

ALL SCRIPTS AND NEEDS:

NEEDS:

Journal bib record
Patron record
Bib record not checked in to be checked out
Item with damaged barcode
Journal bib record with j/copy record
Current journal bib record
Journal with copy record with routing slip
Journal bib record with routing slip
Journal bib record without copy record
Journal with copy record
Current journal (newspaper) bib
Patron 1 not registered
Item 2: checked out to patron 3: overdue
Item 8: booked for patron 3
Bib record for juv book with 7 day check out; patron record for another library
Journal bib (social sciences) with 500 holdings
Monographic bib
journal bib record with copy record, holdings record and multiple barcodes
3 similar titled records
bib record with "Die" as first word, bib record with other foreign article
10 records, author or subject or title "Martin Luther"
Bib with misspelling
bib record with barcodes for 9 volumes
2 bib records with holdings
Bib record with diacritics in title

Acquisitions specific:

Need 5-10 monographic records, one with at least 3 volumes
Need 5-10 serial records, two with similar names(for title change)
Need 3-5 vendor records, one each set up to ftp, one to receive printed/faxed purchase orders, and one to receive orders by phone, with various discounts
Need at least 2 separate funds for firm orders and for standing orders with flags set for max order amount, nearing budget, and exceeding budget
Need separate fund for continuation orders (if applicable)
Need deposit account

CIRC

Find patron in system
Modify patron record by adding a barcode.
Demonstrate how to pay/waive/itemize and override a fine
Demonstrate how to place a fine on patron record
Demonstrate how to charge for a book reported lost
Transfer a current fine on patron's record to the universities Banner system
Demonstrate how to generate overdue notices and shelf list
Demonstrate how to generate a batch or single overdue notice
Demonstrate how to cancel/interrupt the process while list is being generated
Can your system generate notices by e-mail?
Demonstrate how to process day end
Run day end for two days previous
Demonstrate how to generate a student fines list for past 3-12 months
Create list in the following order: SSN, Name, Amount, Due Date, Barcode, and Title
Demonstrate how system would generate patron records from PLU Banner system
Demonstrate how to check out materials that are damaged, or have a lost or missing status

Demonstrate how to check out a book that isn't in system
Demonstrate how to check out a book that was not checked in; obtain and clear any fines on the last patron that had the book
Demonstrate to check out a book with damaged barcode
Demonstrate how to change item variables to missing, lost, renew, change date, bindery, etc.
Demonstrate how to check out materials that are damaged, or have a lost or missing status.
Demonstrate how to check out a book that isn't in the system.
Demonstrate how to check out a book that was not checked in , obtain and clear any fines from last patron checkout
Demonstrate how to check out a book with damaged barcode.
Patron 1 wants to check out items 2 and 8
Add a Block/Special Message to Patron Record: 1)Find patron in system 2)Add a block/special message (need to update address and phone number, lost copycard or ID is being held at the circulation desk, patron must bring ID to checkout) to patron record
Read a Block/Special Message: 1)Demonstrate how to find and read a patron block/special message 2) Delete a block/special message 3) Save a block/special message

RESERVE

Place three items on Reserve with default checkout time of 2 hours: 1) professor is not in database; create a professor authority, 2) course is not in database; create a course authority, WRIT 101 Sec. 13: Inquiry Seminar: Writing Topic: The Art and Science of Caring
Place four items on reserve for three professors team teaching the same course: 1) Items are all personal copies, 2) Two items will check out for 2 hours, 3) Two items will check out for 3 days
Place a personally owned book on reserve which is exactly the same as a PLU owned library book (attach a barcode to a title already in database).
Place a personally owned book on reserve which is exactly the same as a PLU owned library book except for a different copyright date
Demonstrate creating a short bib record with a very long title that has a typographical error somewhere in the middle. Correct the error.
Demonstrate correcting a typographical error in a short bib record with a very long title which has already been filed.
Place multiple copies of the same title on reserve and label each as c.01, c.02, etc.

SERIALS--Copy Record

Create a new Copy Record
Demonstrate how to revise a current Copy Record.
Delete a current Copy Record
Create a Copy Record for a 2nd issues for the same magazine.
Create a process for claiming journals
Show how a claim is noted after its sent
Show how we can cancel claims and delete a claiming process for certain journals and newspapers
Show a process for closing a copy record
Create a binding process for journals ready to be bound
Check in a new journal 1) how will it be noted if notes to be bound, routed, or any other info referring to the processing of this journal (shelving instructions) 2) show how latest issue is displayed
Check in a supplement or special issue
Check in an index
Check in microfilm
Check in a second paper copy
Add new staff or department to routing list
Add a new journal to the routing list
Delete routing notation, delete journal from routing lists, delete names from routing list
Show procedure and information notification when routing a journal, and after it is returned
Demonstrate a method used for processing a new title into the serials module
Create a publication pattern for a journal using weekly, monthly, quarterly with seasons and with months, biweekly, annual, bimonthly, semi-annual.

Create an irregular pub patter
Create a 2nd pub pattern for the same journal
Create a process for claiming journals; show how a claim is noted after it is sent; cancel claim, delete a claiming process

Search for ILL

Find v. 498, which is checked out. who has it?
Find volume 95 no. 2 of journal of social sciences.
Checked in status and call number.
Add fast bib and attach 50 holdings
Find journal volume checked out, who has it.
Find journal with holdings sept 1995 (month and year)
Find patron name and phone number.
Change due date of journal / juv to 28 days
Check out to other library
Search by barcode/title/author/

CATALOGING

Demonstrate loading MARC records including an overlay of several existing MARC records
Create a MARC record
Create a Non-MARC record for: a monographic title, a serial title, and a video or other non-print medium; display each
Merge (3) similar records
Search by Title, demonstrate use of 245 indicators to “skip” foreign articles
Search for a bib record by fields other than title: e.g. issn, isbn, call #, bib control #, subject keyword & authority, author
Sort a list of records
Demonstrate correcting a misspelling in a MARC record, in an uncontrolled field, in an authority-controlled field
Re-Index a bib record
Set session defaults for barcoding (Itype, etc.)
Add a barcode
Delete a barcode
Transfer a single barcode from one bib record to another
Change a status, Itype or other code(s) for a barcode record
Create a saved list of barcodes (not bib #s)
Move a saved list of barcodes to another bib record
Delete a saved list of barcodes
Change a status (e.g. check-in) for a saved list of barcodes
Change an item type or code for a saved list of barcodes
Print a label for spine including pocket/card labels
Print a batch of labels for spine/pocket/card
Print a batch of labels for a saved list of barcodes (if different)
Create a note which displays at check-in. Show display
Create a note which displays at check-out. Show display
Search by exact title for a record with diacritics. Show display
Demonstrate deleting a serials record with holdings attached
Search and sort a list of titles for Martin Luther
Create a name authority (author) for Jebidiah Smith
Create a name authority (subject) for Jebidiah Smith
Add a barcode to existing record for v.10

Scripting for Acquisitions

Create order - firm

- create order for v.3 only for a monograph with multiple volumes
- create a 2nd order for v.4 only for the same monographic title
- split the fund charged between 2 departments, 60%/40%
- add order comments for vendor

- attach the order to an existing bib
- create an order without existing bib record using different ship to address
- have two order records printed to same vendor
- have two order records ftp to a vendor
- have two records not requiring ftp or printing
- process order for ftp to vendor
- ftp order to vendor
- receive acknowledgement from vendor
- post acknowledgement to order history
- add separate accounting field (able to list, sort, total) ex. 4122-7135, 7512
- exceed flagged amount for order
- order comes with flagged amount of budget for account
- order amount exceeds fund budget
- create a prepaid order for printing
- print single workslip
- print workslips in a batch

Create order – standing order

- create standing order
- set renewal date
- attach order to more than one bib
- ex. membership comes with 3 titles

Create orders – other

- create a continuation order
- create a standing order (?) that uses a deposit account
- create a standing order for a free/gift item

Changes to open (live) order

- change purchase order number
- change vendor
- change fund charged
- change unit price
- change process type from ftp to print
- reprocess order and print
- add comments
- append to comments
- remove comments
- change title word misspelling
- cancel firm order with comments
- reopen cancelled firm order
- cancel standing order with comments
- reopen cancelled standing order
- move standing order to new bib record (title change)
- renew standing order
- renew batch of standing orders (ex. by vendor/fund)

• Invoicing

- invoice a firm order with different price from order
- make a supplemental payment to a closed invoice
- apply a credit to a closed order
- reverse an invoice (or reopen to correct?)
- pay an invoice with multiple orders. Demonstrate use of “prorating”
- invoice a standing order for the first time and identify item being invoiced
- invoice a standing after it has been invoiced at least once (renewal needed?)
- invoice a deposit order account
- invoice a continuation order
- invoice a miscellaneous item (no order)
- invoice a prepaid order (here or in receiving?)

- invoice an item but do not receive it (firm order)
- invoice an item but do not receive it (standing order)
- invoice a standing order where multiple volumes of same title are received
- list open invoices
- Order – history
 - review actions/comments on order
 - review invoices posted to order
- Vendor records
 - add a vendor record
 - change a vendor record name, address
 - edit vendor record to add/change email address
 - add discount
- Receiving
 - receive a prepaid order
 - receive an already invoiced standing order
 - receive and order without an invoice
- Claiming
 - create list of claims (two different vendors)
 - remove some items from list
 - force claim on an order
 - print claims by vendor
 - prepare (?) claim list for ftp to vendor
 - ftp claim list to vendor
 - list orders that have been claimed and are still open
- Search/view from acquisition module
 - search title
 - search by order number
 - view bib record
 - view subscription summary on bib
 - view holdings on bib record
 - view order history on bib
 - view order/history/invoice/bib/holdings from one search
 - find date of invoice in order history
 - find date invoice paid on system in order history
 - search for paid invoice by invoice number
- Selection list
 - demonstration of usage
 - Would like to see
 - one order tied to multiple bib records (ex membership with multiple titles)
 - holdings record from acquisition module
 - paying of standing order without renewing each time
 - list of orders paid and not received
 - list of orders received and not paid
- online invoicing

Media Module Script

Patron Records

<i>Patron</i>	<i>Patron Record Exists?</i>	<i>Media Privileges?</i>	<i>Expired?</i>
Patron A	Yes	Yes	No
Patron B	No	Yes	No
Patron C	Yes	No	No
Patron D	Yes	Yes	Yes

Media Item Records

<i>Item</i>	<i>Media Item</i>	<i>Checked Out</i>	<i>Booked</i>	<i>Reserve Item</i>	<i>Overdue?</i>
Item A1	Yes	No	No	No	No
Item A2	Yes	No	No	No	No
Item A3	Yes	No	No	No	No
Item A4	Yes	No	No	No	No
Item B	No	No	No	No	Yes
Item C	Yes	No	No	No	No
Item D	No	No	No	Yes	No
Item E	Yes	Yes	No	No	Yes
Item F	Yes	No	No	No	No
Item G	Yes	No	No	No	No

Record Management and Organization

Create a Media Equipment record for Item A; show what fields are available. Add copies A2, A3, and A4.

Create a Media Room record; show what fields are available.

Are equipment types authority controlled? Please explain why or why not?

How are patron media privileges determined? Please explain.

How are different patron loan times determined? Please explain.

Group Items F and G into Set 1.

Reservation Tasks with Different Patrons

Make a 24 hour reservation (starting now) for Patron A to use Item A1 and Set 1.

Make a 24 hour reservation (starting now) for Patron B (not registered yet, but with a valid ID card) to use Item A1. If not available choose item A2.

Make a 24 hour reservation (starting now) for Patron C to use Item A3.

Make a 24 hour reservation (starting now) for Patron D to use Item A4.

Check out Item A1, A3, Item E, and Set 1, and to Patron A.

Check out Item A4 to Patron C. Can you override privilege and other reservation?

Check out Item D to Patron A.

Make a recurrent reservation for Patron A and Set 1 for every Wednesday, 1:00-2:50 for four weeks.

Reservation Modifications

Move items on Patron A's reservation to a reservation for Patron B.

Make a 24 hour reservation (starting now) for Patron B (not registered yet, but with a valid ID card) to use Item A1. If not available choose item A2.

Change reservation for Patron A to add 4 hours.

Change recurrent reservations for Patron A and Set 1 for every Wednesday, 1:00-2:50 to Every Thursday.

Item A2 has a damaged barcode; replace it with a new barcode number.

Item A3 needs to go in for repair. Replace it with Item A4 in its reservations

Reservation/Item Status Viewing

View Patron B's reservation.

View Patron A's reservation.

View all reservations for today, for this month.

View today's reservation status for Items A1-A4.

View items checked out to Patron A.

Check in Item A1 and Set 1.

View Patron A's reservation.

View all reservations for today, for this month.

Find out who last checked out Item A1 and Set 1.

View Patron A's history of reservations

Media Reserves Scripts
DRAFT 6-14-2000

Patron Records

Patron	Patron Record Exists?	Media Privileges?	Expired?
Faculty A	Yes	Yes	No
Faculty B	No	Yes	No
Faculty C	Yes	Yes	Yes

Media Item Records

Item	Media Owned?	Checked Out?	Booked?	Overdue?	Presently on Semester Reserves?
A1	Yes	Yes	Yes	Yes	No
A2	Yes	No	Yes	No	No
A3	Yes	Yes	No	No	No
A4	Yes	Yes	Yes	No	Yes
A5	Yes	Yes	Yes	Yes	Yes
A6	Yes	No	Yes	No	Yes
A7	Yes	No	No	No	No
B	No	No	No	No	No
C	No	Yes	Yes	No	Yes

Semester Long Reservations

Create a reservation for Faculty A with Item A1 and place the item on 24-hour reserve. Who has the item booked and when is it booked? Who has the item presently checked out? Add Items A2 through A7 to the reservation. What other professor/class has item A4 on reserve?

Create a reservation for Faculty A with Items B and C and place the items on 2-hour reserve.

Create reservations for Faculty A and C for Item A5 and place the item on 2-hour reserve.

Display the record screen for Item A5. Does it show that item is checked out to two separate faculty members?

Variable End Date Reservations

Create a 2-week reservation for Faculty A with Items A7 and B. Place the items on 24-hour reserve.

Create a 2-day reservation for Faculty B with items B and C and place the items on 2-hour reserve. Once this is done, modify the reservation to be a 6-day reservation and not a 2-day reservation.

Cataloging

Change the I-Type code for Item A1 to a different code.