



## **Circulation Questions, Reports and Information**

### **General**

1. Is it possible to force upper case record fields to mixed case and/or vice versa?
2. How and when are patron records indexed?
3. Are separate patron indices maintained for separate agencies?
4. Is it possible to index patrons by email address?
5. Is a record for the last patron to use an item stored? How many patrons? For how long? How it is purged? How to switch on / off (Patriot act?) By Agency, Patron Type? Material?
6. Assuming a patron's husband wants to pick up an item on hold for his wife. Is there a way for staff to check the item out to the husband, thus filling the hold? Is there a way for staff to check the item out to the husband without filling the hold?
7. Indicate the procedure proposed/used in migrating data from the present system. (Patron data / current checkout transactions, Dynix PURF History? Use Statistics
8. Standard format for alternate IDs for USD
9. PIN – Derivation of PIN – is it a PIN or a personal password
10. Patron Automatic address check and intervals – customizable feature BY AGENCY?
11. Indicate if the system is able to make use of RFID tags/technology.
12. Is the system able to validate a 14-digit codabar barcode?
13. Describe the procedure used to replace one barcode with another, noting links to piece, use, circulation and acquisitions data.

### **Notices**

14. How are notices created? Daily, on demand? How far back are notices archived?
15. What output formats are available for notices? Can they be formatted to work on laser printers? Local printer (define), receipt printer, system printer, e-mail?
16. Can notices be run once a day at the university and once a week at the elementary schools?
17. Where do notices print out (e.g., what branches or agencies)? Can more than one branches overdue notices be printed from a single account?
18. Show examples of first overdue, final overdue and billing notice. What customization can be made?
19. Show examples of email notices.
20. Show examples of pre-overdue alerts or reminder notices prior to overdue status.
21. Show examples of "item-out" lists by an individual patron ID.
22. Show examples of notices generated for specific types of materials, i.e., collections, by group of patrons (teachers), checked out at a certain branch or agency, etc.
23. Create a list of overdues in the following order: SSN, Name, Amount, Due Date, Barcode, Title, Owning Library, Lending Library, Zip Code, Homeroom
24. Show examples of overdue notices clearly indicating LENDING library, not OWNING library.
25. How many characters of TITLE and how many characters of Call number display on the notice?
26. Show examples of overdue notices with serial records having full subscription summary designations in the CALL/COPY VOL
27. If a large number of overdues is being run and a paper jam occurs in the printer, how can the notice run be restarted?
28. Show samples of the following types of circulation notices:
  - i. Overdue notices in batch
  - ii. A single overdue notice for a given patron
  - iii. A set of overdue notices beginning about halfway through the run
  - iv. Notices sorted by zip code
  - v. Notices sorted by homeroom (does homeroom display clearly)?



- vi. Bills for Lost Books
  - vii. Fines Due on Books Returned
29. Please show an example of a hold notice and indicate if notice contains patron's email address/patron's ID number/Phone number. To what extent (if any) is the notice customizable by the library?
  30. Are email hold notices available?
  31. Show a copy of a recall notice which differs in wording from a hold request.

### **Circulation Reports**

#### **Demonstrate how the following reports can be produced:**

32. Daily reports regularly produced (scheduled by cron on the current unix server) now include:
  - a. Overdue notices
  - b. Billing/Lost notices
  - c. Holds notices
  - d. Recall notices
  - e. Hold cancelled
33. Previous overdue, holds, recall, cancelled, and billing notices (how far back can they be saved?)
34. Email notification for overdue, holds, recall, cancelled, and billing/lost notices (how far back can these be saved?)
35. List of pay transactions by agency by patron listing ID, barcode of book, type of transaction, charges, fines, lost, and "other" collected; waives, refunds and ending balance per patron per day.
36. List of patrons by ID, name, agency, balance, charge (code) description and date of transaction for any patron's account accruing \$10 or more in charges – this is used to place registration holds on campus computers.
37. List of patrons by ID, name, agency, balance and date of transaction for any patron's account that previously showed \$10 or more in charges, and has a balance change (or balance of \$0.00), indicating fines are paid in full and registration holds for campus need to be removed.
38. A list of new patrons added to the system daily by agency with name, @ID, SSN, address, and phone, which is used for quality control purposes
39. A list of new records added to the system daily (fastadds) to ensure coding and rules and quality control over correct checkouts on unknown items by circulation staff
40. A list of new items added on reserve daily to check for accuracy and quality control of circulation staff.
41. A weekly list of incorrect @IDs or SSN numbers which do not fit patterns for agencies or SSN pattern for data quality control.



**Notices on Demand (Dynix RSN):**

42. Ability to generate summary notices, generic notices at any day or time, or scheduled
  - a. by a specific patron; by a specific patron type; all patrons in an agency; excluding a specific collection, excluding a specific ptype, itype or collection; using a pre-set saved.list of identified patrons; from a specific city; from a specific zip code; from a specific homeroom; using one or more specific collection; using one or more specific item types.
  - b. generating this set of data and then providing information: Items held; items out and overdue; items out, overdue, or having PURFS; Lost items only; Items out, overdue, having a PURF and LOST; monetary PURFs only; non-monetary PURFS only; only overdue and PURF; overdue and PURF with suggested replacement cost; overdue only; overdue only with suggested replacement cost; PURFS only minus overdue books; overdues or PURFS being assessed on items coming from another library than the home library.
  - c. Display data on the notices including the following options: barcode and call number; patron name only (no title or bib detail); Title and Call#; Title, Call# and Barcode; Title, Call#, Barcode, and Agency
  - d. Have the ability to generate an individual notice with address; individual notice with alternate address, such as permanent address or homeroom; individual notice with window envelope address (configured either to the left or to the right); list of patrons by library and by name; list of patrons by ZIP by name; list of patrons by homeroom and by name; list of patrons by name and total balance against above criteria.
  - e. Ability to generate notices in increments and printer styles as follows: auxprint, full page; auxprint, halfpage; auxprint, third page; screenprint; systemprinter, fullpage; systemprinter, halfpage; systemprinter, third page; laser, fullpage; laser halfpage; laser, third page
43. Daily report of breakdown of number of notices generated by agency, date, time.
44. Daily shelflist of overdue items by day, including agency, collection, call title, barcode patron name, patron, ID, zip, homeroom, cumulative duedate
45. Daily phone list for holds ready for pickup.
46. Daily hold shelf cancellation list, ordered by title, call, agency, previous requestor's name
47. Daily hold alert report indicating:
  - a. As needed overdue report of items overdue on a specific date or between two dates (needed for snow days, days closed, exceptions, etc. with normal accoutrement of data)
  - b. As needed item status reports (losts, missings, withdrawn, trace, inventory, out)
48. Reports listing all names and count of item types
49. Reports listing all names and count of item statuses
50. Reports listing all names and count of collection codes
51. Reports listing all names and count of item stat classes
52. Reports listing all names and count of patron types
53. Reports listing all names and count of patron stat classes
54. Reports listing all names and count of city codes
55. Reports listing all names and count of block codes
56. Reports listing all notice headers
57. Reports listing all names and count of homeroom codes
58. Reports listing all IP numbers, logins and network addresses for FTP access
59. Reports listing all permissions by agency, functionality and security level of a given password
60. Reports listing all passwords active in a given agency, functionality, or security level.



61. Reminder notices
62. Daily statistics
63. Monthly statistics
64. Snapshot reports of circulation
65. Snapshot reports of PURF
66. Search statistics for PAC, all indexes
67. Monthly inter-intra loan stats for transits and holds
68. Weekly purchase alerts by agency for items with a threshold of more than x holds in them.

### **Ad-Hoc Reports**

69. Select list of holds by patron name,
70. Select list of holds by fill date
71. Daily circ report by branch, by agency, by total system, including SSN, Patron name, ID#, barcode of book, payment or transaction date, amount owed, paid, waived, lost, etc.
72. End of semester faculty reminder notice
73. Daily circ report by patron, item, duetime, duedate
74. Report of patrons of a specific type (e.g. community patrons) whose items are due at the end of a semester, or whose items are due \*after\* their status expires.
75. Select patrons with more than one barcode assigned to them, or with ID cards that are marked as lost
76. Select all patrons of a certain patron type who have items out, to show a list of addresses and city/state/zip
77. Select patrons with a certain patron type for duedate reminder notices which are worded different from faculty notices.
78. Printout of any patron by ID with listing of material out, overdue, and on hold/recall.
79. A list of all patrons with invalid phone numbers, e.g., not fitting a pattern of NNN-NNN-NNNN or (NNN) NNN-NNNN
80. A list of all holdings sorted by agency, by collection code, by call number, of a certain status, say, Missing, or Missing Inventory
81. A list of all patrons who have had material assessed as lost in the last 12 months, regardless of whether or not they have paid for the material
82. Faculty notices sorted by agency
83. Graduate notices sorted by zip code
84. USD 250 notices sorted by homeroom
85. A shelflist report of overdue items printed to notices, listed by library by collection code by call number to correspond as a shelflist search list for the batch overdues run the same day.
86. "Yesterday's" shelflist report from yesterday's overdues.
87. A list of any patron owing more than \$10 in fines, fees, and lost charges, with an itemized list by title and barcode as to what the transaction represents.
88. A list of invalid patron IDs matching certain patterns for certain agencies.
89. A report of patron types, # of types on the system
90. A report of patron types by agency showing which agencies are using incorrect patron types
91. A report by patron ID showing records where the patron alternate ID number does not match the @ID of the record
92. A report of all patrons and total amount due, duedate, etc. based on assignment of a block message for "SETOFF"
93. A report of all patrons whose patron types do not match their statistical codes
94. An accounting report of all financial transactions by workstation or user name
95. An accounting report of all financial transactions assessed against a single patron's record
96. A trace list of all items temporarily misplaced.
97. A list of all items claimed returned by patron, name, ID number.



98. A count of patrons by zip code or voting district
99. A report showing all pamphlet collection codes which have a status of “in processing”
100. A count of all SSNs on the system and a list of all SSNs which have more than one patron ID key attached to them.

**General / Ancillary products**

101. Explain if/how the system works with:
  - a. Backup Circulation
  - b. Receipt printers
  - c. Self Checkout
  - d. Debt Collection and Recovery agencies

**Backup Circulation**

102. Check out items (using a scanner) to two patrons and renew items for one using the offline backup circulation system.
103. Check in an item on which a request had been previously placed.
104. Upload those items to the main host and show the new statuses.
105. Run a report showing the backup transactions. (Provide a printed sample if this cannot be demonstrated live.)