**Retrieval Request for Sierra Barcoded Items (RR in current system)**

RR plus a Sierra barcode or an inventory number for a record that has an associated Sierra item record would bring up a screen displaying:

* Inventory number
* Sierra Barcode number
* Owning library/agency of the item being requested
* Blank fields for input of the following data:
* Type of retrieval – one if two options:

1. Permanent retrieval (can only be done by someone with authorization for the owning unit.)
2. Temporary retrieval

* Unit charge ID number – require, wanded or ten-keyed in by operator (options to add new ones, Discuss with Nathan/Chrystal)
* Send item to attention of. For entering the name of the requesting person if this is a request for a permanent retrieval or temporary retrieval for use in a unit. (if an item is being retrieved for a borrower, the inventory system will fill the requester name field with “hold request” on the inventory record.

The systems audits for:

* Entry of a reserve unit location as the unit charge ID
  + Requestor is informed that permanent retrieval must be performed by the owning unit, system does not process the request
* Current values for missing or requested for permanent retrieval in the last-activity code of the inventory record or deletion switch set
  + A message is produced and the request is not processed.
* Entry of request for permanent retrieval, or presence of restricted access code on the inventory record.
  + If the requestor’s authorization and the owning unit on the inventory record do not match, the system provides a message and does not process the request.
* Current value of checked out in the last activity-code of the inventory record, and status of checked out on the item record, or presence of active hold for item,
  + If the item is checked out to a borrower or has a hold, and the request is for a temporary retrieval, a message is produced for the operator to place a recall in Sierra.
  + If the item is on its way back to the warehouse, a temporary retrieval request is processed as a 2nd request for retrieval
  + If the request is for a permanent retrieval and the item is charged to the owning unit, the status of the inventory record is changed to reflect permanent removal and no request is placed, if the item is charged to a non-owning unit, the request is placed,

If the request successfully passes these audits, the system sets the last-activity-code to reflect a request for temporary or permanent retrieval and to reflect whether the Inventory Record needs to appear on the next Item Retrievals – Picking List when it is produced. The system also places the current date in the Date of Last Check Out field and retains the requesting unit (3-character alpha from the requester’s authorization record), requester logon ID and department name/campus address in the inventory record. If the requested item was for circulation to a borrower, a Type 2 activity record for a hold is created in the ICS activity file. Also Nathan/Crystal Question.

**Retrieval Request for boxes- UTL**

RR plus an inventory number for a box of unitemized UTL materials (there will be a description but no agency item number in the inventory records and the owning unit would be the UTL or a UTL Unit, A&M, Law, HRC, General Libraries, Library Storage Facility. Or materials will have an agency item number with no description or box/volume/serial number. Owning units a topic for discussion with Nathan and Crystal on Friday.) brings up a screen displaying

* the inventory number,
* description,
* Box/volume/serial number
* owning library/agency of the item being requested
* Blank fields for the following data:
* Type of retrieval – check one of two options

1. Permanent retrieval (can only be done by someone with authorization for owning unit)
2. Temporary retrieval for use within a unit

* Send item to name/address – for entry of the name and address of the person to which the materials is to be sent.

The inventory system audits for:

1) Current values for missing or requested for permanent retrieval in the last-activity code of the inventory record or deletion switch set

* A message is produced and the request is not processed

1. Entry of request for permanent retrieval, or presence of restricted access code on the inventory record.

* If the requester’s authorization and the owning unit on the inventory record do not match, the system provides a message and does not process the request

1. Current value for checked out in the last-activity code of the inventory record

* If the request is for a temporary retrieval, a message is produced and the request is not processed.
* If the request is for a permanent retrieval and the item is checked out to the owning unit, the status of the inventory record is changed to reflect permanent removal and no request is placed. If the item is checked out to a non-owning unit, the request is placed.

If the request successfully passes these audits, the system sets the last-activity-code to reflect a request for temporary or permanent retrieval and to reflect whether the Inventory Record needs to appear on the next Item Retrievals – Picking List when it is produced. The system also places the current date in the Date of Last Check Out field and retains the requesting unit (3-character alpha from the requester’s authorization record), requester logon ID and department name/campus address in the inventory record.

**Retrieval Request – Outside Agencies**

Retrieval Request plus an inventory number or an agency item number for an item from an outside agency (the owning unit would be for an outside agency) would bring up a screen displaying the

* Inventory Number
* Agency Item Number
* Owning library/agency of the item being requested
* And blank fields for input of the following data:
* Type of retrieval – check on of two options

1. Permanent retrieval (can only be done by someone with authorization for owning unit)
2. Temporary retrieval - whether the item is to be used in-house or circulated to a borrower from the outside agency.

* Send item to name/address – for entry of the name and address of the person to which the materials is to be sent

The inventory systems audits for:

1. Current values for missing or requested for permanent retrieval in the last-activity code of the inventory record, or deletion switch set.

* A message is produced and the request is not processed.

1. Entry of request for permanent retrieval, or presence of restricted access code on the inventory record (all outside agency items should be marked restricted)

* If the requester’s authorization and the owning unit on the inventory record do not match, the system provides a message and does not process the request.

1. Current value for checked out in the last-activity code of the inventory record

* If the request is for temporary retrieval, a message is produced and the request is not processed
* If the request is for a permanent retrieval and the item is checked out to the owning unit, the status of the inventory record is changed to reflect permanent removal and no request is placed, if the item is checked out to a non-owning unit, the request is placed

If the request successfully passes these audits, the system sets the last-activity-cod to reflect a request for temporary or permanent retrieval and to reflect whether the inventory record needs to appear on the next Item Retrievals – Picking list when it is produced. The system also places the current date in the Date of Last Checkout field, and retains the requesting unit (3 character alpha from the requestor’s authorization record TOPIC FOR FRIDAY DISCUSSION), requestor logon ID and name/address in the Inventory record.

**Box record update (UB in current system)**

A box record display may be invoked by keying or wanding the container number with the UB Command to display Container records for input or editing of data:

* Restricted use code
* Media or format code
* Processing status code
* Size/type code
* Description
* Box/volume/serial number
* Owning Library
* Agency Item

All other fields are not updatable.

\* see Row/Ladder update below

**Inventory Record display and update (UR in current system)**

The operator may key or wand in the Inventory number or Sierra number or bar code number of outside agency with the UR command to display the inventory record for input or editing of data. Fields that may be edited are:

* Restricted use code (restricted use status man not be removed from outside agency records or from Barker materials)
* Description – Must be filled if a box. Must be blank if it is an individual item or has an agency Item Number
* Box/Vol/Serials number – Must be filled if a box. Must be blank if it is an individual item or has an agency Item Number
* Last activity code ~~(can only be updated with “M” for Item Not Found~~)
* Send item to attention of – this data originates on the Retrieval Request screen but can be updated here by staff if a mistake was made on input
* Requesting unit – originates from Retrieval Request screen

All other fields are not updatable.

**Tray Recorded Update (UT in current system)**

A tray record display could be invoked by keying or wanding the Container number with the UT Command to display the tray record for input or editing of data elements:

* Restricted Use code (restricted use may not be removed from outside agency records or from Center for American History materials)
* Media or format code
* Processing status code
* Size/type code
* Additional Items – ability for the operator to wand in pairs of additional inventory and item numbers from items to be added to a tray that could not be input on the initial accession screen. The system would perform all the same audits it performs on the accession screen. A tray verification screen would be invoked and the system would perform all the usual checks and procedures here. After verification, the system would open a Container Weight screen to update the weight of the tray which the operator would be required to acknowledge and approve. The system would subtract the old weight from the associated Row/Ladder/Shelf records. (Do we need to write something for R/L/S records.)
* All other fields are not updatable.

Location data (Row//Ladder/Shelf) in a tray record may also be changed via input of new location data into the portable reader and then uploaded. If location data is changed, the associated weight of the container would be deducted from the cumulative weight record for the shelf from which the container was removed and added to the new shelf to which the container was being added. If the weight on the new shelf exceeds the maximum threshold weight, a report would be produced.

**\* Row/Ladder/Shelf Updating. Topic of discussion with Nathan/Crystal on Friday**

Row/Ladder/Shelf – if location data is changed, the associated weight of the container would be deducted from the cumulative weight record for the shelf from which the container was removed and added to the new shelf to which the container was being added.

A message would be displayed reminding the operator to record the empty space on the old shelf from which the container was removed. If the weight on the new shelf exceeded the maximum allowed, an audit would be displayed and the operator would be required to press a PF key to acknowledge the message

Location data (row/ladder/shelf) in a box record may also be changed via input of new location data into the portable reader then uploaded to the mainframe.

**Weight Calculation**

We need the ability to have weights calculated for Ladder and Shelves and provide notification when weight limits are exceeded. Weight limits will vary between ladders and shelves in the three different units. The process must allow for additional Ladder/Shelf limitations as LSF adds additional units.