



USER DOCUMENTATION

Remote Storage Setup and Management

Ex Libris

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Remote Storage - Background

Remote Storage (RS) refers to a collection of material that is shelved outside of the library. The RS does not have public access. When the patron finds the desired item in the Web OPAC, it is immediately obvious that the material is located in the RS. The end user is able to register a request for RS material and be informed as to when it is expected to be available for him. When an RS item is delivered to the library, it is put on hold for the patron who requested it, and loaned to him when he comes to pick it up. When the item is returned to the library, it is checked in and the patron is credited with its return, but the item itself remains in transit to the RS until the RS informs the library that it has reached its destination.

An item that is placed in the RS retains its original loan status, and is loaned accordingly.

The Remote Storage features do **not** deal with the management of the facility itself, and the setup assumes that the RS uses the item barcode for communication with the library (requests and returns).

Scenario

- The patron searches the Web OPAC and finds an item which is registered as shelved in the RS and not currently on loan.
- The patron places a request for the item.
- The patron is informed that the request has been placed, and that the item is expected to be available for him at XXX library within ZZZ time.
- Periodically, a file of requests is prepared for transfer to the RS.
- The RS sends the items to the pickup library.
- [The patron is informed that the item is now available for pickup. Optional.]
- The item is loaned to the patron.
- The patron returns the item.
- If there is a request for the item, the next patron is informed and the item is put aside for him, etc.
- If there is no additional request for the item, the return transaction is treated as a transfer return. The patron is credited, but the item is “loaned” to the RS.
- The RS sends a list of barcodes to the library for items that have arrived back at the RS. Reading in the barcodes completes the return transaction and the item is no longer considered “in transit”.

Elements and Setup for RS

Items (Z30)

The basic setup required in order for the system to work with items within the context of a Remote Storage is that the item be assigned an “RS” code in the RS ID field, and an “RS” processing status, in the processing status field.

RS ID Field (Z30_DEPOSITORY_ID)

In addition to the item sublibrary, collection and call number fields, the item record has a field (Z30_DEPOSITORY_ID), which is used to identify the RS where the item is located. The presence of a code in this field indicates that the item is held in Remote Storage. This field **must** contain data in order for the RS features to be active for the item. The field acts as a pseudo-sublibrary, and the code is used as a sublibrary group code in tab17 (library open hours).

The Z30_DEPOSITORY_ID field can be updated in several different ways:

- Update the field in the Item Record window.
- Update a group of items using Global Update on the Items List window.
- Update multiple items by using the Items module's menu entry Utilities/ Item Process Status, and wand the barcodes.
- Update multiple items by using the Circulation module's menu entry Items/Change Item Information, and wand the barcodes.
- Update an input file of item records, using the Update Item Records (p_manage_62) service.

Processing Status Field (Z30_ITEM_PROCESS_STATUS)

In addition to the Z30_DEPOSITORY_ID field, RS items should be assigned a special processing status.

The processing status **must** be used in:

- tab15 (item statuses) in order to define column 8. Column 8 should be set to C (the item can be always be requested and there is no availability check because hold requests are always allowed).
- tab39 (hold request daemon configuration) in order to define the printer ID and format for the call slips that are used for creating the file of requests from the RS (the file is created using the Depository Export (cir-18) service).

The processing status **can** be used in:

- tab37 (pickup sublibraries that are allowed for hold request) to define the pickup sublibraries allowed for RS items
- tab42 (change of item process status, according to processing action) to define setting the processing status according to action code DP. Action code DP in column 3 will trigger an update of the processing status, if the item has a Z30_DEPOSITORY_ID.
- tab14 (reshelving time) to define a time lapse for the reshelving message in the Web OPAC. The reshelving message is in effect after the item has been reported as received in the RS.

Subscriptions (Z16)

The Subscription record has a Z16_DEPOSITORY_ID field. When filled in, its value serves as the default for the Depository ID in item records created through Serials control.

Patron ID

The library must create a Patron record (Z303 and Z305) with an ID that is the same as the RS code. This patron record is used for “transfer” return: when a loaned item is returned, it is actually loaned to the RS, and therefore is “in transit” until it has been reported as returned to the RS.

Expected Delivery Time

When the patron places a request for an RS item in the WEB OPAC, he is informed when the requested item is expected to be available. This time lapse is dependent on the following:

- tab_hold_request, check procedure "v": if the item belongs to a depository and it is currently available, the expected delivery time is calculated using tab24 + tab17.
- tab24 defines, per pickup sublibrary, the maximum time lapse from request to delivery, and the specific delivery times.
- tab17 defines library closing hours, for both the RS and the sublibrary, to determine that both the RS and the sublibrary are open at the relevant time. If either is not open, the expected delivery time is set according to the next available time. If end-of-day is reached, the next time is the first time in the next day. This new time is rechecked against tab17, etc. Thus, if the calculated delivery time is past the library closing time, the system sets the expected delivery time to the next day.
- The expected delivery time is displayed to the patron in the WEB OPAC as a message, in place of the "Your place in queue" message. The text for the message is defined in line 6003 of the /alephe/error_<lng>/check_hold_request table.

Requests from the RS

Requests for material are sent to the RS at set times.

The ue_06 daemon detects RS requests, according to the tab39 setup; slip format “00” is used in order to create a “slip” that includes only the item barcode. The Depository Export (cir-18) batch service prepares the file of requests for the RS (see the Services section below).

Loan

The item is loaned to the patron, using the item loan status.

Return

When an item with a Z30_DEPOSITORY_ID code is returned, if there are no waiting requests, the item is automatically loaned to a user ID that is the same as the Z30_DEPOSITORY_ID code. This causes the item to appear in the Web OPAC and the GUI modules as an item "in transit".

Return from “In Transit”

The RS sends back a file of barcode numbers in order to report returns to the RS. Using the Depository Import (cir-03) service deletes the “loan” thereby removing the “In transit” status.

Interim Requests

If a loaned RS item is requested by another patron, it is processed in the same manner as a regular item: when the item is returned a message is displayed informing the operator that it is requested. The item is dealt with in the same manner as any requested item.

If the RS item is requested while it is “In transit”, the request is not activated until the “in transit” status is removed.

Services

There are two batch services which support the RS functionality:

Depository Export (cir-18)

This service builds an export file of requests for material in the RS. The service picks up the requests file that was created by ue_06, in order to ftp it to the depository. The ue_06 print format should be set to '00' in order that the file contain barcodes only. The service closes the request file, and a new request file will automatically be started.

Depository Import (cir-03)

When an item arrives back at the RS, the RS writes the Z30_BARCODE in a file. The service accepts an input file of barcodes, and performs a return (check-in). The Z36 loan to the RS (created when the item was returned) is removed, thereby removing the item's "In transit" status. The system checks for matching Z37 hold requests with status "W". If found, the Z37-STATUS is changed from "W" to "A", and the Z37-PRINT-STATUS is changed from "P" to blank. This is done in order that the ue_06 requests daemon will pick up the request.

Summary of Tables for RS Setup

- **tab24** is a table used only for RS, which defines the maximum time required for delivery of items from the RS to the pickup sublibrary.
- Processing status column in **tab37** (pickup library setup) enables definition of the pickup sublibraries for RS items.
- Processing status column in **tab39** (call slips daemon setup) enables separate definitions for requests for items in RS.
- Processing status can be used in **tab14** (reshelving time) for RS items.

- Processing status in **tab42** (update item process status) is used for updating item process status.

ITEM ##### DP DP ##

- In **tab17** (library open hours), the RS code functions like a sublibrary, and must be defined.
- In **tab15.lng** (item status), the RS processing status code must be added, with column 8 set to “C”:

15A ## DP L Depository Y Y C Y Y Y Y Y

- Action 57 in **tab_events.lng** is used for “In transit” loan of material being returned to RS:

57 Y Depository Loan

- In 15.2 ITEM-DEPOSITORY-ID is defined in **/tab/tab_item_display.lng**:

ITEM-DEPOSITORY-ID L Depository ID:

In 16 this is defined in the library’s **pc_display_<lng>/item expand** file.

- ITEM-DEPOSITORY-ID is defined in **/tab/pc_tab_exp_field.lng** for the drop-down list of values for the RS code.

ITEM-PROCESS-STATUS	L Depository	DP
ITEM-DEPOSITORY-ID	L No Depository	
ITEM-DEPOSITORY-ID	L Depository 1	DP1
ITEM-DEPOSITORY-ID	L Depository 2	DPHVD
P-RET-ADM-01	L Depository ID	DEPOS