to previous level :

## General Notice Controls (CNCT)

This table defines general parameters associated with notice production on a system-wide basis.

**Access** Select General Notice Controls (CNCT) from the Circulation Output Production (COPM) menu. Only notices generated by the Notice Production (C) processing job are affected by the following fields. See *Production Codes (COPC)* on page 5-18.

```

NOTICE CONTROL

Control record : NOTICE.CONTROL

1. ZIP or postal code required for notices (1=Yes) : 1
2. LViS - local phone messages only (1=Yes) : 0
3. Local Area Code(s) : 703
4. LViS - suppress local area code (1=Yes) : 1
5. LViS - Number of days to keep voice notices : 15
6. Generate CA notices for LB with $0.00 amount owing (1=Yes):

Options:
? Help # line Line by line Print Exit

```

- |                                                 |          |                                                                                                        |
|-------------------------------------------------|----------|--------------------------------------------------------------------------------------------------------|
| 1. ZIP or postal code required for notices      | [0 or 1] | Defines whether a zip or postal code has to be present on a patron record before a notice is produced. |
|                                                 | 0        | Zip/postal code not required for notices.                                                              |
|                                                 | 1        | Zip/postal code is required for notices.                                                               |
| 2. LViS - suppress long distance phone messages | [0 or 1] | Determines how the optional Voice Contact system produces notices.                                     |
|                                                 | 0        | Generates a phone call.                                                                                |

- 1 Generates a hardcopy notice instead of a phone call if a patron's phone number requires a long distance call.
3. Local area code(s) [0 or 1]  
Lists the Local Area Codes that must be suppressed during dialing.
- 0 Do not enter the local area code(s).
- 1 Enter the local area code(s) for Voice Contact telephone calls.
4. LViS - Suppress local area code [0 or 1]
- 0 The Voice Contact product reads the local area code from field 3.
- 1 The Voice Contact product skips the local area code defined in field 3 if the code is also in the patron's phone number.
5. LViS - Number of days to keep voice notices [Any number]  
Specify the number of days the Voice Contact product should keep a patron's voice notices.
6. Generate CA notices for LB with \$0.00 amount owing [0 or 1]
- 0 Check Accounts Receivable to see if there are any outstanding fines or bills owed for this item.
- 1 Do not check Accounts Receivable.

## Notice Type Codes (CNTC)

The notice types defined here are provided with the system. They form the basis of more tailored notice types, which are described in the Notice Codes (CNC) section.

**Access** Selects Notice Type Codes (CNTC) from the Circulation Output Production menu. The following screen shows a list of notice types.

```

 NOTICE TYPE

Number of records : 7
Code Description of code

1. C Courtesy Notice
2. CA Collection Agency Notice
3. H Hold Cancellation
4. I Invoice (Bill for Replacement cost)
5. O Overdue Notice
6. P Pickup Notice (Holds)
7. R Recall Notice

Options:
? help # line Print Forward Backward Search jump Exit

```

**Changing Notice Type Codes** Existing notice type codes can be modified and printed. To modify codes, enter the line number at the option prompt. The system displays all existing information.

```
NOTICE TYPE CODES

NOTICE TYPE CODE : 0

1. Notice Type Description : Overdue Notice
2. Notice Date Description : DUE:
3. Format (0 = Items Checked out) : 0
 (1 = Items on Hold)
4. Default Output Header : **** OVERDUE ****

Options:
? help # line Line by line Print Exit File
```

To edit a code record field, enter the line number. To save changes, use the *File* command.

Notice Type codes cannot be deleted, or new codes added. These generic codes are required for system processing. The codes are used in the Notice Codes (CNC) program to provide the library with customized notices.

NOTICE TYPE CODE      System provided information. Indicates the type of notice.

1. Notice Type Description      [text]

General description of this type of notice.

NOTE: Three of the fields in this table control the notice format of INVOICES (Notice Type Code I) **only**. These three fields are

- Notice Date Description
- Produce Separately (1=yes)
- Default Output Header

The notice format for other notice types (courtesy, collection agency notice, hold cancellation, overdue, pickup notices, and recall) are controlled by the Notice Print Format Codes Table (CNFC). These fields may be left blank for these Notice Type Codes.

2. Notice Date Description Provides a **print constant** which displays before the due date as it prints on notices, example DUE:
3. Format 0 = Items checked out 1 = Items on hold. [System Default - cannot be edited.]
- 0 Indicates items checked out.
- 1 Indicates items on hold.
4. Default Output Header [text]  
Enter a title for your notice.

## Contact Method Codes ( CCMC )

Patron contacts may be carried out in a variety of ways, depending upon institutional situations. Common contact methods include mail and telephone. Different methods require different types of information. For example, telephone contacts need patron names, phone numbers and item titles, while mail notices require patron addresses.

**Access** Select Contact Method Codes (CCMC) from the Circulation Output Production menu. Notice Method Codes are entered into the Patron Group Code (CPGC) to determine whether patrons in this group have notices sent, or are contacted by telephone.

```
CONTACT METHOD CODES

Number of records : 7
Code Description of code

1. E Email
2. M Mail
3. M2 Mail (Address 2)
4. P Phone
5. PM Phone first; Mail notice if not reached
6. V Voice
7. VM Voice then Mail

Options:
? help Add item # line Print Forward Backward Search jump
Exit
```

**Changing Contact Method Codes** Contact method codes can be modified, deleted and printed. New codes can be added. To modify or delete codes, enter the line number. ADVANCE displays all existing information. Only Contact methods that the library has added can then be deleted. Contact Methods such as Mail are required for system processing.



```

CONTACT METHOD CODES

CONTACT METHOD CODE : M

1. Description : Mail
2. Output Type : 0,1
 (0 = Letter)
 (1 = List)
3. System Printer # : 0
4. Use Mailing Address (1 to 10) : 1
 (May be in form 4,6,1 to try next)
 (address if blank address found)
5. Envelope Window Top Margin : 10
6. Envelope Window Left Margin : 5
7. Envelope Window Height : 3
8. Envelope Window Width : 30
9. Start Records From Top Margin : 16
10. Total Page Length : 58

Options:
? help # line Line by line Copy Print Exit

```

To edit a code record, enter the line number. To save any changes, use the *File* command. Use the *Exit* command to exit without saving any changes.

To add new contact method codes, use the *Add* command. ADVANCE prompts:

```
Enter the name of the code you wish to add. :
```

Enter one to three characters to represent the code record to be created. The system then displays a blank workform.

When the fields in the workform are completed (skipping a field and leaving it blank is considered a completed field) the command options appear at the bottom of the screen. Use commands described previously (example, editing existing codes) to create new notice type codes. Remember to save new codes with the *File* command.

1. Description [text]

Provides a description of the contact method.

2. Output Type [0, 1, 2, or 3]
- Defines the type of output for this contact method. More than one value can be entered into this field. The choices are 0=letter, 1=list, 2=voice, 3=Email. Choice 2 is valid only for libraries using the LViS Voice Contact system. The choices, and the order in which they appear, determine how output is printed. For example, in `Contact Method M (Mail)` the Output Type might be 0,1. This means the system prints a notice for mailing, and adds the patron to a contact list. For `Contact Method P (Phone)` the Output Type might be 1, meaning print a contact list only.
- If the value 0=letter appears first, then the system sends the notices to the Notices Sent file, meaning they are ready for mailing.
- If the value 1=list is first, followed by 0=letter, the system prints a contact list and sends the notices to the Notices Held file, which is not automatically printed. Use the *Send Outputs to Printer* option on the `Circulation Calendar Processor (OCP)` to print the Notice Held file.
- If the patron has an incomplete address, such as no zip or postal code, notices are also sent to the Notices Held file until such time that the patron record is updated.
3. System Printer [0 or any number]
- Defines which system printer is used for notices.
- 0 If your library has only one system printer enter 0.
- [printer number] If multiple printers are used for various types of printouts, enter the appropriate system printer number.
4. Use Mailing Address [one or more numbers (1 to 10) separated by commas]
- Determines which address from the patron registration record will be used by the system on notices. For example, consider students, who typically are not on campus during summer terms. You could define a `Mail2`, contact method and enter 2,1 in this field to have the system use Address 2 (if not blank) for notices, and otherwise use Address 1. In the `Patron Group Code (CPGC)` for students, you could enter `Mail2` in the contact method field and all notices to this patron group would use Address 2 when possible.

Fields 5 - 10

Control the format of **INVOICES** only. For all other Notice Types (courtesy, collection agency, hold cancellation, hold pickup, overdue, recall), the print format is now controlled by the Notice Print Format Code table (CNFC).

Fields 5 to 10 must be entered if your library sends out Invoices. The window width defaults are set for business envelopes with the window on the lower right side of the envelope.

## Notice Codes (CNC)

Notice codes define the details of the previously defined **Notice Types** based upon patron groups. Once Notice Codes are established the codes are entered into the Patron Group/Circulation Code combination to determine which notice is the first to be sent to this type of patron. Since each Notice Code has a field to trigger the *next Notice Code* to be printed, this establishes a sequence of notices unique to each Patron Group. (See *Loan Periods* on page 4-1, for further information)

**Access** Select Notice Codes (CNC) from the Circulation Output Production menu.

Since notice code tables use definitions from notice type codes, the latter must be defined first.

```

 NOTICE CODES

Number of records = 9
Codes Description of codes

1. BFR Bill For Replacement
2. CND Default Courtesy Notice
3. HCND1 Default Hold Cancellation Notice 1
4. HEND_ Default Hold Expired Notice
5. HND_ Default Hold Notice
6. ODD1 First Overdue Notice 1
7. ODD2 Second Overdue Notice 1
8. INV Invoice
9. RND Default Recall Notice

Options:
? QA Add item # line Print Forward Backward Search jump
Exit

```

**Changing Notice Codes** Notice codes can be added, modified, deleted or printed. To modify or delete existing codes, enter the number. ADVANCE displays the current information. Edit a code record field by entering the line number. Use the *Delete* command to permanently remove the code record from the system.

To save changes, use the *File* command. Use the *Exit* command to exit without saving any changes.

```

 NOTICE CODES

NOTICE CODE : CND
------(Page 1 of 2)
1. Description : Student Courtesy Notice 1
2. Notice Type : CND = COURTESY NOTICE
3. #Days after grace period or placed : -01
 (- Days for production prior to grace period)
 (+ Days for production after grace period)

4. Administrative hold (1=Yes) :
5. Production Charge :
 (Charge Per Notice Code)
6. Replacement cost of Item (1 = Yes) :
7. Output Header : COURTESY NOTICE
8. Output Description #1 : This is a reminder that the+
9. Output Description #2 : To avoid late or overdue ch+
10. Output Description #3 : Thank Y+
11. Next Notice Code : ODS = Student Overdue Notice 1
12. Notice Format Code : Courtesy Notice Print Format Code
13. Notice Contact Method :
Options: _
Forward ? help # line Line by line Copy Print Delete Exit

```

**Adding Notice Codes** To add new notice codes to the existing list, use the *Add* command. The system will prompt:

```
Enter the name of the code you wish to add : _
```

Enter 1-10 characters to name the new code record. The system displays the blank workform, with the new code record name displayed on the second line between the colon and \*\*\* New Record \*\*\*. Use the commands described in previous sections to create new notice type codes.

If the library intends to create many different notice codes for different types of patrons, the codes should be created using initial alphabetic characters such as the generic Notice Type codes. This is helpful in grouping Notices Codes together, such as various overdue notices for staff, faculty, students and so forth.

Save the new codes with the *File* command.

|                                        |                                                                                                                                                                                                                                                                                                                                                |
|----------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Description                         | [text]                                                                                                                                                                                                                                                                                                                                         |
|                                        | Describes the specific notice more fully than the associated code, such as Faculty Overdue Notice.                                                                                                                                                                                                                                             |
| 2. Notice Type                         | [Any Notice Type Code]                                                                                                                                                                                                                                                                                                                         |
|                                        | This is a code from the generic notice types table created in <i>Notice Type Codes (CNTC)</i> .                                                                                                                                                                                                                                                |
| 3. # Days after grace period or placed | [any positive or negative number]                                                                                                                                                                                                                                                                                                              |
|                                        | Determines when the notice is to be printed. The number of days is related to either the due date (or the end of the grace period), or to the date a hold was placed (for pickup and cancellation notices). Use + to print a notice after the grace period; use – to print a notice the specified number of days before the grace period ends. |
| 4. Administrative hold                 | [0, 1]                                                                                                                                                                                                                                                                                                                                         |
|                                        | 0 An administrative block is not added to the patron's record.                                                                                                                                                                                                                                                                                 |
|                                        | 1 The system adds an administrative block to the patron's record when this notice is generated.                                                                                                                                                                                                                                                |
| 5. Production Charge                   | [Any Production Charge Code]                                                                                                                                                                                                                                                                                                                   |
|                                        | If the library charges a fee for notice production, enter a code from the Production Charge Code table ( <i>COPG</i> ).                                                                                                                                                                                                                        |
| 6. Replacement cost of Item            | [0 or 1]                                                                                                                                                                                                                                                                                                                                       |
|                                        | 0 Do not charge replacement cost.                                                                                                                                                                                                                                                                                                              |
|                                        | 1 The system includes the item replacement cost on the notice. This can be used to charge the patron for replacement costs when the item is long overdue, and would normally be included on invoices.                                                                                                                                          |
| Fields 6 to 9                          | Controls the output of <b>INVOICES</b> only. For all other Notice Types (courtesy, collection agency, hold cancellation, hold pickup, overdue, recall), the print format is now controlled by the Notice Print Format Code table ( <i>CNFC</i> ).                                                                                              |

|                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7. Output Header          | <p>[text – invoices only]</p> <p>Prints at the top of the notice. It can be specific to the type of invoice sent to different patron groups. If no Output Header is specified here, the system defaults to the header which appears in the Notice Type table.</p>                                                                                                                                                                                                                                                                                                                                                 |
| 8.-10. Output Description | <p>[3 lines of text – invoices only]</p> <p>Three lines of descriptive, free text, information. This information prints on the invoice and provides details to the patron about any instructions they need to return/pay for materials.</p>                                                                                                                                                                                                                                                                                                                                                                       |
| 11. Next Notice Code      | <p>[Any Notice Code or blank]</p> <p>Defines which notice is the next in the sequence. For example, Faculty might get a courtesy notice, followed by an invoice. Students might receive two overdue notices, followed by an invoice. The first notice in the sequence that a patron type receives is defined in the Patron Group Codes table (CPGC).</p> <p>blank Leave blank if this is the last notice that will be produced.</p>                                                                                                                                                                               |
| 12. Notice Format Code    | <p>[Any Notice Format Code]</p> <p>Indicates to the system the code which defines the format and data elements for all notices (except invoices). These codes are created in the Notice Print Format Code table (CNFC). This field must be completed for all notices except Invoices.</p> <p>Invoices Leave this field blank for invoices.</p>                                                                                                                                                                                                                                                                    |
| 13. Notice Contact Method | <p>[Any Contact Method Code]</p> <p>Defines the contact method used for this notice. These codes are defined in the the Contact Method Codes table (CCMC). This method overrides the method set in the patron registration record, the Patron Group Codes table (CPGC) or Patron Membership Codes table (CPMC), or the Production Codes table (COPC).</p> <p>Note that if the method determined by this field (or the other places listed) for sending the notice to the patron is voice or email, the Voice Notice Allowed or EMail Allowed fields on the second screen can specify a higher-level override.</p> |

## Second Screen

Use the *Forward* command on the first screen of the table to go to a second screen of code-definition fields. (Use the *Backward* command to return to the first screen.)

```

 NOTICE CODES

NOTICE CODE : CND
------(Page 2 of 2)
 Description : Student Courtesy Notice
-----<Printed Notices>-----
2. Notice Format Code : CND = COURTESY NOTICE
3. Production Charge :
-----<Voice Notices>-----
4. LViS Format Code :
5. Production Charge :
6. Voice Mail Allowed : 1
 (0 - no, change contact method to 'phone')
 (1 - no, change contact method to 'mail')
 (2 - yes)
-----<Email Notices>-----
7. Notice Format Code :
8. Production Charge :
9. EMail Allowed :
 (0,1 or 2 as Voice)

Options:
Backward ? help # line Line by line Copy Print Delete Exit

```

Description [System display – cannot be edited.]

This is the Notice Code description from the first screen.

Fields 2 and 3 [Fields 2 and 3 default from fields 5 and 12 on the first screen.]

Changes here will be reflected on the first screen and vice versa. They are replicated for your viewing convenience. These fields are for printed notices.

Fields 4, 5, and 6 Fields 4, 5, and 6 relate to the LViS Voice Contact subsystem.

Only libraries which have purchased this optional feature will have access to these fields. For example, the first overdue notice might be telephoned, unlike the second overdue notice, or an invoice, which might require a printed notice.



|                       |                                                                                                                                                                                   |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fields 7, 8, and 9    | Fields 7, 8, and 9 relate to Email contacts.                                                                                                                                      |
| 7. Notice Format Code | [Any valid Notice Format Code]<br>Format and data elements of Email notices. These codes are created in the <code>Notice Print Format Code</code> table (CNFC).                   |
| 8. Production Charge  | [money]<br>The Library may assign a production charge for sending an Email notice.                                                                                                |
| 9. EMail Allowed      | [0, 1, or 2]<br>0 Phone instead of sending an Email message.<br>1 Send mail instead of an Email message.<br>2 Send an Email message, as was specified. Blank has the same effect. |

## Production Codes (COPC)

Production codes specify notice generation parameters. Each notice type (for example, notices, invoices) has its own production codes. The following screen lists the predefined production control codes. The right column displays the date and time of next production.

New production codes **cannot** be added or deleted.

The schedule of Production control codes can be modified.

**Access** Select Output Production Codes (COPC) from the Circulation Output Production menu.

| PRODUCTION             |                                  |    |          |         |
|------------------------|----------------------------------|----|----------|---------|
| Number of records : 10 |                                  |    |          |         |
| Code                   | Description of code              |    |          |         |
| 1. C                   | Notice Production                | 26 | FEB 2000 | 12:00am |
| 2. CA                  | Collection Agency Status Update  | 31 | DEC 1999 | 05:04pm |
| 3. CLEANUP             | Calendar Cleanup Routine         | 13 | DEC 1999 | 04:00am |
| 4. DUEDATE             | Build Due Dates Table            | 13 | FEB 2000 | 08:00am |
| 5. EMAIL               | Email Notices                    | 01 | AUG 2002 | 05:00am |
| 6. HOLDS               | Holds: Upgrades/Purchase Alerts  | 03 | JUN 2000 | 07:18am |
| 7. I                   | Invoice Production               | 03 | MAR 2000 | 12:00am |
| 8. RBR                 | RBR Processing - OPAC Index Upda | 31 | DEC 1999 | 10:10am |
| 9. S                   | Statement Production             | 23 | FEB 2000 | 12:30pm |
| 10. SA                 | Status/Action Item Calendar      | 22 | NOV 1999 | 02:46pm |

Options:  
 ? help # line Print Forward Backward Search jump Exit

Notice production is generally handled automatically by the **background processor**. The background processor checks for the date and time of the next production job (specified by fields 3 to 7 on the following screen). The processor then automatically processes the job at the specified time and sets the next production time. The background processor can be turned off to allow manual processing of jobs.

If a job is scheduled to start before the previous job has been completed, the background processor waits until the first job is completed and then

starts the new job. If two or more jobs have the same scheduled start time, the processor begins them in the same order as they appear in the list.

The background processor does not run the production job if the Next Production Date is set to blank in the Production Code. If the Next Production Date is set but the Production Period is blank, the background processor runs the job once and then sets the Next Production Date to blank.

**Recommended** From the list of production codes on the previous screen, run *CLEANUP* routine regularly, preferably prior to running other production codes.

**Modify Codes** To modify existing codes, enter the line number at the options prompt. *ADVANCE* displays all existing information for the chosen code on screens similar to the following.

```

 PRODUCTION

PRODUCTION CODE : C

 (Page 1 of 2)
1. Description : Notice Production
2. Production Charge :
3. Production Period : D
 (U=Minutes, D=Daily
 W=Weekly, M=Monthly)
4. Length of period : 1
5. Period detail (Time,Day,Week) : 00:00
6. Next Production Date : 26 FEB 2000
7. Next Production Time : 12:00am
8. Automatically Output (1 = Yes) : 0
9. Automatically Email if used : 1
 (1 = Spool to dispatch queue)
 (2 = Mail immediately)
10. System Printer # : 0
11. Default Contact Method : M = Mail
12. Default Holiday Contact Method :
Options:
Forward ? help # line Line by line Copy Print Exit File

```

```
 PRODUCTION

PRODUCTION CODE : C
----- (Page 2 of 2)
1. Output Header : NOTICES
2. Comment Line #1 :
3. Line #2 :
4. Line #3 :

Last Production Date : 25 FEB 2000
Last Production Time : 01:09pm

Options:
Backward ? help # line Line by line Copy Print Exit File
```

To edit a production code record, enter the line number. To save changes, use the *File*. Use the *Exit* command to exit without saving changes.

Production Code

Production Code provided by ADVANCE. (These codes cannot be added or deleted.)

1. Description

[text]

Describes the type of notice/report generated by the Production Code.

2. Production Charge

[Any Production Charge Code or Blank]

Enter a code defined in the Production Charge Codes (COPG) table. It can be a list of charge codes. When the notice is generated the system checks each code to make sure there is a valid charge in field 3 and a transaction code in field 4 of the COPG. Then the system builds a charge record which is added to the patron's block record.

If production charge codes are entered into Notice Codes (CNC) table, there is no need to use field 2.

The production charge at the Production Code, field 2, is applied once only to the set of notices for a given patron. The production charge

in the Notice Code (CNC) is applied to each **line item** appearing on the notice.

Fields 3 to 7

Used to schedule the background processor.

3. Production Period

[U, D, W, M]

Specify the units of time that you require the background processor to run. (Use in conjunction with the next field.)

U Period is specified in minutes.

D Period is specified in days.

W Period is specified in weeks.

M Period is specified in months.

4. Length of period

[numbers]

Enter the number of minutes, days, weeks, or months. This is the length of time between automatic production startups, in units specified by the preceding field.

5. Period detail (Time, Day, Week)

[time, day, week]

This field enables you to specify the time of the day, the day of the week and the week of the month that you require for the production of the job represented by this code. This field is used in conjunction with field 3, Production Period.

Fields 6 and 7 can be left blank. The system will calculate the next date and time based on the current date and the information in fields 3, 4, and 5.

Time and dates can be specified for within the period in fields 3 and 4 as shown in these examples:

- For a month-based period, you can specify a time, day, and week in this field. For example:

21:00, 1, 3

means 9:00 PM on the 1 st day (Monday) of the third week of the month.

- For a week-based period, you can specify a time and day in this field.

21:00, 1

means 9:00 PM on the first day of the week (Monday).

- For a day-based period, you can specify a time in this field.

21:00

means 9:00 PM.

NOTE: For a minute-based period, do not use this field. Enter the time in 24-hour format. Examples:

21:30 03:00

If a job is run off-schedule — by modifying the system-calculated date and time in the fields 6 and 7 or by running the job interactively (Calendar Processor [OCP] from the Output Control Menu [OCM]) — the system will use the value in this field to reset the schedule.

blank The system will calculate the next date and time base on the previous ones. For example, if a week-based job was last started at 9:00 PM on the 5th day of the week, then the system schedules the next run at 9:00 PM on the 5th day of one of the following weeks. It does not matter why the job was last started at that date and time.

The system does not reset the schedule after a job has been run off-schedule due to operator intervention.

*Next Production Date and Time*

The *Production Period* and *Length of period* (fields 3 and 4) define the length of time between the automatic startups of a processing job. The *Production Period* field can be left blank to prevent the system from automatically calculating and setting the *Next Production Date and Time* (fields 6 and 7), which tell the system when to start the job next.

6. Next Production Date

[day, month, year (in system format)]

The date specified here will be the next occasion the background processor is activated to automatically produce the specified notice. If required, an operator can override the default date by editing this field.

The year can be omitted from the date. The system assumes the current year.

7. Next Production Time [time (24-hour format)]
- This field also refers to the background processor. It is the same as the previous field except that you specify the time of day that the processor should start its automatic production. When entering a time, do not enter AM, PM, or the colon. For example, if you enter 2130 the system displays 09:30 PM after you <ENTER>.
8. Automatically Output [0, 1 or blank]
- Tells the background processor whether this report should be automatically printed.
- 0 or blank Save the output in a file. This file can be printed by selecting the *Send Outputs to Printer* option from the Calendar Processor (OCP) menu, under the Output Control Menu (OCM). CAUTION: Print the output before the next run of the same process. The output file can contain output from only a single production run. Each run overwrites the old output with new output.
- 1 Save the output to a file and send it to a print queue.
9. Automatically Email if used [0, 1 or blank]
- Tells the background processor whether this report should be automatically sent via Email. Note that Email is generated only if Email is defined as a contact method (CCMC) and it is set as the method to use for a notice (CNC) and for the patron group (CPGC) or membership (CPMC).
- 0 or blank Save the output in a file. This file can be sent by Email by selecting the *Send Outputs to Printer* option from the Calendar Processor (OCP) menu, under the Output Control Menu (OCM). CAUTION: Send the output before the next run of the same process. The output file can contain output from only a single production run. Each run overwrites the old output with new output.
- 1 Save the output to a file and send it by Email to the patron. Note that you must execute the EMAIL job to send notices.

10. System Printer # [number]  
Defines which system printer is used to print notices and reports for this processing job.
11. Default Contact Method [Any Contact Method Code or blank]  
If no contact method is defined in the patron record or in the Patron Group Codes table (CPGC) or Membership Codes table (CPMC), the system will look here for a default contact method. These other sources override an entry made here on the Production Codes screen.
12. Default Holiday Contact Method [Any Contact Method Code or blank]  
If no holiday contact method is defined in the patron record or in the Patron Group Codes table (CPGC) or Membership Codes table (CPMC), and today is during a defined holiday period, the system will look here for a default contact method. These other sources override an entry made here on the Production Codes screen.

### Second Page

1. Output Header [text]  
This field will print on all notices.
2. Comment Line #1 [text]  
Used for Invoices and Statements only.
3. Line #2 [text]  
Used for Invoices and Statements only.
4. Line #3 [text]  
Used for Invoices and Statements only.
- Last Production Date and Time* The date and time that the processing job was last automatically started, or started interactively via OCP.



## Build Due Date Table

Use the DUEDATE code to schedule the background processor to build a table of due dates for use by the checkout process. If changes are made to the rules for due date and the Loan Matrix table is rebuilt, then the DUEDATE production job should be run manually (from the Calendar Processor [OCP]) to rebuild the table of due dates.

```

 PRODUCTION CODES

PRODUCTION CODE : DUEDATE

1. Description : Build Due Date Table
2. Production Charge :
3. Production Period : D
 (U=Minutes, D=Daily
 (W=Weekly, M=Monthly)
4. Length of period : 1
5. Period detail (Time,Day,Week) :
6. Next Production Date : 24 APR 1991
7. Next Production Time : 04:45PM
8. Automatically Output (1 = Yes): 1
9. System Printer # :
10. Default Contact Method :
11. Output Header :
12. Comment Line #1 :
13. Line #2 :
14. Line #3 :
Options: -----
 ??=help ##=# line CO=Copy PRT=Print DEL=Delete
 FI=File E=Exit

```

This Build Due Date Table function helps speed up the checkout process by creating a table of due dates. This function builds a set of tables containing pre-calculated due dates for every patron group and every circulation code that uses a daily loan cycle.

The checkout process will be faster because the system will not need to calculate due dates for each item checked out. Instead, the system will refer to this table for the appropriate due date. This reference process enables the system to skip the time consuming and process-intensive job of due date calculation.

### Recommendation

It is recommended that the DUEDATE process be scheduled for the start of every week. The process clears old due date information from the file

and then builds the tables for the next week. This process is **not** required, but if the tables are not built then the calculation of each item's due date will be done at checkout time.

## Production Charges (COPG)

Production charge codes link notice production to Circulation Transaction Control (CTC) and the accounts receivable function. They also can specify a charge to the patron for each notice sent. If the library wishes to charge for notice production, these codes are entered into the Notice Code table for that type of notice.

**Access** Select Output Production Charges (COPG) from the Circulation Output Production menu.

```

 PRODUCTION CHARGE CODES

Number of records = 2
Codes Description of codes

1. INVPRO Invoice Production Charge
2. NOTPRO1 Notice Production Charge 1

Options:
 ?=? help A=Add item ##= line PRT=Print
 F=Forward B=Backward E=Exit

```

Production charge codes can be added, modified, or deleted. To modify or delete codes from the table, enter the number. ADVANCE displays all existing information for the code on a screen similar to the one below.

```

 PRODUCTION CHARGE CODES

PRODUCTION CHARGE CODES : INVPRO

1. Description : Invoice Production Charge
2. Accounting Description : Invoice Production Charge
3. Production Charge : 5.00
4. Charge Transaction Code : PRO = Production Charge
5. Amount to deduct from FINE :
 (Notice production only)

Options: _____
 ?=? help ##= line CO=Copy PRT=Print DEL=Delete
 FI=File E=Exit

```

To add new production charge codes, use the *Add* command. ADVANCE prompts:

Enter the name of the code you wish to add. :

Enter one to seven characters for the code. The system displays a blank workform. Use the commands described in previous sections to create new notice type codes. Use the *File* command to save new codes.

- |                                                        |                        |                                                                                                                                                                                                               |
|--------------------------------------------------------|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Description                                         | [text]                 | Provides a free text explanation of the production charge and the type of notice with which it is associated.                                                                                                 |
| 2. Accounting Description                              | [text]                 | Prints on notices.                                                                                                                                                                                            |
| 3. Production Charge                                   | [numbers]              | Specifies the amount of the charge for each notice. Leave blank if no charge is applied.                                                                                                                      |
| 4. Charge Transaction Code                             | [Any Transaction Code] | This is a value from the <code>Transaction Codes (CTC)</code> table. Indicates to the system what kind of patron block is to be invoked if patrons have too many production charges, or if charges go unpaid. |
| 5. Amount to deduct from FINE (Notice Production Only) | [number]               | This is used if the library does not wish to charge a maximum fine, and in addition a production charge.                                                                                                      |

## Notice Headers (CNHD)

Notice header allows the library to customize the headings for all notices defined in the system. Usually, only one header is defined in a given system.

**Access** Select Notice Header (CNHD) from the Circulation Output Production menu. The following screen represents a sample header record.

```

NOTICE HEADER

NOTICE HEADER CODE : NOTICE.HEADER

1. Header Line #1 : Aloha University Libraries
2. Line #2 : Main Library Circulation Department
3. Line #3 : ADVANCE, Hawaii 96999
4. Line #4 : (416) 475-7733
5. Email address : notices@mylibrary.com
 (For Reply To)

Options: _____
? help # line Line by line Print Exit

```

Modification and deletion of header records can be done by using the commands. To create a new header record requires the use of the system editor and access to the system control file.

The Notice Headers by Location table (COPN) described later in this section allows the definition of notice headers specific to an agency or sublocation for a specific notice.

## Notice Print Format Codes (CNFC)

The Notice Print Format Codes define the Geac-provided and library-defined print formats for courtesy notices, hold cancellation notices, pickup notices, overdue notices, and recall notices — all types of notices except invoice notices. The particular format used for a notice is the one assigned to that notice in the Notice Codes table (CNC).

**Access** Enter (CNFC), or select it at the Circulation Output Production Menu (COPM).

**NOTE:** This table has a sub-table, **Notice Format Field Definitions**.

```
NOTICE PRINT FORMAT CODES

Number of records : 7
Code Description of code

1. CND COURTESY NOTICE
2. CNDS STAFF COURTESY NOTICE
3. HCND1 CANCELLATION NOTICE
4. HND1 DEFAULT PICKUP (HOLD) NOTICE
5. ODD1 OVERDUE NOTICE 1
6. ODD2 OVERDUE NOTICE 2
7. RND1 RECALL NOTICE
8. BFR BILL FOR REPLACEMENT NOTICE
9.
10.
11.
12.
13.
14.

Options:
line Add item Forward Backward ? help Search jump Exit
```

A sample detailed screen, for the Geac-provided code CND follows. It was accessed by entering 1 at the main Notice Print Format Codes screen.

```

 CNFC - NOTICE PRINT FORMAT CODES

NOTICE FORMAT CODE : CND
1. DESCRIPTION : COURTESY NOTICE
2. TOTAL NUMBER OF FIELD DEFINITIONS : 23
3. NUMBER OF TITLES PER PAGE : 5
4. FIELD NUMBER FOR START OF TITLE BLOCK : 16
5. FIELD NUMBER FOR END OF TITLE BLOCK : 23
6. NUMBER OF BLANK LINES BTN TITLES : 1

Options:
 File Line by line # line Copy ? help Exit

```

**Filing Prompts** When you *File* a code, the system asks:

Do you wish to print a sample Notice now?

Answer **Y** to print a dummy page of the notice, or **N** to save changes and return to the table's initial screen without printing a page. The dummy page contains **X**'s in all the defined fields — this way you can get a better picture of new or modified formats, or can line up forms on a printer before printing the notices output by the **C** processing job.

If you answer **Y** to print a page, the system then prompts:

Do you wish to make further modifications to the Notice format?

Answer **Y** to stay on this screen, or **N** to save changes and return to the table's initial screen. If you answer **Y** to stay, the current code definition is **not** filed — to save any work you do on this screen, you must later *File* it without printing a dummy page or without asking to make further modifications.

Notice Print Format Code

[10 char.]

When you add **new** codes for any library-specific formats, leave the Geac-supplied codes unchanged for reference or use.

1. Description

[Text]

Brief description of the *Notice Print Format Code*.

2. Total Number Of Field Definitions [System-supplied number]  
Number of *Notice Format Fields* defined for the purchase order. <ENTER> to access the Notice Format Field Definitions sub-table which defines the contents and position of these fields. (See the [12. Notice Format Code](#) on page 5-15.)
3. Number Of Titles Per Page [2 digits]  
Number of items (titles) printed per page.
- Fields 4 - 5. [2 digits]  
Reference numbers of the first and last *Notice Format Fields* which describe an item (title). *Notice* formats have three groups of *Notice Format Fields* (defined at the Notice Format Field Definitions sub-table): **top-of-form information** such as date, patron name and address; **title block** item description such as title, author, due date; **bottom-of-form information**, if necessary.
6. Number Of Blank Lines Btn Titles [2 digits]  
Number of blank lines left between items (titles) if multiple titles are printed per page (see field 3 above).

### Notice Format Field Definitions

Notice Format Fields define the size, position, and content of each of the print fields for a Notice Print Format Code.

Access the Notice Format Field Definitions sub-table by selecting field 2 at the detailed screen of the higher-level Notice Print Format Codes table (described in the preceding section.)

A screen with the first 14 fields for CND, a Geac-provided Notice Print Format Code, follows.

NOTE: The system keeps the fields sorted in *ROW,COLUMN* sequence.



```

CNFC - NOTICE FORMAT FIELD DEFINITIONS BROWSE
NOTICE FORMAT CODE: CND
FIELD DESCRIPTION FROM ROW,COLUMN TO ROW,COLUMN
 1. DATE 2,1 2,8
 2. TIME 2,10 2,18
 3. TITLE 2,20 2,50
 4. PAGE TEXT 2,65 2,70
 5. PAGE NUMBER 2,72 2,75
 6. PATRON ID 5,1 5,15
 7. PATRON NAME 10,5 10,55
 8. PATRON ADDR 11,5 11,55
 9. PATRON CITY 12,5 12,55
10. PATRON ZIP 13,5 13,55
11. DASH 15,1 15,80
12. NOTICE TYPE TEXT 17,30 17,60
13. NOTICE DESC 20,5 20,80
14. NOTICE DESC 21,5 21,80

Options:
line Add item Forward Backward ? help Exit

```

The following is a sample detailed screen, for field number 7 (patron name). Type 7 at the main Notice Format Field Definitions screen to obtain this screen.

```

CNFC - NOTICE FORMAT FIELD DEFINITIONS
NOTICE FORMAT CODE: CND
FIELD NUMBER : 7
1. DESCRIPTION : PATRON NAME
2. START ROW : 10
3. START COLUMN : 5
4. END ROW : 10
5. END COLUMN : 55
6. FIELD TYPE : 1 - Standard field
7. LABEL :
8. INFORMATION SOURCE: S5 - Patron Name

Options:
File Line by line # line Delete ? help Exit

```

Field Number : [2 digits]

1. Description [text]

Brief description of the *Notice Format Field*.

|               |                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|---------------|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fields 2 - 5  | [2 digits]         | Starting and end print positions for the field. You can specify a multiple-row field, if you wish, but be careful: make sure the end column is greater than the start column. If the field is labelled (see below), include the width of the label in the space you specify here. CAUTION: If the field is the <b>first</b> field of the title block (as specified for the Notice Print Format Code; see the preceding section), then make sure it is the <b>first</b> field on its row. Similarly, if the field is the <b>last</b> field of the title block, then make sure it is the <b>last</b> field on its row.                                                                                                                                                                                                                                                   |
| 6. Field Type | [1, 2, 3, 4, or 5] | <p>Describes the information source, as listed below. To see the <code>Field Type Codes</code> table, enter ?? in this field and &lt;ENTER&gt;. (These codes are defined in <code>Notice Print Information Source Codes [CISFC]</code> – see <i>Notice Information Source Codes (CISFC)</i> on page 5-36.)</p> <ol style="list-style-type: none"><li><b>Standard field</b><br/>Indicates patron name, notice notes, call number, and other information from Circulation records.</li><li><b>Bibliographic field</b><br/>Information from specified MARC fields and subfields.</li><li><b>Free text field</b><br/>Enter any text.</li><li><b>Programmed field</b><br/>A special customized information source, created by Geac programmers for the library.</li><li><b>File lookup field</b><br/>Information from specified PATRON or PIECES database fields.</li></ol> |
| 7. Label      | [text]             | Text (including blanks) printed at the beginning of the field, such as "DUE:" or "COPIES:". If the print field is a free text field, specify all its text here.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |

8. Information Source [1-5 char. or blank]

A valid Notice Information Source Code. This code describes where the data for the field is provided from. The code's *Field type* must match the one you specify above for the print field. To see the Notice Information Source Codes table, enter ?? in this field and <ENTER>. If the print field is a free text field, leave this blank. The data in dollar amount fields and total fields is right-justified; the data in most other fields is left-justified.

## Notice Information Source Codes (CISFC)

When defining a notice print format (in the Notice Print Format Codes table), the library defines the size, position, and contents of each print field; to specify the data source for these field contents, the library assigns a Notice Information Source Code at field 8 of the Notice Format Field Definition sub-table. For example, the code B2 specifies where to get author information.

**Access** Enter CISFC at any Circulation menu, or select it at the Circulation Output Production Menu (COPM).

```
NOTICE INFORMATION SOURCE CODES

Number of records : 28
Code Description of code

1. B1 Title
2. B2 Author
3. B3 Local Call #
4. B5 Subject
5. S1 System Date
6. S10 Patron Phone Number
7. S11 Borrower Name (other than patron)
8. S12 Due Date
9. S13 Return Date
10. S14 Item Barcode
11. S15 Notice Type/Code
12. S16 Notice Notes
13. S17 Institution Code
14. S18 Institution Name in OPAC

Options:
? help Add item # line Print Forward Backward Search jump
Exit
```

A sample detailed screen, for the code B1, follows.

```

 INFORMATION SOURCE CODES
 : B1

1. Description : Title
2. Field type : 2 = Bibliographic field
3. Source for bib info : *245abc
4. Conversion Code :
 (for file lookup only)
Options:
? help # line Copy Print Delete File Exit

```

Information Source Code

[1-5 char]

By convention, the code consists of a letter and a distinguishing number; the letter is one of the following: bibliographic information (*Field Type Code* =2); file lookup (*Field Type Code* =5); standard (*Field Type Code* =1); T totals (*Field Type Code* =1); Geac-programmed (*Field Type Code* =4)

Although you may add or modify the B and F codes, do not change anything other than the *Description* in the other codes. The definitions used by print jobs for the other codes are actually stored elsewhere and the codes are shown in this table only for information purposes only; changes made here do not affect the real definitions and will only be confusing.

1. Description

Brief description of the Notice Information Source Code.

2. Field type

[1, 2, 3, 4, or 5]

A valid *Field Type Code*, describing the kind of information source, as listed below. To see the *Field Type Codes* table, enter ?? in this field and <ENTER>.

1 **Standard field**

Patron name, notice notes, call number, and other information from Circulation records. **Geac-ASSIGNED ONLY.**

2 **Bibliographic field**

Bibliographic information from specified MARC fields and subfields.

3 **Free text field**

**DO NOT USE THIS FIELD.**

4 **Programmed field**

A special customized information source, created by Geac programmers for the library. **Geac-ASSIGNED ONLY.**

5 **File lookup field**

Information from specified fields of the PATRON and PIECES files.

3. Source for bib/file lookup

[Answer only if you answered 2 or 5 to the preceding field]

Field Type 2

Specify the source(s) of **bibliographic** information. If you specify alternate sources, use commas to separate them; the system will take information from the first source that has data. There are two types of sources:

- MARC record tag and subfields: in the format "\*nnnssss", where "nnn" represents the 3-digit MARC tag and "ssss" represents the complete list of MARC subfield codes. The tag must be preceded by an asterisk. (The elements of fixed length fields such as 008 cannot be specified.)
- MARC record Leader field: in the format "Lnn-mm", where "nn" represents the starting character position and "mm" represents the number of characters.

Field Type 5

Specify the source of **circulation** information. The system will lookup the patron record or piece record and return data from a specified attribute, multivalued, or subvalue. This information can be in turn used as a lookup key (with an optional prefix) to retrieve data from another file's attribute, multivalued, or subvalue. And so on, until the desired information is retrieved. The following format must be used for the lookup statement:

```
PATRON;att{;mv{;sv}}{,filename{;idprefix}{;att{;att{;mv{;sv}}}}...}where: PATRON (or PIECES) is the initial filename, att is the file's attribute number, mv is the file's multivalued number, sv is the file's subvalue number, filename is the name of a subsequent file for lookup, idprefix is the prefix for the lookup key for that next file, {} brackets indicate an optional part of the statement and \.\. indicates a repeatable part of the statement. For example, the statement PATRON;14,CODES;PCD-;1 means: retrieve the data from attribute 14 of the PATRON file, put the prefix PCD- in front of that data and use it as a lookup key in the CODES file, and retrieve the data from attribute 1 there.
```

4. Conversion Code [Answer only if you answered 5 to field 2 — only for a file lookup]
- Indicates a data conversion mask must be applied to the data retrieved from the database. For example, D conversion applied to the internal-format date "8790" produces the text "30 JAN 1992".

## Notice Production Sequences (COPS)

This table allows you to define the way patron notices are sorted. This applies only to notices generated by the C-Notice Production background job.

It is possible to define sequences other than patron barcode order by which notices are sorted. For example, notices can be collated by the agency associated with each line item on the notice.

**Access** Select Notice Production Sequences (COPS) from the Output Production Menu (COPM).

**Default Collation Sequence** If you leave the *Collation sequence* field blank, the system defaults to `Ntc.Pid,Ntc.Code`, that is, sorting by the patron barcode and the notice code.

**Sorting by Call Number** Add `Ntc.SortCallno` to the end of your Collation sequence to sort the items by call number within the existing collation. For example, enter `Ntc.Pid,Ntc.Code,Ntc.SortCallno` in the *Collation sequence* field to sort the items within the notice by call number.

```

 PRODUCTION

PRODUCTION CODE : C

1. Collation sequence :
2. Separate sequences :
3. Page break on :
4. Summary sequence :
5. Archive period :
 Date of last use :
 Description : Notice Production

Options:
? help # line Line by line Copy Print Exit
```

1. Collation Sequence [Dictionary items separated by commas or blank]

**blank** The system defaults to sorting by `Ntc.Pid,Ntc.Code` — patron barcode and the notice code.



This field can have several entries, separated by commas. For example, notices can be collated by Institution, Sublocation, Patron ID, Notice Type, Zip code.

The following dictionary items may be used for Notice Collation Sequence. Some care must be taken in entering these names. Multiple dictionary items should be separated by commas and with no spaces between. An invalid dictionary item will generate an error message requiring acknowledgment. **Enter the dictionary items exactly as they appear on the following list.**

| Dictionary Item | Description                                                   |
|-----------------|---------------------------------------------------------------|
| Ntc.Inst        | the institution associated with the notice                    |
| Ntc.Subl        | the sublocation associated with the notice                    |
| Ntc.Pid         | the Patron ID (barcode)                                       |
| Ntc.Type        | the notice type                                               |
| Ntc.Item        | the item barcode number where available                       |
| Ntc.Bib         | the bibliographic control number                              |
| Ntc.Hdng        | the text of the output header associated with the notice code |
| Ntc.Date        | the date associated with the notice                           |
| Ntc.Prio        | the Notice Print Order associated with the notice type        |
| Ntc.Sepv        | the setting of the CNTC field (produce separately)            |
| Ntc.SortCallno  | the call number associated with the item                      |
| Ntc.Code        | the notice code.                                              |
| Ntc.Zip         | the notice zip code                                           |

2. Separate sequence [one dictionary item]

This defines a single dictionary item that tells the system how separate **sets** of notices are to be identified. If defined, it must correspond to one of the entries in the notice collation sequence. Sublocation is the most

likely as it would allow a set of notices for each branch to be individually identified and printed separately.

### 3. Page break ON

Defines a field on which a new page of output is to be generated for a given patron. This will default to Notice Type since each type of notice has text specific for that notice. This field would not normally need to be defined.

### 4. Summary Notice Sequence

Prints a summary report consisting of one line each for notices sent and notices held. This sequence defaults to that for the printed notices, as defined in the Notice Type table. This allows for a different sequence to be defined for the notice summaries (Contact and Sent), if the library requires it.

### 5. Archive period for notices

[-1 to 999]

Allows the library to define a number of days for which to keep all previous runs of notices. If you enter -1 the system would keep all notices generated by the Notice Production (C) job today. If you enter 1 the system will keep all notices from today and yesterday, thus for one day. Enter a number from -1 to 999 for the number of days notices should be retained. A value of 1 or 2 would be appropriate. A setting of -1 causes the system to behave as it did in previous releases. It is the responsibility of the system administrator to ensure that sufficient spare disk capacity exists on the system if notices are to be kept for longer periods of time.

*Date of last use* and *description* are system supplied fields. This is the date on which this table was last updated. These fields are automatically set by the system.

## Notice Headers by Location (COPN)

This table allows the definition of location specific notice header. These may be associated with the institution, or sublocation for a specific notice. Appropriate Notice Format Codes allow these headers to be inserted into the notice. They allow a header and text specific to an institution or sublocation to be included in a notice. These Notice Header codes are entered into the Institution (CHIC), or Sublocation (CHSC) tables. (See *Loan Periods* on page 4-1 for further information).

**Access** Select Notice Headers by Location (COPN) from the Output Production Menu (COPM).

```

NOTICE HEADER

NOTICE HEADER CODES : PUBR1

1. Description : PUBLIC LIBRARY BRANCH 1
2. Header Line #1 : Circulation Department
3. Line #2 : Public Library Main Branch
4. Line #3 : 123 Main Street
5. Line #4 : San Diego TX
6. Email address : notices@mylibrary.com
 (For Reply To)

Options:
? help # line Line by line Copy Print Delete Exit

```

1. Description [text]

Describes the header code which will display in the appropriate Institution or Sublocation tables with which it is associated.

Fields 2 to 5

Allow four lines of text which will print on notices. These lines of text are referenced from the Notice Format Codes as HI1...HI4 and HS1...HS4. See *Notice Format Codes* for further information.

The system has a defined hierarchy to extract the notice header information. It is sublocation, institution, and system. You can define in the notice format which of these to use. Refer to Notice Print Information Source Codes (CISFC) for the list of entries. If the system

cannot find a header for that level, it proceeds to the next level to try and extract a header. Definitions for sublocations and institutions are entered here. The system is defined in `Notice Header (CNHD)`.

6. Email address (For  
Reply To)

[text]

Library Email address to be used if patrons reply to Email notices.

## Holiday Periods by Institution (CIHP)

This table allows the definition of holiday periods so that you can set the system to use different patron contact methods when issuing notices during those periods.

**Access** Select *Holiday Periods by Institution (CIHP)* from the *Output Production Menu (COPM)*.

At the *Enter Institution Code* prompt, enter an institution code.

```

 HOLIDAY CONTROL RECORD EDIT

Enter Institution Code : AU
 Start End Description Apply
 ----- ----- ----- -----
1. 20 DEC 2000 05 JAN 2000 MID-WINTER 2000 Y

Options:
? help # line New Backward Forward Exit

```

Use the *# line* or *New* options to edit or add holiday period definitions. A detail screen such as the following example appears.

```
HOLIDAY CONTROL RECORD EDIT

Enter Institution Code : AU

1. Notice Holiday Start date.....: 20 DEC 2000
2. Notice Holiday End date.....: 05 JAN 2000
3. Holiday description.....: MID-WINTER 2000
4. In use (0=No, 1=Yes).....: 1

Options:
? help # line Line by line Delete File Exit
```

- 1. Notice Holiday Start date [date]  
Start date for the holiday period of notice production runs.
- 2. Notice Holiday End date [date]  
End date for the holiday period of notice production runs.
- 3. Holiday description [text]  
Description of the holiday period.
- 4. In use [0 or 1]
  - 0 (no) Do not use this period to activate holiday contact methods for notice production runs.
  - 1 (yes) Use this period to activate holiday contact methods for notice production runs.

# 6

## Payment Collection

---

This chapter describes the procedures for activating the ADVANCE payment management or accounts receivable function. Codes defined here include:

- fund codes
- financial transaction codes
- register location codes
- register port codes
- payment type codes
- receipt header setup

The accounts receivable function uses two types of codes: accounting and security control. The former includes fund, financial transaction, and payment type codes. The latter includes register location and register port codes.

This chapter also describes:

- fine rule codes

## Payment Collection Menu (CPCM)

From the Circulation Codes Menu select the Circulation Payment Collection (CPCM).

```
DD MMM YYYY Geac ADVANCE Library System (#.##) XXXXX YY
 HH:MM Your Library Name
```

CIRCULATION PAYMENT COLLECTION

1. CPFC Fund Codes
2. CFFB Fund/Transaction Codes
3. CPRL Register Location Codes
4. CPRP Register/Port Codes
5. CPTC Payment Type Codes
6. CRHD Receipt Header
7. CFRULE Fine rules

Enter the number of your selection and press <ENTER>  
or ? followed by <ENTER> for Help.  
Press <ENTER> to return to previous level :



## Fund Codes (CPFC)

Fund codes distinguish various types of revenues which the library collects from circulation transactions. For example, you can use these codes to group payment types such as all payments from a particular branch. The division and format of fund codes may vary from one institution to another depending upon accounting practices. The ADVANCE Library System accommodates a variety of accounting practices.

**Access** Select Payment Fund Codes (CPFC) from the Circulation Payment Collection menu.

```

 FUND CODES

Number of records : 7
Code Description of code

1. 1 Circulation Fines - MAIN Campus
2. 2 Circulation Fines - Campus 1
3. 3 Circulation Fines - Campus 2
4. C CIE Library Circulation Fines
5. COPY Circulation Fines - MAIN Campus
6. Y APL Circulation Fines - Branch 1
7. Z APL Circulation Fines - Branch 2

Options:
? help Add item # line Print Forward Backward Search jump
Exit

```

**Changing Fund Codes** Existing fund codes can be modified, deleted and printed. New codes can be added. To modify or delete existing codes, enter the number. ADVANCE displays the existing information.

```
FUND CODES

FUND CODE : 1

1. Fund description : Circulation Fines - Main Campus
2. Type of Charge : Fines
3. Fund : G

Options:
? help # line Line by line Copy Print Delete Exit
```

To edit a code record field, enter the line number. Use the *Delete* command to permanently remove the code record from the system. Save changes with the *File* command. Use the *Exit* command to abandon changes.

To add new fund codes to the existing list, use the *Add* command. ADVANCE prompts:

```
Enter the name of the code you wish to add. :
```

Enter one to five characters to represent the code record to be created. The system displays a blank workform. This alpha/numeric code can be the same as that used by the library's accounting system. Fund codes for like kinds of revenue can be grouped together and entered into the Fund/Transaction Codes (CPFB) table.

```
FUND CODES

FUND CODE : newl *** New Record ***

1. Fund description :
2. Type of Charge :
3. Fund :
```

1. Fund description [text]  
Provides information on the department, location, or subdivision of revenue source.
  
2. Type of Charge [text]  
Describes what the charge is for fines, lost books, service fees, etc.
  
3. Fund [text]  
Can be entered into Fund Transaction Codes (CPFB).  
Complete the appropriate fields, and check the accuracy of the entered data. When you complete the last field, the command options appear at the bottom of the screen.

```
Options:
? help # line Line by line Copy Print Delete
Exit
```

Save the new definition using the *File* command.

## Fund Transaction Codes ( CPF B )

Payment transaction codes define types of patron charges and fine blocks. Payment transaction records contain information which will print on patron receipt and notices, a default cost of transaction (if appropriate), institution for which this type of charge is valid, and fund codes.

**Access** Select Fund/Transaction Codes (CPF B) from the *Circulation Payment Collection* menu.

The following screen shows a list of default transaction codes.

**NOTE:** Only codes that are chargeable transactions appear on this screen.

| TRANSACTION CODES & ACCOUNT |                                                |
|-----------------------------|------------------------------------------------|
| Number of records : 8       |                                                |
| Code                        | Description of code                            |
| -----                       |                                                |
| 1. 14                       | Late Return Fines                              |
| 2. 2                        | Lost Books                                     |
| 3. 25                       | Damaged Book                                   |
| 4. 5                        | Charges (Future use)                           |
| 5. 9                        | Delinquent                                     |
| 6. ISUR                     | IL/I Sur Charge                                |
| 7. PRO                      | Production Charge                              |
| 8. REG                      | Registration                                   |
| Options:                    |                                                |
| ? help                      | # line Print Forward Backward Search jump Exit |

Code 14, Late Return Fines, 2 for Lost Books, and 5 for Charges (future use) are permanent codes. You cannot change these codes because they are required by the system.

### Changing Transaction Codes

Other transaction codes can be modified, deleted and printed. New codes can be added from the Transaction Codes menu (CTC). See [General Codes](#) on page 8-1. If an entry has been added to Circulation Transaction Codes (patron blocks) which indicates that the block is *Charge controlled*, an entry will automatically be added to the Fund/

Transaction Codes ( CPF B ) list. You may then modify the record and add appropriate information.

To modify or delete codes, enter the line number. ADVANCE displays all existing information as shown on the following screen. Edit a code record field by entering the line number.

```

 TRANSACTION CODES & ACCOUNT

TRANSACTION CODE : 25

1. Description : Damaged Book
2. Receipt Display code : DM
3. Receipt Code Description #1 : The item listed was returned damaged.
4. Receipt Code Description #2 : Repair or replacement costs are asses+
5. Institutions (No sublocations) : AU,APL,CIE
6. Sublocations : ALII,CAM1,CAM2,MAIN,BRA1,BRA2
7. Fund Code : 1,2,3,C,X,Y,Z
8. Default Cost of Transaction : 15.00

Options:
? help # line Line by line Print Exit

```

```

 TRANSACTION CODES & ACCOUNT

TRANSACTION CODES : Tst *** New Record ***

1. Description : _____
2. Receipt Display code :
3. Receipt Code Description #1 :
4. Receipt Code Description #2 :
5. Institutions (No sublocations) :
6. Sublocations :
7. Fund Code :
8. Default Cost of Transaction :

Options:
? help # line Line by line Print Exit

```

1. Description [text – up to 32 characters]
2. Receipt Display code [1 – 3 chars]  
This code displays on receipts.
3. Receipt Code Description #1 [text]  
Description that appears on Invoices.
4. Receipt Code Description #2 [text]  
Description that appears on Invoices.
5. Institutions (No sublocations) [Institution Code or blank]  
One or more valid institution codes, as defined *Institution Codes (CHIC)*, separated by commas.
6. Sublocations [Sublocation Code or blank]  
One or more valid sublocation codes, as defined *Sublocation Codes (CHSC)*, separated by commas.
7. Fund Code [Fund Code or blank]  
One or more valid Fund Codes, separated by commas, as defined in *Fund Codes (CPFC)*.
8. Default Cost of Transaction [Price in nnn . nn format, no currency symbol]  
Provides default charge value when a chargeable BLOCK is created.

## Register Location Codes (CPRL)

Register Location Codes are used for control of financial transactions. Any number of registers can be defined in a system. For each register, one or more ports may be designated to have access to them. All ports in the system correspond to physical locations.

Registers are needed to facilitate fine payment or to check patron blocks, particularly if money is involved. The library will need to define a register for every port used for accepting fine payment.

**Access** Select Register Location Codes (CPRL) from the *Circulation Payment Collection* menu.

The following screen displays a list of sample register codes.

```

 REGISTER CODES

Number of records = 10
Codes Description of codes

1. CIRC0 Circulation Register 0
2. CIRC1 Circulation Register 1
3. CIRC2 Circulation Register 2
4. CIRC3 Circulation Register 3
5. CIRC4 Circulation Register 4
6. CIRC5 Circulation Register 5
7. CIRC6 Circulation Register 6
8. CIRC7 Circulation Register 7
9. CIRC8 Circulation Register 8
10. CIRC9 Circulation Register 9

Options:
? help Add item # line Print Forward Backward Search jump
Exit

```

**Register Location Codes** Existing register location codes can be modified, deleted and printed. New codes can be added. To modify or delete existing codes, enter the register code number. ADVANCE displays all existing information as displayed on the following screen.

```
REGISTER CODES

REGISTER CODE : CIRC0

1. Description : Circulation Register 0
 Port Numbers : 000,001,002,003,004,005,006,007,008,009,010,011,012,013,014,

Options: _
? help # line Line by line Copy Print Delete Exit File
```

Only the description field can be edited here. Inclusion or exclusion of a given port from the list must be done from Register/Port Code (CPRP).

To add new register codes, use the Add command. ADVANCE prompts:

```
Enter the name of the code you wish to add. : _
```

Enter one to three characters to represent the code record to be created. When the workform appears, enter a brief description. Save the new register code with the *File* command.



## Register/Port Codes (CPRP)

Register Port Codes link ports and registers. A port may only support one register, but one register may be accessed through many ports.

**Access** Select Register/Port Codes (CPRP) from the *Circulation Payment Collection* menu.

The following is a sample list of ports and their descriptions.

```

 CIRCULATION REGISTER

Number of records = 45
Codes Description of codes

1. 000 Cataloguing
2. 001 OPAC
3. 002 Circulation I
4. 003 Circulation II
5. 004 Circulation III
6. 005 Branch 1
7. 006 Branch 2
8. 007 Branch 3
9. 008 Branch 1 OPAC
10. 009 Branch 2 OPAC
11. 010 Branch 3 OPAC
12. 011 Computing Services Port
13. 012 Remote Dial-in Port
14. 013 System Printer

Options:
? help # line Print Forward Backward Search jump Exit

```

Ports can be added or deleted from an authorized register access list. Enter the number corresponding to the desired port description from the screen. Use the *Delete* command to remove the port from the displayed register.

```

 CIRCULATION REGISTER

PORT.REGISTER CODE : 002

Description : Circulation 1
2. Register Code : Circulation Register 1
3. Produce cash receipt : 2
 0 - Suppress cash receipt
 1 - Produce manually
 2 - Produce automatically
4. Fast fine payment (0 = No, 1 = Yes) : 1
5. Fast fine waiving (0 = No, 1 = Yes) : 1
6. Payment type to use for FAST PAY : FASTPAY = Fast Fine Payment
7. Payment type to use for FAST WAIVE : FASTWAV = Fast Fine Waiving

Options:
? help # line Line by line Copy Print Exit

```

Enter the register code at the Register Code prompt to add new port(s) to the authorized list. Ports must be predefined by the system administrator using the system utility functions.

**PORT REGISTER CODE**

Displays from the previous screen.

**Description**

Description displays from the PORT record. This field cannot be edited from the Circulation Register screen.

**2. Register Code**

[Any valid code(s) from the Register Location Codes (CPRL) tables.]

A register location code must be linked to a register/port code before that checkout or checkin port can access the accounts payable screen or before that port can use the Accounts Receivable (CAR) screen.

If you use the COUT or CIN commands, the system prompts:

```
This port has not been designated as a register.
```

If you use the AP command, the system prompts:

```
This terminal is not a register.
See account details (Y/N)?
```

If you use the PAY or WAIVE commands, the system prompts:

```
PAY function not available on this terminal.
```

or:

WAIVE function not available on this terminal.

3. Produce cash receipt [0, 1, or 2]

- 0 Do not print cash receipts.
- 1 Print cash receipts only when requested.
- 2 Always print receipts.

4. Fast fine payment [0 or 1]

- 0 Allow fast fine payment.
- 1 Do not allow fast fine payment.

5. Fast fine waiving [0 or 1]

- 0 Allow fast fine waiving.
- 1 Do not allow fast fine waiving.

6. Payment type to use for FAST PAY [Payment code or blank]

If you use fast fine payment, we recommend that you specify the payment type FASTPAY. Payment codes are defined in the Payment Codes (CPTC) table.

7. Payment type to use for FAST WAIVE [Payment type code or blank]

If you use fast fine waiving, we recommend that you specify the payment type FASTWAV. Payment codes are defined in the Payment Codes (CPTC) table.

## Payment Codes (CPTC)

Payment codes describe methods of payment. Common payment types include cash, credit card, personal check, and so forth. The following screen displays a list of sample payment codes.

**Access** Select Payment Type Codes (CPTC) from the *Circulation Payment Collection* menu found under the *Payment Collection* heading.

```

 PAYMENT METHOD

Number of records : 7
Code Description of code

1. CASH CASH (Currency / Coin)
2. CHECK Personal Checks
3. DCARD Debit Cards
4. TCHECK Travelers Checks
5. WAIVE Waive Balance Due
6. FASTPAY Fast Fine Payment
7. FASTWAV Fast Fine Waiving

Options:
? help Add item # line Print Forward Backward Search jump
Exit
```

**Changing Payment Codes** Payment codes can be modified, deleted and printed. New codes can be added. To modify or delete codes, enter the number corresponding to the desired payment type. The system will display all existing information as shown in the example on the following screen.

```

 PAYMENT METHOD

PAYMENT METHOD CODE : CASH

1. Description : Cash (Currency / Coin)
2. Method code (1 = Check) : 2
 (2 = Cash)
 (3 = Waive)
 (4 = Other)
3. Mix Cash and Checks (1 = Yes) : 1
4. Additional Info. (1 = Yes) :
5. Override required (1 = Yes) :

Options:
 ?=? help #=# line CO=Copy PRT=Print FI=File
 E=Exit

```

Edit a field by selecting the line number. Use the *Delete* command to permanently remove the code record. To save changes, use the *File* command. Use the *Exit* command to leave without saving any changes.

PAYMENT METHOD  
CODE

Displays from previous screen.

1. Description

[text]

Enter a description of the payment method.

2. Method Code

[1, 2, 3, or 4]

1 Check

2 Cash

3 Waive

4 Other (Use this code for Fast Pay and Fast Waive.)

Fields 3, 4, and 5

Controls actions taken when patrons pay through the Accounts Receivable function.

3. Mix Cash and  
Checks

[0 or 1]

- 0 Do not mix cash and checks.
  - 1 Permits two methods of payment (cash and cheque) in one transaction. The system prompts you to enter the amount of the cash payment and then the amount of the cheque payment.
4. Additional Info [0 or 1]
- 0 Only the payment/waiver is required.
  - 1 The system displays a comments field that require notes before processing. For example, if a charge is being waived, then enter 1 (yes) for Additional Information.
5. Override required Obsolete field.

To add new payment codes to the existing list, use the *Add item* command as for previous codes. Enter one to three characters to represent the code record to be created. The system displays a blank work-form. Complete as appropriate. Use the *File* command to save the new record.

## Receipt Header (CRHD)

The Receipt header is used to customize the message which prints at the top of patron transaction receipts. This header can only be created using the system editor, and access to system control files is required.

**Access** Select Receipt Header (CRHD) from the *Circulation Payment Collection* menu found under the *Payment Collection* heading.

```

 RECEIPT HEADER

RECEIPT HEADER CODE : RECEIPT.HEADER

1. Header Description : ADVANCE UNIVERSITY LIBRARIES

Options:
 ?? help #=# line PRT=Print FI=File E=Exit

```

Select the *# Line* option to modify the existing receipt header. To save changes, use the *File* command. Use the *Exit* command to exit without saving any changes.

RECEIPT HEADER  
CODE

Displayed by the system.

1. Header Description

[text]

Text that prints at the top of receipts for payment from accounts receivable, checkout, and checkin.

## Fine Rules Codes (CFRULE)

Fine rule codes define general rules for assessing fines.

**Access** Select Fine Rules (CFRULE) from the Circulation Payment Collection menu.

The first screen has a Enter Fine Rules Code prompt.

To add a new fine rule code record, enter one to twelve characters to represent the new code record at the first prompt. A blank workform appears.

To modify, delete, or print an existing code, enter the code at the first prompt, or enter (??) to browse available codes. Select the desired code from the list using the # *line* option. Following is a sample list.

```

 CIRC FINE RULE CODES

Number of records : 2
Code Description of code

1. RECALL GENERAL FINES FOR RECALLS
2. VACRCL VACATION FINES FOR RECALLS

Options:
? help # line Print Forward Backward Search jump Exit
```



## Editing Fine Rule Codes

Fine rule codes can be modified, deleted, and checked.

```

Page 1 of 1 FINE RULES CODES DD MMM YY

Enter Fine Rules Code : RECALL

1. Description : GENERAL FINES FOR RECALLS

2. recalled GEN1 --- : Always used

Options:
line Add item File Delete Exit Check Fine Rule ? help

```

Use the *Delete* option to permanently remove the code record from the system. Use the *File* option to save changes. Use the *Exit* option to abandon changes.

Use the *Check Fine Rule* option to test the stored file rule set. See [Checking Fine Rules](#) on page 6-24.

Edit the Description field if necessary.

1. Description [text]

Enter a description of the fine rule.

## Editing Detailed Fine Rules

A fine rule code may have one or more detailed fine rules, each covering a specific period. The system assesses a total fine by using all relevant

detailed fine rules, so ensure that they cover mutually exclusive date ranges (fields 2–3).

On the Fine Rules Codes screen, use *Add item* to add a detailed fine rule, or use *# line* to edit one of the listed detail fine rules. The Circulation Fine Rule Details screen appears.

```

 CIRCULATION FINE RULE DETAILS DD MMM YY

Fine Rule : RECALL - GENERAL FINES FOR RECALLS

1. Description : recalled GEN1
2. Return Date - Start : End :
3. Issue Date - Start : End :
4. Due Date - Start : End :
5. Amount(s) : 1.00(1-3),2.00(4-5),10.00(6-)
6. Period : D 7. Unit : 1
8. Minimum amount : 9. Maximum amount :
10. Amount to ignore : 11. Initial amount :
12. Include grace (Y/N) : Y 13. Round up (0,1,2) : 0
14. Use Calendar (Y/N) : Y 15. Special Calendar :
16. Special rule :
17. Maximum days : 200

Options:
line Line by line Accept Delete Exit ? help

```

1. Description [text]

Enter a description of the detailed fine rule.

2. Return Date - Start, End [Dates or blank]

The system uses the detailed fine rule to assess the fine based on the item's *return date*, if the item is returned during this specified period.

You can leave the Start or End date blank, but if you leave both dates blank, the item's return date does not determine whether this rule is applied.

Specify dates in only one or none of the three fields: Return Date, Issue Date, or Due Date. If you leave all three fields blank, the detailed fine rule is not restricted to a period during which items are returned, checked out, or due.

3. Issue Date - Start, End [Dates or blank]
- The system uses the detailed fine rule to assess the fine based on the item's *checkout date*, if the item is checked out during this specified period.
- You can leave the Start or End date blank, but if you leave both dates blank, the item's checkout date does not determine whether this rule is applied.
- Specify dates in only one or none of the three fields: Return Date, Issue Date, or Due Date. If you leave all three fields blank, the detailed fine rule is not restricted to a period during which items are returned, checked out, or due.
4. Due Date - Start, End [Dates or blank]
- The system uses the detailed fine rule to assess the fine based on the item's *due date*, if the item is due during this specified period.
- You can leave the Start or End date blank, but if you leave both dates blank, the item's due date does not determine whether this rule is applied.
- Specify dates in only one or none of the three fields: Return Date, Issue Date, or Due Date. If you leave all three fields blank, the detailed fine rule is not restricted to a period during which items are returned, checked out, or due.
5. Amount(s) [One or more amounts, each in the format *nnn.nn*, (that is, numbers separated by a decimal point, no currency symbol), separated by a comma, with any multiple periods specified in the format *nn-nn* (whole numbers, enclosed in parentheses) after each amount]
- Enter one or more amounts that represent the amounts charged per period (or multiple periods) of time.
- For example, to charge a fine of 0.10 per hour, set the amount to 0.10, set the period to H, and set the unit to 1.
- To charge a fine of 0.10 per hour for the first 2 hours, 0.25 per hour for the next 4 hours, and 1.00 per hour afterward, set the set the amount to 0.10(1-2),0.25(3-6),1.00(7-), set the period to H, and set the unit to 1.

6. Period [Y, C, W, D, H, or M]  
Enter the type of period, as (W)eeks, (D)ays, (H)ours, or (M)inutes.  
NOTE: (Y)ears and (C) months are not implemented.
7. Unit [nnnn (whole number)]  
Enter the number of periods that make up a unit. For example, if the amount is 2.00, the period is D, and the unit is 5, then the system assesses a fine of 2.00 every five days.
8. Minimum amount [Amount in the format nnn . nn, that is, numbers separated by a decimal point, no currency symbol, or blank]  
Because minimum and maximum amounts are best specified for the entire fine rather than each detailed fine period, it is recommended that fields 8 and 9 be left blank. See *Patron Group Codes (CPGC)* on page 4-63.
9. Maximum amount [Amount in the format nnn . nn, that is, numbers separated by a decimal point, no currency symbol, or blank]  
Because minimum and maximum amounts are best specified for the entire fine rather than each detailed fine period, it is recommended that fields 8 and 9 be left blank. See *Patron Group Codes (CPGC)* on page 4-63.
10. Amount to ignore [Amount in the format nnn . nn, that is, numbers separated by a decimal point, no currency symbol]  
Enter the smallest amount you want to charge a patron. For example, if you enter the amount 0.99 and a patron's calculated fine is 0.99 or less, then nothing is charged. This is similar to having a grace period.
11. Initial amount [Amount in the format nnn . nn, that is, numbers separated by a decimal point, no currency symbol]  
Initial amount added to the fine. Note that if more than one detailed fine is applied (because the complete fine period falls into more than one period), only the first initial amount is added to the fine.

12. Include grace [Y or N]
- This setting overrides the global setting in the “Calculate Overdues fine field” in the Checkout Control Table (COCT).
- Y Use the grace period when calculating the fine.
- N Do not use the grace period when calculating the fine.
13. Round up [0, 1, or 2]
- This setting overrides the global setting in the “Round hourly fines up or down” parameter in the Circulation Control Table (CCT).
- 0 After dividing the full fine period by the Unit value, round the period **down** to a whole number of days (or hours or minutes) before multiplying by the Amount value.
- However, if the type of period is (W)eeks, then round the period **down** to a whole number of weeks by ignoring any partial weeks at the beginning and end of the full fine period.
- 1 After dividing the full fine period by the Unit value, round the period **up** to a whole number of days (or hours or minutes) before multiplying by the Amount value.
- However, if the type of period is (W)eeks, then round the period **down** to a whole number of weeks by ignoring a single partial week at either the beginning or end of the full fine period.
- 2 After dividing the full fine period by the Unit value, round the period **up** to a whole number of weeks (by including both beginning and end partial weeks) before multiplying by the Amount value. Enter 2 only if the type of period is (W)eeks.
14. Use Calendar [Y or N]
- Y Use the Calendar of closed days when calculating the fine.
- N Do not use the Calendar of closed days when calculating the fine.
15. Special Calendar [<CIN> followed by the code for a special calendar, or blank]
- Use a special referenced Calendar in place of the current port’s Calendar of closed days when calculating the fine.

16. Special rule [code for a special rule, or blank]  
Use a special rule created by Geac Professional Services for the library.

17. Maximum days [nnnn (whole number)]  
To improve system performance when calculating fines for extremely long overdue items (or accidentally ancient due dates), enter the maximum number of preceding days to check for open days, etc. For example, if the maximum fine is 50.00, the rate is 0.50 per day, and the library is open 5 days per week, then checking the Calendar more than the preceding  $[(50.00 / 0.50) * (7/5) + 10 \text{ holidays per year}] = 150$  days approximately, and you should enter a generous value such as  $(3 * 150) = 450$  in this field.

### Checking Fine Rules

Use the *Check Fine Rule* option on the `Fine Rules Codes` screen to test the stored file rule set. Enter test information in the fields that appear, such as shown in the following example.

```
Complete the following fields to test the fine rules :-

1. Check-out Date & Time : 01 JAN 00 12:15
2. Due Date & Time : 05 FEB 00 09:00
3. Grace Date &Time (def as 2) : 05 FEB 00 09:00
4. Check-in Date & Time : 16 MAY 00 10:05
5. Patron Membership : P1
6. Item Circ Code : GEN1
7. Checkin Calendar : MCAL
8. Recall Date (if used) :
```

The system tests each of the fine rules, providing results such as shown in the following example.

Fine Rule : 1  
Days and seconds for calculating fines for Calendar MCAL  
Days 86 Seconds 3557100 Seconds today 3900  
Calculated fine is 860  
End of processing for fine rule 1  
Press any key to move onto next fine rule

Fine Rule : 2  
  
Period "recalled GEN1" covers :  
Start Date 05 FEB 2000 09:00:00  
End Date 16 MAY 2000 10:05:00  
End of processing for fine rule 2  
All fines calculated - there are 1 transaction codes  
Transaction type 14 - 860  
Press any key to continue





# 7

## Item Control Codes

---

This chapter discusses procedures for setting up item control codes in the ADVANCE library system:

- status control codes
- status calendar codes
- action control codes
- action calendar codes
- status/action calendar code

## Introduction

### *Status and Action Codes*

Item or piece control is a basic function of any automated circulation system. For the purposes of item control in ADVANCE, each item is controlled by its current status code and/or its pending action code(s).

- **Status Codes**

An item's status is its present state or condition, for example: *on hold, checked out, at bindery, missing, in library*, and so forth.

- **Action Codes** (pending action)

An item's action refers to the type of actions to be taken for a specific item, for example, *route to cataloguing, send to repair, on hold for patron*.

At a given time, an item may have several action codes attached to it, but only **one** status code.

### *Control and Calendar Codes*

ADVANCE provides two types of code tables for item statuses and actions: Control Codes and Calendar Codes. Each table uses the same list of status codes or action codes.

- **Control Codes** (CIS and CIA)

Define the types of online circulation processing that can be performed on an item which has a particular status or action, especially Holdings update, checkout, and placing of holds.

- **Calendar Codes** (CISC and CIAC)

Define the relative priorities of status and action codes for the purposes of changing item status/actions through CREL, CCS, CEH, and CCA. These codes are also used by the Circulation Calendar Process to automatically update or report on statuses and actions according to a predetermined schedule.

### *Adding New Status or Action Codes*

New status codes may be entered in either the Status Calendar Codes (CISC) or Status Control Codes function (CIS). Similarly, new Action Codes may be entered in either the Action Calendar Codes (CIAC) or the Action Control Codes (CIA) function.

### *Deleting Status or Action Codes*

Codes provided with ADVANCE may not be deleted. (The *Delete* option is not provided on screen.)

Validation Checking

When Circulation staff modify Status and/or Action Calendar Codes (CISC and CIAC), the system validates the changes. If inappropriate values have been assigned, the system allows you to *File*, but when you *Exit* the list codes the system will display error or warning messages that explain the problem along with the following message:

Press <Enter> to continue, or 'E' to exit:

Staff should return to the code table and correct the problem at their earliest opportunity.

## Item Control Codes Menu (CICM)

From the *Circulation Codes Menu*, select Item Control Codes Menu (CICM). The CIRCULATION ITEM CONTROL CODES screen appears.

```
24 APR YYYY Geac - Library Division - ADVANCE (##.##) 004 AU
12:04 Your Library Name
```

CIRCULATION ITEM CONTROL CODES

1. CIS Item Status Control Codes
2. CISC Item Status Calendar Codes
3. CIA Item Action Control Codes
4. CIAC Item Action Calendar Codes
5. CSAC Status/Action Calendar Access

```
Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help.
Press <ENTER> return to previous level:
```

## Status Control Codes (CIS)

Status control codes define the online circulation processing restrictions and textual descriptions for each status. The library's description of the status of each item is included in the detailed record and holdings displays in the online catalogue.

**Access** Select Item Status Control Codes (CIS) from the *Circulation Item Control Codes* menu.

The following screen shows a list of item status control codes. The right column shows the message displayed in the online catalogue.

```

 STATUS CONTROL

Number of records : 28
Code Description of code

1. 0 Remove current Item's status
2. 016 On Route On Route
3. 050 Billed as Lost Billed as Lost
4. 055 Lost and Paid Lost and Paid
5. 100 Temporarily out of collection Out of collection
6. 110 Sent for repair Being Repaired
7. 112 At Reprography At Reprography
8. 114 At Bindery At Bindery
9. 124 New Books Display New Books Display
10. 130 Out on Loan Checked Out
11. 135 In Transit In Transit
12. 136 Sorting shelves Sorting Shelves
13. 140 Recalled Recalled
14. 142 Missing from collection Missing

Options:
? help Add item # line Print Forward Backward Search jump
Exit

```

### Changing Status Control Codes

Status control codes can be modified or deleted, and new ones added. To modify or delete an existing code, enter its line number.

The following status codes, which are provided with the system, cannot be deleted.

| <b>Code #</b> | <b>Description</b>                |
|---------------|-----------------------------------|
| 0             | Remove current item's status      |
| 016           | On route                          |
| 050           | Billed as lost                    |
| 055           | Lost and paid                     |
| 100           | Temporarily out of collection     |
| 110           | Sent for repair                   |
| 112           | At reprography                    |
| 114           | At bindery                        |
| 124           | New books display                 |
| 130           | Out on loan                       |
| 135           | In transit                        |
| 136           | Sorting shelves                   |
| 140           | Recalled                          |
| 142           | Missing from collection           |
| 145           | On search                         |
| 150           | Claimed returned                  |
| 165           | In RBR processing                 |
| 171           | RVC: suspended                    |
| 185           | Placed in selector's reorder file |
| 199           | On display                        |
| 250           | On order                          |
| 400           | In process                        |

| Code # | Description     |
|--------|-----------------|
| 450    | In cataloguing  |
| 500    | Other           |
| 520    | Check the shelf |
| 530    | On hold         |
| 998    | On hold (GLIS)  |

```

 STATUS CONTROL

STATUS CONTROL CODE : 050

1. Description : Billed as Lost
2. PIECES display : Billed as Lost
3. OPAC display (* = return date) : Missing
4. Can NOT update Item = 1 : 0
5. Can NOT Checkout = 1 : 1
6. Can NOT place a Hold = 1 : 1
7. Block Code :
8. Produce inserts (1 = YES) : 1

Options:
? help # line Line by line Copy Print Exit

```

To modify a field in the code record, enter its line number. Save changes using the *File* command. To permanently delete a code record, use the *Delete* command. The system will ask for confirmation. Enter *Y* to confirm that you want the code record deleted.

To add a new status control code, use the *Add* command. The system prompts for a three to five character code. When the character code is entered, a blank workform is displayed.

```
 STATUS CONTROL

STATUS CONTROL CODE : TT *** New Record ***

1. Description :
2. PIECES display :
3. OPAC display (* = return date) :
4. Can NOT update Item = 1 :
5. Can NOT Checkout = 1 :
6. Can NOT place a Hold = 1 :
7. Block Code :
8. Produce inserts (1 = YES) :
```

1. Description [text]

A free text field which displays when this status code is selected from a browse list. Normally, this text would be seen by staff only.

2. Pieces Display [text]

A free text field for descriptive information which will display on the detailed holdings screen for any item having this status. This text would be seen by staff and by OPAC users with access to Holdings Display.

3. OPAC Display [text, \* for return date]

A free text field for descriptive information which will display in the Online Catalogue when a list of items is displayed beneath a bibliographic record. To display the return date for an item, enter the text followed by an asterisk, for example, Due Date \*. The system automatically displays the due date for the item in the Online Catalogue.

Though fields 1 – 3 may have the same description, they may vary, particularly if further information is needed for staff display at the holdings level.



4. Can NOT update Item (Y or N). [0 or 1]  
 Controls whether staff can manually update items having this status.
- 0 (yes) Item information can be edited while this status is assigned to the pieces record.
- 1 (no) ADVANCE will not permit changes made in Edit Holdings (CEH) to be filed. Displays the error message:  
 This piece CANNOT be updated with the current status.  
 NOTE: the status field can be updated even though the holdings fields cannot.
5. Can NOT Checkout (Y or N). [0 or 1]  
 Controls whether items with this status can be checked out.
- 0 (yes) The item can be checked out while this status is assigned to the pieces record.
- 1 (no) Items with this status cannot be checkout. Displays the error message:  
 The current action for this item is ....  
 This item may NOT be checked out. Press <ENTER>.  
 Staff must take action to update the item, or it must have subsequent action taken (for example, have it checked in at its owning location) before a checkout can occur.
6. Can NOT place a hold (Y or N). [0 or 1]
- 0 (yes) Item information can be edited while this status is assigned to the pieces record.
- 1 (no) Prevents an OPAC user from placing holds, and causes a message to display in Holds by Patron (HRT) if staff attempt to place a hold on an item with this status.
7. Block Code [Any Block Code or blank]  
 Enter a block code from the Circulation Transaction Codes (CTC) table, found under the General Codes Menu (CGCM), to link this status to a block on the patron's record. Not all status codes are associated with patron blocks.

### 8. Produce inserts [0 or 1]

0 (no) Do not produce inserts.

1 (yes) The system produces inserts when items with this status are checked out or checked in. See *Configuration Codes: Checkin and Checkout Port Control*. Also see the *Utilities Management Guide: Creating Port Control Tables*. The terminal which produces inserts must have a local printer attached, and the Port Control tables must be set to produce inserts for this feature to operate.

These inserts can be placed inside the book to transmit further information to the next processing area, for example books with holds have inserts which advise the staff of the name and telephone number of the patron for whom the book is held. If an item was checked out *on the fly* and an insert is produced on checkin, the staff will be alerted to return the item to the Cataloguing Department for further processing.

When fields are complete, the following options appear automatically at the bottom of the screen.

```
Options:
? help # line Line by line Copy Print Delete Exit File
```

## Status Calendar Codes (CISC)

Status control and status calendar tables share the same codes. Status calendar codes are used by calendar background processors to schedule and process jobs described by the status control codes. The status codes discussed under the previous heading are used to implement library policy on items.

**Access** Select Item Status Calendar Codes (CISC) from the Circulation Item Control Codes menu.

The following screen provides a partial list of status calendar codes.

```

 CIRCULATION STATUS CALENDAR

Number of records : 28
Code Description of code

1. 0 Remove current Item's status
2. 016 On Route On Route
3. 050 Billed as Lost Billed as Lost
4. 055 Lost and Paid Lost and Paid
5. 100 Temporarily out of collection Out of collection
6. 110 Sent for repair Being Repaired
7. 112 At Reprography At Reprography
8. 114 At Bindery At Bindery
9. 124 New Books Display New Books Display
10. 130 Out on Loan Checked Out
11. 135 In Transit In Transit
12. 136 Sorting shelves Sorting Shelves
13. 140 Recalled Recalled
14. 142 Missing from collection Missing

Options:
? help Add item # line Print Forward Backward Search jump
Exit

```

### Changing Status Calendar Codes

Status calendar codes can be modified or deleted, and new ones can be added. To access an existing status calendar code, enter its line number.

To modify a field of the status calendar code record, enter the line number. Save changes by using the *File* command. If you *Exit* without using the *File* command, the changes you made during the editing session will not be saved.

### Status Calendar Code Validation Rules

When you exit the list of Status Calendar Codes, ADVANCE validates the codes according to the following rules:

- a. ADVANCE classifies status codes into five groups, G1 (lowest) to G5 (the highest), based on the codes' relative status override levels required for processing. (Field 2. *Status Override Level* on the CIRCULATION STATUS CALENDAR screen.) The grouping of status codes is used only for validation purposes and cannot be displayed or modified by the library.

The status override levels you assign to status codes in the higher group **must** be greater than the status override levels assigned to status codes in the lower group. For example, code 050 must be greater than 130; 016 must be greater than 530. There is one exception: status code 530 can be greater than **or** equal to the status codes in G1.

|    |                  |                                                          |
|----|------------------|----------------------------------------------------------|
| G1 | Lowest priority  | 0, 100, 110, 112, 114, 124, 165, 171, 250, 400, 450, 500 |
| G2 |                  | 530                                                      |
| G3 |                  | 016, 135, 136, 520                                       |
| G4 |                  | 130                                                      |
| G5 | Highest priority | 050, 055, 150, 140, 142, 145, 185                        |

- b. When statuses are applied, the new status **must** always be greater than or equal to the old status.
- c. Status codes in G5 (highest priority) must all have the same override level.
- d. Actions to delete must be defined as follows:

| Status        | Action Codes to Delete |
|---------------|------------------------|
| 016, 135, 136 | 16, 17, 18             |
| 110           | 230                    |
| 112           | 240                    |

|     |                                      |
|-----|--------------------------------------|
| 114 | 240                                  |
| 130 | 8, 16                                |
| 142 | 4, 8, 16, 17, 18, 220, 230, 240, 250 |
| 165 | 250                                  |
| 450 | 4, 220                               |
| 530 | 8                                    |

*Status Code Error Messages*

If you modify a status code and the changes are invalid, the system allows you to *File* the status code anyway. When you *Exit* the list of status codes, however, the CIRCULATION STATUS CALENDAR - ERROR REPORT screen appears.

```

 CIRCULATION STATUS CALENDAR - ERROR REPORT

ERROR:

Status Codes Messages
136 "Status Override Level" must be greater than 530
135 "Status Override Level" must be no greater than 136

Press <ENTER> to continue, or 'E' to exit:

```

*Codes Not Included in Validation Checking*

New codes (not provided by Geac) added to the code tables will not be included in the groups used for validation checking.

## Editing Status Calendar Codes

Use the *# line* option from the CIRCULATION STATUS CALENDAR list of codes to access a code.

All changes must conform to the standards described under *Status Code Validation Rules*.

```

 CIRCULATION STATUS CALENDAR

STATUS CALENDAR CODE : 050

1. Description : Billed as Lost
2. Status Override Level (1-99) : 80
3. Action codes to delete :
4. Status code to add :
5. Input additional data (1 = Yes) :
6. # Hours till Delete/Report : 12
7. (T)imer, (D)elete, (R)eport : R
8. Change in # Hours : 24
9. (A)ction, (S)tatus code : S
10. Change to code : 185

Options:
? help # line Line by line Copy Print Exit

```

1. Description [text]

Describes the status. If you change the description in this table, you are also changing the description in the Status Control Codes (CIS) table.

2. Status Override Level (1-99) [1 – 99]

The priority of this status in relation to other statuses used by the Calendar Processor and certain Circulation functions [Change Status (CCS) and Recall (CREL)] which Circulation staff can use in the bulk update of item statuses.

In the Change Status or Edit Holdings functions, an attempt to change the status of this item to a status which has a lower status override level than the current level will produce the message:

The current circulation status of this Item cannot be overridden.

ADVANCE comes with predefined override levels which you can modify according to the validation rules.

3. Action codes to delete [Any Action Code or blank]
 

Codes to delete. Defaults are provided with the system. For example, the status of *On Hold Shelf* will cause an action code of *On Hold for Patron* to be deleted.

blank Pending action codes will not be attached to this status.
4. Status Code to add [Leave blank]
 

This field only is not applicable (only used for action codes).
5. Input additional data (Y or N) [0 or 1]
 

0 (no) Explanatory notes for this status change are not necessary.

1 (yes) The system prompts for an explanatory note when this status is changed in Edit Holdings.
6. # Hours until Delete/Report [Any number in the format nn.n, i.e., 22.5 for twenty-two hours and thirty minutes]
 

Specifies the number of hours the system waits before changing the status of an item. This change is controlled by the *Status /Action Item Calendar (SA)* background processor. (The SA job should be run as often as your most frequently changing status.) See *Output Production* on page 5-1 and *Production Codes (COPC)* on page 5-18. The action the system will take when it checks the item depends on the content of fields 7 through 10.
7. (T)imer, (D)elete, (R)eport [T, D, or R]
 

When the system checks the item after waiting for the interval specified in the previous field (field 6), the system will take the action specified in this field:

T (Timer) The system looks at fields 8, 9, and 10 for information about how to change the item's status/action code.

- R (Report) The system prints the item on the status/action report. The system will also do the status/action change if it is specified.
- D (Delete) The system prints the item on the status/action report and deletes or clears the status if there is no status/action change. For example, if you need the information *item on sorting shelf* to be printed only once on the report, enter D instead of R. This will prevent the information from appearing repeatedly and the system will not change the status.
- Fields 8 -10 Used to automatically change an item's status.
8. Change in # Hours [Any number in the format nn.n]  
Specifies the length of time before the Status/Action Calendar (SA) background processor processes the change.
9. (A)ction, (S)tatus Code [A or S]  
Specifies whether the change is to a new *Action* or *Status*.
- 10.Change to code [Any valid Status Code if field 9 is specified as Status or any valid action if field 9 is specified as Action]  
Specifies the new code to which the item is changed.  
  
For example: if an item is sent *ON ROUTE*, the system can automatically change it to *IN TRANSIT* after a specified period of time. This information will be reported on the Status/Action report printed by the background processor. The library should carefully check which Status and Action codes need reports. The background processor can be set to run on a frequent basis for example hourly, or every 6 hours. Since the system wants to report every change of status or action code it encounters, select R for Report only for those changes which the library wishes to have in printed form.

### Add New Status Calendar Code

To add a new status calendar code, use the *Add* command. ADVANCE prompts for a three to five character string for the code. When you have entered the characters, a blank workform is displayed.



CIRCULATION STATUS CALENDAR

STATUS CALENDAR CODE : 017

\*\*\* New Record \*\*\*

- 
- 1. Description :
  - 2. Status Override Level (1-99) :
  - 3. Action codes to delete :
  - 4. Status code to add :
  - 5. Input additional data (1 = Yes) :
  - 6. # Hours till Delete/Report :
  - 7. (T)imer, (D)elete, (R)eport :
  - 8. Change in # Hours :
  - 9. (A)ction, (S)tatus code :
  - 10. Change to code :

Enter definitions for each field. The command options will appear when the last field is completed.

Options:

? help # line Line by line Copy Print Delete Exit File

Save new code definitions with the *File* command.

## Action Control Codes (CIA)

Select Item Action Control Codes (CIA) from the Circulation Item Control Codes menu found under the Status Control Codes heading. Action control codes specify restrictions on checking out, placing holds on, and updating items with a given action. The following screen shows a sample list of action control codes.

```

 ACTION CONTROL
Number of records : 10
Code Description of code

1. 0 Delete Action code (Do not delete)
2. 4 Incomplete, Return to cataloguing Return to Cataloguin
3. 8 On Hold On Hold/Person
4. 16 Route to: Route to:
5. 17 Return to: Return to:
6. 18 Transfer to: Transfer to:
7. 220 On Hold for Cataloguing Send/Cataloguing
8. 230 On Hold for Book Repair Send/P&R
9. 240 On Hold for Bindery Send/Bindery
10. 250 On Hold for RBR Hold/RBR

Options:
? help Add item # line Print Forward Backward Search jump
Exit

```

Action control codes, like status control codes, are also displayed on the detailed record and holdings display in the online catalogue. Online catalogue action code text is shown in the right column on the screen.

Action control codes can be modified, deleted, or added by using the options at the bottom of the screen.

**Permanent Codes** Some action control codes (such as 0, 4, 8, 16, 17 and 18) are permanently coded into the system; they cannot be deleted but they can be modified.

## Editing Action Control Codes

To access an existing action control code, enter its line number. To modify a code field, enter the line number at the Action Control list of codes. Save any changes with the *File* command.

```

 ACTION CONTROL

ACTION CONTROL CODE : 8

1. Description : On Hold
2. PIECES display : On Hold/Person
3. OPAC display (* = return date) : On Hold
4. Can NOT update Item = 1 :
5. Can NOT Checkout = 1 :
6. Can NOT place a Hold = 1 :
7. Produce inserts (1 = YES) : 1

Options:
? help # line Line by line Copy Print Exit

```

1. Description [text]  
A free text description of the action code.
2. PIECES display [text]  
Text displayed in the *Pending Action* field when an item is selected from the `DETAIL DISPLAY` screen. This pending action displays when the item is checked-in.
3. OPAC display [text or \* for return date]  
Text displayed in the OPAC *Detailed Display* screen under the `STATUS` heading.

4. Can NOT update Item [0 or 1]
- 0 (yes) Item information can be edited while this action control code is assigned to the pieces record.
- 1 (no) Prevents the updating of the item record governed by this action control code. Displays the error message:
- `This piece CANNOT be updated with the current status.`
- NOTE: the action field can be updated even though the holdings fields cannot.
5. Can NOT Checkout [0 or 1]
- 0 (yes) This item can be checked out while this action control code is assigned to the pieces record.
- 1 (no) Prevents the checkout of the item governed by this action control code. Displays the error message:
- `The current action for this item is ....`  
`This item may NOT be checked out. Press <ENTER>.`
6. Can NOT place a Hold [0 or 1]
- 0 (yes) The item can be held and the hold will be filled while this action control code is assigned to the piece.
- 1 (no) Prevents the placing of holds in the Online Catalogue on the item governed by this action control code. In Holds by Patron (HRT), in Circulation, a prompt that a hold cannot be placed on the item will display, but staff may commit the hold anyway.
7. Produce inserts [0 or 1]
- 0 (no) Checkout/checkin insert notes will not be produced.
- 1 (yes) Prints an insert that can be attached to the item. An example of an insert is a routing slip. See *Status Control Codes (CIS)* on page 7-5 for information on setting up insert production.

## New Action Codes

To add a new action control code, use the *Add* command. The system prompts for the new code. Enter three to five characters. A blank work-form is displayed.

```
ACTION CONTROL

ACTION CONTROL CODE : TTT *** New Record ***

1. Description :
2. PIECES display :
3. OPAC display (* = return date) :
4. Can NOT update Item = 1 :
5. Can NOT Checkout = 1 :
6. Can NOT place a Hold = 1 :
7. Produce inserts (1 = YES) :
```

Enter field data as described. Follow the instructions on record modification to change specific fields of code records. Save new code definitions with the *File* command.

## Action Calendar Codes (CIAC)

Select Item Action Calendar Codes (CIAC) from the Circulation Item Control Codes menu.

Action calendar codes identify pending operations necessary to change item status. Such operations are:

- Sending an incompletely catalogued item to the cataloguing department.
- Removing other action or status codes.
- Adding other action or status codes.

The following screen shows a list of action calendar codes. Action control and action calendar tables share the same set of codes. You can modify or delete action calendar codes or add new ones.

### Permanent Codes

Some Action Calendar Codes, such as 0, 4, 8, 16, 17, and 18, are permanently coded into the system. They cannot be deleted but they can be modified.

```

 ACTION CALENDAR

Number of records : 10
Code Description of code

1. 0 Delete Action code (Do not delete)
2. 4 Incomplete, Return to cataloguing Return to Cataloguin
3. 8 On Hold On Hold/Person
4. 16 Route to: Route to:
5. 17 Return to: Return to:
6. 18 Transfer to: Transfer to:
7. 220 On Hold for Cataloguing Send/Cataloguing
8. 230 On Hold for Book Repair Send/P&R
9. 240 On Hold for Bindery Send/Bindery
10. 250 On Hold for RBR Hold/RBR

Options:
? help Add item # line Print Forward Backward Search jump
Exit

```

## Change Action Calendar Code

To access an existing action calendar code, enter its line number. A screen similar to the following is displayed. To modify any field, enter the line number. Save changes with the *File* command, or exit without saving changes with the *Exit* command.

## Action Calendar Code Validation

When you exit the list of Action Calendar Codes, ADVANCE validates the codes according to the following rules:

- a. The status to add must be set correctly:

| Action | Status Code to Add |
|--------|--------------------|
| 8      | 530                |
| 16     | 16                 |
| 17     | 16,135 or 136      |
| 18     | 16, 135, or 136    |

- b. The status/action chain also must be set correctly:

| Action | Change to Code |
|--------|----------------|
| 4      | (Action) 220   |
| 220    | (Status) 450   |
| 230    | (Status) 110   |
| 240    | (Status) 114   |
| 250    | (Status) 165   |

- c. It is recommended that the priorities of all action codes be equal.

### Action Calendar Code Warning and Error Messages

If an action code is modified and the changes to *status to add* or *change to code* are invalid, the system allows you to *File* anyway. When you *Exit* the list of action codes, however, the ACTION CALENDAR - ERROR REPORT screen appears. You must correct the error(s) before you can exit from the ACTION CALENDAR screen. If you modify the *Action*

order of a code so that codes 4, 8, 16, 17, 18, 220, 230, 240, and 250 are unequal, a warning message will be displayed upon exiting the list of action codes, but you will be permitted to exit.

```

 ACTION CALENDAR - ERROR REPORT

ERROR:

Action Codes Messages
8 "Status code to add" must be 530

Press any key to continue :
```

### Deleting or Adding Action Calendar Codes

If you use *Delete* for deleting an Action Control Code, the following message will appear in place of the option line:

```
Are you sure that you want to delete this code?
(Y/N) : _
```

Choose Y or N.

To add a new action calendar code, use the *Add* command. The system will prompt for a three to five character code. A blank workform will be displayed.



## ACTION CALENDAR

ACTION CALENDAR CODE : TTT

\*\*\* New Record \*\*\*

```

1. Description :
2. Action Order (1-99) :
3. Action codes to delete :
4. Status code to add :
5. Input additional data (1 = Yes) :
6. # Hours till Delete/Report :
7. (T)imer, (D)elete, (R)eport :
8. Change in # Hours :
9. (A)ction, (S)tatus code :
10. Change to code :

```

1. Description [text]  
Description of the action.
2. Action order [1 – 99]  
Action order allows you to specify the order of actions in a queue of actions. For example, on hold for the Reserve Book Room will be the first action invoked if its action order is higher than on hold for person.
3. Action Codes to delete [Action Code or blank]  
Codes to delete when this action is current.  
blank Pending action codes will not be attached to this status.
4. Status Code to add [Action Code or blank]  
Status code to add when this action is in effect.
5. Input additional data [0 or 1]  
0 (no) Explanatory notes for this status change are not necessary.

- 1 (yes) The system will prompt for an explanatory note when this action is changed:  
Additional status information required, (E)xit.
6. # Hours till Delete/  
Report [Any number in the format nn.n or blank]  
Specifies the number of hours the system waits before changing the action code of an item. This change is controlled by the Status / Action Item Calendar (SA) background processor. See *Output Production* on page 5-1 and *Production Codes (COPC)* on page 5-18. The action the system will take when it checks the item depends on the content of fields 7 through 10.
7. (T)imer, (D)elete,  
(R)eport [T, D, or R]  
When the system checks the item after waiting for the interval specified in the previous field (field 6), the system takes the action specified in this field:
- T (Timer) The system looks at fields 8, 9, and 10 for information about how to change the item's status/action code.
- R (Report) The system prints the item on the status/action report. The system will also make the status/action change if it is specified.
- D (Delete) The system prints the item on the status/action report and deletes or clears the status if there is no status/action change. For example, if you need the information *item on sorting shelf* to be printed only once on the report, enter D instead of R. This prevents the information from appearing repeatedly and the system will not change the status.
- Fields 8-10 Used to automatically change an item's action code if Field 7 is set to T for timer.
8. Change in # Hours [Any number in the format nn.n]  
Specifies the length of time before the Status/Action Calendar (SA) background processor will process the change.
9. (A)CTION, (S)tatus  
code [A or S]  
Specifies whether the change is to a new Action or Status.

10. Change to code [Any valid Status Code if field 9 is specified as Status or any valid action if field 9 is specified as Action]

Specifies the new code to which the item is changed.

For example, if an item is *On Hold for Bindery*, the system can automatically change it to *At Bindery* after a specified period of time. This information will be reported on the Status/Action report printed by the background processor. The library should carefully check which Status and Action codes need reports. The background processor can be set to run on a frequent basis, for example hourly, or every 6 hours. Since the system wants to report every change of status or action code it encounters, select R for Report only for those changes which the library wishes to have in printed form.

## Status/Action Calendar Access Codes (CSAC)

Multiple institutions can be defined in ADVANCE. The Status/Action calendar process automatically updates statuses and actions for those institution codes specified in Status/Action Calendar Access (CSAC). Items belonging to institutions not entered in CSAC will not have statuses and actions automatically updated by the SA calendar.

**Access** Select Status/Action Calendar Access (CSAC) from the Circulation Item Control Codes menu found under the Status Control Codes heading.

```
INSTITUTIONS ALLOWED ACCESS TO STATUS/ACTION CALENDAR

STATUS/ACTION CALENDAR CODE : CALENDAR.INSTITUTIONS

1. Institution Codes : AU = ACADEMIC LIBRARY STANDARDS

Options:
? help # line Line by line Print Exit
```

Select a field by its line number to edit, or use the *Line by line* option to edit fields sequentially. Once a field has been selected and edited, use the *File* option to save the changes. *Exit* if you wish to leave the record without making changes.

```
INSTITUTIONS ALLOWED ACCESS TO STATUS/ACTION CALENDAR

STATUS/ACTION CALENDAR CODE : CALENDAR.INSTITUTIONS

1. Institution Codes : AU

Valid Entries : INSTITUTION CODE
```

*STATUS/ACTION  
CALENDAR CODE*

1. Institution Codes

System supplied.

[One or more valid institution codes separated by commas]

Limits access to status and action calendars to those institutions specified in this field. Institutions whose codes are not listed here will not have their status and action codes updated by the calendar jobs.

If no institution is specified, all institutions will have their status and action codes updated by the calendar job.



# 8

## General Codes

---

This chapter describes the types of general transaction control codes:

- Transaction (or patron blocks) codes
- Hold codes
- Recall codes
- Administration stop messages
- Sendmail path.

## Circulation General Codes Menu (CGCM)

From the Circulation Codes Menu found under the Circulation Codes Menu heading, select the General Codes (CGCM) menu.

```
DD MMM YYYY Geac ADVANCE Library System (#.##) DEFAULT AL
HH:MM Your Library Name
```

### CIRCULATION GENERAL CODES

1. CTC Transaction Codes
2. CHC Hold Codes
3. CRC Recall Codes
4. CADM Administration Stop Messages
5. SMAIL Sendmail Path

Enter the number of your selection and press <ENTER>  
or ? followed by <ENTER> for Help.  
Press <ENTER> to return to previous level :



## Transaction Control (CTC)

Transaction Codes (CTC) allow you to control various types of circulation activities. Most specifically, these codes are used to define when patron records are to be blocked and/or charged. The following screen provides a list of pre-defined circulation transaction codes. Administrative holds is a general category that indicates that the threshold level of a restriction has been reached. In that sense, all transaction codes can potentially be administrative holds. These thresholds are defined in the Circulation Codes tables as attached to Patron Group Codes. (See *Loan Periods* on page 4-1.)

**Access** Select Transaction Codes (CTC) from the *General Codes Menu*.

```

 CIRCULATION TRANSACTION

Number of records = 17
Codes Description of codes

1. 1 ADMINISTRATIVE HOLD
2. 10 Messages
3. 11 Item Waiting
4. 14 Late Return Fines
5. 2 Lost Books
6. 25 Damaged Book
7. 3 Certain Returned
8. 30 Lost Card
9. 4 Mail Returned
10. 5 Charges (Future use)
11. 6 Overdue Items
12. 7 Expired Card
13. 8 Family Block
14. 9 Delinquent

Options:
? help Add item # line Print Forward Backward Search jump
Exit

```

**Required Codes** Some codes are required by the system and cannot be deleted.

*Code numbers and names appear on both the Transaction Codes (CTC) under the General Codes Menu (CGCM) and the list of Fund/Transaction Codes, for those codes which are designated as charge-controlled.*

### Changing Transaction Codes

Library created circulation transaction codes can be modified, deleted and added. New codes can be added to the existing file. To modify or delete an existing code, enter the line number. If the code is system controlled, a delete option will not display. The system will display all existing information as shown on the screen workform.

To change a code record field, key its line number. Use the *Delete* option to permanently remove the code record. To save changes, use the *File* option. Use the *Exit* option to leave without saving changes.

To add new notice codes to the existing list, use the *Add* command. The system will prompt:

```
Enter the name of the code you wish to add. :
```

Enter one to three characters to represent the code record. The system displays a blank workform. Supply all applicable data on the workform. Save the new code records with the *File* command.

```
 CIRCULATION TRANSACTION

BLOCK CODE : 14

1. Description : Late Return Fines
2. Charge controlled (1 = Yes) : 1
3. Create transaction manually (1 = Yes) :
4. Delete transaction manually (1 = Yes) : 1
5. Type of transaction (1 = Partial) : 1
 (2 = Full)
6. Display transactions (1 = Yes) : 1
7. Unused (reserved for France) :
8. Display in Checkout (1 = Yes) : 1
9. Display in Checkin (1 = Yes) :
10. Display in HRT/MB (1 = Yes) : 1
11. Link to Membership Code (1 = Yes) :

Options:
? help # line Line by line Print Exit
```

- 1. Description [text up to 26 chars]  
Describes the function of the code.

2. Charge controlled [0 or 1]  
Specifies if there is a dollar amount associated with the code.
- 0 (no) Default mode is **no**. You will not be prompted for a price whenever you add this block.
- 1 (yes) The system prompts:  
Enter charge amount:  
Whenever you add this block, this code becomes a Payment Transaction Code. It will automatically be entered into the list of codes in the Fund/Transaction Code (CPFB) table, found under the Payment Collection Menu (CPCM). See *Payment Collection* on page 6-1. You should complete the record for this charge controlled patron block using that menu.
3. Create transaction manually [0 or 1]  
Specifies to the system whether it should automatically invoke the code.
- 0 (no) The default is **no**. You will not be able to assign the block from the patrons block screen.
- 1 (yes) You will be able to assign the block from the patrons block screen.
4. Delete transaction [0 or 1]  
Determines whether a transaction code can be deleted.
- 0 The transaction can only be deleted by the system.
- 1 You can delete the transaction manually.
5. Type of transaction [1 or 2]  
Specifies the severity of the block.
- 1 Partial block. The system warns you of the condition but will not stop patron processing.
- 2 The transaction code can completely block patron processing. For example, if a patron has overdue items, Full will prevent item checkout by imposing a full block. The system prompts:

This patron is on administrative hold. Do you wish to override? (Y/N)

6. Display transaction [0 or 1]
- 0 Transactions do not display in the blocks record, but the transactions do create an entry in the BLOCKS file.
  - 1 Displays the transaction blocks when a patron ID or name is entered into the system. These transactions appear in the list of blocks from the patron's record in Checkout (COUT) or Holds (HRT) or to the patron at an OPAC screen who is viewing their patron record and who has access to the Blocks display option.
7. Unused This field is not currently implemented.
8. Display in Checkout [0 or 1]
- 0 Do not trigger the automatic display of blocks in Checkout.
  - 1 Trigger the automatic display of blocks in Checkout.
9. Display in Checkin [0 or 1]
- 0 Do not trigger the automatic display of blocks in Checkin.
  - 1 Trigger the automatic display of blocks in Checkin.
10. Display in HRT/MB [0 or 1]
- 0 Do not trigger the automatic display of blocks in Holds or Materials Booking.
  - 1 Trigger the automatic display of blocks in Holds and Materials Booking.
11. Link to Membership Code If the library has not implemented Patron Memberships, leave this field blank. If the library has implemented Patron Memberships, see see [\*Transaction Control \(CTC\)\*](#) on page E-23.

## Hold Codes (CHC)

Hold codes are used to define holds privileges for Patron Groups and Circulation Codes. Hold Codes control such activities as: which hold and hold cancellation notices are sent to patrons, the length of time before holds expire or are removed from the hold shelf, and the generation of purchase alerts. Hold Codes can be entered into Patron Group Codes (CPGC), into Circulation Codes (CCC), and into Hold Port Control (CPH).

As each hold is placed a default Hold Code must be applied. Though defaults can be changed during the Holds by Patron (HRT) function, the system looks for defaults in the following sequence: first in CPGC, for the Circulation Code as linked to a Patron Group Code. If none is entered there, the system looks for a default Hold Code in the Patron Group itself. If none exists there it looks to the Hold Port Control (CPH) table of the port where the hold is being placed.

Access Select Holds Codes (CHC) from the *General Codes Menu*.

```

 HOLD CODES

Number of records = 11
Codes Description of codes

1. HCD Default Hold Code
2. HCF1 Faculty Hold Code 1
3. HCI1 Interlibrary/Institutional Hold 1
4. HCONR1 Other/Non-resident Hold Code 1
5. HCR1 Resident Hold Code 1
6. HCRBR1 RBR Hold Code 1
7. HCRBR2 RBR Hold Code 2
8. HCS1 Student Hold Code 1
9. HCSG1 Graduate Student Hold Code 1
10. HCST1 Staff Hold Code 1
11. TITLE Default Title Hold Code

Options:
 ?=? help A=Add item #=# line PRT=Print
 F=Forward B=Backward E=Exit

```

**Changing Hold Codes** Hold codes can be added, modified, deleted, and printed. To modify or delete codes, enter the number of the desired hold type. ADVANCE displays the existing information.

```
 HOLD CODES

HOLD CODE : HCD
------(Page 1 of 2)
1. Hold Description : Default Hold Code
2. # Holds before Recall (Item holds) : 2
3. Ratio of holds to pieces before : 5
 Recall (title holds)
4. # Minutes Before Hold Removal : 5760
5. New Loan period (D,H,M) : D
6. Length of loan period : 10
7. Notice Code : HND1 = Default Hold Notice 1
8. Pickup Cancellation Notice Code : HCND1 = Default Hold Cancellation+
9. Expired Cancellation Notice Code :
10. Lapsed Hold Notice Code :
11. Default hold expiry period (weeks) : 1
12. Default hold expiry date :
 (takes priority over 11)

Options:
Forward ? help # line Line by line Print Delete Exit
```

```
 HOLD CODES

HOLD CODE : HCD
------(Page 2 of 2)
1. # Holds Before a Purchase Alert : 3
2. days unsatisfied to trigger : 1
 upgrade (0 - don't do it)
3. New hold code to use for above :
 (default - no change)

Options:
Backward ? help # line Line by line Print Delete Exit
```

To change a code record field, enter the line number. Use the *Delete* option to permanently remove the code record from the system. To save changes, use the *File* option. Use the *Exit* option to exit without saving changes. To add new hold codes, use the *Add* option. The system prompts:

Enter the name of the code you wish to add. :

Enter one to three characters to represent the code record to be created. ADVANCE displays a blank workform. Complete each applicable field in the workform. *Save* the new code by using the *File* command.

Several of the fields in this table are controlled by actions taken by the Background Processing jobs, for example, Holds: Notice Production (C), and Upgrades/purchase alerts (HOLDS). See *Production Codes (COPC)* on page 5-18.

- |                                                               |                                                                                                                                                                                                                                                                           |
|---------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1. Hold Description                                           | [text]<br><br>A free text field to define the type of Hold Code.                                                                                                                                                                                                          |
| 2. # Holds before Recall<br>(Item holds)                      | [Any number]<br><br>This field is not currently implemented.                                                                                                                                                                                                              |
| 3. Ratio of holds to<br>pieces before recall<br>(title holds) | This field is not currently implemented.                                                                                                                                                                                                                                  |
| 4. # Minutes Before<br>Hold Removal                           | [Any number]<br><br>Specifies in minutes, the length of time an item can sit on the hold shelf without being picked up by the patron. Time is calculated from when the hold was captured.                                                                                 |
| 5. <i>New Loan Period</i>                                     | [D, H, or M]<br><br>D Loan period in days.<br><br>H Loan period in hours.<br><br>M Loan period in minutes.                                                                                                                                                                |
| 6. <i>Length of Loan<br/>Period</i>                           | [Any number]<br><br>This field is not currently implemented.                                                                                                                                                                                                              |
| Fields 7-10                                                   | The next four fields contain Notice Codes from the Notice Codes (CNC) table, found under the Output Production Menu (COPM). These notices are generated by the Notice Production (C) background processor when the appropriate condition occurs. Various Notice Codes can |

be created for different patron types and are controlled by the Hold Code entered into the Patron Group/Circulation Code table for that type of borrower. If the library does not wish to notify patrons of lapsed or expired holds, then no notice code needs to be entered.

7. Notice Code

[Any holds-specific Notice Code]

Enter a Notice Code from the *Notice Codes (CNC)* table to specify the notice to be printed when a hold is **filled**. This is normally a pickup notice advising patrons that a book has been returned to the library and is being held for them. Caution: The hold code is linked to a particular Circulation Code that is in turn linked to a Patron Group Code.

8. Pickup Cancellation  
Notice Code

[Notice Code]

Enter a Notice Code from the *Notice Codes (CNC)* table, found under the *Output Production Menu (COPM)*, to specify the notice to be printed for patrons when a filled hold is **cancelled** before the item has been picked up.

9. Expired Cancellation  
Notice Code

[Notice Code]

Enter a Notice Code from the *Notice Codes (CNC)* table to specify the notice to be printed for patrons when a hold **expires** without having been filled.

10. Lapsed Hold Notice  
Code

[Notice Code]

Enter a Notice Code from the *Notice Codes (CNC)* table to specify the notice to be printed for patrons when a hold **lapses**. A lapsed hold is one that was filled but then sat on the hold shelf too long because the patron never picked up the item. This period is controlled by field 4.

11. Default hold expiry  
period (weeks)

[Blank or whole number]

This specifies a number of weeks a new hold can remain unfilled before being automatically cancelled by the *Upgrades/purchase alerts (HOLDS)* background processing job. The system calculates a hold's default expiration date by adding this number of weeks to the date the hold is placed.

The system does not use this field if there is a date specified in field 12.



12. Default hold expiry date (takes priority over 11) [Blank or Date in system format]
- This specifies a date in the future on which new holds are set for automatic cancellation by the `Hold Removal and Update (C)` background processing job. If you enter a date in this field, the system will not use any value entered into field 11. This specific date could be used to cancel all holds (for patrons with this hold code entered into their `Patron Group/ Circulation Code` tables) at a particular time, for example at the end of the school term.

## Second Screen

**NOTE:** The next three fields are accessed from the second screen of the Hold Code table. Use the *Forward* option to get to this second page. The actions specified on this page are carried out by the `Upgrades/ Purchase Alerts (HOLDS)` background processing job.

1. # Holds Before a Purchase Alert. This field is not currently implemented.
2. # days unsatisfied to trigger upgrade [Any whole number]
- If the library uses Hold Scopes, it is possible to automatically widen the scope after a certain number of days. This field defines the number of days that the hold will be left unfilled before it is extended to a wider scope. The `Qualifier Codes (CQUAL)` table, found under the `Configuration Codes Menu (CCCM)`, is used to define the scope of a hold, as well as to define the next wider scope.
3. New Hold Code to use for above [Blank or new Hold Code]
- If the library chooses, a new hold code can also be specified for holds which are upgraded to a wider scope.

## Recall Codes (CRC)

Recall codes define the types of recalls notices sent to patrons based on their Patron Group/Circulation Code combination. A Recall Code also allows the definition of new loan periods for recalled items. The Recall Code is entered into the Patron Group/Circulation Code table to control recall notices and recalculated loan periods for that patron/material type combination.

**Access** Select Recall Codes (CRC) from the *General Codes Menu*.

```

 RECALL CODES

Number of records = 17
Codes Description of codes

1. RCD Default Recall Code
2. RCF1 Faculty Recall Code 1
3. RCI1 Interlibrary/Institutional Recall 1
4. RCONR1 Other/Non-resident Recall Code 1
5. RCR1 Resident Recall Code 1
6. RCRBR1 RBR Recall Code 1
7. RCS1 Student Recall Code 1
8. RCSG1 Graduate Student Recall Code 1
9. RCST1 Staff Recall Code 1

Options:
 ?=? help A=Add item #=# line PRT=Print
 F=Forward B=Backward E=Exit
```

If the number of a notice type is entered, the system displays the information shown on the following screen.

Recall code fields are edited and created in the same way as other code records.

```

 RECALL CODES

RECALL CODE : RCD

1. Recall Description : Default Recall Code
2. New Loan period (H,D) : D
3. Length of loan period : 5
4. Notice Code : RND = Default Recall Notice
5. Notice Code when no date change :

Options:
? help # line Line by line Copy Print Delete Exit

```

1. Recall Description [text]  
A free text field to define the type of Recall Code.
2. New Loan Period (H,D) [H or D]  
This specifies the time period of a new loan period calculated when an item is recalled from a patron.
- H The time period is hours.  
D The time period is days.
3. Length of Loan Period [Blank or any whole number]  
Specify the length of the new loan period.
4. Notice Code [Notice Code]  
This field contains a Notice Code from the Notice Codes (CNC) table, found under the Output Production Menu (COPM). This Recall notice is intended to inform the patron that the book in his/her possession is needed by another patron/library department, and now has a new due date. These notices are generated by the Notice Production (C) background processor when items are recalled. Various Recall Notice Codes can be created for different patron types and are controlled by the Recall Code entered into the Patron Group/Circulation Code table for that type of borrower. If the library does not wish to notify patrons of recalls and changed due dates, then no notice code needs to be entered.

5. Notice Code when no date change [Blank or a Notice Code]

If the library chooses not to recalculate due dates for patrons from whom books are being recalled, then an alternate Notice Code can be entered into this field. This field contains a Notice Code from the Notice Codes (CNC) table, found under the Output Production Menu (OPM). This notice advises the patron that another patron/library department needs the book, but does not inform them of a change of due date. If the library does not wish to notify patrons of recalls, then no notice code needs to be entered.

## Administrative Hold Messages (CADM)

Administrative hold messages are displayed when a patron is fully or partially blocked from service due to an administrative hold.

**Access** Select Administration Stop Messages (CADM) from the *General Codes Menu*.

```

 ADMINISTRATION

Number of records : 3
Code Description of code

1. 1 Maximum Outstanding Debt Exceeded
2. 2 Maximum Overdue Items Exceeded
3. 3 Maximum Claimed Returned Exceeded

Options: Enter specified line number
? help Add item # line Print Forward Backward Search jump
Exit

```

To edit the text of an administrative hold, select *# line*, enter the line number, and edit the *Description* field on the detail screen that appears.

## Sendmail Path ( SMAIL )

Specifies the location of the library's UNIX e-mail system, which can be used as a contact method for sending notices to patrons.

**Access**    Select Sendmail Path (SMAIL) from the *General Codes Menu*.

```
 UNIX PATH FOR SENDMAIL

Control record : SENDMAIL.PATH

1. Absolute path to sendmail : /usr/sbin/sendmail

Options:
? help # line Line by line Print Exit
```

To edit the path, select *# line*, enter the line number, and edit the *Absolute path to sendmail* field.

# 9

## Output Control

---

This chapter describes the processing operations offered through the OUTPUT CONTROL MENU.

- Use the Calendar Processor to start up background processing jobs or print the output from jobs.
- Use the Register Reports to print bank deposit slips and transaction summaries for cash register sessions.
- Use the Voice Processing Utilities to download and upload LViS voice messages. See the separate LViS documentation for details.

### Output Control Menu (OCM)

Select Output Control Menu (OCM) on the GENERAL CIRCULATION MENU (GCM).

```
DD MMM YYYY Geac ADVANCE Library System (#.##) P P P P P P I I I I I I
HH:MM Your Library Name

 OUTPUT CONTROL MENU

 1. OCP Calendar Processor
 2. ORR Register Reports
 3. OVR Voice Processing Utilities

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help.
Press <ENTER> to return to previous level :
```

## Calendar Processor Menu (OCP)

The Circulation module has a background processor which can automatically carry out scheduled tasks such as notice production and due date table building. Circulation staff can also have the system execute these tasks interactively when the background processor is not activated.

Use the production codes (accessed from the CIRCULATION CALENDAR PROCESSOR menu or from the Output Production Codes option on the CIRCULATION OUTPUT PRODUCTION menu) to schedule a job for the background processor.

You can also use the CIRCULATION CALENDAR PROCESSOR menu to start up a job interactively, or print the output from a job.

**Access** Select the CIRCULATION CALENDAR PROCESSOR menu on the OUTPUT CONTROL MENU (OCP).

```

DD MMM YYYY Geac ADVANCE Library System (#.##) P P P P P P I I I I I I
HH:MM Your Library Name

 CIRCULATION CALENDAR PROCESSOR

 1. Processing Cycles
 2. Execute production run
 3. Send Outputs to Printer

Background Processor : Inactive

Last cycle check :

Options:
Redisplay # line ? help Exit

```

### 1. Processing Cycles

Accesses the PRODUCTION CODES table and view or update the job definitions. (The background processor can be active or inactive.)



To select this option, enter 1 and <ENTER>. The system displays the PRODUCTION screen for defining the codes, as described in *Production Codes (COPC)* on page 5-18.

## 2. Execute production run

With the background processor de-activated, this option starts a job immediately and interactively (instead of letting the background processor start it).

To select this option, enter 2 and <ENTER>. The system prompts:

Enter Production Code:

Enter a Production Code (or ?? for a list) and the system responds with the process's scheduled start time. If you then answer Y to override the time, the system starts the job immediately.

## 3. Send output to printer

Prints the output generated by a job, either to the print queue or to the screen. (The background processor can be active or inactive.)

To select this option, enter 3 and <ENTER>. The system prompts:

Enter Production Code:

Enter a Production Code (or ?? for a list) and the system either says that no reports are available or displays the PRODUCTION OPTIONS screen. On that screen, you can either exit (using *Prior screen* option), send the report to the terminal's screen, send the report to a print queue (if you want, you can specify a different print queue than the one defined for the process in the Production Code), or view creation dates and times of retained reports for the specified production code (using *Select date* option).

Note that the system overwrites the old output with new output every time a process runs. However, reports from the Notices job can be kept longer.

When sending outputs to a printer the system prompts the user to enter a form (printer) number. The system validates the specified form to determine if it is:

- a valid form and loaded on the printer
- a valid form but not loaded on the printer
- an undefined form.

If it is a valid form but not loaded, the system prompts you to determine whether you want to send your output to a printer queue. If you say yes, the output is kept in the queue until the forms are loaded.

E Exits the screen and return to the CODE TABLES menu.

To select this option, enter E and <ENTER>.

blank Re-displays the screen, updating the information in the Background Processor and Last cycle check fields.

To select this option, just <ENTER>.

## Fields

*Background Processor* [ Active, date, time, [Production Code]]

The background processor was activated at the date and time shown. If a job is currently being executed, its Production Code is also displayed. For example:

```
Active since 04-27-00 15:03:35
```

*Inactive* The background processor is de-activated.

*Last cycle check* [date and time]

If the background processor is **active**, the system displays the date and time the processor was activated, and also the job that was running, if any, when you last displayed or redisplayed this screen. For example:

```
04-27-00 15:03:35 (C)
```

## Activating and De-activating the Background Processor

To activate or de-activate the background processor, access the CIRCULATION BACKGROUND PROCESSOR screen (PCIR) from the BACKGROUND PROCESSOR MENU (UBPM) in the Utilities module, and then select the appropriate option. Most libraries will leave the background processor on all the time, and let it execute all the jobs as scheduled. For details, see the *Utilities Management Guide*.

## Accessing Retained Reports

Most reports generated from calendar processor jobs in Circulation are retained until they are overwritten by new reports generated when the process runs again. However, the patron notices generated by the C Notice Production background job are retained for the period defined by the Archive period for notices parameter in the Notice Production Sequences table (COPS).

### Procedure

1. Select *Send Outputs to Printer* from the CIRCULATION CALENDAR PROCESSOR menu.
2. The system prompts for a valid production code.
3. Enter a production code and <ENTER>.
4. The PRODUCTION OPTIONS FOR [PRODUCTION CODE] screen appears.

```

 PRODUCTION OPTIONS FOR NOTICES
 Date : 25 MAR 00 13:09

LINE PRODUCTION OPTION DESCRIPTION

 1. Email notices - Report on notices not yet sent
 2. Email notices - Report on mail sent
 3. Printed Notices - Contact Report
 4. Printed Notices - Report on Mail Sent
 5. Notices Errors
 6. Printed Notices Sent

Options:
line Forward Backward Select date Prior screen ? help

```

5. Choose the *Select date* option. The PRODUCTION OPTIONS FOR [PRODUCTION CODE] screen re-appears with a list of retained reports, showing their creation dates and times.

```
 PRODUCTION OPTIONS FOR NOTICES

Date and Time of production run

1. 20 MAR 00 13:26
2. 22 MAR 00 17:09
3. 24 MAR 00 10:54

Options:
? help Prior screen # line
```

6. Select a date/time item to display the description(s) of the reports generated then. For example, selecting 1 might produce the following screen.

```
 PRODUCTION OPTIONS FOR NOTICES
 Date : 20 MAR 00 13:26

LINE PRODUCTION OPTION DESCRIPTION

1. Email notices - Report on notices not yet sent
2. Email notices - Report on mail sent
3. Printed Notices - Contact Report
4. Printed Notices - Report on Mail Sent
5. Notices Errors
6. Printed Notices Sent

Options:
line Forward Backward Select date Prior screen ? help
```

7. Select an item.
  - If no Email notices exist, the system prompts: *Send Job to (P)rinter or (T)erminal:*. Enter P or T.
  - If Email notices do exist, the system prompts: *Send Job to (P)rinter, by (E)mail, or (T)erminal:*. Enter P, E, or T.
8. When you are finished, select *Prior screen* to exit.

## Register Reports (ORR)

Reports are available for each Circulation cash register session.

Access Select Restister Reports menu on the OUTPUT CONTROL MENU (OCP).

```

REGISTER BATCH DISPLAY

Batch# Register Open by Open Time Close by Close Time

1. 1 CIRC0 KS 08/10/93 12:21 KS 02/21/97 15:58
2. 1 CIRC1 MASTER 02/10/99 10:14 MASTER 02/10/99 10:14
3. 1 CIRC2 MASTER 02/11/99 14:20 MASTER 02/11/99 17:43
4. 1 CIRC9 MC 08/16/93 13:35 MASTER 08/17/98 15:58
5. 2 CIRC0 KS 04/15/97 19:06 MASTER 02/05/99 11:47
6. 2 CIRC1 MIKEC 04/07/99 14:44 MIKEC 04/07/99 14:46
7. 2 CIRC2 MASTER 02/11/99 17:44 MASTER 04/08/99 13:47
8. 2 CIRC9 MASTER 02/10/99 10:11 MASTER 04/08/99 10:33
9. 3 CIRC0 MASTER 02/05/99 11:48 MASTER 02/05/99 11:51
10. 3 CIRC1 MASTER 04/08/99 09:35 MASTER 04/08/99 09:35
11. 3 CIRC2 MASTER 04/08/99 16:04 MASTER 04/08/99 16:10
12. 4 CIRC0 MASTER 02/05/99 12:40 MASTER 02/09/99 13:50
13. 4 CIRC1 MASTER 04/08/99 09:37 MASTER 04/08/99 10:39
14. 4 CIRC2 MASTER 04/08/99 16:11 MASTER 04/08/99 16:49

Options:
? help # line Backward Forward Exit

```

Use the *# line* option to select a register section. The REGISTER REPORT MENU appears.

```
REGISTER REPORT MENU

1) Print Bank Deposit Attachment
2) Print Brief Transaction Summary
3) Print Detailed Transaction Summary

Options:
? help # line Exit
```

**1. Print Bank Deposit Attachment**

Prints a bank deposit report for the register session, showing the payment types, amounts, totals, and comments.

**2. Print Brief Transaction Summary**

Prints a brief summary report of the register session, showing the account numbers, transaction numbers, amounts, and totals. PLUS prompts you to enter 1 to sort by account number or enter 2 to sort by transaction number.

**3. Print Detailed Transaction Summary**

Prints a detailed summary report of the register session, showing the account numbers, transaction numbers, amounts, totals, transaction date and time, item ID or description, and code. PLUS prompts you to enter 1 to sort by account number or enter 2 to sort by transaction number.





# A

## Using ADVANCE

---

This appendix provides some general instructions on how to use ADVANCE:

- the parts of a screen
- selecting menu items
- selecting screen options
- editing in data fields
- editing in data field windows.

## The Parts of a Screen

The ADVANCE screens follow a common design, as illustrated in the following sample menu — the ADVANCE MASTER MENU.

### Menu Screens

Each menu screen typically has:

- the **software name** (Geac ADVANCE Library System) and **release number** (RRRR, e.g. 5.00), and your **library system name** (Your Library Name), at the top centre of the screen
- the **date** (DD MMM YYYY) and **time** (HH:MM), in the top left corner of the screen
- the terminal's **Port Code** (PPPPPP) and default **Institution Code** (IIIIII), in the top right corner of the screen
- a **screen title** (e.g. MASTER MENU), four lines down in the centre of the screen
- an **information display** or **work area**, in the middle of the screen
- an **options area** for entering a menu option, at the very bottom of the screen.

```
DD MMM YYYY Geac ADVANCE Library System (RRRR) PPPPPP IIIIII
HH:MM
 Your Library Name

 MASTER MENU

1. CAT Cataloguing 4. ACQ Acquisitions
2. CIRC Circulation 5. SER Serials Control
3. OPAC Online Catalogue 6. UTIL Utilities

 7. ON Change User
 8. OFF Log Off

Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help :
```

## Non-Menu Screens

Most non-menu screens lack the information shown in the top three lines of menu screens, and list the options across the bottom of the screen. A sample ordering screen from Acquisitions is shown below.

The operator's **User ID** (UUUUUU) is shown in the top right corner of many screens.

```

 ORD - ORDERING DATA UUUUUU
PO#/LINE#: 9200000314/0001 VENDOR : PENGUIN ORDER DATE: 02/08/93
REQUEST #: 920123 ORDER TYPE: REGULAR REQST DATE: 02/08/93
LIBRARY : UL CONDITION : OPEN EST DELVRY: 02/22/93
ISBN/ISSN: 0898598125 LC CARD # : 85029331 RECEIVED :
AUTHOR : Buss, Arnold H., 1924-
TITLE : SOCIAL BEHAVIOR AND PERSONALITY.

STATUS : Rush Order

1. VENDOR : PENGUIN 6. SELECTOR : ACQ 10. UNIT COST: 46.50
2. PAY TYPE : PAY 7. TOTAL CPY: 6 11. DISCOUNT%: 15.000
3. TRANSFER : Y 8. PRIORITY : RUSH 12. TAX % : 8.000
4. CLM CODE : DFLT 9. CURRENCY : CDN 13. ADDED CHG: 0.00
5. REQUESTOR: C. Smith 14. CONDITION: OPEN
15. VENDOR : Please supply ASAP
 NOTE :

Options: Description of selected option
File # line Line by line Bibliographic Allocation Notes Status
Conditions Serial Publication Vendor inquiry Prior screen ? Help
Exit

```

## Selecting Menu Items

The ADVANCE modules are menu-driven. Menu screens which list available sub-menus or functions are offered at the highest levels of the module. There are two ways to select a menu item.

### Menu Item Number

To select a menu item, you may enter the item's reference number on the menu and <ENTER>. For example, to select the Serials Module on the ADVANCE MAIN MENU, enter the number 5 and <ENTER>; similarly, to select the Vendor Maintenance Menu on the SERIALS CONTROL MAIN MENU, enter the number 4 and <ENTER>.

### Screen Identifiers

Each menu item also has a short alphabetic name, called a screen identifier. For example, the Publications Pattern Function, an item listed on the SERIALS CONTROL MAIN MENU, has the identifier PUBM. You can enter the identifier instead of the menu item number on this menu.

Furthermore, you do not have to be on the menu that lists the function when you enter the screen identifier — you can enter the screen identifiers on any menu in the module to go **directly** to the screen you want, skipping any intermediate menus.

## Selecting Screen Options

Many non-menu screens have a list of options at the bottom. The way these options are presented depends on whether or not the “option bar” feature is turned on for your particular ADVANCE module (e.g. Serials) or your terminal’s port. (This feature is controlled by the system administrator at a setup table — see the *Utilities Management Guide*.)

All sample screens in this guide show option lines with this feature turned on.

### Option Bar

If the “option bar” feature is turned **on**, the option line will look something like the following, with one of the options highlighted and a brief description of it shown on the first line.

```
Options: Get more information
Check in Holdings Claims Order detail Forward Backward
Prior screen ? help Exit
```

To select an option:

1. move the highlighted bar in any of three ways:
  - press an arrow key
  - press the space bar
  - type the first (capitalized) letter of the option. If more than one option begins with the same letter, type the letter a second time to proceed to the second option.
2. and then <ENTER> to execute it.

### Option Code

If the “option bar” feature is turned **off**, the option line will look something like the following, with a code (or “command”) shown to the left of each option.

```
Options: <ENTER> = scroll options
C = Check in H = Holdings CL= Claims O = Order detail
F = Forward B = Backward P = Prior screen ? = ? help
```

To select and execute an option, enter the option’s code and <ENTER>. For example, enter CL and <ENTER> for *Claims*.

**Scrolling** If the system does not have enough room to list all options at once, you can <ENTER> to scroll forward in the list. For example, the previous sample display will change to:

```
Options: <ENTER> = scroll options
F = Forward B = Backward P = Prior screen ? = ? help
E = Exit
```

and then to:

```
Options: <ENTER> = scroll options
E = Exit
C = Check in H = Holdings CL= Claims O = Order detail
```

and then finally back to the original display.

---

## Editing in Data Fields

Many screens have fields into which you can place the cursor to add or change data. These fields are usually the numbered fields.

### Single-field Access

To access a particular field, select the *# line* option and type the field's reference number. Afterward, you can leave the field and return to the option line by <ENTER>.

### Line-by-Line, Multi-field Access

To access all the screen's fields, one after another, instead select the *Line by line* option; this places the cursor in the screen's first field. <ENTER> takes you to the next field rather than down to the option line.

When you add a **new** record, the system displays a screen with most or all of the fields left blank and automatically puts you into line-by-line entry mode.

### Commands

The commands you can use to edit text or display help within a field are described in the following table.

Use the Back Space key and type over existing text, or use the <ESC> commands, when necessary. Be careful about using **arrow keys** for this purpose because they work differently on different types of terminals.

NOTE: The library might have different commands defined for some functions, such as <ESC>OO rather than <ESC>O for the insert/over-type mode toggle. If necessary, ask your system manager or Geac Customer Support, who can check the ADV.DEFINE.CURSORS file.

| <b>Enter</b> | <b>Description</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ENTER>      | To leave the current field as is and <b>proceed</b> , just <ENTER>. In line-by-line mode, the system places the cursor at the next field; otherwise, it places the cursor down at the option line.                                                                                                                                                                                                                                                                                                                                                         |
| (blank)      | To leave the current field as is and send the cursor <b>down to the option line</b> , even in line-by-line mode, enter a blank at the beginning of the field and <ENTER>.                                                                                                                                                                                                                                                                                                                                                                                  |
| .            | To leave the current field as is and <b>go back</b> one field, type a period at the beginning of the field and <ENTER>. In line-by-line mode, the system places the cursor back at the preceding field; otherwise, it places the cursor down at the option line.                                                                                                                                                                                                                                                                                           |
| #            | To <b>clear</b> the current field and proceed, type a number sign at the beginning of the field and <ENTER>. In line-by-line mode, the system places the cursor at the next field; otherwise, it places the cursor down at the option line.                                                                                                                                                                                                                                                                                                                |
| ?            | For library-defined <b>help</b> on the field, type a single question mark at the beginning of the field and <ENTER>.                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| ??           | <p>At fields which take a setup code as the value, you can have the system display the <b>list of valid codes</b>. Type two question marks at the beginning of the field and &lt;ENTER&gt;.</p> <p>For example, typing ?? in the <i>CHRONOLOGY CODE</i> field of the PUBM - PUBLICATION PATTERN screen causes the system to superimpose the CHRONOLOGY CODE - (CHRN) table. If you wish, you can assign one of the listed Chronology Codes to the field by entering the code's reference number at this table before returning to the original screen.</p> |
| <ESC>A       | ErAse character under the cursor (the cursor moves to the left).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <ESC>B       | Tab Backwards within the field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| <ESC>D       | Delete character under the cursor (the cursor does not move).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <ESC>H       | Go to the beginning of the field (Home).                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| <ESC>I       | Insert (paste) text from your preceding deletion/capture in the field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| <ESC>L       | Go to the end of the field.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <ESC>O       | Toggle between insert and Overtyping modes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |



| Enter  | Description                                                                                                                                                                                                                                                                                                                                                                                                                     |
|--------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ESC>P | For some fields, the system can only show the first line of information stored in the field. (If there is more text than can be shown, the system displays a plus sign, +, at the end of the line.) If the system does not automatically display and allow you to edit this text when you access the field, use this command to open an <b>edit window</b> .<br><br>See the next section for a list of window editing commands. |
| <ESC>Q | Delete (and capture) text to the beginning of the field.                                                                                                                                                                                                                                                                                                                                                                        |
| <ESC>R | Restore the field (undo changes).                                                                                                                                                                                                                                                                                                                                                                                               |
| <ESC>Z | Delete (and capture) text to the end of the field.                                                                                                                                                                                                                                                                                                                                                                              |

### <ESC> Commands

1. Press the keys one after another rather than together. To use “<ESC>E”, for example, press the Escape key, release it, and then press the “E” key.
2. Enter characters in upper or lower case, as you wish. For example, <ESC>h is equivalent to <ESC>H.

For convenience, some libraries have set up **function keys** to take the place of the commands listed in the table.

## Editing in Windows

The following table lists the commands required for editing text within a field window. A window is a temporary workspace for a field in which you may enter or edit several lines or “pages” of data and use some special editing commands. You may also use the arrow, Tab, and Back Space keys as usual.

NOTE: The library might have different commands defined for some functions, such as <ESC>OO rather than <ESC>O for the insert/over-type mode toggle..

| <b>Enter</b> | <b>Description</b>                                              |
|--------------|-----------------------------------------------------------------|
| <ESC>A       | erAse character under the cursor (the cursor moves to the left) |
| <ESC>B       | tab Backwards                                                   |
| <ESC>D       | Delete character under the cursor (the cursor does not move)    |
| <ESC>E       | Exit from the window (and save changes)                         |
| <ESC>F       | reFormat the contents of the window                             |
| <ESC>H       | go to the beginning of the line (Home)                          |
| <ESC>I       | Insert (paste) text from your preceding deletion/capture        |
| <ESC>L       | go to the end of the Line                                       |
| <ESC>M       | go to the bottoM of the window                                  |
| <ESC>O       | toggle between insert and OvertypE modes                        |
| <ESC>P       | go to the next Page; oPen a window                              |
| <ESC>Q       | delete (and capture) text to the beginning of the line          |
| <ESC>R       | Restore the line (undo changes)                                 |
| <ESC>S       | Split the line into two lines                                   |
| <ESC>T       | go to the Top of the window                                     |
| <ESC>U       | go Up to the previous page                                      |
| <ESC>Z       | delete (and capture) text to the end of the line                |

**<ESC> Commands**

1. Press the keys one after another rather than together. To use “<ESC>E”, for example, press the Escape key, release it, and then press the “E” key.
2. Enter characters in upper or lower case, as you wish. For example, <ESC>h is equivalent to <ESC>H.

For convenience, some libraries set up **function keys** to take the place of the commands listed in the table.



# B

## Glossary

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This glossary explains many of the terms you may encounter in the documentation or while performing system activities.

Words shown in *italics* are defined elsewhere in the glossary.

### A

- AACR2      Anglo-American Cataloguing Rules, version 2. These are the rules that form the “bible” of cataloguing procedure as they relate to the construction of catalogues and other lists.
- access level      A number between 0 and 99. The higher the number, the more you are allowed to do. See also *priority level*.
- access point      An entry point into a catalogue. A heading by which a bibliographic record may be retrieved.
- accession number      A number assigned by the library to an individual *bibliographic item* when it is added to the library’s collection. In ADVANCE, the accession number is usually replaced by assigning a *barcode* to the item. Barcodes themselves may constitute a form of accession number, if they are sequential.
- account      Accounts are used within the PICK system software. ADVANCE is an account in SYSPROG.
- accounts receivable      The Circulation process by which patron fines are paid, created, or assessed and other financial transactions are performed.
- Acquisitions module      The ADVANCE module used to order and keep track of the purchase of items for a library, both serials and monographs.

|                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| added entry        | An entry, other than a subject entry and additional to the main entry, under which a bibliographical entity is represented in a catalogue.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| ALA character set  | An extended 8-bit ASCII character set defined for MARC records and adopted by the American Library Association. Of the 256 characters allowed for by this code, US/MARC defines 208.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| application        | A software program or set of programs that uses the computer as a tool, as opposed to the software necessary to run the computer.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| archive tape       | Tape from a <i>bibliographic utility</i> ( <i>OCLC</i> , <i>WLN</i> , <i>RLIN</i> , or <i>UTLAS</i> ) which are released to each library and contain a copy of that library's records from the utility's database. Tapes are produced regularly.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| ASCII              | An acronym for "American Standard Code for Information Interchange". A standard 7-bit code representing up to 128 characters. The ASCII code is used in computer communications.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| attach             | To connect a job or terminal to the computer in such a way that they can communicate. Also, to define communications characteristics for a terminal.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| authoritative form | The form of a heading that has been chosen as the standard form to be used in all bibliographic records.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| authority control  | <p>A way of handling and standardizing bibliographic information using "see" and "see also" references.</p> <p>The classic example of a "see reference" is Mark Twain vs. Samuel Clemens. The library decides which of these names for the same author will be the "established" form — say, Mark Twain. If users look for "Clemens, Samuel", they will find the reference, "see Twain, Mark".</p> <p>"See also references" are generally used in subject searches. A user who looked under the subject of "Home" might find "see also Family".</p> <p>Authority control refers to the sum of the library's cataloguing decisions as to which bibliographic elements will be established form headings, rejected form headings, and related headings.</p> |
| authority file     | Records of the correct forms of names, series, or subjects used in the catalogue. The purpose of the authority file is to keep entries uniform.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| authority hot key  | The function key a user can press to browse and retrieve an authority heading for the MARC field they are cataloguing.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

---

## B

- backup** An exact copy of a primary unit that can be used in place of the primary unit in case the primary unit fails. Usually 'backup' refers to copies of ADVANCE software and the library's data files which are kept on tape. If the disk versions of these files get damaged, the files can be restored from the backup versions on tape.
- barcode** A series of printed lines and spaces representing numbers, letters, or other symbols. Barcodes are not eye readable. The format of the barcode varies from one manufacturer to another. Geac equipment can work with several barcode formats, including 'CODABAR' and Code 39.
- barcode reader** A device for reading barcode labels into a system. Generic term for 'laser scanner' or 'lightpen'.
- batch** A collection of commands and input held in an editor file. Similar to a program, but relatively simple. Batches feed instructions to the computer without requiring the presence of an operator. When you execute a batch, it usually performs several control console commands and may run several programs in a pre-assigned order.
- baud rate** Also simply "baud". A standard unit, in bits per second, used to express the data transmission capability of lines, terminals, and interface equipment.
- bibliographic item** A document or set of documents in any physical form, published, issued, or treated as an entity, and as such forming the basis for a single bibliographic description. Contrast with *physical volume* and *copy*.
- bibliographic record** In ADVANCE, the MARC format record that describes one bibliographic item. For example, if the library owns 10 copies of a three-volume edition of "War and Peace", it will describe them in one Bibliographic Record with 30 items or pieces in the Item File — 10 for each of the separate volumes.
- bibliographic utility** An online processing centre whose services are based on a machine-readable database of catalogue records. The main North American utilities are *OCLC*, *WLN*, *UTLAS*, and *RLIN*.
- binding entry** An entry in a bibliographic record to indicate that an item is physically bound with one or more other items. Used with books bound together, AV kits, etc.

- bit A binary digit. A data field that has only two possible values, 0 or 1 — that is: NO or YES; OFF or ON.
- blind heading This is an authorized heading for which no authors or subjects exist in the bibliographic database. In general, blind headings do not appear in the Online Catalogue. Note, however, that blind, non-provisional, topical subject headings do appear in the Online Catalogue. All blind headings can be searched for in the Cataloguing module.
- blind reference This is a reference to an authorized heading that does not exist in the bibliographic database. In general, blind references do not appear in the Online Catalogue. Note, however, that references to blind, non-provisional, topical subject headings do appear in the Online Catalogue.
- Boolean searching A searching technique in which search terms are presented to the system in a particular manner. These terms are operated on with Boolean logic, which means the search terms may be separated by the operators AND, OR, NOT. For example, consider the subject search: COMPUTERS AND CARS. This search would result in the retrieval of a series of items in which both COMPUTERS and CARS formed a subject term.
- boot Short for “boot strap”. The operation of loading the initial elements of the ‘operating system’ into computer memory.
- borrower Known as *patron*.
- BOT Reflective marker to identify the beginning of a tape.
- bug An error in a program or hardware function that causes the function to work incorrectly.
- byte A character of data, normally represented by 8 bits.

## C

- call number Alphanumeric code used to identify and locate a particular item on the shelves. Call numbers usually consist of a classification number and author or cutter number; they may also include an accession number. In most systems, the call number also classifies the subject material of the book. Various systems exist - common ones are *LC* and *Dewey*.
- CAN/MARC Canadian version of the MARC format.



---

|                           |                                                                                                                                                                                                                                                                                                     |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| carriage return           | Indicates the use of the ENTER or RETURN key on the keyboard. Operators use this key to send data to the computer, or to respond to a prompt. Sometimes abbreviated to “<CR>”.                                                                                                                      |
| Cataloguing module        | The ADVANCE module that automates bibliographic and authority control.                                                                                                                                                                                                                              |
| cataloguing source number | Unique number assigned by the provider of the cataloguing record: e.g. OCLC, LC.                                                                                                                                                                                                                    |
| charge                    | Known as <i>checkout</i> . A function in the Circulation module: the process by which a library item is lent to a patron. To loan a book to a patron is to charge it out to the patron.                                                                                                             |
| checkdigit                | A calculated digit added to the end of a number used to validate the correctness of the sequence of digits. Used in <i>barcodes</i> , <i>ISBNs</i> , and so on.                                                                                                                                     |
| checkin                   | 1) In the Circulation module, the process of checking returned items in at the circulation desk. Also known as <i>discharge</i> .<br>2) In the Acquisition and Serials modules, <i>checkin</i> is the process of receiving an item shipped to the library, and recording the receipt on the system. |
| checkout                  | A function in the Circulation module: the process by which a library item is lent to a patron. To loan a book to a patron is to <i>charge</i> it out to the patron.                                                                                                                                 |
| chronology                | Date that identifies an issue of a serial — e.g. “June 1991”.                                                                                                                                                                                                                                       |
| Circulation module        | The ADVANCE module that automates circulation functions and transactions.                                                                                                                                                                                                                           |
| citation                  | A display of bibliographic information describing a given work.                                                                                                                                                                                                                                     |
| CODABAR                   | A 14-digit <i>barcode</i> format that ADVANCE uses.                                                                                                                                                                                                                                                 |
| COM                       | Acronym for “Computer Output on Microform”. Information is recorded on microfilm or microfiche instead of paper.                                                                                                                                                                                    |
| command                   | An order telling the system to start, stop, or continue an operation within a function. Commands are usually entered by typing a mnemonic code.                                                                                                                                                     |

|                    |                                                                                                                                                                                                             |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| compile            | To translate a program from a high-level source language to a machine-executable form.                                                                                                                      |
| content designator | The means of identifying data elements and/or of providing additional information about a data element. Content designators consist of tags, indicators, and subfield identifiers.                          |
| control characters | Keyboard letters, numbers, or symbols which are entered while the <CONTROL> key is held down. They are not normally printable characters.                                                                   |
| control console    | A terminal, usually in the computer room, from which the system may be controlled.                                                                                                                          |
| conversion         | The process of turning machine-readable records in one format into machine-readable records of a different format.                                                                                          |
| copy               | A single piece of a document; a duplicate; an instance of a serial issue. See also <i>bibliographic item</i> , <i>physical volume</i> , <i>piece</i> , and <i>copy set</i> .                                |
| copy number        | A number assigned by the library to a copy. The number need not be unique. Its usual purpose is to distinguish between different copies of the same title, or different copy sets of the same serial title. |
| copy set           | A duplicate run of issues of a serial; simplistically a “subscription”.                                                                                                                                     |
| copy-specific hold | A hold placed on a specific copy. A copy-specific hold may be used, for example, to capture a particular copy to be sent to the bindery. Contrast with title-level hold.                                    |
| core               | Computer memory, usually measured in megabytes: “MB”.                                                                                                                                                       |
| CRT                | Cathode Ray Tube screen of a terminal. Also known as VDU (visual display unit).                                                                                                                             |
| CSN                | Cataloguing Source Number.                                                                                                                                                                                  |
| cursor             | A small square or line on the terminal screen which tells you where the next character you type will appear.                                                                                                |
| cutter number      | Part of the <i>call number</i> used to identify the author for filing purposes.                                                                                                                             |

---

## D

|                    |                                                                                                                                                                                                                                                                                              |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| database           | A pool of data held in computer storage, controlled by a central authority, and available to any application capable of accessing the storage. It is designed to meet the requirements for consistent and current data by many or all of an organization's application systems.              |
| data communication | The transmission of data across geographically separated locations.                                                                                                                                                                                                                          |
| data element       | The smallest unit of information that is explicitly identified in MARC format. Within a variable field, a data element is identified by a subfield identifier. Within the record label, the directory, and a fixed-length subfield, a data element is identified by its character positions. |
| date of last use   | The date of the last transaction associated with a particular record.                                                                                                                                                                                                                        |
| Dewey              | Dewey Decimal Classification system, developed by Melvil Dewey.                                                                                                                                                                                                                              |
| diacritics         | Also "diacritic characters/marks". The marks, such as accents, which appear under or over characters, used to denote a specific sound for a given character. Sometimes used to refer to non-English alphabetic characters as well.                                                           |
| discharge          | Known as <i>checkin</i> . A function in the Circulation module: the process by which library staff record that a borrowed item has been returned by the patron.                                                                                                                              |
| disk               | Also "hard disk". A magnetic storage medium, like magnetic tape, but in the form of a platter, similar to a phonograph record.                                                                                                                                                               |
| disk drive         | A data storage device that holds, reads from, and writes to <i>disks</i> .                                                                                                                                                                                                                   |
| diskette           | Also "floppy disk". Similar to <i>disk</i> , typically used with microcomputers.                                                                                                                                                                                                             |
| DOS                | Disk Operating System, for a microcomputer.                                                                                                                                                                                                                                                  |
| download           | The data flow from the host computer system <b>down</b> to the microcomputer.                                                                                                                                                                                                                |

## E

|                  |                                                                                                                                                                                                                   |
|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| edit record      | The “edit” records are the temporary, work versions of bibliographic records, stored in the Work File. Edit records are not shown in the Online Catalogue.                                                        |
| edition          | A new edition of a work, revision. Edition information may modify some but not all of the bibliographic information for a work. According to AACR2, a new bibliographic record must be created for a new edition. |
| editor           | A program that enables the user to create, purge, retrieve and update variable-length record source files.                                                                                                        |
| editor file      | A file created using the editor.                                                                                                                                                                                  |
| enumeration      | Numbering that identifies an issue of a serial — e.g. “Vol.3 Pt.A”.                                                                                                                                               |
| EOF              | The magnetically recorded mark at the end of a file.                                                                                                                                                              |
| EOT              | The reflective marker at the end of a tape attached to the tape surface.                                                                                                                                          |
| established form | This is the form of a heading that has been chosen as the standard form that should be used in all bibliographic records. Also known as <i>authoritative form</i> .                                               |

## F

|        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| F.E.   | Stands for “Field Engineer”. Also written “FE”.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| F.E.D. | Also written “FED”. Field Engineering Division — the Geac department responsible for maintaining and repairing hardware.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| field  | <ol style="list-style-type: none"><li>1) A MARC “field” is a defined part of a MARC record used to contain only a specific category of data. For example, included in the Bibliographic Record is the Main Entry - Personal Name Field (Tag 100), the Title Statement Field (Tag 245), and the Local Call Number Field (Tag 090). There are two kinds of MARC fields - <i>variable length</i> and <i>fixed length</i>. Some people use the word “tag” to refer to a MARC field.</li><li>2) An area on the screen where you can enter data, or where the system will display information: for example, author, title. Fields often appear on the screen with a descriptive word beside them. For example, the author field usually has “AUT:” or “AUTHOR” beside it.</li></ol> |

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|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| field separator            | A control character used at the end of each <i>variable field</i> to separate it from the next.                                                                                                                                                                                                                                                                                                                                                                           |
| file                       | <p>A collection of related records treated as a unit.</p> <p>A file is a logical structure which associates a set of items. On a PICK system, files are organized in a hierarchical structure. There are four levels of files: the System Dictionary, a users' Master Dictionary, File-level Dictionaries, and the Data Files. A PICK system can contain any number of files, which can contain any number of data items, limited only by the size of the disk drive.</p> |
| file structure             | The rules of organization that relate records within a file.                                                                                                                                                                                                                                                                                                                                                                                                              |
| fixed-length field         | Also "fixed field" and "control field". A MARC field of pre-defined length in a bibliographic record: for example, the Physical Description Field (Tag 007). Fixed-length fields are made up of one or more fixed-length data elements (sometimes called <i>offsets</i> ).                                                                                                                                                                                                |
| fixed-length field element | Part of a MARC <i>fixed-length field</i> whose length and contents are pre-defined. For example, the language code (character positions 35 to 37) in Tag 008.                                                                                                                                                                                                                                                                                                             |
| fixed-length subfield      | A <i>subfield</i> whose length is invariant, being determined for all occurrences by provisions of this format. A fixed-length subfield may be defined to contain one or more data elements. Fixed-length subfields may occur in both fixed-length fields (e.g. field 100, subfield ‡a), and variable-length fields (e.g. field 200, subfield ‡z).                                                                                                                        |
| frame                      | Disk drive storage is divided into sections called "frames". Each frame is numbered, giving the system direct access to that particular frame-id or FID. The physical size of a frame is machine-dependent, and limited only by the size of the disk drive.                                                                                                                                                                                                               |
| function                   | <p>In ADVANCE, "function" refers to each of the possible actions available in the main menus.</p> <p>For example, in the Circulation module, "function" refers to an operation available in the online menus: e.g. checkout.</p>                                                                                                                                                                                                                                          |
| fund                       | The library can define amounts of money to be encumbered, spent, referred to, and reported on through named "funds" within the Acquisitions module. The term "fund" is used to contrast with external "accounts" which are not system-maintained.                                                                                                                                                                                                                         |

## G

GFE Group Format Error. A GFE typically indicates that the data may be corrupted. Normally GFEs are caused by a sudden power failure.

## H

- hang Refers to the situation where the computer does not respond to terminal activity. Usually the result of some kind of fault, either in the software or the hardware.
- hold Sometimes called “reservation”. A facility in Circulation referring to the process by which an item not currently available is reserved for the patron. It is normally used when all copies are on loan. When the item becomes available, the library sets it aside for the requesting patron.
- holdings **Piece holdings:** the physical volumes that the library owns of a given work.  
**Copy holdings:** the issues that the library owns of a serial.  
**Summary holdings statement:** a description of the range of copy holdings.
- host The controlling or main computer in a data network.
- hot key See *authority hot key*.

## I

- imprint Publisher name, including date and place of publication.
- index A list of data arranged in some order (usually alphabetical) using a special “key” (such as author, title, etc.) which acts as an access point to the database. Indexes facilitate quick access to a large body of data.
- index entry A word, phrase, or number used to locate an item within a specific index.
- index key The term or phrase from a source record which allows you to search for that record - for example, “Twilight Zone”, or “Bowie, David”.
- indicator A special data element in a MARC variable field. Each US/MARC variable field must have two one-character indicators.

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|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| intensity         | The brightness of the characters on the screen.                                                                                                                                                                                                                                                                                             |
| interface         | To interconnect devices or systems with different characteristics. Usually involves converting data suitable for one system into a form suitable for a second system. The term can be used as a verb or a noun. It can be applied to a cable or a connector, to a device that performs a conversion operation, or to a conceptual boundary. |
| interlibrary loan | The arrangement whereby a library system may borrow items from another library system. Either or both of the two libraries may be Geac customers. ILL patron privilege classes and material types should be defined in the Policy Tables.                                                                                                   |
| invoice           | An accounting document supplied to the library by a vendor, indicating the character, quantity, price, terms and nature of delivery of goods sold or services rendered. In the Acquisitions module, staff members will create a system record for each invoice received.                                                                    |
| I/O               | Abbreviation of “input/output”.                                                                                                                                                                                                                                                                                                             |
| ISBD              | “International Standard Bibliographic Description” — a format for describing bibliographic information.                                                                                                                                                                                                                                     |
| ISBN              | “International Standard Book Number” — an alphanumeric code (with dashes) assigned by some publishers to their works. The same work published in different countries will have different ISBNs.                                                                                                                                             |
| ISO               | Short form for “International Standards Organization”.                                                                                                                                                                                                                                                                                      |
| ISSN              | International Standard Serial Number. Similar to ISBN, except for serials.                                                                                                                                                                                                                                                                  |
| issue             | A publication unit of a serial, usually identified by unique enumeration (numbering) and chronology (cover date).                                                                                                                                                                                                                           |
| item              | Used variously, in different contexts, to mean <i>bibliographic item</i> , <i>physical volume</i> , <i>copy</i> , or barcoded <i>piece</i> .                                                                                                                                                                                                |

## J

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|-----|------------------------------------------------------------------------------------------------------------------------------------------------|
| job | Often used as a synonym for “program”. A unit of work to be done using the computer. Often accomplished through the use of a batch or program. |
|-----|------------------------------------------------------------------------------------------------------------------------------------------------|

journal entry In the Acquisitions module, a transaction record specifying the transfer of money into or out of one or more funds.

## K

KB Short for “kilobyte” — 1024 *bytes* of memory.

keyword A word which is used as an access point to the bibliographic record. These words are taken from author, title, and subject, and individually indexed without regard to order of appearance.

## L

laser scanner Device for reading barcodes or OCR labels. See also *barcode reader*.

LC Short for “Library of Congress”. It refers to the Library of the Congress of the United States, a body with some of the characteristics of a national library. Also used to refer to the classification system used by the Library of Congress.

LCSH “Library of Congress Subject Headings”. A subject classification system for cataloguing.

LC Card Number Sometimes abbreviated to “LCCN”. “Library of Congress Control Number” — the number assigned to an item by the Library of Congress production services as a printing control number / inventory number after an item has been catalogued.

LC MARC Records Records in *US/MARC* format produced by the Library of Congress.

leader The beginning portion of a MARC record. The leader contains coded information about a record, including record type, bibliographic level, and creation date. The information is stored in a fixed-length format.

library system Also called “library”, or more often, “site”. A purchaser of ADVANCE. A library system may consist of a central library, along with its branches and departments. Alternatively, a library system may be a consortium or co-operative. A library system is composed of one or more “agencies” which share the same CPU.

lightpen The pen-like device attached by a cord to the terminal. It is used to read *barcodes* into the system for operations such as registering new patrons



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to the system, searching quickly and accurately for those already there, or entering a patron or item during a function such as CHECKIN, CHECKOUT, etc.

- line The transmission medium and equipment for carrying speech and/or data between separated locations, usually between host computer and remote terminal.
- line printer The printers used to print reports are often called “line printers”, so named because they print one line at a time. Printing speed for line printers is given in number of lines per minute: for example, “600 lpm”.
- linking The process of adding holdings information and (in particular) a barcode number for an item to the item’s bibliographic record.
- Also used in the Reserve Book Room to bring together specific courses with items.
- load To mount a tape on the tape drive and set it to the load point.
- load point The beginning of the usable portion of a tape. The load point occurs when the tape drive detects a one inch reflector on the tape (the *BOT* mark). A tape at load point may be used as soon as the drive goes online.
- local call number Known as *shelf location*.
- local copy number Known as *copy number*.
- log To record events and their time of occurrence.
- log on See *sign on*.
- log off See *sign off*.

## M

- magnetic tape Storage medium for information. Usually used in conjunction with a computer system. Typically, the magnetic tape is 1/2 inch in width, and comes in various lengths.
- main entry In a manual cataloguing system, the primary access point for a bibliographic item. Normally the author but sometimes the title.

|               |                                                                                                                                                                                                                                                                                                                                                                                                                            |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| MARC field    | A <i>fixed-length</i> or <i>variable-length field</i> in a MARC format record.                                                                                                                                                                                                                                                                                                                                             |
| MARC format   | “MAchine Readable Cataloguing” — a standardized communications format for storing and transferring bibliographic and authority cataloguing data records on magnetic tape. A MARC record is composed of a leader, a directory to the fields, fixed length fields, and variable length files. National libraries issue records for various materials in their own versions of MARC: for example, US/MARC, CAN/MARC, UK/MARC. |
| material type | A category of library materials used in the library. For example, newspapers, adult fiction paperbacks, and video cassettes could all have different material types. The library usually categorizes its materials based on its circulation policies (such as loan period) and the statistical reports desired. Every item is assigned a material type. A two-character code identified by MARC.                           |
| master record | Completed bibliographic records, stored in the main bibliographic file, or the main record for binding entry records.                                                                                                                                                                                                                                                                                                      |
| MD or M/DICT  | “Master Dictionary” — each user account on the system has a Master Dictionary associated with it. It is structurally similar to all other files on the system. Many things that a user enters at the TCL prompt are contained in the user’s Master Dictionary: verbs, procs, connectives, file-names, etc.                                                                                                                 |
| menu          | A listing of the functions available online that allows a user to choose and perform a variety of actions. The user selects the action by entering certain key(s).                                                                                                                                                                                                                                                         |
| module        | An “application” package within the ADVANCE System — examples: the Circulation module, the Cataloguing module.                                                                                                                                                                                                                                                                                                             |
| monograph     | Book; contrast with <i>serial</i> .                                                                                                                                                                                                                                                                                                                                                                                        |

## N

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|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| non-filing       | Words or characters that do not affect sorting. For example, <b>The Joy of Cooking</b> is filed under “J” for “Joy”, not “T” for “The”. “The” is a non-filing word.                                                     |
| non-filing count | A specific number of characters which will be ignored for sorting purposes. Usually applied to the title of a work, and usually counted from the first character in the title. For example, <b>The Joy of Cooking</b> , |

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filed under “J” for “Joy”, would have a non-filing count of “4” (the three characters in “The” plus one space). This count is normally placed in one of the indicators of a MARC record.

normalization To improve the matching and filing of index entries, several “normalization rules” are applied automatically. For example, all letters may be converted to upper case, and some punctuation marks can be converted to blanks or stripped.

note A type of field or screen display where library staff can enter free text about a patron or item.

notice In ADVANCE, “notice” generally refers to an item printed by the library, but meant to be circulated outside the library, such as a fine notice, overdue notice, or claim notice (in Acquisitions).

## O

OCLC A bibliographic utility, formerly “Ohio College Library Center”, now “Online Computer Library Center”. Among other services, it provides a machine-readable database for cataloguing.

OCR Optical Character Recognition or Reader.

offline Opposite of *online*.

offset Another term for fixed-field data elements.

online “Online” has two meanings:  
1. Connected directly to and interacting with a computer.  
2. A major program used to make computer interaction easier: for example, the Circulation online.

Online Catalogue One of the ADVANCE modules, the Online Catalogue is an online query system that automates manual catalogue systems for lookup only. It allows library patrons to search the MARC records database. Patrons can examine bibliographic records, locating items through standard indexes such as subject, title, author, series, keywords, and bibliographic identification numbers.

OPAC Short for “Online Public Access Catalogue”. The ADVANCE OPAC is known as the “Online Catalogue”.

|                  |                                                                                                                                                                                                                |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| operating system | Often referred to as “OS”. The set of programs that control the computer and its processing.                                                                                                                   |
| operator         | The person using a terminal.                                                                                                                                                                                   |
| order            | See <i>purchase order</i> .                                                                                                                                                                                    |
| OS               | Short form for <i>operating system</i> .                                                                                                                                                                       |
| OSI              | Stands for “Open System Interconnect.” An international standard developed by <i>ISO</i> and used for communication between different types of computers. The OSI model defines 7 levels for the interconnect. |

**P**

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|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| parity            | A system of detecting errors in data transmissions and transfers. By selectively adding a single bit to bit patterns, parity causes the bit patterns to have either an odd number of bits turned On (odd parity), or an even number of bits turned On (even parity).                     |
| parity error      | Parity errors occur when the bit patterns caused by the system’s ‘parity’ setting are incorrect: for example, when the system detects a “0” but expected a “1”. Parity errors imply that one portion of the system has detected a non-recoverable failure by another part of the system. |
| password          | A code which is typed by an operator to sign on to the system or to a module. The password determines the operator’s <i>access level</i> .                                                                                                                                               |
| password security | The type of security in which staff passwords are used. The password indicates the operator’s access level which, in turn, determines the commands he or she is permitted to use.                                                                                                        |
| patron            | Refers to the individuals who use the goods and services offered by a library. Also called “borrower” and “user”.                                                                                                                                                                        |
| patron agency     | The location/library where a patron is registered.                                                                                                                                                                                                                                       |
| patron class      | Known as “patron privilege class”.                                                                                                                                                                                                                                                       |
| patron record     | The record that describes a patron. The description includes: name, barcode number, address, and other patron-related information.                                                                                                                                                       |

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| peripheral         | Also “peripheral device”. In a computer system, a functional unit that makes and/or receives data transfers. The term includes storage devices (such as tape drives), input devices (such as terminals), and output devices (such as printers).                                   |
| physical volume    | All that is contained in one binding, portfolio, etc., whether as originally issued or as bound after issue. A physical volume does not necessarily coincide with a bibliographic volume, which is characterized by a title page and separate pagination. See also <i>piece</i> . |
| PICK               | The operating system and database management system used by ADVANCE.                                                                                                                                                                                                              |
| piece              | A barcoded circulation unit, usually corresponding to a physical volume. Each barcoded volume of a monographic bibliographic item is a piece. In ADVANCE, piece control is handled by the Cataloguing module’s holdings function.                                                 |
| pointer            | A data element which specifies the record-number of a record in a file, or in a related file.                                                                                                                                                                                     |
| policies           | Each library has certain characteristic ways of handling the way it conducts business. These are referred to as “policies”. Circulation Setup policies include loan periods, book limits, material types, renewal limits, fine amounts, and so on.                                |
| policy parameters  | Library policies stated explicitly in the form of sets of values for the Geac-supplied tables, lists of options, and so forth.                                                                                                                                                    |
| policy tables      | The tables completed by a library during the installation process. These define the library policies, contain the decisions regarding library options, outline the structure of the system and list the various codes used by the library. Each module has its own set of tables. |
| port               | An interface that connects one or more devices (e.g., terminals, printers) to the computer. Each port has a unique number.                                                                                                                                                        |
| powerfail recovery | The computer’s ability to recover from power failures without losing data.                                                                                                                                                                                                        |
| printer            | A peripheral device used to provide hard copies of data.                                                                                                                                                                                                                          |

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|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| priority level      | Refers to a “security level” required to perform a function. There is a level of security associated with each command, ranging from 0 to 99 (highest = most). Synonymous with <i>access level</i> .                             |
| PROC                | PROC is short for stored procedure. PROC allows the user to pre-store a complex series of operations which can be invoked by a single command. Anything which can be done at the TCL level can be accomplished with a PROC.      |
| program             | A sequence of machine-readable instructions that a computer can execute. When a program is executed, it performs some function or operation.                                                                                     |
| project manager     | The Geac Project Manager is responsible for liaison between Geac and the individual customer.                                                                                                                                    |
| prompt              | A message from the <i>operating system</i> or an <i>application</i> program. Prompts appear on the CRT screen, and require a response from the computer operator.                                                                |
| publication pattern | A serial’s <i>enumeration</i> pattern, <i>chronology</i> pattern, and publication frequency pattern, used by the Serials module to predict issues.                                                                               |
| purchase alert      | A warning that additional copies of a title may be needed. Usually because all copies are missing or because the “hold ratio” for this item (that is, the number of holds compared to the number of active copies) is very high. |
| purchase order      | A record authorizing a vendor to deliver materials or services, usually at a set price, to the library. One or more copies of one or more items can be covered by a single purchase order (sometimes abbreviated “PO”).          |

## R

|           |                                                                                                                                          |
|-----------|------------------------------------------------------------------------------------------------------------------------------------------|
| reboot    | To perform a second or subsequent <i>boot</i> .                                                                                          |
| recall    | To require that a book on loan be returned before the expiry of the due date that was assigned when the charge was made.                 |
| recompile | To perform a second or subsequent <i>compile</i> of a program.                                                                           |
| recon     | Retrospective conversion of bibliographic records into machine-readable format. This process typically occurs when a library purchases a |

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|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | library automation system but still has some bibliographic records that were never put into machine-readable format.                                                                                                                                                                                                                                   |
| record            | To make computer processing easier, data items are brought together to form a unit called a “record”. A group of records makes up a “file”.                                                                                                                                                                                                            |
| recovery          | The process of returning a system to operable condition following a failure.                                                                                                                                                                                                                                                                           |
| reel              | A magnetic tape volume or the tape and the spool on which it is wound.                                                                                                                                                                                                                                                                                 |
| registration      | The process of recording information about individual patrons for the Circulation system, and especially of assigning barcode numbers to those patrons. Usually, “patron registration” applies to the initial entry of this information onto the system.                                                                                               |
| release           | Release refers to a particular version of a package of software: for example, Release 5.0 of ADVANCE.                                                                                                                                                                                                                                                  |
| remote            | A term applied to a device or operation that is geographically-separated from a computer but communicates with it.                                                                                                                                                                                                                                     |
| renewal           | The process whereby a borrowed item is checked out again to the same patron, effectively extending the loan period.                                                                                                                                                                                                                                    |
| report            | A result of processing in which data from various data fields is selected and presented in a particular way to provide certain pre-defined information to the user. The hard copy of this data is printed as a “report”.                                                                                                                               |
| reserve           | A “reserve collection” is also known as “short loan collection”. In academic libraries, a type of material in high demand that has short loan periods assigned to it. Reserve is often applied to required course reading materials, or to new or topical items.<br><br>The term “reserve” is sometimes used by public libraries to mean <i>hold</i> . |
| reserve book room | “RBR” is a function within the Circulation module designed to handle high-use materials in the reserve collection, often items associated with a course. It allows the user to enter instructor and course information, and links titles with the appropriate courses.                                                                                 |
| reserve recall    | An item is recalled for the Reserve Book Room.                                                                                                                                                                                                                                                                                                         |

- response time Used in connection with computer systems. The amount of time it takes for an online system to give data requested of it. It is measured as the amount of time between the point when a user presses the ENTER or RETURN key and the point when the first character of response appears on the screen.
- restore To replace something which has been removed, deleted or damaged. Restoration is part of recovery, and usually refers to the process of replacing disk files with the backup copies on tape.

## S

- scanning Also “wandering”. The act of drawing the lightpen across a barcode to read the barcode into the system.
- security level The level assigned to each function, command, and override in order to restrict its usage. Only those functions and commands having a priority level at or below the operator’s active access level may be used.
- “see also” reference A reference from an established form of a heading to one or more related headings. Also known as a "see also" cross reference.
- see reference A reference to the established form of a name from a form which should not be used as a heading. Also known as a “‘see’ cross reference”, “rejected form heading”, or “variant form heading”.
- serial A publication issued in successive parts bearing numerical or chronological designations and intended to be continued indefinitely. This includes periodicals, newspapers, annuals, etc. In ADVANCE, a serial is a *bibliographic item* (catalogued in the Cataloguing module) which may also have a *publication pattern* and *copy set* defined in the Serials module. A serial may also have *pieces* (barcoded items) assigned to it. Also see the definitions of *issue*, *copy*, and *holdings*.
- Serials module The ADVANCE module that automates serials control — primarily checkin and issue prediction.
- shelf list A catalogue of the items in a library; items are described in the same order that they are arranged on the shelves.
- shelf location Also “local call number”. The *call number* assigned to a specific copy of an item.



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|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| sign off           | Also “log off” and “logging off”. To enter the necessary information to end a session on a terminal. The console command is “OFF”. Compare to <i>sign on</i> .                                                       |
| sign on            | Also “log on”, “log in”, and “logging on”. To enter the necessary information (such as an identification number or password) to begin a session on a terminal. The console command is entry of a valid account name. |
| site               | Customer library, usually where the computer is located.                                                                                                                                                             |
| sort               | To arrange entities according to some pre-defined criteria, usually alphabetic.                                                                                                                                      |
| spine label        | Label for the spine of a book, typically with the call number.                                                                                                                                                       |
| string             | Any succession of characters. These can be numbers, letters, blanks, or other characters. The PICK system treats most data simply as a sequence of symbols or “string”.                                              |
| subfield           | In MARC format, the name for a defined part of the field in a MARC <i>variable-length field</i> , such as subfield b.                                                                                                |
| subfield code      | The one-character code which identifies a MARC subfield: for example, the “a” in “ $\ddagger$ a”.                                                                                                                    |
| subject headings   | Authorized terms that describe the contents of a book. Several may apply to a single work. One North American standard is LC Subject Headings.                                                                       |
| surcharge          | The charge automatically levied against a patron to cover certain costs, such as the cost of postage for notices, or ordering and cataloguing a replacement book.                                                    |
| syndetic structure | The logical organization of the catalogue, using “ <i>see</i> ” and “ <i>see also</i> ” <i>references</i> to interrelate the concepts represented in the catalogue.                                                  |
| SYSPROG            | System Programmer. The highest-level account within PICK.                                                                                                                                                            |
| system backup      | To copy (back up) all the files making up the system.                                                                                                                                                                |
| system manager     | The library staff member responsible for the systems staff and the computer.                                                                                                                                         |

## T

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|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| tag                | The labelling mechanism used by MARC to associate data elements with their functions. Tags are composed of three digits: for example, “210” is the tag for the Abbreviated Title Field. Each different tag represents a different piece of bibliographic information: e.g., personal author, uniform title. “Tag” is sometimes used to mean MARC field. |
| tag number         | A term sometimes used to mean <i>tag</i> .                                                                                                                                                                                                                                                                                                              |
| tape               | A magnetic tape reel or cassette, or the tape on the reel or cassette.                                                                                                                                                                                                                                                                                  |
| tape backup        | The process of making a copy of data files and/or the system software. The library uses the backed-up tapes as a security precaution, in case the need for a 'restore' arises.                                                                                                                                                                          |
| tape drive         | The equipment that holds, reads from, and writes to magnetic tapes.                                                                                                                                                                                                                                                                                     |
| TCL                | “Terminal Control Language” processor. TCL is the primary interface between end-users and the computer. The state in which the computer <i>prompt</i> is displayed and is waiting for user input is commonly called being “at TCL”.                                                                                                                     |
| telecommunications | The organization and facilities that provide communications service between users in geographically separated locations. The term encompasses telephone, telegraph, radio, and satellite-based systems; unless otherwise indicated, telephone is usually assumed.                                                                                       |
| terminal           | A device used by a person to communicate with the computer.                                                                                                                                                                                                                                                                                             |
| Terminal Number    | Each terminal in a library system is assigned a unique number.                                                                                                                                                                                                                                                                                          |
| title              | The name of a work, including any alternate title, subtitle, or other associated descriptive matter preceding the author, edition, or imprint statement on the title page.                                                                                                                                                                              |
| tracing            | Any record of entries or references that have been made in connection with the cataloguing of a particular work or publication, or with establishing a particular heading. Also known as subject headings or added entries.                                                                                                                             |
| track              | A unit of data storage space on disk.                                                                                                                                                                                                                                                                                                                   |

- 
- transfer To read data in one location and write it in another location.
  - transaction Any checkin, checkout, renewal, or hold.

## U

- UK/MARC The United Kingdom version of the MARC format.
- UNIX A computer *operating system* developed by Bell Laboratories.
- upload The data flow from the microcomputer **up** to the host computer system.
- UPS “Uninterruptable Power Supply” — essentially a series of batteries that conditions the power to the computer, and, with the absence of electricity, provides power to the computer for a period of time (e.g. 30 minutes.)
- user Same as *patron*.
- US/MARC The version of the MARC format used in the USA.

## V

- variable-length field Also “variable field”. A MARC field in a bibliographic record whose length is not pre-defined: for example, the Title Statement Field (Tag 245). A variable field is composed of two one-digit *indicators* and one or more *subfields*.
- vendor A dealer, wholesaler, or other organization supplying books or other materials to the library.
- volume Bibliographic element of a series. For example, **The Art of Computer Programming** has three volumes. The important point is that volumes normally share SOME bibliographic elements with each other.
- voucher A request for the complete or partial payment of one or more invoices, usually sent to the library’s financial services department.

## W

- wand Device for reading barcodes. Known as *lightpen*.
- wanding Known as *scanning*.

- WLN “Western (formerly ”Washington“) Library Network” — a bibliographic utility.
- word A unit of data storage: 8, 16, or 32 bits depending on the computer.
- work file A file where data is temporarily stored before being placed in the database. Used in the Cataloguing module.

# C

## Importing Patron Records

---

Your library may need to add large groups of new patrons to the library system's patron database. The ADVANCE Library System enables patron records to be imported or loaded into the patron database with the Patron Importing Menu (UPIM) option in the Utilities Module.

## Patron Importing Menu (UPIM)

The patron importing process assumes that the patron records to be imported are in a format that is compatible with the library system.

Enter UPIM on the IMPORT MENU (UTLM) screen in the Utilities module to display the PATRON IMPORTING MENU.

```
DD MMM YYYY Geac - Library Division - ADVANCE (#.##) XXXXX YY
HH:MM Your Library Name
```

PATRON IMPORTING MENU

1. UPIR Import Patron Records
2. UIPR Index Patron Records
3. DVPF Define Valid Patron Fields

```
Enter the number of your selection and press <ENTER>
or ? followed by <ENTER> for Help.
Press <ENTER> to return to previous level :
```

Use Define Valid Patron Fields (DVPF) to specify the fields to be imported. Use Import Patron Records (UPIR) to import or load patron records from a computer tape or a computer file into the ADVANCE system. Once the records are within the system, use Index Patron Records (UIPR) to index the records and add them to the database.

## Defining Valid Patron Fields (DVPF)

Enter DVPF, on the PATRON IMPORTING MENU, to display the Patron Loader Field Definition screen.

```

DD MMM YYYY Geac ADVANCE Library System (##.##) XXXXX YY
HH:MM Your Library Name

Patron Loader Field Definition Screen 1 of 4

Field ID Length Occs Offset Notes [* - can have multiple]

1. ACT.DATES 0 0 1 * Date of last use
2. ADDRESSES 25 6 1 * addresses (non GMA)
3. BARCODE 8 1 151 Patron Barcode
4. BIRTHDATE 6 1 159 Date of birth
5. CITY 0 0 165 City name for address 1 - GM
6. CITY2 0 0 165 City name for address 2 - GM
7. CITIES 10 6 165 * City names (Alt to CITY & CI
8. EMAIL.ADDR 0 0 225 Email Address
9. EXP.DATES 0 0 225 * Membership expiry date(s)
10. GROUP 0 0 225 Statistical Group
11. HOME.INST 0 0 225 For hold pickups
12. HOME.SUBL 0 0 225 For hold pickups

Options:
line Line by line Forward Backward Add item Insert at
Delete # File Exit ? help

```

Select **Add item** or *Insert at #* to add definitions of the fields that you will use in defining the tape or file import tables in Import Patron Records (UPIR). The ADVANCE patron field definitions are provided. When finished editing the list, select *File*.

NOTE: To change fields that cannot be changed from this screen, the system administrator may edit the CF VALID.PATRONS.FIELDS file at the tcl level in UNIX.

Field ID [text]

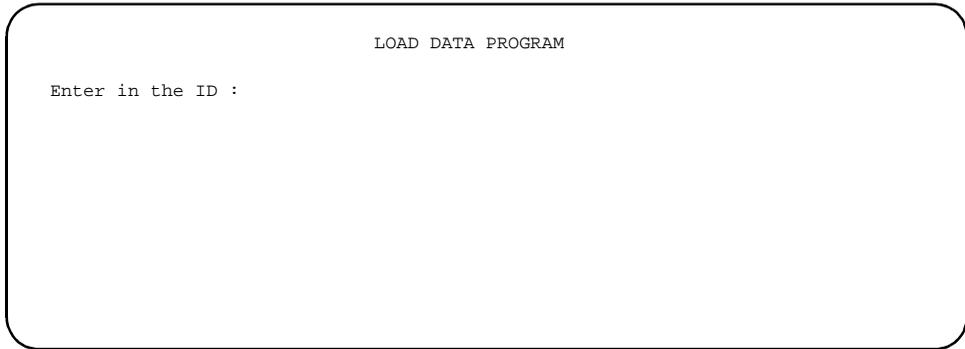
Enter the name of the patron field. For the fields you are importing, this name must match the ADVANCE patron record's field ID.

|        |                                                                                                                                                                                                                                                                                                                                                                                                                  |
|--------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Length | [number]<br><br>Enter the maximum number of characters to extract from the tape field for the patron field.                                                                                                                                                                                                                                                                                                      |
| Occs   | [number]<br><br>Enter the number of occurrences of the element in the tape field. For example, if patron tapes had two five-digit zip codes, you would enter LEN=5 and OCCS=2, indicating a total field length of 10 characters.<br><br>NOTE: To set the maximum number of occurrences for a particular tape field, the system administrator may edit the CF VALID.PATRONS.FIELDS file at the tcl level in UNIX. |
| Offset | When you complete the other fields, the system automatically enters the tape field start position, based on the preceding field's start position, length, and number of occurrences.                                                                                                                                                                                                                             |
| Notes  | Notes about the ADVANCE patron fields. An asterisk (*) indicates that multiple occurrences of the field can be imported.                                                                                                                                                                                                                                                                                         |



## Patron Importing (UPIR)

Enter UPIR, on the PATRON IMPORTING MENU to display the Import Patron Records screen.



LOAD DATA PROGRAM

Enter in the ID :

**Load File Name** On the LOAD DATA PROGRAM screen enter the name (ID) of an **existing** patron load program or enter a **new** name for a new patron loader profile. Enter ?? to search the list of existing profiles.

### Loading with Existing Profiles

If you enter the name of an existing profile the system will display the LOAD DATA PROGRAM screen. The screen will contain information for a patron load profile that had been created and saved at a previous editing session. The screen can be used for the present load session instead of entering all new information for each patron load session. The following screen is an example for the patron load profile called GLIS . CONV.

```
DD MMM YYYY Geac - Library Division - ADVANCE (##.##) XXXXX YY
HH:MM Your Library Name

LOAD DATA PROGRAM

SYSTEM INFORMATION : System name (ADVANCE) = ADVANCE
Load Id : GLIS.CONV Module name (CIRC) = CIRC
 Brief description = GLIS TO ADVANCE
 Load into file (BATCH.LOAD) = BATCH.LOAD
 Read from ('T' FOR TAPE) = T

Options:
Edit Start Exit Delete ?-help
```

Select *Edit* to edit the profile. See [Editing a Load Profile](#) on page C-8.

Select *Start* to start the loading proces. See [Beginning the Patron Load](#) on page C-14.

## Creating a Load Profile

To create a new profile, enter the new Load ID in the ID prompt of the first screen. The system then displays a list of existing profiles and prompts: Enter number from above, N for New or Q to Quit :

Enter N to proceed with the creation of a new patron load profile. The LOAD DATA PROGRAM screen appears, showing the first of many fields.

```

DD MMM YYYY Geac - Library Division - ADVANCE (#.##) XXXXX YY
HH:MM Your Library Name

 LOAD DATA PROGRAM

SYSTEM INFORMATION : System name (ADVANCE) =
Load Id : Students Module name (CIRC) =
 Brief description =
 Load into file (BATCH.LOAD) =
 Read from ('T' FOR TAPE) =

Options:
Edit Start Exit Delete ? help

```

This screen is the first of two screens that are required for creating a load profile. Note that the new profile name is displayed in the top left quadrant of the screen, just under the title, SYSTEM INFORMATION.

Select *Edit* to edit the profile. See [Editing a Load Profile](#) on page C-8.

## Editing a Load Profile

Select the *Edit* option on the LOAD DATA PROGRAM screen to edit a new or existing profile. The cursor is automatically positioned in the first field. All the fields can be edited, even though some of the fields have default information. The fields with default information present indicates that this field has generally the same information for all patron loads. The defaults can be over-written if required. The fields are as follows:

|                                |                                                                                                                                                                                                         |
|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| System name<br>(ADVANCE)       | System defaults to the name in brackets.                                                                                                                                                                |
| Module name (CIRC)             | System defaults to the name in brackets.                                                                                                                                                                |
| Brief description              | Enter a free text description of the profile.                                                                                                                                                           |
| Load into file<br>(BATCH.LOAD) | System defaults to the name in brackets. Care should be taken when changing this file name because the system will need the name used in this field to index the new patrons.                           |
| Read from (T FOR<br>TAPE)      | Patron load profiles can be used for loading from tape or from computer files. Enter a T for loading patrons using the system's tape drive. Enter a file name for loading patrons from a computer file. |

## Loading from Tape

If you entered a T in the *Read from* field, for loading patrons using the system's tape drive, the system adds TAPE INFORMATION fields to bottom of the previous screen.

```

DD MMM YYYY Geac - Library Division - ADVANCE (#.##) XXXXX YY
 HH:MM Your Library Name

 LOAD DATA PROGRAM

SYSTEM INFORMATION : System name (ADVANCE) = ADVANCE
Load Id : TEST.LOAD Module name (CIRC) = CIRC
 Brief description =
 Load into file (BATCH.LOAD) = BATCH.LOAD
 Read from ('T' FOR TAPE) =
— TAPE INFORMATION —
Tape density (default 1600)... 1600
Tape label (ENTER for none)...
Record length..... 400
Block size 4000
Records per block..... 10
Data start position (def. 0)... 0
ASCII flag (0=ASCII,1=EBCDIC)... 0
Tape device name -&DEVICES& ID.
Tape device number (ndmtu)....

```

Fill in the tape information fields with the specifications for the tape you plan to use for the patron loading process.

### Loading from File

If you entered a file name in the *Read from* field for loading patrons from a file on disk rather than from a tape, the system adds a few fields to the bottom of the previous screen.

```
DD MMM YYYY Geac - Library Division - ADVANCE (#.##) XXXXX YY
HH:MM Your Library Name

 CREATE A TABLE FOR LOADING FILES

SYSTEM INFORMATION : System name (ADVANCE) = ADVANCE
Load Id : new2 Module name (CIRC) = CIRC
 Brief description =
 Load into file (BATCH.LOAD) = BATCH.LOAD
 Read from ('T' FOR TAPE) = new2sys
 Local subroutine name =

 ----- FILE INFORMATION -----
 Record length..... -1
 Number of records per block....
```

Fill in the file information fields with the specifications for the file you plan to use for the patron loading process.

### Second Page

After you answer the patron field information “load” prompt, the system automatically displays the following screen. The system provides the set of field definitions from the Patron Loader Field Defintion table (DVPF) as the default. Note that fields that have Occs=0 are not provided. This screen allows you to tell the system the order of the patron data fields on a tape or file so that the system can read the information off the tape or file in the correct order.

**Important** The order of the various patron fields on the tape or file will have been determined by the creator of the patron records tape or file. Information

about the fields' order of occurrence on a tape can be obtained from the creator of the tape or by manually reading the tape at the Terminal Control Language (TCL) level or from UNIX. (Specific tape reading commands vary depending on the device.) The following screen **must** be completed **accurately** for the patron import process to be successful.

```

 CREATE A TABLE FOR LOADING FILES

FIELD NAME LEN OCCS TRIM START
1. BARCODE 12 1 0 1
2. NAME 20 1 0 13
3. STREET 20 1 0 33
4. CITY 10 1 0 53
5. PHONE 7 1 0 63

Options:
line Line by line Backward Forward Add item Delete
Tape info File Delete On/off display Exit ? help

```

Use the *# line*, *Line by line*, and *Add item* options to specify fields. Specify every field in a tape's record and each field's exact length in characters. The fields and their length must be specified **exactly**, in order for the system to read patron records correctly from the tape.

When you have completed the `Valid patron fields` screen, you must use the *File* option to save the information you have just entered. If you do not want to save the information, use the *Exit* option

## FIELD NAME

The line number represents a patron field's relative position on the tape or file. For each incoming field, enter the corresponding patron field number. To display a convenient list of valid patron field numbers at the top of the screen, select the *On/off display* option. The valid fields are defined in `Define Valid Patron Fields (DVPF)`.

```

Valid patron fields
 1 ACT.DATES 2 ADDRESSES *3 BARCODE 4 BIRTHDATE *5 CITY
 6 CITY2 7 CITIES 8 EMAIL.ADDR 9 EXP.DATES 10 GROUP
 11 HOME.INST 12 HOME.SUBL 13 IDS 14 ID.TYPES 15 MEMBERSHIPS
*16 NAME 17 NOTES 18 OLD.BARCODES 19 PASSWORD 20 PATRON.CODE
*21 PHONE 22 PUB.NOTES 23 STAFF.NOTES 24 STATES *25 STREET
 26 STREET2 27 STREETS 28 XFIELD1 29 XFIELD2 30 XFIELD3
 31 XFIELD4 32 XFIELD5 33 XFIELD6 34 XFIELD7 35 XFIELD8
 36 XFIELD9 37 XFIELD10 38 ZIP 39 ZIP2 40 ZIPS >>

 FIELD NAME LEN OCCS TRIM START
1. BARCODE 12 1 0 1
2. NAME 20 1 0 13
3. STREET 20 1 0 33
4. CITY 10 1 0 53
5. PHONE 7 1 0 63

Options:
line Line by line Backward Forward Add item Delete
Tape info File Delete On/off display Exit ? help

```

For example, if the tape field is the patron’s barcode, then you would enter 3. The FIELD NAME column then automatically shows the valid patron field name, BARCODE.

An asterisk (\*) to the left of a patron field number at the top of the screen indicates that the field has already been defined in this profile.

LEN [number]

Enter the maximum number of characters to extract from the incoming field for the database field.

OCCS [number]

Enter the number of occurrences of the element in the incoming field. For example, if patron tapes had two five-digit zip codes, you would enter LEN=5 and OCCS=2, for a total field length of 10 characters.

TRIM [0 or 1]

0 (no) Do not remove trailing spaces from the incoming field.



- 1 (yes) Remove trailing spaces from the incoming field.

START

When you complete the other fields, the system automatically enters the tape or file field start position, based on the preceding field's start position, length, and number of occurrences.

**Tape Information**

Select the *Tape info* option to re-display the TAPE INFORMATION portion of the previous screen. The re-displayed tape information can be edited again.

If you do not want to change the tape specifications, <Enter> to skip over fields. To exit the screen, <Enter> repeatedly. The CREATE A TABLE FOR LOADING FILES or Valid patron fields screen will appear again.

## Beginning the Patron Load

Select the *Start* option on the LOAD DATA PROGRAM screen to start loading patron records. The following screen appears, showing a summary of the information entered on the two screens used to create the patron load profile. See *Editing a Load Profile* on page C-8.

The prompt at the bottom of the screen notifies you that the system is ready to start the patron load process.

```
System..... ADVANCE
Module..... CIRC
Description..... GLIS TO ADVANCE

tape density..... 1600
tape label.....
length/data rec..... 400
block size..... 4000
#recs/block..... 10
Start position..... 0

Read from..... TAPE
Load into file..... BATCH.LOAD
Using Device name..
Using Device number..
```

```
The program is ready to process. Are you ready? Y/N:
```

Enter N to stop the loading process and return to the first LOAD DATA PROGRAM screen, or enter Y to proceed with the loading process.

If you are loading from a file rather than from tape, the system then prompts *Clear batch file?* Enter N if you do not want the system to delete the file when the loading process is completed, or enter Y to have the file automatically deleted.

The system then prompts *How many records to process <default ALL> ?* Enter the number of records you want processed or just <Enter> to process all of the records.

**Loading Speed** The loading process is fairly rapid. Thousands of patron records will only take minutes to load. The more time consuming process is indexing the records.

### Ending the Patron Load

When you enter **Y**, to proceed with the loading process, the following screen appears. The screen is an example of how the final screen of the patron loading process appears. It displays a statistical summary of the loading process.

The number in the double pointed brackets (<< >>) is an approximate count of the records loaded into the system.

```

System..... ADVANCE
Module..... CIRC
Description..... GLIS TO ADVANCE

tape density..... 1600
tape label.....
length/data rec..... 400
block size..... 4000
#recs/block..... 10
Start position..... 0

Read from..... TAPE
Load into file..... BATCH.LOAD
Using Device name..
Using Device number..

<<100>>

Tape/Diskette Attached Block Size: 4000
Cannot read any more tape records... Are you done? Y/N

```

**Exiting Patron Load** Answering the prompt with a **Y** will return you to the Patron Importing Menu.

**Loading Multiple Tapes** Answering the prompt with a **N**, will enable you to load additional tapes. When the *Are you done? Y/N* prompt appears, mount another tape in the tape drive. Answer the prompt only after you have loaded your next tape.

With the new tape in the drive, enter N. The system will load the next batch of patron records and keep a running count of records being loaded. The count will be:

- displayed within the double pointed brackets (<< >>)
- a running count that includes all the patron records from previous tapes loaded during this session
- an approximation only
- Repeat the tape loading process for each additional tape until all tapes are loaded. Then answer the Are you done? Y/N prompt with a Y

## Indexing Patron Records

After using Import Patron Records (UPIR), you must **index** the patron records into the system's database; otherwise the system will not be able to find the new records.

Indexing the new patron records is done with Index Patron Records (UIPR) from the Patron Importing Menu. The indexing process sorts the newly loaded patron records into the appropriate places within the existing patron record database.

Before you start the indexing process, be sure the patron load process has been completed. Make a note of the ID name you used in the first step of the patron load, the ID name will be needed to start the indexing process.

Also, to enable you to check the success of the indexing, it is wise to obtain a sample group of patrons from the newly loaded group. The sample could be 5 to 10 names with some unique information associated with each name, for example, an address or personal ID number. The sample can be obtained from the original source of the new patron records or from the batch load file.

The original source could be the registrar's or admissions office. The batch load file is the file where the newly loaded patrons are stored before they are indexed. In the examples on the preceding pages, the batch load file is called BATCH.LOAD. You can look at this file by logging out of ADVANCE and using commands at the Terminal Control Language (TCL) level to read the batch load file. For example, LIST BATCH.LOAD F1 F2 F3 displays the data in fields 1, 2 and 3 in the BATCH.LOAD file.

**NOTE:** Opening the batch load file is a process that should only be undertaken by someone who is familiar with TCL commands.

## Start Indexing

Enter UIPR, on the PATRON IMPORTING MENU to start the indexing of the newly loaded patron records. The following screen appears.

```
Program to transfer data in the BATCH.LOAD file to the CIRC files
=====
Enter the batch table name : _
```

Enter the ID name used in the load process. When the ID name is entered, the screen changes to the following.

```
Program to transfer data in the BATCH.LOAD file to the CIRC files
=====
The data to be loaded is for : TEST.LOAD
Is this correct? (Y/N) : ____
```

The prompt enables you to change ID names or correct spelling mistakes. Entering a N, will enable you to make changes.

Entering a Y, will cause the system to accept the ID name and to display the following screen.

## INDEXING PATRON RECORDS

File BATCH.LOAD, for Profile TEST.LOAD contains 10 records

1. DEFAULT Expiration date for patron records : SEPT 29 2000
2. Discard batch item if no Personal ID number : N
3. Enter address line delimiter if used (e.g. '|', ':') :
4. Enter access level for (remote) membership access : 90
5. Load ALL (Y) or only NEW (N) Patrons : N
6. Load how many records (default ALL) ? :

Where possible, expiration date for patron records is extracted from the imported Patron Code or Membership data. However, we also need you to enter a DEFAULT expiration date for patron records for which we cannot deduce an expiration date from the imported data.

Options:

# line Line by line Accept Exit ? help

1. DEFAULT Expiration date for patron records
 

Determines when the patrons, currently being added to the database, should renew their membership in the library. The date entered here will be inserted into *Expiration Date* field on each patron's Patron Registration (CPR) screen if the date cannot be determined from the incoming data.

In this example, the date entered is: SEPT 29 1996. The system accepts this date format but converts the date to the standard system format: 09-29-96.
2. Discard batch item if no Personal ID number
 

Enter Y to discard the incoming patron record if no Personal ID is present.

Enter N to add the new patron record to the patron database. The new record will be available to the system after Index Patron Records (UIPR) is run.

NOTE: The system uses the Personal ID to match incoming records against the database. If you permit records without IDs to be loaded, these records will not match any record in the database. As a result multiple records may exist for the same patron.
3. Enter address line delimiter if used
 

Enter the delimiter used to indicate line breaks in the incoming data, if necessary – for example, a vertical bar (|) or a colon (:).

## Appendix C: Importing Patron Records

---

- |                                                      |                                                                                                                              |
|------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|
| 4. Enter access level for (remote) membership access | Enter the access level associated with the membership information being added to the database.                               |
| 5. Load ALL (Y) or only NEW (N) Patrons              | Enter Y to add all incoming records (replacing any existing, matching records), or enter N to add only new incoming records. |
| 6. Load how many records                             | Enter the number of records you want added, or leave blank to load all records.                                              |

### Continuing the Indexing

Choosing the *Accept* option to start the indexing process. The system prompts `Proceed (Y/N) ?` Enter Y to proceed, or enter N to exit. Once committed, the process will run until completed.

NOTE: Indexing is process-intensive, which means it makes serious demands on the system's computing power. These demands are serious enough that other system users may find system response is slower during indexing.

### Indexing Completion

As the indexing proceeds, the system counts the patron records and posts the count, in tens, to the screen. The following screen shows how the posted count looks. The record count scrolls down the screen as the screen is filled.

```
120
130
140
150
160
170
180
190
200
210
220
230
240
```



When the system finishes indexing, the count stops and the following title is displayed: \*\*\* END OF PATRON INDEXING PROGRAM \*\*\*. Below this title, the system displays statistical information about the indexing process.

```
220
230
240
*** END OF PATRON INDEXING PROGRAM ***

Number of records read from BATCH.LOAD = 246
Number of records written to file PATRON = 269
Number of records updated in PATRON = 23
Number of error records = 0
Number of records written to ZIP file = 2
Number names added to PATXREF = 246
Number names deleted from PATXREF = 22
Number records written to file SSN = 223

<ENTER> to continue.
```

### Clear Batch File

On the screen above, when you <Enter> to continue, the system displays the following message.

```
Process completed, do you want to clear the batch file? Y/N:
```

The message over-writes the second last line of the statistics displayed on the screen above.

```
220
230
240
*** END OF PATRON INDEXING PROGRAM ***

Number of records read from BATCH.LOAD = 246
Number of records written to file PATRON = 269
Number of records updated in PATRON = 23
Number of error records = 0
Number of records written to ZIP file = 2
Number names added to PATXREF = 246
Process completed, do you want to clear the batch file? Y/N:
Number records written to file SSN = 223

<ENTER> to continue.
```

Enter N, to save the batch file. You may want to save the file until you have confirmed that the indexing was successful. If the indexing was unsuccessful, you can re-try the indexing using the same batch file. You should only save the batch file for a limited time, ideally only as long as you need to verify the file. The batch file should be cleared before the next patron load to prevent database corruption.

Enter Y, to clear or delete the batch file. Clearing the batch file should be done as a routine, to prevent complications for the next patron load procedure. If the batch file is not cleared, data from the previous load may get indexed into the patron database along with the new patron records. This mixing of old and new patron records could corrupt the system's patron records database.

Patron Importing  
Ends      Once the new patron records have been indexed and the batch file has been cleared, the patron importing process is ended.

## Patron Purge (CPFM)

To reach the Patron Purge menu, select Circulation Purge Files Menu (CPFM) from the Circulation Main Menu.

Patron purge allows you to delete all patrons whose patron record (CPR - Patron Registration) is classified as inactive based on a date you specify. ADVANCE compares your selection date to:

- the date of last transaction, and
- the date when the record was last updated

as shown on the patron registration screen. Any patron records that contain last transaction dates and last update dates older than the date you specify may be deleted when you run Patron file purge. Any patron record that contains holds, blocks, or fines will not be deleted.

CPPR - Patron file purge report, allows you to view the patrons to be deleted first before going to CPPD - Patron file purge which deletes all patrons who meet the selection criterion.

A date is the only selection criterion separating active from inactive patrons.

The system displays a summary of the total number of patron records examined, how many will be deleted and how many will not be deleted. The full report is printed to the location specified in your port default printer assignment as defined by your PORT setup table. You can access your PORT record from the Master Menu by typing PORT. The name of your PORT record is shown at the top right of any menu screen (shown generically as P P P P P P II on the following screen). Neither Patron file purge report or Patron file purge will run unless you have specified a printer. The patron purge report is 132 columns wide. Ensure that the settings in the Standard Printer Settings field are set to 132 (columns) and 66 (lines).

The full text of the report contains names of the patrons who will be deleted.

A patron purge report is not included with the standard ADVANCE circulation reports provided by the report writer.

```
DD MMM YYYY Geac ADVANCE Library System (#.##) PPPPPPP II
HH:MM
```

### CIRCULATION FILE PURGE MENU

1. CPPR Patron file purge report
2. CPPD Patron file purge
3. CPMBP Materials Booking pattern deletion

Enter the number of your selection and press <ENTER>  
or ? followed by <ENTER> for Help.  
Press <ENTER> to return to previous level :

### Patron File Purge Report

Displays the number of patron records examined, how many will be deleted, and the number of patron records who are not within the test range.

1. Select CPPR - Patron file purge report. The system displays the message that No patrons will be deleted.
2. The system prompts: Enter the last update date: Enter a date that marks the separation point between active and inactive patrons. (Those who have not used their accounts and whose patron records have not been updated by the library.)
3. The system prompts: List the patrons that would be deleted: (Y/N)?

Y — Creates a report that lists all patrons and indicates those who will be deleted.

**N — Creates a report that lists only the patrons who cannot be deleted because there are holds, checkouts, or blocks on their records.**

(The report created is not printed to the screen. It is printed to the printer specified in your PORT record.)

```
DD MMM YYYY Geac ADVANCE Library System (#.##) P P P P P I I
HH:MM
```

CIRCULATION PATRON PURGE - PART 1

This process will produce a report indicating how many patrons would be deleted from the PATRON file based on their file record being updated before the date specified and their last transaction occurring before this date. Details are printed for those patrons which would NOT be deleted due to existing blocks or delinquency. You have the option to list those patrons which would be deleted.

\*\*\* No patrons will be deleted at this stage \*\*\*

Enter last update date : 9/1/96

List patrons that would be deleted (Y/N) ? : y

Patrons tested 361

Report is being printed - Press <ENTER>

4. The system displays the messages Patrons tested: which indicate the number of patron records examined and Report is being printed - Press <Enter>. When you press <ENTER> the summary report displays.

```
DD MMM YYYY Geac ADVANCE Library System (#.##) P P P P P P
II
HH:MM

CIRCULATION PATRON PURGE - PART 1

This process will produce a report indicating how many patrons
would be deleted from the PATRON file based on their file record
being updated before the date specified and their last transaction
occurring before this date. Details are printed for those patrons
which would NOT be deleted due to existing blocks or delinquency.
You have the option to list those patrons which would be deleted.

*** No patrons will be deleted at this stage ***

Enter last update date : 9/1/96

Summary :- Patrons that will be deleted 312
 Patrons that will not be deleted 49
 Errors reading Patron file 0
 Patrons out of test range 0
 Total patrons tested 361

Press <ENTER> to return to menu
```

*Patrons that will be deleted*

Number of patrons who will be deleted from the patron database, if CPPD - Patron file purge is selected and run. Patrons who will be deleted include patrons who:

- have no outstanding blocks, fines, or holds on their accounts
- have not had their patron record updated by the library
- have not made recent transactions.

*Patrons that will not be deleted*

Number of patrons who will not be deleted from the patron database, if CPPD - Patron file purge is selected and run. Patrons who will not be deleted include patrons who:

- have holds, blocks, or other restrictions on their patron records
- have had their patron record updated by the library more recently than the date specified
- have made a transaction on their account more recently than the date specified.

|                                   |                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Errors reading Patron file</i> | ADVANCE attempted to read a record and was unable to do so. Each patron record that is unreadable increments the number by one.                                                                                                                                                                                                                                                                 |
| <i>Patrons out of test range</i>  | Number of patrons who were tested but whose records did not meet the test selection criteria. For example, if the update date is May 1, 1988 the number of patrons outside this range will consist of the major portion of your database since most patrons would have made transactions on their accounts or the library would have updated their patron registration more recently than 1988. |

### Viewing the Patron Purge Report

The full report of the patron purge process is available from the location specified in the PORT record of the terminal you are working from. The PORT record can be viewed by typing PORT at the Main Menu. The system displays a list of all port records. To determine the name of your port record check the name displayed at the top right of any menu screen (shown generically as PPPPPP II on the menu screens in this appendix).

If your PORT record indicates that an auxiliary printer is attached, the report is sent to it. If you are attached to a system printer, the report is sent there. If neither of these choices have been selected, the system displays the error message:

```
No printer is defined for this port, process will terminate.
Press <ENTER>
```

when you select either CPPR - Patron file purge report, or CPPD - Patron file purge from the CIRCULATION FILE PURGE MENU.

A patron purge report is not provided with the standard ADVANCE reports available from the report writer.

|                   |                                                                                                                                                                                                     |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Screen            | The report printed to the screen is a summary only. After printing the report to the screen, the report file is cleared. To view which patrons were tested you must direct the report to a printer. |
| Auxiliary Printer | After the report output has been printed on your auxiliary printer, the report file is cleared. The next time you want to print the report you will have to regenerate it.                          |
| System Printer    | After printing to the specified printer, the report spool is cleared. The next time you want to print the report you will have to regenerate it.                                                    |

## Appendix C: Importing Patron Records

### Example

```
PATRON PURGE ROUTINE (Patrons marked with ***** will be deleted) [Cutoff date 31 DEC 91] PRINTED 24 SEP 1996 PAGE 1

Patron Barcode Patron name Group Address Phone Last Tr. Last Upd.

29999000399469 ALDERWOOD, DAN Patron 39 ELMWOOD PLACE, TOPAZ UNIVERSITY 555-6119 03/09/91 19 JUL 91 ***
29999000011112 ALDERWOOD, SAM 6 WEST SIXTH STREET, TOPAZ, ONTARIO 555-5666 01 APR 91 11 NOV 91 ***
29999000021337 ANDELS, EMILY Staff 77 ELM ST, TOPAZ, ONTARIO 555-9988 14 SEP 90 19 JUL 91 ***
29999000023002 ANDERSEN, MARY 49 UPLANDS DR, TOPAZ, ONTARIO 555-3537 00/00/00 19 JUL 91 ***
29999000021394 ANDERSON, VIRGIL Staff 129 YEATS WAY PLACE, TOPAZ, ONTARIO 555-3395 08/09/90 19 JUL 91 ***
29999000498972 ANNE, SALLY Student 7833 LAKEVIEW STREET,, TOPAZ UNIVERSITY 555-6371 00/00/00 19 JUL 91 ***
299990000537456 APRIL, SERENA 72 LOWELL AVE., TOPAZ UNIVERSITY 555-1617 02/11/91 19 JUL 91 ***
299990000536151 BARBER, HENRY Student 5134 MCGEE CR., TOPAZ UNIVERSITY 555-0708 00/00/00 19 JUL 91 ***
299990000537290 BARNES,DEANNA Patron RR #1, TOPAZ UNIVERSITY 555-4435 00/00/00 19 JUL 91 ***
299990000527887 BATTSON,SHIRLEY 3374 MARBLE CT., TOPAZ UNIVERSITY 555-5744 01/23/91 19 JUL 91 ***
299990000535302 BAUER, PAM Patron 631 VINE STREET,, TOPAZ UNIVERSITY 555-6941 00/00/00 19 JUL 91 ***
299990000528075 BELLAMY, JAMES 35 ELMWOOD DRIVE #1816,, TOPAZ UNIVERSITY 555-0151 00/00/00 19 JUL 91 ***
299990000537480 BENNETT, MARY 6551 TROPP ST, TOPAZ UNIVERSITY 555-9700 00/00/00 19 JUL 91 ***
299990000528315 BERRY, ANNE 55 MCMANUS,, TOPAZ UNIVERSITY 555-1495 00/00/00 19 JUL 91 ***
299990000876357 BERRY, RONALD Staff 2874 PATRIOT AVE, TOPAZ, ONTARIO 555-9873 14 APR 91 19 JUL 91 ***
29999000399436 BIENA-SIKES, CRYSTAL 3650 CARDIFF CRES #1702, TOPAZ UNIVERSITY 555-7447 00/00/00 19 JUL 91 ***
299990000536961 BLASEWELL, CHARLES Student 213 LINCOLN ST.,, TOPAZ UNIVERSITY 555-1168 03/15/91 19 JUL 91 ***

. . .
```

|                |                                                                          |
|----------------|--------------------------------------------------------------------------|
| Patron Barcode | Patron's barcode number.                                                 |
| Patron name    | Patron's name as it appears on the patron record in patron registration. |
| Group          | Patron type code assigned on the patron record.                          |
| Address        | Patron's primary address as it appears on the patron record.             |
| Phone          | Patron's telephone number.                                               |
| Last Tr.       | Date of the last transaction made on this patron's account.              |
| Last Upd.      | Date when the patron record was last updated by the library.             |
| ***            | Indicates this patron will be deleted when patron purge is run.          |



## Patron Purge Completion (CPPD)

Before you run Patron Purge, Part 2 (CPPD) which permanently deletes patrons from the database, you should review the Patron Purge Report (CPRR).

```

DD MMM YYYY Geac ADVANCE Library System (#.##) P P P P P I I
HH:MM

 CIRCULATION PATRON PURGE - PART 2

This process will purge from the system those patrons whose records were
last updated before the specified date AND whose last transaction was
before this date. Patrons with outstanding blocks will not be deleted.
An audit report of the patrons deleted will be produced.

*** THIS PROCESS WILL DELETE PATRONS ***

Enter last update date : 1/1/65

Type "Y" if you are sure you want to continue y
Selecting PATRON file - please be patient

Patrons tested 300
 362

Report is being printed - Press <ENTER>

```

1. Select CPPD - Patron file purge from the CIRCULATION FILE PURGE MENU.
2. The system prompts: Enter the last update date:. Enter a date that marks the separation point between active patrons and those who you consider inactive. (Those who have not used their accounts and whose patron records have not been updated by the library.)
3. The system prompts:

Type "Y" if you are sure you want to continue

The system selects the patron file and tests the patron records comparing their transaction and update dates to the selection date criteria. The number of patrons tested is displayed. To view the summary report press <Enter>. The full report is printed to the system, or auxiliary printer depending on how your PORT record is

setup. For audit purposes, a copy of the report is written to the CALENDAR.OUTPUT file. The report name is of the form PATRON.PURGE.date.time, where the date and time are in ADVANCE internal format.

```
DD MMM YYYY Geac ADVANCE Library System (#.##) P P P P P P II
HH:MM

CIRCULATION PATRON PURGE - PART 2

This process will purge from the system those patrons whose records were
last updated before the specified date AND whose last transaction was
before this date. Patrons with outstanding blocks will not be deleted.
An audit report of the patrons deleted will be produced.

*** THIS PROCESS WILL DELETE PATRONS ***

Enter last update date : 1/1/91

Summary :- Patrons deleted 6
 Patrons not deleted 0
 Errors reading Patron file 0
 Patrons out of test range 356
 Total patrons tested 362
Press <ENTER> to return to menu
```

4. Press <Enter> to return to the CIRCULATION FILE PURGE MENU.



# User Permissions

---

## Introduction

In the Utilities Function, library administration staff can define user-specific permissions for many of the Circulation functions and tasks (see the *Utilities Management Guide*). This appendix lists and describes these permissions.

## Levels of Permission

There are three levels of permission: Y, N, and P.

- Y The user has permission for the specified function or task, perhaps qualified by special restrictions. In addition, other permissions may be required — for example, you cannot edit patron records (permission 097) unless you can view patron records (permissions 096).
- N The user does not have permission for the specified function or task.
- P The user must enter a library-specified password to have permission. With the correct password, this is equivalent to Y; without the correct password, this is equivalent to N.

The P level is useful at libraries in which people share terminals and a single user ID is defined for an area of work (such as process payment transactions). The high-security tasks (such as delete patron records) can be password controlled. The people who know the password can enter the password when they need to perform the task, then afterward leave the terminal as is — they do not need to log off, log in as a higher-level user, perform the task, and afterward log back off and then on again as a lower-level general user.

## Restrictions

Qualifiers or restrictions are not used with some types of permissions. Any permission designated as a type 2 on the General Permissions Setup table will not have a qualifier. Types of General Permissions are Geac assigned and cannot be changed by the library. (See the *Utilities Management Guide*.)

|                   |                                                                                                                                                                                                                                            |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| OPAC Qualifier    | Restricts holds processing by Qualifier Code.                                                                                                                                                                                              |
| Sublocation Code  | Restricts access to circulation functions by Sublocation Code. If an Institution Code with sublocations is specified, then any activity that can be performed at the institution level can also be performed at any of the sublocations.   |
| Patron Block Code | Specifies which Patron Block Codes can be added or deleted if this activity is allowed in the Patron Block Code definition. (See the Transaction Codes table on the Circulation General Codes Menu.)                                       |
| Keyword Table     | The <i>Keyword table</i> on the UPDATE MODULE ACCESS RECORD screen provides an additional way to limit access to certain functions. The <i>Keyword table</i> option allows you to specify by screen identifier which menus are accessible. |

---

## Permission List by Permission ID Number

Permission ID Numbers are assigned by the system. To display Permission ID Numbers grouped by module use MODULE PERMISSIONS (MPERM) on the SECURITY MENU.

- 081 - Change Checkout date and time
- 082 - Change due date and time
- 083 - Override administrative hold on patron
- 084 - Override max items checked/time limit
- 085 - Override max items in possession limit
- 086 - Override patron group loan period
- 087 - Override maximum renewal limit
- 088 - Change Checkin date and time
- 089 - Suspend/Resume charging fine at Checkin
- 090 - Waive overdue fines during Checkin
- 091 - Remove traces for missing items
- 092 - Cancel holds
- 093 - Change hold scope
- 094 - Allow copy specific hold
- 095 - Change hold priority level
- 096 - View patron records
- 097 - Change patron records
- 098 - Add patron records
- 099 - Delete patron records
- 100 - Add patron blocks
- 101 - Delete patron blocks
- 102 - Process payment transactions
- 103 - Waive fines in Accounts Receivable
- 104 - Open and Close cash registers
- 105 - Access to RBR processing

### 081 - Change Checkout date and time

- Y / P Permits you to change the checkout date and time when you enter *Change Date* (CD) at the Checkout screen.
- N When you enter CD, the system displays the message: You are not permitted to change the current checkout date and time.
- Prerequisite None.
- Restriction None.

### 082 - Change due date and time

- Y / P Permits you to change the due date and time when you enter DUE at the Checkout screen.
- N When you enter DUE, the system displays the message: You are not permitted to change the due date and time.
- Prerequisite None.
- Restriction None.

### 083 - Override administrative hold on patron

- Y / P Allows you to proceed with a process, such as checkout, materials booking, or holds processing, when an administrative block is imposed on a patron.
- N The system prompts: This patron is on administrative hold. Do you wish to override? (Y/N):  
  
If you answer Y, the system displays the message You are not permitted to override the administrative hold.
- Prerequisite None.
- Restriction None.

### 084 - Override max items checked/time limit

- Y / N / P Allows you to proceed with checkout when the per time limit on the number of items a patron is allowed to checkout is exceeded.

---

N The system displays the message Limit of N items checked out to this patron. Continue (Y/N)? If you answer Yes, the system displays the message You are not permitted to override the max. items checked/time limit.

Prerequisite None.

Restriction None.

### 085 - Override max items in possession limit

Y / P Allows you to proceed with checkout when the limit on the number of items a patron has in possession is exceeded.

N The system displays the message The total number of items allowed in possession has been exceeded. Do you still wish to check out this item (Y/N)? If you answer Yes, the system displays the message You are not permitted to override the max. items in possession limit.

Prerequisite None.

Restriction None.

### 086 - Override patron group loan period

Y / P Allows an item to be checked out when a loan period is not defined for the item or when the loan period has not been linked to the patron's group. In addition, you are allowed to change the loan period at Checkout.

NOTE: If you have answered Yes to the *Override Use Period* field on the Circulation Code table, you must still have this permission in order to change the loan period.

N ADVANCE determines the loan period from one of several sources.  
If the Circulation Code is not linked to the Patron Group Code, the system prompts:

Loan period : NC Patron Group Code : P1

This patron cannot check out this Item. Do you wish to override? (Y/N) :

If you answer Y, the system displays the message: You are not permitted to override loan period.

If no loan period has been defined for the item in either the Circulation Code table or the pieces record, the system prompts:

This Item has no loan period.

Do you wish to check out this Item? (Y/N) :

If you answer Y, the system displays the message: You are not permitted to override the due date.

If a loan period defined in the Patron Group table differs from the default Circulation Code defined for the Institution the system displays the message: This Item has no loan period.

Prerequisite None.

Restriction None.

#### 087 - Override maximum renewal limit

Y / P Allows you to proceed with checkout when the limit on the number of times an item can be renewed has been exceeded.

N The system displays the message This item is OVERDUE and must be checked in. Checkin and Renew? (Y/N). If you answer Yes, the system displays the message You are not permitted to override the maximum renewal limit.

Prerequisite None.

Restriction None.

#### 088 - Change Checkin date and time

Y / P Permits you to change the checkin date and time when you enter *Change Date* (CD) at the Checkin screen.

N When you enter CD, the system displays the message You are not permitted to change the Checkin date and time.

Prerequisite None.

Restriction None.



---

### 089 - Suspend/Resume charging fine at Checkin

- Y / P Allows you to change the *Charging Fines* field from Yes to No or No to Yes by entering F at the Checkin screen.
- N When you enter F, the system displays the message You are not permitted to change the "Charging Fines" field.
- Prerequisite None.
- Restriction None.

### 090 - Waive overdue fines during Checkin

- Y / P Allows you to waive overdue fines when an item is checked in.
- N When you attempt to waive a fine at the Accounts Receivable screen during checkin the system displays the message You are not permitted to waive fines.
- Prerequisite None.
- Restriction None.

### 091 - Remove traces for missing items

- Y / P Allows you to remove a trace on an item at checkin.
- N When you attempt to remove a trace at checkin the system displays the message You are not permitted to remove the trace.
- Prerequisite None.
- Restriction None.

### 092 - Cancel holds

- Y / P Allows you to cancel holds by using the *Cancel hold #* and *Cancel all* options from the HOLDS BY PATRON (HRT) screen.
- N The *Cancel hold #* and *Cancel all* options are not available on the HOLDS BY PATRON (HRT) screen.
- Prerequisite None.

Restriction None.

### 093 - Change hold scope

Y / P Allows you to change hold scope by using the *Scope* option from the HOLD DETAIL SCREEN.

N The *Scope* option is not available on the HOLD DETAIL SCREEN.

Prerequisite None

Restriction By OPAC Qualifier for holds processing. If you enter \* in the scope field, the system replaces the symbol with the words *System wide* indicating that all locations defined on the Qualifier Code table will be considered when filling the hold. (Qualifier codes are defined on the Qualifier Code Maintenance (MQUAL) menu on the Qualifier Maintenance Menu in Utilities.)

NOTE: Qualifiers must be defined for holds processing on the OPAC Qualifier Codes table. (The *Use qualifier for Holds Processing* field must be answered *Yes*.)

### 094 - Allow copy specific hold

Y / P Allows you to place a copy specific hold by using the *Copy hold* option from the HOLD DETAIL SCREEN screen.

N The *Copy hold* option is available but if selected displays the message *You are not permitted to place a copy specific hold*.

Prerequisite None.

Restriction None.

### 095 - Change hold priority level

Y / P Allows you to change the holds priority level by using the *Hold level* option or to change the holds queue by using the *Move hold* option to reposition the sequence of the holds either up or down in the list. This also changes the priority level of the hold, either decreasing or increasing it depending on the relative position in the list.

---

N The *Move hold* option is not available on the HOLD QUEUE DISPLAY screen. The Hold level option is not available on the HOLD DETAIL screen.

Prerequisite None.

Restriction None.

### 096 - View patron records

Y / P Allows you to view patron registration record. This permission determines whether the patron record is available at Patron Registration (CPR), Checkout (COUT), Holds by Patron (HRT), Last Access Patron History Display (CLPD), Last Access Patron History Clear (CLPC), and Patron Display (PAT).

N The system displays the message *You are not permitted to see the patron record*. This message also displays if you ask to see a patron record for sublocation that you are not allowed to access.

Prerequisite None.

Restriction By sublocation.

### 097 - Change patron records

Y / P Allows you to edit the patron registration record. This permission determines whether the patron record can be changed at Patron Registration (CPR), Checkout (COUT), Holds by Patron (HRT), Last Access Patron History Display (CLPD), Last Access Patron History Clear (CLPC), and Patron Display (PAT).

N The system displays the message *You can look at this patron record but changes are not permitted*. This message also displays if you ask to see a patron record for a sublocation that you are not allowed to access.

Prerequisite Permission 96.

Restriction By sublocation.

### 098 - Add patron records

- Y / P Allows you to create a patron registration record.
- N When N is selected the message *You are not permitted to add patron records* displays when you attempt to add a new patron at the Patron Registration screen.
- Prerequisite None.
- Restriction By sublocation.
- If your permission is qualified by sublocation, you can not file a new patron record if you do not have permission for that sublocation. For example, if you are allowed to create new patron records for only sublocation CAM2, the system will not file a new patron record if the patron's sublocation is CAM1. The system displays the message *You are not permitted to register the patron at this location: [sublocation code]*.

### 099 - Delete patron records

- Y / P Allows you to delete a patron registration record by using the *Delete* option.
- N The *Delete* option is not available on the Patron Registration screen.
- Prerequisite Permission 96.
- Restriction By sublocation. If your permission is qualified by sublocation, you can not delete a patron record if you do not have permission for that sublocation. The *Delete* option is not available on the Patron registration screen.

### 100 - Add patron blocks

- Y / P Allows you to apply Patron Blocks by using the *Add item* option from the Circulation Transaction Update (CTU) screen.
- N The *Add item* option is not available on the Circulation Transaction Update (CTU) screen.
- Prerequisite To add a Patron Block, the *Create transaction manually* field must be set to allow the block to be created. Some system controlled Patron Blocks

---

cannot be added or deleted. See the Transaction Codes (CTC) tables on the General Codes Menu (CGCM).

Restriction By Patron Block codes.

### 101 - Delete patron blocks

Y / P Allows you to delete Patron Blocks by using *Del # range (#.#)* option from the Circulation Transaction Update (CTU) screen.

N The *Del # range (#.#)* option is not available on the Circulation Transaction Update (CTU) screen.

Prerequisite To delete a Patron Block, the *Delete transaction manually* field must be set on the Transaction Codes (CTC) table on the General Codes Menu. Some system controlled Patron Blocks cannot be added or deleted. See the Transaction Codes (CTC) tables on the General Codes Menu (CGCM).

Restriction By Patron Block code.

### 102 - Process payment transactions

Y / P Allows you to accept fine payments from Accounts Receivable (CAR) screen if their port has been designated as a register on the Register/Port Codes (CPRP) screen on the Circulation Payment Collection Menu (CPCM).

N When you enter a barcode or patron name at the Accounts Receivable (CAR) screen, the system displays the message *You are not permitted to accept fine payments.*

Prerequisite The port must be designated as a register.

Restriction None.

### 103 - Waive fines in Accounts Receivable

Y / P Allows you to waive fines by selecting the *Waive* payment method from the Accounts Receivable (CAR) screen.

N The system displays the message *You are not permitted to waive fines.* This message appears if you have permission to process

payment transactions (permission 102) but do not have permission to waive fines (permission 103).

Prerequisite Permission 102.

Restriction None.

#### 104 - Open and Close cash registers

Y / P Allows you to open and close cash registers from the Accounts Receivable (CAR) screen on the Patron Control Menu.

N The system displays the message *You are not permitted to open or close cash registers.*

Prerequisite The port must be designated as a register.

Restriction None.

#### 105 - Access to RBR processing

Y / P Allows you access to the Reserve Book Room functions.

N The following menus are effected:

- Temporary Location Codes (CRLC)

The system displays the message *Access to individual records not permitted.* The Temporary Location Codes screen appears, but the code tables are not available.

- Add a New Instructor Record (CRBNI)

The system displays the message *Access to RBR functions not permitted.* No further access to the function is allowed.

- Add a New Course Record (CRBNC)

The system displays the message *Access to RBR functions not permitted.* No further access to the function is allowed.

- Rebuild RBR Indexes (CRBI)

The system displays the message *Access to RBR functions not permitted.* No further access to the function is allowed.

- Check RBR File Consistency (CRBC)

---

The system displays the message Access to individual records not permitted. No further access to the function is allowed.

- Reserve Processing Main Menu (CREM)

The system displays the message Access to RBR functions not permitted. No further access to the function is allowed.

- Move Items into RBR (CRLM)

The system displays the message Access to RBR functions not permitted. No further access to the function is allowed.

- Move Items out of RBR (CRUM)

The system displays the message Access to RBR functions not permitted. No further access to the function is allowed.

Prerequisite None.

Restriction None.







# Patron Memberships

---

## Introduction

The basic ADVANCE system allows you to store an Expiration Date on the PATRON REGISTRATION screen for each patron. The Patron Memberships feature, described in this appendix, allows you to associate more than one membership (corresponding to a Patron Group in the basic system) with a patron. The feature allows you to store additional membership information and further control Circulation functions, based on the one or more memberships that each patron can have at one or more library locations.

The membership information includes: expiry date, standard and holiday contact methods for notices, patron ID and ID type, access level for updating the information, and public and private notes. You can define membership periods and can collate notices by membership group. The Checkout Port Control table controls which membership groups can be used (for checkouts, blocks, fines, holds, and so on) at each port. Charge-related blocks are membership specific, and you can set other blocks to be membership specific as well. A default membership code can be associated with each patron code.

This appendix describes the following operations, setup tables, and functions:

- database conversion
- **Membership Control Table (CMEM)** – on the Circulation Configuration Codes menu (CCCM)
- **Patron Type Codes (CPC)** – on the Loan Periods Menu (CLPM)
- **Patron Membership Codes (CPMC)**, which replaces Patron Group Codes (CPGC) – on the Loan Periods Menu (CLPM)

- **Patron Membership Group Codes** (MEMGRP) – on the Patron Control Menu (PCM)
- **Notice Production Sequences** (COPS) – on the Circulation Output Production menu (COPM)
- **Checkout Port Control** (CPCC) – on the Circulation Configuration Codes menu (CCCM)
- **Transaction Codes** (CTC) – on the General Codes Menu (CGCM)
- **Patron Registration** (CPR) – on the Patron Control Menu (PCM)
- **Checkout** (COUT) – on the Standard Circulation Menu (SCM)

# Database Conversion

CAUTION: Once a library's database has been converted to support Patron Memberships, it cannot be converted back to support the basic ADVANCE system. Geac Customer Support will assist you in the conversion process.

## Before Starting

- Discuss the Patron Memberships feature with Geac Customer Support to ensure that it is suitable for your library's needs.
- Read this appendix.

## Shortly Before the Conversion Jobs

- In the Patron Membership Group Codes table (MEMGRP), define membership groups as appropriate.
- In the Patron Membership Codes table (CPMC), adjust the expiry date, period, and associated membership group, if necessary. Note that the information in this table is based on the information in the Patron Group Codes (CPGC) table.
- In the Patron Type Codes table (CPC), ensure that the default patron group code (membership code) associated with each patron type is appropriate.
- In the Checkout Port Control table (CPCC), identify the membership groups for each checkin port.
- In the Transaction Codes table (CTC), determine which of the non-charge-related blocks are membership specific.

## Immediately Before the Conversion Jobs

- In the Membership Control Table (CMEM), set the "Use Membership option" parameter to 1 (yes).

## Conversion Jobs Run By Geac Customer Support

- Update the current patron records (PATRON file), financial transactions (AR.BILLS file), and blocks (BLOCKS file).
- Update the current housebound history (HOUSEBOUND.HISTORY file), if used by the library.

### After the Conversion Jobs

- Replace CPGC (Patron Group Codes) with CPMC (Patron Membership Codes) on the Loan Periods Menu (CLPM).
- In the Patron Membership Group Codes table (MEMGRP), add any additional membership groups that you need.
- Inspect the Patron Membership Codes table (CPMC).
- In the Patron Type Codes table (CPC), ensure that the default membership code associated with each patron type is still appropriate.
- In the Checkout Port Control table (CPCC), ensure that the list of membership groups for each checkin port is still appropriate.
- In the Notice Production Sequences table (COPS), set notices to be collated by membership group, as appropriate.
- Update the patron loader as appropriate. See *Importing Patron Records* on page C-1.
- In Patron Registration (CPR), adjust the individual patrons' membership information as appropriate. Assign additional memberships where necessary.

## Membership Control Table (CMEM)

Use this table to turn on the Patron Memberships feature.

### Access

Select the Membership Control Table option (CMEM) on the CIRCULATION CONFIGURATION CODES menu (CCCM).

```

CIRCULATION MEMBERSHIP CONTROL

Membership Control record : CIRC.MEMBERSHIP

1. Use Membership option (1=Yes) : 1
2. Embed Patron Group / Membership in patron record (1=yes) :
 (Only applied in UK if not using Memberships)

Options:
? help # line Line by line Print Exit

```

- 1. Use Membership option [0 or 1]
  - 0 (no) Do not implement the Patron Memberships feature.
  - 1 (yes) Implement the Patron Memberships feature.

**CAUTION:** Do not set this parameter to 1 until you have discussed this feature with Geac Support. Once your system has been converted to support Patron Memberships, it **cannot** be converted back to support the basic ADVANCE system.

- 2. Embed Patron Group / Membership in patron record [0 or 1]
 

CAUTION: Do not change this parameter – it is for Geac Support use only, for UK customers. (Typically 0.)

## Patron Type Codes (CPC)

Use this table to identify patron types and group them for descriptive and/or statistical purposes. Patron Types with common circulation privileges can then be linked to Patron Membership codes. For the main description of this table, see *Patron Type Codes (CPC)* on page 4-57.

**Access** Select the Patron Type Codes option (CPC) on the CIRCULATION LOAN PERIODS menu (CLPM). Select a code to edit.

| PATRON TYPE                                |                          |
|--------------------------------------------|--------------------------|
| PATRON TYPE CODE : F                       |                          |
| -----                                      |                          |
| 1. Description                             | : Faculty and Associates |
| 2. Patron Group Code                       | : P2 = F                 |
| 3. Additional Borrower (1 = Yes)           | : 1                      |
| 4. Default Expiration Date (e.g. 01 Jun)   | : 30 MAY 2002            |
| 5. Maximum Number of<br>s                  | : 7                      |
| 6. Number of years before expiration 1-99: | 1                        |
| (takes precedence over 4 above)            |                          |
| 7. Default priority for Holds (1-99)       | : 98                     |
| 8. Allow ILL (1 = Yes)                     | : 1                      |

Keep in mind that *Patron Group Codes* are replaced by *Patron Membership Codes* in a system using the Patron Memberships feature. For example, note the following difference.

2. Patron Group Code      If you wish, enter a **Patron Membership Code** so that the system can provide a default membership when you add a patron in Patron Registration. You can enter two question marks (??) to see and select from a list of Patron Membership Codes.

## Patron Membership Codes (CPMC)

Patron membership codes are used to set circulation policies for patrons who have the same membership. You can also cluster patron type codes to provide a default membership for each new patron. For instance, membership code *P3* might include patron type codes *R* for Resident, *S* for Student, and *U* for Undergraduate, while *P1* only includes only *F* for Faculty. The patron membership code record defines the circulation privileges for all patron types in that membership. Circulation codes are then attached to the Patron Membership Codes to define, and customize, what circulation rules will be used when a patron with this membership checks out an item with that circulation code.

General loan policies are defined on the basis of collection types (see [Circulation Codes \(CCC\)](#) on page 4-39 ). Those codes are generic and do not take effect until they are linked to, and customized for, Patron Membership Codes. Patron Membership Codes allows further refinement of loan policies for individual patron memberships. These policies are, however, based upon the generic, or template, circulation codes.

NOTE: In a system using the Patron Memberships feature, the Patron Membership Codes (CPMC) replaces the similar Patron Group Codes (CPGC) table.

**Access** Select the Patron Membership Codes option (CPMC) on the CIRCULATION LOAN PERIODS menu (CLPM) to access the Patron Membership Codes functions. Patron membership codes are created and edited the same way as other circulation codes.

### List Membership Codes

The MEMBERSHIP screen is obtained by entering two question marks (??) in the Enter Membership Code field when the initial blank workflow appears.

```
MEMBERSHIP

Number of records = 6
Code Description of codes

1. P1 F, G, ILL
2. P2 STF
3. P3 R,S,U
4. P4 NR,O

Options:
? help Add item # line Print Forward Backward Search jump
Exit
```

Select a code by using the *# line* option. The ADVANCE system displays all existing information for that code. Use the options at the bottom of the screen to change existing code definitions.

### New Membership Codes

There are two ways to create new membership codes,

- Enter a new code at the blank initial MEMBERSHIPS CODES screen.
- Select the *Add item* command option on the MEMBERSHIPS CODES screen which lists existing codes.

To create new group codes on the initial blank MEMBERSHIPS CODES screen, enter one to 13 characters at the prompt. (Note that the system imposes no limit on the number of characters, but for practical purposes, no more than 13 is recommended.) The system displays the following message:

```
Table is not found. Do you wish to create a new entry?
```



(Y/N) : \_\_

Enter Y to proceed. The workform is displayed.

If you are on the MEMBERSHIPS CODES screen with the listing of existing codes, select the *Add item* option.

Enter the code you wish to add. :

When you enter the code, the MEMBERSHIPS CODES screen appears. The code appears in the *Enter Patron Group Code:* field and the cursor is positioned at the *Description* field.

```

 MEMBERSHIP CODES DD MMM YYYY
 Membership Control
 Enter Membership Code : TEST1
 -----(Screen 1 of 2)-----
1) Description :
2) Membership Group :
3) Membership Expiry Date :
4) Membership Period (nnD/M/Y) :
5) Access level default :
6) Additional Borrowers (Y or N) :

Circulation Codes :
```

As you complete each field, <ENTER> to move the cursor to the next field. As you move from field to field, the system automatically displays valid values for each field.

### Screen 1: Membership Control

This is the first of two screens that comprise the MEMBERSHIP CODES screen. Use the command options at the bottom of the screen to change or save the information.

```

MEMBERSHIP CODES DD MMM YYYY

 Membership Control

Enter Membership Code : P1

1) Description : P1 Belongs to AU
2) Membership Group : AU AU
3) Membership Expiry Date : 12-31-2001
4) Membership Period (nnD/M/Y) : 20M
5) Access level default : 90
6) Additional Borrowers (Y or N) : N

Circulation Codes : AV1,AV2,BKR,BRENT,DYNA,GEN1,GEN2,GY,GY1,GY2,HELD
 ILL,I LL1,KAY,KB,KB1,KB2,KB3,N/C,RARE,REF,RESD,RESH,RESO,SE,SPEC1

Options:
? help # line Line by line Forward Circ code Delete File
Exit

```

Some of these parameters correspond to parameters in the Patron Group Codes table of an ADVANCE system that does not use the patron memberships feature.

1. Description [text]

This is a free text field to provide greater information on the characteristics of this type of membership than can be included in the code.

There is no corresponding parameter in the Patron Group Codes table of an ADVANCE system that does not use the patron memberships feature.

2. Membership Group [Any Membership Group Code]

**Required.** Membership Group to which this membership belongs. The membership group controls which patron address lines are displayed and

specifies the default hold pickup locations. Membership Group Codes are defined in the Patron Membership Groups (MEMGRP) table found on the Patron Control Menu (PCM). See *Patron Membership Group Codes (MEMGRP)* on page E-18.

There is no corresponding parameter in the Patron Group Codes table of an ADVANCE system that does not use the patron memberships feature.

### .3. Membership Expiry Date

[Any future date]

**Field 3 or 4 is Required.** If the membership code is linked to any Patron Type Codes, then this field is used in Patron Registration (CPR) to provide a default expiry date for new patrons and their initial, default membership, only if no expiration information was entered in the Patron Type Code. See *Patron Type Codes (CPC)* on page E-6.

Regardless of whether the membership code is linked to any Patron Type Codes, or whether expiration information was entered in the Patron Type Code, this field is used in Patron Registration to provide a default expiry date for any additional memberships of this type.

Note that field 4, *Membership Period*, overrides the value entered in this field.

This parameter corresponds to the *Default Expiration Date* parameter in the Patron Group Codes table of an ADVANCE system that does not use the patron memberships feature.

### 4. Membership Period

[whole number (nnnnn), and D, M, or Y]

**Field 3 or 4 is Required.** Specifies a period of time (added to the date on which the patron registers the membership), rather than the fixed membership expiration date which appears in field 3.

At the time of new patron registration, when a Patron Type Code is entered, the system checks first to see whether expiration information is defined for the Patron Type Code, and if so, uses that information. Otherwise, the system checks what expiration information is defined for the Membership Code, if any, linked to the patron type. If a number of (D)ays, (M)onths, or (Y)ears has been entered into this field, the system uses that as the default expiration dates for both the record and the membership. If no number is entered into this field, the system checks field 3 for a default expiration (fixed) date and uses that as the default expiration dates.

There is no corresponding parameter in the Patron Group Codes table of an ADVANCE system that does not use the patron memberships feature.

5. Access level default [0 - 99]

**Required.** This field sets the default priority level on each patron membership record. Staff members must be at this level or higher in order to edit membership related information in a patron record. In addition, staff members must be at this level or higher in order to edit membership related information at a port different than the one at which the membership group is valid.

There is no corresponding parameter in the Patron Group Codes table of an ADVANCE system that does not use the patron memberships feature.

6. Additional Borrowers [Y or N]

This field has an effect only if additional borrowers are not always allowed for the registered patron's Patron Type Code. In other words, if the corresponding parameter is left blank in the registered patron's Patron Type Code (see *Patron Type Codes (CPC)* on page E-6), then this parameter controls the additional borrowers for the individual patron memberships.

This parameter corresponds to the *Additional Borrowers* parameter in the Patron Group Codes table of an ADVANCE system that does not use the patron memberships feature.

Y Allows other people to check out books using the barcode of a registered patron in this patron membership.

It is necessary to enter information about the additional borrowers in an individual patron's registration screen before this option takes effect – see *Circulation User's Guide: Patron Registration*, and *Checkout*.

N Additional borrowers are not allowed for registered patrons in this patron membership.

Circulation Codes

This unnumbered field shows all Circulation Codes included in the membership. The list is created as those codes are linked one-by-one from this screen.

## Screen 2: Loan Policy Control

```

MEMBERSHIP CODES DD MMM YYYY

 Loan Policy Control

Enter Membership Code : P1

Valid Patron Codes : AD,HS,JV,O,OG,OS,S
1) Frequency to Check Patron : 9999
2) Hold Code : HCD Default Hold Code
3) Notice Method Code : M Mail
4) Membership Code Priority : 90
5) Total Items Checked/Time : 20
6) Total Items in Possession : 30
7) Maximum Claimed Returns : 2
8) Maximum Items Overdue : 6
9) Maximum Outstanding Debt : 100.00
10) Holiday Notice Method Code :

Circulation Codes : AV1,AV2,BKR,BRENT,DYNA,GEN1,GEN2,GY,GY1,GY2,HELD
ILL,ILL1,KAY,KB,KB1,KB2,KB3,N/C,RARE,REF,RESD,RESH,RESO,SE,SPEC1

Options:
? help # line Line by line Backward Circ code Delete File
Exit

```

All of these parameters correspond to parameters in the Patron Group Codes table of an ADVANCE system that does not use the patron memberships feature.

## Valid Patron Codes

This unnumbered field shows all Patron Type Codes attached to the membership. The patron type code list is automatically updated as each Patron Type Code, described in the previous section, has a Patron Membership Code entered into its record. Note that all patron types are valid for this patron membership regardless of this list – that is, patrons of any type can have a membership of this kind. This list only indicates that this membership is the default for new patrons of the listed patron types.

## 1. Frequency to check patron

[Any whole number]

**Required.** Defined in number of days. Based on the value in this field, the system allows you to verify patron registration membership data on a regular basis. Each time a patron barcode, or name, is entered in a circulation function, the system checks to see if the patron's active member-

ship has been updated within the last  $x$  number of days. The system displays the message:

```
Patron record last updated on date. Please press <ENTER>.
```

You do not need to take action on the patron's record, but you can confirm basic information such as address and telephone. If you wish to effectively suppress this verification the field can be set to a maximum of five digits, for example 99999.

### 2. Hold Code

[Any Hold Code or blank]

Default Hold Code for the patron membership. If a default is not set here, the system looks at the Hold Port Control (CPH) table for a port-determined Hold Code to use. If Hold Code is entered in CPH, the Hold Code in CPGC takes precedence over the Hold Port Control table.

Hold Codes are defined on the Hold Codes (CHC) table on the General Codes Menu (CGCM).

### 3. Notice Method Code

[Any Contact Method Code]

Defines the method by which patrons are contacted concerning over-dues, invoices, recalls, holds, or other notices and obligations. The default is usually M for Mail, but other options are available. From this table notices can be generated using the *Address 2* of the patron record, or you may choose to telephone patrons first, then follow up with a mailed notice. These choices affect the form created by the output production program, for example a list for telephoning, or a finished notice for mailing. The notice methods are defined in the Contact Method Codes (CCMC) table found on the Output Production Menu (COPM). Also see field 10, *Holiday Notice Method Code*.

Note that contact methods defined for particular notices in Notice Codes (CNC) override the methods defined in this table or on the patron's PATRON REGISTRATION screen.

### 4. Membership Code Priority

[Any whole number]

Determines a priority on the next two parameters: *Total Items Checked/Time* and *Total Items in Possession*. The relative priorities for this setting on the Patron Membership Code (CPMC) and the Circulation Code (CCC) determine which limit is used.

The system **always** uses the *Total Items* fields for the total items, regardless of Circulation Code; however, the value from this field will be used for the Individual Circulation Code limits if the priority is set high.

This parameter corresponds to the *Patron Limits* parameter in the Patron Group Codes table of an ADVANCE system that does not use the patron memberships feature.

5. Total Items Checked/  
Time [Any whole number]
- Required.** Establishes a limit on the total number of items a patron using this Patron Membership can check out at one time. Care should be taken in establishing this limit. For each Circulation Code attached to this Patron Membership, a limit is also set on the maximum number of items **with that Circulation Code** that can be checked out at one time. The library can establish an upper limit in either table. For example, if you wish to allow patrons a cumulative total which reflects the sum of each of the Circulation Codes, then the limit here in the Patron Membership Code should be quite high. If you wish to limit the total number of items that can be checked out at one time, regardless of Circulation Code, then set this number no higher than the limit set for any of the individual Circulation Codes. The patron who checks out the limit on an individual Circulation Code would be prevented from proceeding with any other checkouts.
6. Total Items in  
Possession [Any whole number]
- Required.** Establishes a limit on the total number of items a patron using this Patron Membership can have in their possession, which is a cumulation of prior and current checkouts. As with the field above, this limit is set for the Patron Group, inclusive of items checked out from all Circulation Codes. A limit is also established for each Circulation Code individually. If the library wants to effectively have no limit on the number of items a patron has then this number can be set very high. The system accepts a number up to 5 digits (no commas).
7. Maximum Claimed  
Returns [Any whole number]
- Required.** Sets a threshold on the number of times a patron using this Patron Membership can claim to have returned an item which the system still shows as checked out to them. (See *Circulation Users Manual: Checkout*, for information on setting a Claim Returned flag on an item.) The number entered into this field can be up to 5 digits, effectively indi-

cating no limit. For each patron membership, however, the library can establish a threshold beyond which the patron will have a block on their record. See *General Codes* on page 8-1, *Transaction Control (CTC)* on page 8-3, for more information on controlling patron blocks.

8. Maximum Items  
Overdue.

[Any whole number]

**Required.** Sets a threshold on the number of items a patron using this Patron Membership can have overdue before a block is placed on his/her record. The number entered into this field can be up to 5 digits, effectively indicating no limit. (See *Transaction Control (CTC)* on page 8-3, for more information on controlling patron blocks).

9. Maximum  
Outstanding Debt

[Number in the format nnnn.nn, no currency symbol]

**Required.** Sets a limit on the maximum amount of money a patron using this Patron Membership can owe to the library before an administrative block is placed on his/her record. (See *Transaction Control (CTC)* on page 8-3, for more information on controlling patron blocks).

10. Holiday Notice  
Method Code

[Any Contact Method Code]

Defines the method by which patrons using this Patron Membership are contacted *during the holidays* concerning overdues, invoices, recalls, holds, or other notices and obligations. The default is usually M for Mail, but other options are available. From this table notices can be generated using the *Address 2* of the patron record, or you may choose to telephone patrons first, then follow up with a mailed notice. These choices affect the form the output production program creates, for example a list for telephoning, or a finished notice for mailing. The notice methods are defined in the Contact Method Codes (CCMC) table found on the Output Production Menu (COPM). Holiday periods are defined in the Holiday Periods by Institution (CIHP) table, also on the Output Production Menu (COPM).

Note that contact methods defined for particular notices in Notice Codes (CNC) override the methods defined in this table or on the patron's PATRON REGISTRATION screen.

Circulation Codes

This unnumbered field shows all Circulation Codes included in the membership. The list is created as those codes are linked one-by-one from this screen.



## Linking Circulation Codes to Patron Membership Codes

Patron Membership Codes must be linked to all the appropriate Circulation Codes. If certain Patron Memberships are not allowed to borrow material from a particular collection (as defined by a Circulation Code), then do not link that circulation code to that Patron Membership.

To link circulation codes to a patron membership code, select the *Circ code* option on the MEMBERSHIP CODES screen. The system will prompt:

Please enter a circulation code :

Enter a valid circulation code. An invalid entry or entering double question marks (??) will give you access to a browse list of valid codes.

If you choose an unlinked circulation code from the browse list, the system displays the circulation code screen with a message in place of an options line.

For further information, see [Linking Circulation Codes to Patron Group Codes](#) on page 4-70, replacing Patron Group Codes with Patron Membership Codes.

## Patron Membership Group Codes (MEMGRP)

Patron membership groups allow you to set some characteristics of the memberships that can be used at a port. Each membership belongs to one membership group (as set in the Patron Membership Code table, CPMC). A membership group can be associated with one or more ADVANCE ports (as set in Checkout Port Control, CPCC), and more than one membership group can be associated with the same ADVANCE port.

**Access** Select the Patron Membership Groups option (MEMGRP) on the Patron Control Menu (PCM). Patron Membership Group Codes are created and edited the same way as other circulation codes.

```

 MEMBERSHIP GROUP CODES

Number of records : 4
Code Description of code

1. ALII ALII Membership Group
2. AU AU
3. PUB1 PUB1 Membership Group for P5
4. PUB2 PUB2 Membership Groupfor BRA2 only

Options:
? help Add item # line Print Forward Backward Search jump
Exit

```

Select a code by using the *# line* option. The ADVANCE system displays all existing information for that code. Use the options at the bottom of the screen to change existing code definitions.

### New Membership Codes

To create new membership codes, select the *Add item* option. The system prompts:

```
Enter the code you wish to add. :
```

When you enter the new code (up to 15 characters) and <ENTER>, the MEMBERSHIP GROUP CODES detail screen appears.

As you complete each field, <ENTER> to move the cursor to the next field. As you move from field to field, the system automatically displays valid values for each field. When you are finished, the option line reappears at the bottom of the screen.

## Detail Screen

```

 MEMBERSHIP GROUP CODES

MEMBERSHIP GROUP : AU

1. Description : AU
2. Address lines : 1,2
3. Assoc. Institutions (Holds) : AU = University of Academia
4. Assoc. Sublocations (Holds) :

Membership Codes : P1,P2

Options:
? help # line Line by line Copy Print Delete Exit

```

1. Description [text]

This is a free text field to provide greater information on the characteristics of this membership group than can be included in the code.

2. Address lines [2 address numbers, separated by a comma]

Up to 10 addresses can be defined for patrons. Specify which two addresses should be displayed, and in what sequence, on the PATRON REGISTRATION screen at a port at which this membership is the active membership.

3. Assoc. Institutions (Holds) [Zero, one, or more Institution Codes, separated by a comma]

Notices can be collated by Membership Group. The system determines a hold's Membership Group based on which Membership Group has the hold's pickup institution (and/or sublocation) specified in this field (and/or field 4). We recommend that you specify each location for only one

Membership Group so that a hold's pickup location is not associated with multiple Membership Groups.

If a hold's pickup location is simply "pickup where found", the system uses the Membership Group of the patron's Master membership.

Note that, for overdue and recall notices, the Membership Group is that of the membership on which the item was checked out.

4. Assoc. Sublocations  
(Holds)

[Zero, one, or more Sublocation Codes, separated by a comma]

The system determines a hold's Membership Group based on which Membership Group has the hold's pickup sublocations (and/or institutions) specified in this field (and/or field 3). For further details, see the description of field 3.

Membership Codes

This unnumbered field shows all Membership Codes included in the membership group. The list is updated as each Patron Membership Code, described in the previous section, has a Membership Group Code entered into its record..

The sequence in which the membership codes are listed can determine a patron's active membership at a port. For details, see [Active Membership](#) on page E-25.

## Notice Production Sequences (COPS)

This table allows you to define the way patron notices are sorted. This applies only to notices generated by the C-Notice Production background job. For the main description of this table, see [Notice Production Sequences \(COPS\)](#) on page 5-40

**Access** Select the Notice Production Sequences option (COPS) on the Output Production Menu (COPM). Then select C (Notice Production).

```

 PRODUCTION

PRODUCTION CODE : C

1. Collation sequence : Ntc.Inst,Ntc.Subl,Ntc.Zip,Ntc.Pid,Ntc.Type,Ntc.+
2. Separate sequences : Ntc.Subl
3. Page break on :
4. Summary sequence :
5. Archive period : 31
 Date of last use : 20 JUL 2000
 Description : Notice Production

Options
? help # line Line by line Copy Print Exit

```

**Ntc.Mem** In a system using Patron Memberships, the `Ntc.Mem` dictionary code is available for use in the Collation sequence and Separate sequences fields. This code enables you to have notices sorted and, if you like, separately printed, by Patron Membership Group.

For an overdue or recall notice, the Patron Membership Group is the one that includes the membership on which the item was checked out. For hold notices, see the description of the Assoc. Institutions (Holds) and Assoc. Sublocations (Holds) fields in [Patron Membership Group Codes \(MEMGRP\)](#) on page E-18.

## Checkout Port Control (CPCC)

The Checkout Port Control table defines defaults and location information for the Checkout function. For the main description of this table, see [Checkout Port Control \(CPCC\)](#) on page 3-36.

**Access** Select the Checkout Port Control option (CPCC) on the CIRCULATION CONFIGURATION CODES menu (CCCM). Select a port to edit.

```

 CHECKOUT PORT CONTROL

CHECKOUT PORT CONTROL CODE : COUT1

Description : CIRC Checkout 1
2. Checkout Calendar Name : MCAL
3. Checkout Institutions : AU
4. Checkout Sublocations : CAM1
5. Checkout Collections : CIRC = Circulation Desk
6. Checkout receipt (1 = Yes) : 0
7. Produce inserts (1 = Yes) : 1
8. Default Bibliographic Format :
9. Default Circulation code : GEN1=General Collection Books
10. Collection required (1 = Yes):
11. Default Sublocation :
12. Default Collection :
13. Required Membership Groups : ALII,AU

Options:
? help # line Line by line Copy Print Exit

```

The following field is implemented in a system using Patron Memberships.

### 13. Required Membership Groups

[One or more Membership Group Codes, separated by a comma]

A patron must have a current membership in one of the listed membership groups in order to checkout items at this port. (The patron's membership must also be valid for the item's Circulation Code.)

The sequence in which the membership groups are listed can determine a patron's active membership at a port. For details, see [Active Membership](#) on page E-25.

## Transaction Control (CTC)

The Circulation Transaction Control table allows you to control various types of circulation activities, such as when records are to be blocked and/or charged. For the main description of this table, see [Transaction Control \(CTC\)](#) on page 8-3.

**Access** Select the Transaction Codes option (CTC) on the CIRCULATION GENERAL CODES menu (CGCM). Select a code to edit.

```

 CIRCULATION TRANSACTION

BLOCK CODE : 25

1. Description : Damaged Book
2. Charge controlled (1 = Yes) : 1
3. Create transaction manually (1 = Yes) : 1
4. Delete transaction manually (1 = Yes) : 1
5. Type of transaction (1 = Partial) : 1
 (2 = Full)
6. Display transactions (1 = Yes) : 1
7. Unused (reserved for France) :
8. Display in Checkout (1 = Yes) :
9. Display in Checkin (1 = Yes) :
10. Display in HRT/MB (1 = Yes) :
11. Link to Membership Code (1 = Yes) : 1

Options:
? help # line Line by line Print Exit

```

The following field is implemented in a system using Patron Memberships.

11. Link to Membership Code [0 or 1]

All charge-controlled blocks are automatically associated with a patron membership. The association of non-charge-controlled blocks (CTC codes) can be defined by the library. Association of a block with a membership means that the blocks will display **only** at a “delete CPCC” port that has been designated for that specific membership – see [Checkout Port Control \(CPCC\)](#) on page E-22. At the time of installation, the default setting is for no association.

- 0 (no) Show all non-charge-controlled blocks to staff, regardless of the associated memberships.
- 1 (yes) Show the only non-charge-controlled blocks that are associated the current port's memberships.



## Patron Registration (CPR)

This section describes the Patron Registration features that are different in a Patron Memberships system. For a basic description of Patron Registration, see the *Circulation User's Guide*.

**Access** Select the Patron Registration option (CPR) on the PATRON CONTROL MENU (PCM). At the *Enter Patron Name or Barcode* prompt, identify an existing patron by name, barcode, or personal ID, or enter N to add a new patron.

```

 PATRON REGISTRATION
 Membership : P1
 Outstanding charges : 15.50
Patron Barcode : 29999000005496 Last Update: 07/04/00
Old Barcode : 20000002003503 Last Trans.: 09/22/00
1. Name (Last, F M): MICHAELSON, DONALD Registered : 07/04/00
2. Address 1 : 123 SOUTHAM ST

3. Zip/Postal Code : MARKHAM, ONTARIO L3R 9T8
4. Phone Number(s) : 333-1234
5. Address 2 : 333 CYPRESS LANE

6. Zip/Postal Code : M3L 2G4 14. Password : *****
7. Personal ID : 542802103 15. Home Inst : PUB-PUBLIC LIBRARY
8. ID Type : SSN 16. Home Subl :
9. Patron Code : AD-Adult Borrow 17. Housebound (Y/N) ? : N
10. Expiration Date : 12 JAN 2005
11. Comments :

12. Rte. Recipient : N 18. Std. Contact Method : Phone
13. Rte. Location : 19. Hol. Contact Method : Mail

Options:
line Line by line Added borrowers Delete File Update barcode
Second screen Item list Blocks display Pay charges Waive charge
Addresses Membership Notes Exit ? help

```

### Active Membership

Notice the *Membership* field in the top right corner of the screen. This unnumbered field shows the Patron Membership Code of the patron's **active membership**. This membership is the one that would be used if you check out items to the patron from the current port.

The system determines the active membership as follows:

1. For the current port, ADVANCE gets the list of membership group codes from the Required Membership Groups field of the Checkout Port Control table (CPCC). For example, *ALII*, *AU* for your port.
2. For each of these membership groups, ADVANCE gets the list of membership codes from the Membership Codes field of the Membership Group Codes table (MEMGRP). For example, *PAL1*, *PAL2* for *ALII*, and then *P1*, *P2* for *AU* – resulting in the membership list: *PAL1*, *PAL2*, *P1*, *P2*.
3. The first membership in this list that is included on the patron's PATRON MEMBERSHIP LIST screen is the patron's active agency at this port. For example, if the patron membership list is *GY*, *P1*, *PAL2* (the sequence of memberships on the screen does not matter), then the active membership is *PAL2*.

NOTE: If you edit and Accept changes to a membership's details, then that membership becomes the currently active membership, shown in the Membership field, until you exit the patron's PATRON REGISTRATION screen.

### Membership-specific Fields

The following fields on the PATRON REGISTRATION screen display values for the currently active membership:

- Last Update
- Last Trans.
- Registered
- Expiration Date
- ID Type
- Personal ID
- Std. Contact Method
- Hol. Contact Method

Note that a patron does not have any overall values for these fields, only membership-specific values. Editing a value here changes the value shown on the active membership's PATRON MEMBERSHIP REGISTRATION screen, and vice versa.

### Address Fields

The address fields display in the sequence defined for your active membership's membership group.

Added Borrowers If permitted by the membership and patron type tables, you can add Added Borrowers to the active membership.

### **No Memberships**

When you are adding a new patron, the message `No memberships` appears in place of the Membership field until you add a membership.

### **No Local Memberships**

If the patron has one or more memberships but none of them are valid at your port, the message `No Local Membership` appears in place of the Membership field.

## Adding a Patron

When you are adding a new patron, the text `No memberships` appears in place of the Membership field until you add a membership. You must add a membership in order to File the new patron record.

When you enter a Patron Type Code in the Patron Code field, the system displays a Membership Code field at the right. If your Patron Type Code has a Patron Membership Code specified in the setup table, the system provides that as the default. If you wish, you can enter two question marks (??) to see and select from a list of Patron Membership Codes.

| PATRON REGISTRATION           |                | No memberships            |
|-------------------------------|----------------|---------------------------|
| Patron Barcode :              | 29988000999999 | Last Update:              |
|                               |                | Last Trans.:              |
| 1. Name (Last, F M):          |                | Registered :              |
| 2. Address 1 :                |                |                           |
| 3. Zip/Postal Code :          |                |                           |
| 4. Phone Number(s) :          |                |                           |
| 5. Address 2 :                |                |                           |
| 6. Zip/Postal Code :          |                | 14. Password : *****      |
| 7. Personal ID :              |                | 15. Home Inst :           |
| 8. ID Type :                  |                | 16. Home Subl :           |
| 9. Patron Code : F-Faculty    |                | Membership Code P3        |
| 10. Expiration Date :         |                |                           |
| 11. Comments :                |                |                           |
| 12. Rte. Recipient : N        |                | 18. Std. Contact Method : |
| 13. Rte. Location :           |                | 19. Hol. Contact Method : |
| Enter a valid Membership code |                |                           |

After you enter a value in the Membership Code field, the field vanishes.



## Adding and Editing Memberships

On the PATRON REGISTRATION screen, you can edit the active membership's Expiration Date, ID Type, Personal ID, Std. Contact Method, and Hol. Contact Method, but you cannot edit the other fields of the active membership, or edit any fields of a non-active membership, or add or delete memberships.

Select the *Membership* option on the PATRON REGISTRATION screen to display the PATRON MEMBERSHIP LIST screen.

```

DD MMM YYYY Geac ADVANCE Library System (RRRR) P P P P P I I I I I
HH:MM Your Library Name

 PATRON MEMBERSHIP LIST

Patron Barcode :29999000005496
Name :MICHAELSON, DONALD

 Contact Notes
Membership RegDate ExpDate Normal Hols Stf Pub ID type Access

1. NEWCOME 04Jul00 04Jul02 P M Y Y SIN 50
2. PALII 22Aug00 01Jan10 P M N N N 50
3. P1 04Jul00 12Jan05 P M N N SSN 50

Options:
line Add item Exit ? help

```

If your privileges are lower than a membership's access level, only the Patron Membership Code appears on the line, along with the membership status: *Current* or *Expired*. You cannot edit this membership.

Select *# line* and enter a line number to edit a membership, or select *Add item* to add a new membership. The PATRON MEMBERSHIP REGISTRATION screen appears.

```

DD MMM YYYY Geac ADVANCE Library System (RRRR) P P P P P I I I I I I
HH:MM Your Library Name

 PATRON MEMBERSHIP REGISTRATION

Patron Barcode :29999000005496 Last Update: 07/04/00
Name :MICHAELSON, DONALD Last Trans.: 08/12/00
 Registered : 07/04/00
 Master Membership

1. Membership : NEWCOME
2. Expiry Date : 04 JUL 2002
3. Std. Contact method : P - Phone
4. Hol. Contact method : M - Mail
5. ID type : SIN
6. ID : 9988776655
7. Access level : 50
8. Public note : Newer public note
9. Staff note : Newer staff note

Options:
line Line by line Accept Exit ? help Master Delete

```

Select the *# line* or *Line by line* options to edit the membership fields. Select *Accept* to store your changes and leave, or select *Exit* to leave without storing any changes. Select *Master* to move this membership to the top of the list and mark it the Master Membership. Select *Delete* to delete the membership.

|                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Last Update       | Shows the date that the membership information was last updated. This is also the date on which <i>basic</i> patron information, such as the address, was last updated while this membership was active                                                                                                                                                                                                                                                                                                                                                                 |
| Last Trans.       | Shows the date that the membership was last used for a checkout transaction, or subsequently a fine was paid on the checked out item or a block was added for it.                                                                                                                                                                                                                                                                                                                                                                                                       |
| Registered        | Shows the date that the membership was added and became Current.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Master Membership | This status appears if the membership is the first one in the patron's membership list. You can select the <i>Master</i> option to move a membership to the top of the list and mark it as the Master Membership. A patron's Master Membership should be at the institution that is primarily responsible for the patron.                                                                                                                                                                                                                                               |
| 1. Membership     | <p>[Any Patron Membership Code]</p> <p>Identifies the membership. A patron cannot have more than one membership with the same Patron Membership Code, but can have more than one membership in the same membership group.</p> <p>You can change a patron's membership by editing this field and entering a new Membership Code. If there are any blocks or items checked out on the original membership, the system accepts a new membership only if it is in the same membership group.</p>                                                                            |
| 2. Expiry Date    | <p>[Any date]</p> <p><b>Required.</b> Enter a date that is on or later than today's date. After this date, the patron cannot use this membership to check out materials – the system displays a message such as: <i>Patron's local Membership (NEWCOME) has expired.</i> When necessary, the system changes an item's normal due date at checkout so that it will not be due after this date. Patron Purge deletes a patron record only when all their memberships have expired.</p> <p>You can extend or reduce a patron's membership period by editing this date.</p> |



3. Std. Contact method [Any Contact Method Code]
- Enter the standard method of sending initial notices to the patron about items checked out on this membership. This overrides any generic method defined for the Membership Code.
4. Hol. Contact method [Any Contact Method Code]
- Enter the method of sending initial notices to the patron during the holiday period about items checked out on this membership. This overrides any generic method defined for the Membership Code.
5. ID type [Text]
- Enter a description of the patron identification number entered in the *ID* field. For example, you could enter *SSN*, *SIN*, or *VISA*.
6. ID [Any numbers or letters]
- (Personal ID) Enter a number or code that is unique to the patron. This can be any ID, such as driver's licence, social insurance number, social security number, credit card number, student number, faculty number, etc. Letters can be included.
- The ID is an alternate to the patron's name or barcode number. You can enter this number, preceded by *ID=*, at the *Enter Patron Name or Barcode:* prompt.
7. Access level [0 to 99]
- Enter the minimum privilege level required by a staff member in order to see details, edit, or delete this membership. Staff below this level only see the Patron Membership Code and membership status: *Current* or *Expired*. This level overrides the generic value defined for the Membership Code.
8. Public note [Text]
- Window for a membership note that both the patron and staff members can see. This note is shown in the Online Catalogue's *PATRON RECORD INQUIRY* screen.

9. Staff note

[Text]

Window for a membership note that only staff members can see. This note is shown only on this screen and the PATRON MEMBERSHIP NOTES screen.

## Checkout (COUT)

This section describes the Checkout features that are different in a Patron Memberships system. For a basic description of Checkout, see the *Circulation User's Guide*.

**Access** Select the Checkout option (COUT) on the STANDARD CIRCULATION MENU (SCM). At the *Enter Patron Name or Barcode* prompt, identify an existing patron by name, barcode, or personal ID.

If the patron does not have any memberships at your port, the message *Patron is not registered at this location* appears and you cannot proceed with checkin activities.

If the patron has one or more memberships at your port, the CIRCULATION CHECKOUT screen appears.

```

HH:MM CIRCULATION CHECKOUT DD MMM YYYY
 Membership Code : NEWCOME (P1)
Enter Patron Name or Barcode : 29999000005496 MICHAELSON, DONALD
Blocks : 1 Fines : 0.00 Items out : 2 Holds : 0

 ITEM TITLE DUE

1.

```

### Which Membership Is Used

The patron might have more than one Current (non-Expired) membership at your port. The second line of the CIRCULATION CHECKOUT screen lists the patron's memberships at your port, starting with the membership that is most likely to be used for the transaction – your active membership at the port. (See *Active Membership* on page E-25.) Expired memberships are not listed. When you check out material, the system uses the first membership listed here that is valid for the material's Circulation Code.



# Screen Index

---

## A

ACTION CALENDAR - ERROR REPORT, 7-24  
ACTION CONTROL, 7-18  
Administration Stop Messages, 8-15

## C

CALENDAR CODES, 4-81  
CALL NUMBER PREFIX, 4-29, 4-30  
CBLM (identifier for Build Loan Period Matrix), 4-86  
CCC (identifier for Circulation Codes), 4-39  
CCCM (identifier for Circulation Configuration Codes), 3-2  
CCGC (identifier for Material Group Codes), 4-9, 4-54  
CCM (identifier for Circulation Codes Menu), 4-2  
CCT (identifier for Circulation Control Table), 3-3  
CGCM (Identifier for General Codes), 8-2  
CHC (identifier for Hold Codes), 8-7  
CHCC (identifier for Collection Codes), 4-24  
CHECKIN PORT CONTROL, 3-40  
CHECKOUT CONTROL, 3-11  
CHECKOUT PORT CONTROL, 3-36, 3-37, E-22  
Checkout Port Control, E-22  
CHIC (identifier for Institution Codes), 4-10  
CHLDC (identifier for Holds control codes), 3-22  
CHLDP (identifier for Holds Report Control Codes), 3-27  
CHNC (identifier for Class Number Codes), 4-33  
CHOLD (identifier for Holds Control), 3-21  
CHPC (identifier for Call Number Prefix Codes), 4-29  
CHRT (identifier for Hold/Recall/Trace control table), 3-15  
CHSHELF (identifier for Hold Shelf Messages), 3-30  
CHSM (identifier for Holdings Set-up Menu), 4-7  
CIA (identifier for Item Status Control Codes), 7-18  
CICM (identifier for Item Control Codes Menu), 7-4  
CIHP (indicator for Holiday Periods by Institution), 5-45  
CIPC (identifier for Checkin Port Control), 3-40  
CIRCULATION BACKGROUND PROCESSOR, 9-4  
CIRCULATION CALENDAR, 4-80  
CIRCULATION CALENDAR PROCESSOR, 9-2  
CIRCULATION CODE, 4-40, 4-41, 4-49, 4-70, 4-71  
CIRCULATION CODE RENEWAL RULES, 4-77  
CIRCULATION CONFIGURATION CODES, 3-2  
CIRCULATION CONTROL, 3-3  
CIRCULATION GENERAL CODES, 8-2  
CIRCULATION ITEM CONTROL CODES, 7-4  
CIRCULATION LOAN PERIODS, 4-2  
CIRCULATION MEMBERSHIP CONTROL, E-5  
CIRCULATION PAYMENT COLLECTION, 6-2  
CIRCULATION REGISTER, 6-11, 6-12  
CIRCULATION TRANSACTION, 8-3  
CISC (identifier for Item Status Calendar Codes), 7-11  
CLASSIFICATION CODES TABLE, 4-33, 4-34  
CLCM (identifier for Library Calendar Setup), 4-80  
CLPM (identifier for Loan Periods Menu), 4-2  
CMEM (identifier for Circulation Membership Control Table), E-5  
CNFC - NOTICE FORMAT FIELD DEFINITIONS, 5-33  
CNFC - NOTICE FORMAT FIELD DEFINITIONS BROWSE, 5-33

CNFC - NOTICE PRINT FORMAT CODES, 5-31  
COCT (identifier for Checkout Control), 3-11  
COLLECTION CODES TABLE, 4-24  
CPC (identifier for Paton Type Codes), 4-57  
CPC (identifier for Patron Type Codes), E-6  
CPCC (identifier for Checkout Port Control), 3-36, E-22  
CPCM (identifier for Circulation Payment Collection), 6-2  
CPFB (identifier for Fund/Transaction Codes), 6-4, 6-6  
CPFC (identifier for Payment Fund Codes), 6-3, 6-18  
CPGC (identifier for Circulation Patron Group Codes), 4-63  
CPH (identifier for Hold Port Control), 3-43  
CPICK (identifier for Picking List Control), 3-19  
CPMC (identifier for Circulation Patron Membership Codes), E-7  
CPR (identifier for Patron Registration), E-25, E-35  
CPRL (identifier for Register Location Codes), 6-9  
CPRP (identifier for Register/Port Codes), 6-11  
CPTC (identifier for Payment Type Codes), 6-14  
CQUAL (identifier for Qualifier Codes), 3-32  
CRC (identifier for Recall Codes), 8-12, 8-15  
CREATE A TABLE FOR LOADING FILES, C-11  
CRHD (identifier for Receipt Header), 6-17  
CTC (identifier for Transaction Codes), 8-3, E-23

## D

DEFAULT PRICE TAG, 4-38

## E

ENTER LIBRARY HOLIDAYS, 4-82

## F

FUND CODES, 6-3, 6-4

## H

HOLD CODES, 8-7, 8-8  
Hold Shelf Descriptions, 3-30  
Hold Shelf Messages, 3-30  
HOLDING SETUP MENU, 4-7  
Holdings Setup Menu, 4-7  
HOLDS CONTROL, 3-22  
HOLDS PORT CONTROL, 3-43  
HOLDS REPORT CONTROL, 3-27  
HOLIDAY CONTROL RECORD EDIT, 5-45

## I

IMPORT MENU, C-2  
INFORMATION SOURCE CODES, 5-37  
INSTITUTION CODES, 4-11  
INSTITUTION CODES TABLE, 4-10

## L

LIBRARY CALENDAR, 4-81, 4-84  
LOAD, C-6, C-9  
LOAD DATA PROGRAM, C-5, C-6, C-9  
LOAN MATRIX BUILDER, 4-86, 4-87  
LOAN MATRIX PRINT, 4-88

## M

MASTER MENU, A-2  
MEMBERSHIP, E-8  
MEMBERSHIP CODES, E-10, E-13  
MEMBERSHIP GROUP CODES, E-18, E-19  
MEMGRP (identifier for Patron Membership Group Codes), E-18

## N

NOTICE, 5-6  
NOTICE CODES, 5-12, 5-13, 5-16  
NOTICE HEADER, 5-29, 5-43  
NOTICE INFORMATION SOURCE CODES,  
5-36  
NOTICE PRINT FORMAT CODES, 5-30  
NOTICE TYPE, 5-5  
NOTICE TYPE CODES, 5-6

## O

OCM (Identifier for OUTPUT CONTROL  
MENU), 9-1  
OCP (identifier for CIRCULATION  
CALENDAR PROCESSOR), 9-2  
OCP (identifier for REGISTER REPORTS), 9-8  
OPAC QUALIFIER CODES, 3-33  
OUTPUT CONTROL MENU, 9-1

## P

PATRON GROUP CODES, 4-63, 4-64, 4-65  
PATRON IMPORTING MENU, C-2  
PATRON MEMBERSHIP LIST, E-30  
PATRON MEMBERSHIP REGISTRATION,  
E-31  
Patron Registration, E-25, E-35  
PATRON TYPE, 4-58, 4-59, E-6  
Patron Type Codes, E-6  
PAYMENT METHOD, 6-15  
PCIR (identifier for CIRCULATION  
BACKGROUND PROCESSOR), 9-4  
PICK LIST CONTROL, 3-19  
PRODUCTION, 5-19, 5-25, 5-40, E-21  
PRODUCTION CHARGE CODES, 5-27

## R

RECALL CODES, 8-12, 8-13  
RECEIPT HEADER, 6-17  
REGISTER CODES, 6-9, 6-10

REGISTER REPORT MENU, 9-8  
REGISTER REPORTS, 9-8

## S

SCCT identifier for Self-Checkout Control, 3-17  
SELF CHECKOUT CONTROL, 3-17  
Sendmail Path, 8-16  
SMAIL (identifier for Sendmail Path), 8-16  
SPECIAL LOAN PERIODS, 4-75  
STATUS CONTROL, 7-5  
SUBLOCATION CODES TABLE, 4-16

## T

Transaction Codes, 8-3, E-23  
TRANSACTION CODES & ACCOUNT, 6-6,  
6-7

## U

UNIX PATH FOR SENDMAIL, 8-16  
UPIM (identifier for Patron Importing Menu),  
C-1, C-2  
UPIR (identifier for Import Patron Records), C-17

## V

Valid patron fields, C-12





# General Index

---

## Symbols

- # (clear field edit command), A-8
- # line (option), A-7
- . (previous field edit command), A-8
- <ESC> edit commands
  - regular field, A-8
  - window field, A-10
- ? (help, field edit command), A-8
- ?? (code list, field edit command), A-8

## A

- access control, 2-4
- access level, 2-4
- accounts receivable, 6-1
- action codes, 2-8
- action control codes, 7-18
- activate background processor, 9-4
- active membership, E-25
- Actual Cost field, 4-38
- adding
  - new patrons, C-1
- Additional Borrowers, 4-60, 4-69, E-12
- additional parameters, 4-49
- administrative hold, 8-3
- administrative hold messages, 8-15
- alternate Notice Code, 8-14
- amnesty, fine, 4-53
- arrow keys, A-5
- autocancel
  - holds, 3-28
- automatic notice generation, 4-80
- average cost of item, 4-35

## B

- background processor, 2-6, 9-2
  - activate, 9-4

- de-activate, 9-4
- barcodes
  - negative, 3-12
- batch load file, C-17
- Block Code, 7-9
- blocks
  - severity, 8-5
- booking
  - type, 4-49
- brief registration record, 3-12
- Build Due Dates Table Job, 5-18
- Build Loan Period Matrix, 4-86

## C

- C (Notice Production Job), 5-18, 5-40, E-21
- calculating due dates, 3-13
- calculation of loan periods, 4-80
- Calendar Cleanup Routine, 5-18
- calendar exceptions, 4-82
- Calendar Name, 4-80
- calendar subsets, 4-84
- calendars, 4-3, 4-80
- Call Number Prefix
  - description, 4-31
- Call Number Prefix Code, 4-29
- cancelled holds, 3-28
- charge controlled, 6-6
- Charge controlled field, 8-5
- checkin
  - port control, 3-40
  - ports, 3-41
  - receipt, 3-42
  - return, 4-28
- checkout, 3-11
  - action control code, 7-20
  - calendar, 3-37, 3-40
  - displays, 3-11
  - institutions, 3-37
  - port control, 3-36, E-22

- port timeout, 3-14
- receipt, 3-38
- Checkout Control Table, 3-11, 4-44
- Circulation
  - control, 4-80
  - control fields, 3-3
  - control table, 3-3
  - menu, 2-9
  - policies, 4-63, 4-71, E-7
  - privileges, 4-63, E-7
  - procedures, 3-1
  - transactions, 4-57
- Circulation Code, 2-7, 4-1, 4-2, 4-8, 4-9, 4-19, 4-27, 4-32, 4-36, 4-39, 4-70, E-17
  - description, 4-41
  - limits, 4-74
  - linking, 4-70, E-17
  - setup, 4-39
- Circulation Codes, 4-69
- Class Number Codes, 4-33
- classification
  - description, 4-35
- CLEANUP (Calendar Cleanup Routine), 5-18
- clear batch file, C-21
- clear field (field edit command), A-8
- clear patron history, 3-5
- code list display (field edit command), A-8
- collection
  - definiton, 4-53
  - description, 4-26
  - groups, 2-7
- Collection Agency Status Update Job, 5-18
- Collection Code, 4-24
- commands, 2-5
- contact methods, 5-8
- conventions, 1-2
- conversion-on-the-fly, 3-38
- count of patron records, C-16
- courtesy notice, 4-47, 4-74
- creating
  - Patron Group Codes, 4-65, E-8, E-18
  - patron profile, C-7
- customize menus, 2-4
- customized commands, 2-5

## D

- daily due time, 3-13
- damaged items, 4-35
- date
  - on menu screen, A-2
- de-activate background processor, 9-4
- default
  - expiration date, 4-60
  - menu system, 2-4
  - parameters, 3-3
  - pickup location, 3-23
- Default Price Tag (CDPT), 4-35
- defaults
  - checkout displays, 3-11
  - expiration date, 4-61, E-11
  - Hold Codes, 8-7
  - holds, 3-43
  - holds priority, 4-61
  - Material Group Code, 4-55
  - Notice Code, 4-47
  - Recall Code, 4-47
  - transaction codes, 6-6
- delete (field edit command), A-8
- deleting
  - batch files, C-22
  - transactions, 8-5
- description transaction code, 8-4
- Detailed Display Mode, 3-6
- display
  - patron, 3-11
- due date, 3-12
- due date/time calculations, 3-11
- DUEDATE (Build Due Dates Table Job), 5-18
- DUEDATE option, 5-25
- dynamic stock, 4-50

## E

- edit fields, A-7
- edit window field, A-9, A-10
- editing
  - action control code, 7-19
  - calendars, 4-81
  - Call Number Prefix Codes, 4-29

Classification Codes, 4-33  
 Collection Codes, 4-25  
 contact methods, 5-8  
 fund codes, 6-3  
 holds codes, 8-7  
 Institution Codes, 4-10  
 Material Group Codes, 4-55  
 notice codes, 5-12  
 notice print format codes, 5-37  
 notice print formats, 5-31  
 notice types, 5-5  
 patron codes, 4-58  
 Patron Group Codes, 4-64  
 payment codes, 6-14  
 port register codes, 6-11  
 production charges, 5-27  
 production codes, 5-18  
 recall codes, 8-12  
 Register Location Codes, 6-9  
 status calendar codes, 7-11  
 status control codes, 7-5  
 Sublocation Codes, 4-17  
 transaction codes, 6-6, 8-4  
 ending patron load, C-15  
 exception days, 4-82  
 execute a processing job directly, 9-3  
 exiting patron load, C-15  
 expiration date, 3-12, 4-61, E-11  
 expiry holds, 8-11

## F

Fast Track, 4-49  
 field editing, A-7  
 file specifications for loading patrons, C-10  
 fill qualifiers, 3-24  
 financial transactions, 6-9  
 fine amnesty, 4-53  
 fine blocks, 6-6  
 fines, 4-73
 

- closed hours, 3-14
- outstanding, 4-68, E-16
- patron surcharge, 4-73

 finishing indexing, C-21  
 fixed date loans, 4-76

frequency to check patron, 4-66, E-13  
 function keys, A-9, A-11  
 Fund codes, 6-3, 6-18

## G

General Codes, 8-2  
 general transaction control codes, 8-1  
 generic Circulation Code, 4-42, 4-45, 4-71  
 generic collection definition, 4-39  
 grace period, 3-13, 4-44

## H

Held Circ. Code, 4-47, 4-56, 4-74  
 help (field edit command), A-8  
 help message, 2-5  
 H-holds fill qualifier, 3-24  
 hold
 

- lapses, 8-10

 Hold Code, 4-46, 4-66, 4-74, E-14
 

- description, 8-9
- table second screen, 8-11

 hold scope, 3-32, 8-11  
 Hold title, 4-20  
 hold/recall/trace control table, 3-15  
 holdings
 

- code records, 4-5
- codes, 4-1, 4-2
- location codes, 2-7, 4-5
- locations, 2-7

 holdings records, 4-5  
 holds, 4-74
 

- action control code, 7-20
- cancellation, 8-10
- cancelled, 3-28
- cancelling, 4-21
- control table, 3-21
- copies to holds ratio, 3-27
- default expiry, 8-10
- default pickup, 3-44
- default priority, 4-61
- defaults, 3-43
- display name, 4-21

- Held Circ Code, 4-74
- local patron priority, 3-25
- maximum number, 4-60
- on shelf, 3-26
- OPAC, 4-20
- outstanding, 3-27
- overnight processor, 3-27
- patron blocks, 4-21
- pickup, 8-10
- privileges, 8-7
- reports, 3-27, 3-28
- security, 3-25
  - wider scope, 8-11
- holds fill qualifier, 3-24
- holiday periods, 5-45
- holidays, 4-82
- housebound patron, 3-5

**I**

- IDs, 2-4
- importing
  - patron records, C-1
- indexing
  - patron records, C-17
- insert mode (field edit command), A-8
- inserts, 3-38, 3-42, 7-10
- Institution Code, 4-10, 4-27
  - on menu screen, A-2
- interaction holding codes and circulation codes, 4-7
- item
  - checkin, 3-41
  - location, 4-5
  - record, 4-8, 4-14
  - records, 4-9
  - status, 7-22
- Item Action Calendar Codes, 7-22
- item control codes, 7-1
- Item Status Calendar Codes, 7-11
- item status codes, 2-8
- item status control codes, 7-5
- item status for Held items, 3-30

## K

- Keep Patron History, 4-50
- keywords, 2-5

## L

- lapsed hold, 8-10
- last cycle check
  - background processor, 9-4
- last remote renewal, 4-77
- Length of Use Period, 4-43
- library calendar, 4-3, 4-80
- library system name (on menu screen), A-2
- Line by line (option), A-7
- linking
  - codes, 4-39, 4-70, E-17
  - Patron Group Codes, 4-70
  - Patron Membership Codes, E-17
  - status code to block code, 7-9
- loading
  - multiple tapes, C-15
  - patron profiles, C-5
  - patrons from tape, C-9
- Loan Code Override Level, 4-8, 4-9, 4-13, 4-42, 4-56, 4-72
- loan code override level, 4-19, 4-27, 4-31, 4-35
- loan matrix, 4-3
- loan period matrix, 4-86
- loan period override, 4-44
- loan periods, 4-75, 8-12
  - calendar, 3-13
  - grace periods, 3-13
  - hourly, 3-13
  - institution closing, 3-13
  - institution opening, 3-13
  - menu, 4-2
  - overdue calculation, 3-14
- loan policies, 4-39, 4-53, 4-63, 4-71, 4-75, E-7
- loan policy codes, 2-7
- location
  - specific notice header, 5-43

**M**

maintain patron history, 3-5  
 MARC holding code, 4-12  
 Material Group Code, 4-3, 4-8, 4-13, 4-19, 4-27,  
     4-32, 4-36, 4-53  
     description, 4-55  
     override, 4-53  
 materials booking, 4-43, 4-49  
 Materials Booking Patterns (Menu), 4-2, 4-4  
 Max. Items Checked/Time, 4-48, 4-56, 4-74  
 Max. Items in Possession, 4-48, 4-56, 4-74  
 Max. Renewals, 4-56  
 Maximum Claimed Returns, 4-68, E-15  
 Maximum Items Overdue, 4-68, E-16  
 Maximum Number of Holds, 4-60  
 Maximum Outstanding Debt, 4-68, E-16  
 Maximum Renewals, 4-48, 4-74  
 memberships  
     active, E-25  
 menus  
     item selection, A-4  
 methods of payment, 6-14  
 modifying  
     calendars, 4-81  
     Circulation Code, 4-45  
 multiple  
     institutions status/action calendar codes,  
     7-28

**N**

naming  
     calendars, 4-80  
 new calendar, 4-83  
 new circulation code, 4-40  
 new loan period, 8-13  
 new Material Group Code, 4-54  
 next field (field edit command), A-8  
 Notice Code, 4-47, 4-74, 5-12, 8-10, 8-13  
 notice header, 4-14, 4-21, 5-29  
 Notice Method Code, 4-67, 4-69, E-14, E-16  
 notice print format, 5-30  
     codes, 5-36  
 notice production, 2-8, 5-3

    sequences, 5-40, E-21  
 Notice Production Job, 5-18, 5-40, E-21  
 Notice Type Codes, 5-5  
 notice types, 5-5  
 NUC Symbol, 4-15  
 number of records  
     loaded, C-15

**O**

OPAC Qualifier Code, 3-32  
 option bar, A-5  
 option line, A-5  
     go to (field edit command), A-8  
 output control, 9-1  
 outstanding fines, 4-68, E-16  
 outstanding holds, 4-47  
 overdue  
     fines, 3-14  
     items, 4-68, E-16  
 override loan period, 4-44  
 overtyping mode (field edit command), A-8  
 owning collection, 4-28

**P**

password, 2-4  
 patron  
     blocks, 8-5  
     charges, 4-73, 6-6  
     classification, 4-57  
     codes, 4-57, E-6  
     contacts, 5-8  
     database, C-1  
     debt, 4-68, E-16  
     history, 3-5  
     holds, 3-21  
     load process, C-14  
     loader profile, C-5  
     notices, 4-67, 4-69, E-14, E-16  
     privileges, 4-71  
     transaction receipts, 6-17  
     types, 2-7  
 Patron Display, 3-11

Patron Group Code, 2-7, 4-1, 4-3, 4-60, 4-63  
    linking, 4-70  
Patron Group Codes  
    description, 4-72  
Patron Membership Code  
    linking, E-17  
Patron Membership Codes, E-7  
Patron Memberships  
    control table, E-5  
patron records  
    blocks, 8-3  
    database, C-17  
    indexing count, C-20  
patron registration, 3-5  
Patron Type Codes, 4-1, 4-3, 4-59, 4-66, E-10,  
    E-19  
payment, 6-14  
Payment Codes, 6-14  
payment transaction code, 6-6  
permanent codes, 7-18  
permissions, D-1  
picking list control, 3-19  
Port Code (on menu screen), A-2  
port definitions, 2-7  
ports  
    checkin, 3-40  
    checkin/checkout restrictions, 3-41  
    control, 3-35  
    default pickup location, 3-23  
    default value, 3-35  
    registers, 6-11  
previous field (field edit command), A-8  
print  
    formats, 5-30  
Print Loan Matrix, 4-88  
print output from processing jobs, 9-3  
printing  
    invoices, 3-3  
printout of loan period matrix, 4-88  
Priority field, 4-76  
priority level, 4-42, E-12  
processing jobs  
    run directly, 9-3  
production  
    charges, 5-27  
Production Code, 5-18

    print output of processing job, 9-3  
    run processing job directly, 9-3  
purchase alert, 3-27, 8-11

## Q

Qualifier Code, 3-32, 8-11

## R

reading patron tape data, C-10  
Rebuild end date, 4-84  
Rebuild start date, 4-84  
re-building loan period matrix, 4-86  
recalculated loan periods, 8-12  
Recall Code, 4-47, 4-74, 8-12  
Recall Code description, 8-13  
recalls  
    notices, 8-12  
Receipt header, 6-17  
Register Location Codes, 6-9  
Register Port Codes, 6-11  
register session reports, 9-8  
registering on the fly, 3-12  
registers, 6-9  
release number of ADVANCE (on menu screen),  
    A-2  
remote renewals, 4-76  
renewal period, 4-45  
renewal period, last, 4-77  
replacement cost, 4-46  
reports  
    clearing file, 3-28  
    flagged hold cancellation, 3-28  
required codes, 8-3  
restrictions on patron records, 8-3  
retaining reports, 9-5  
routing items, 3-24

## S

saving batch file, C-22  
screen design, A-2

screen identifier, 2-5, A-4  
 scroll options, A-6  
 second screen Hold Code table, 8-11  
 secondary calendar pattern, 4-84  
 security, 3-25  
     user permissions, D-1  
 security control, 2-7  
 self-checkout, 3-17  
 setup, 2-4  
 space bar, A-5  
 Special Loan Periods, 4-75  
 start indexing, C-18  
 status calendar codes, 7-11  
 status codes, 7-8  
 status control codes, 7-5  
 Status/Action Calendar Access, 7-28  
 Sublocation Code, 4-7, 4-16, 4-26  
 sublocation description, 4-18  
 subsets of calendars, 4-84  
 suppress fines, 4-53  
 surcharges, 4-73  
 system setup, 2-4

## T

tables  
     checkout control, 3-11  
     circulation control, 3-3  
     hold/recall/trace control, 3-15  
     holds control, 3-21  
     port control, 3-35  
 tape reading, C-10  
 tape specifications for loading patrons, C-9  
 time, 3-14  
     on menu screen, A-2  
 timeout, 3-14  
 Total Items Checked/Time, 4-67, E-15  
 Total Items in Possession, 4-68, E-15  
 transaction  
     blocks display, 8-6  
 transaction codes, 4-73  
 transaction control, E-23

## U

update status, 7-9  
 use period, 4-43  
 User ID, A-3  
 user permissions, D-1

## V

valid collection, 4-31, 4-35  
 valid institution call number prefix, 4-32  
 valid institution classification code, 4-36  
 valid sublocation classification code, 4-36  
 verify checkout, 3-4  
 verify patron registration, 4-66, E-13  
 verifying indexing, C-17

## W

window  
     edit field, A-9, A-10

## Y

Yearly Inventory of Collection, 4-75





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