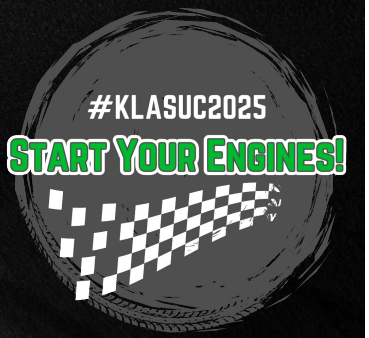
New Features for IRC

7.8.15 – 7.8.25

Nancy Honeycutt –
Manager, Customer Support
Keystone Systems

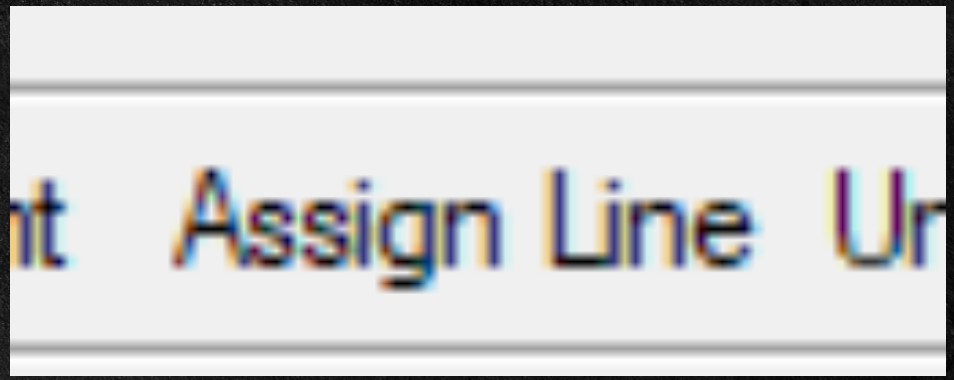


Agenda

- Materials Request
- Acquisitions
- Patron
- Circulation / Catalog
- WebOrder and other updates

Materials Request

- Assign the full quantity of consumables (making sure not to pull from deleted shelves or holdings)



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Materials Request - Emails

- New Options:
  - Tracking number
  - Reporting period

========== Forwarded message ==========
From: <no-reply@klas.com>
To: <Marion@klas.com>
Date: Tue, 04 Mar 2025 10:11:45 -0500
Subject: Order 250304-001 was added
========== Forwarded message ==========

Order 250304-001 was added for:
Teacher: OCSS - ORANGE COUNTY SCHOOLS
Region: T00296 - Linden Wright
Student ID:T00296

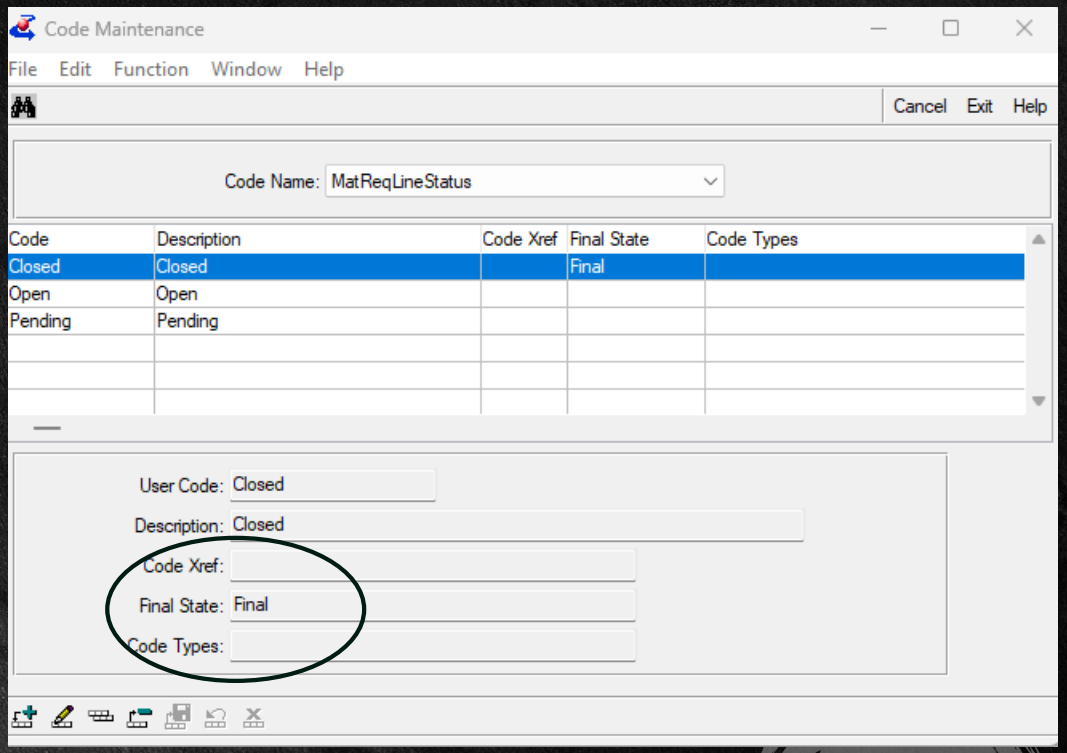
The following items are included in the order:
Line 1: Polly - TA02056
The following items are included in the order:
Line 2: Bold Line Notebook Paper: Loose Sheets: 0.5625 Inch Line Spacing - TA00220
The following items are included in the order:
Line 3: Green-Lined Writing Paper for Primary Students: 8.5 x 11 Inches, 0.4375 Inch Line Spacing, 3-Hole Punched - TA01221

This Order was added on 03/04/25 by KLAS.

Thank you.

Materials Request

- Temp Titles – ISBN corrections
- Set MR Header status based on line action



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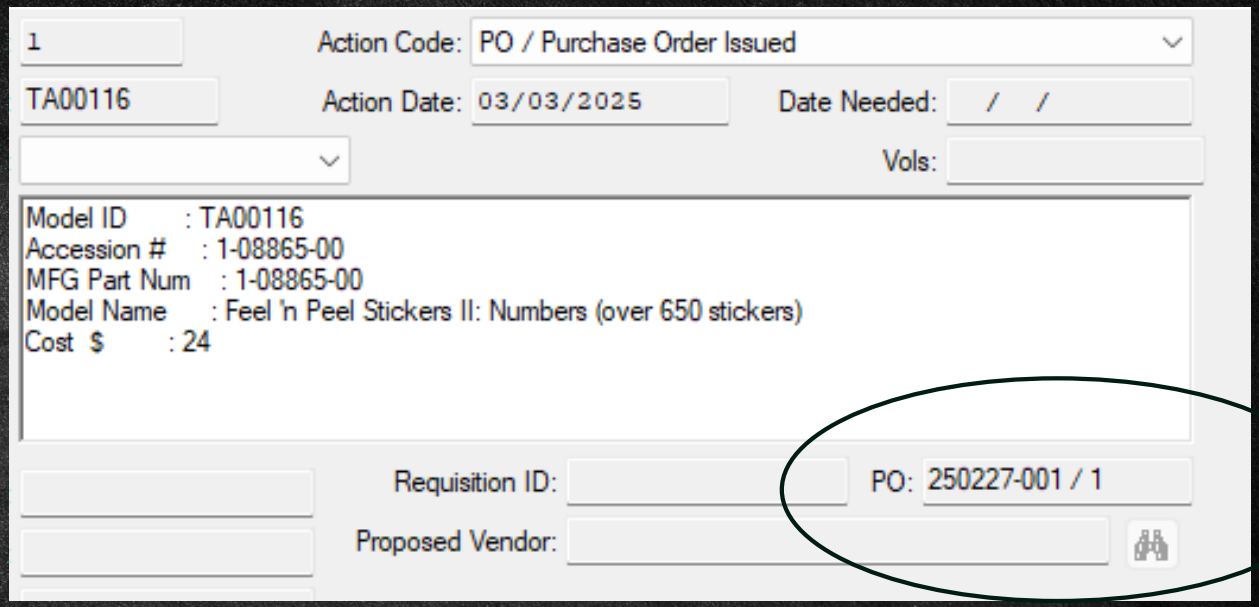
Mat Request / Acquisitions

- Stop a MR Line from being added to a second PO



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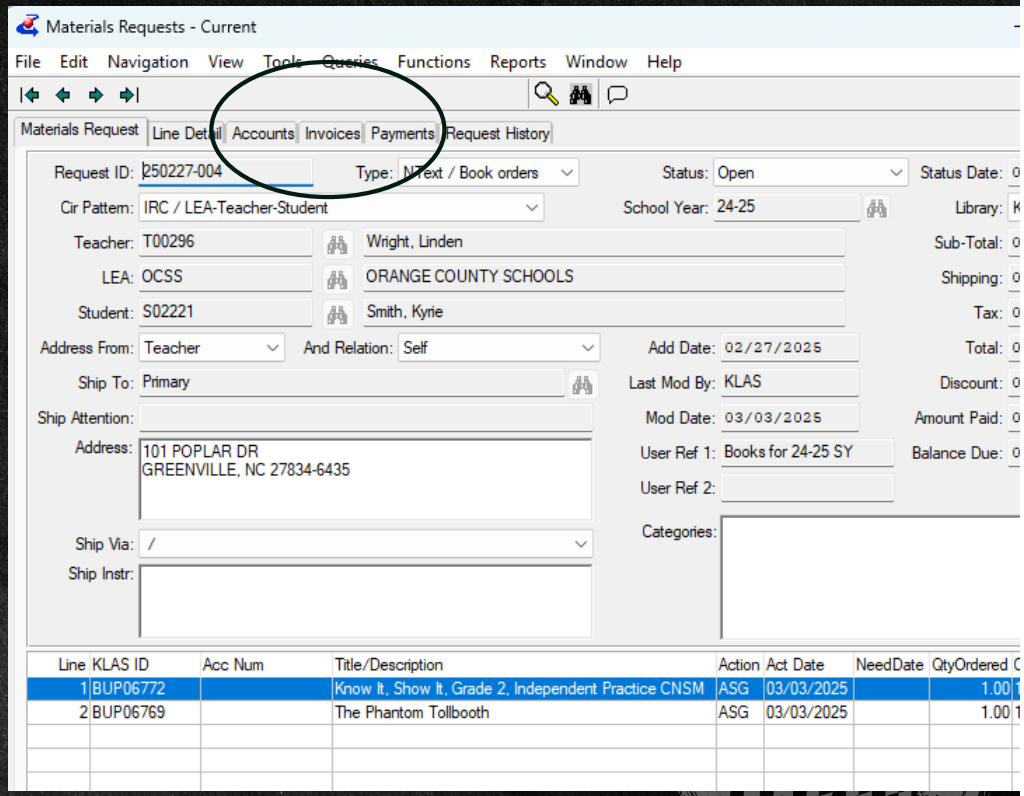
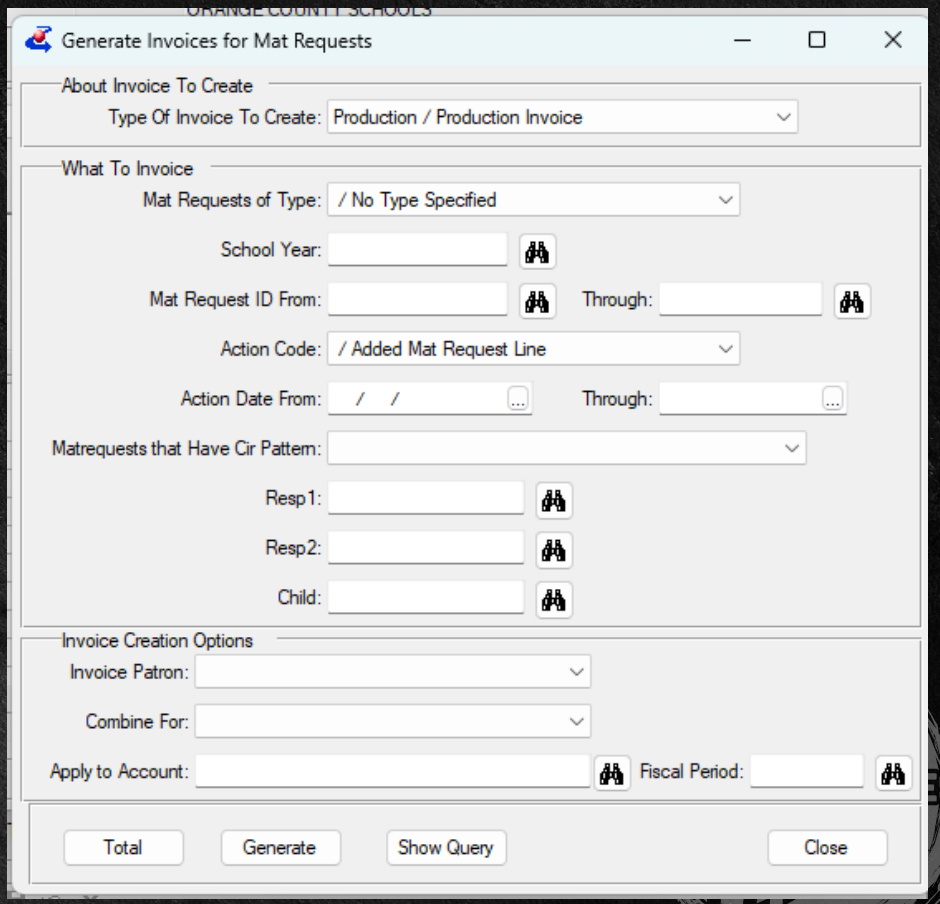
Mat Request - Invoices

- New Invoice function for Mat Requests
- New Invoice Tab
  - make sure F5 refresh works



Mat Request - Invoices

- New - Generate Invoice function
  - On Functions menu
  - Based on MR lines
- Set up Invoice Linetype crossref for pricing
  - Ask Keystone for assistance



Materials Request

- COMING SOON:
  - query on line type
  - key in Student IDs on the MR Header (instead of selecting from the Find)

Acquisitions

- Print invoice – include all fields on title record

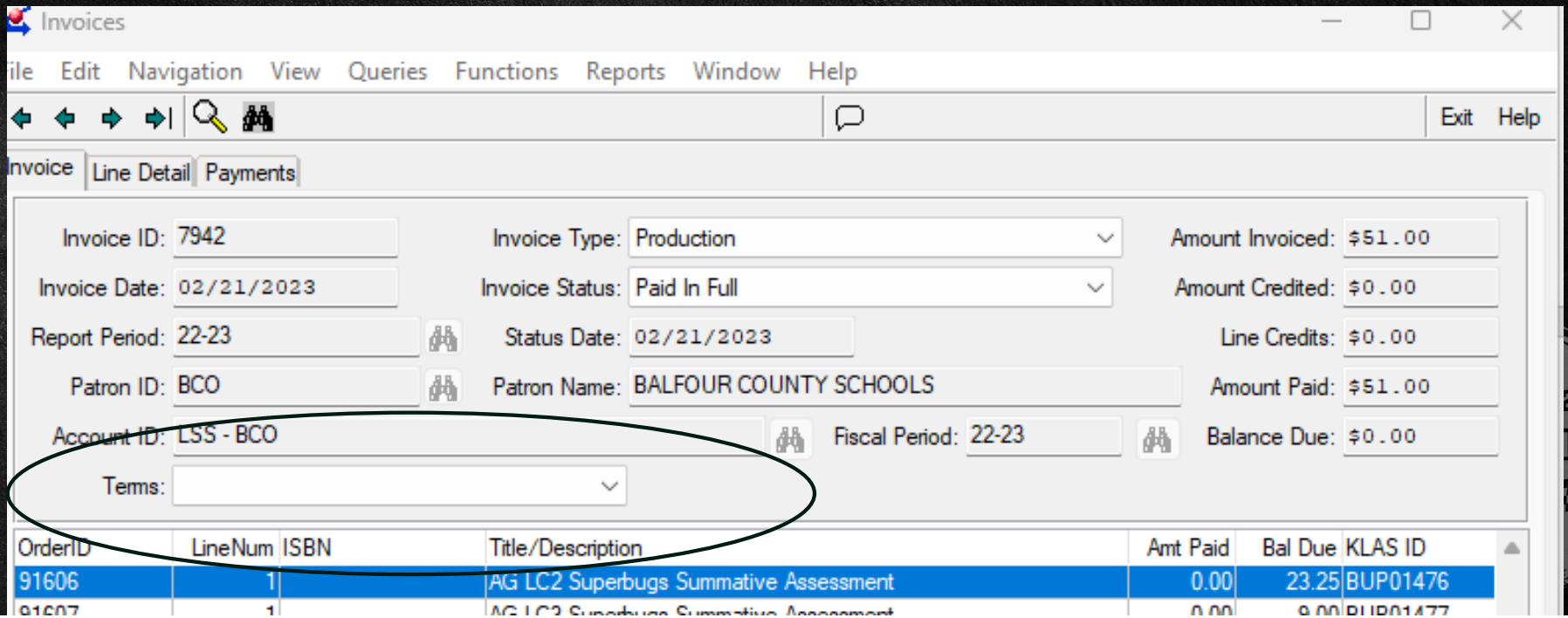
- COMING SOON
  Print order – tokens for Adding user, bibliographic info

Acquisitions / Mat Request

- Fixed issue with processing fee and how it gets put on the associated MR line
- Update order – prorate tax on completed MR lines
  or create newline with tax.

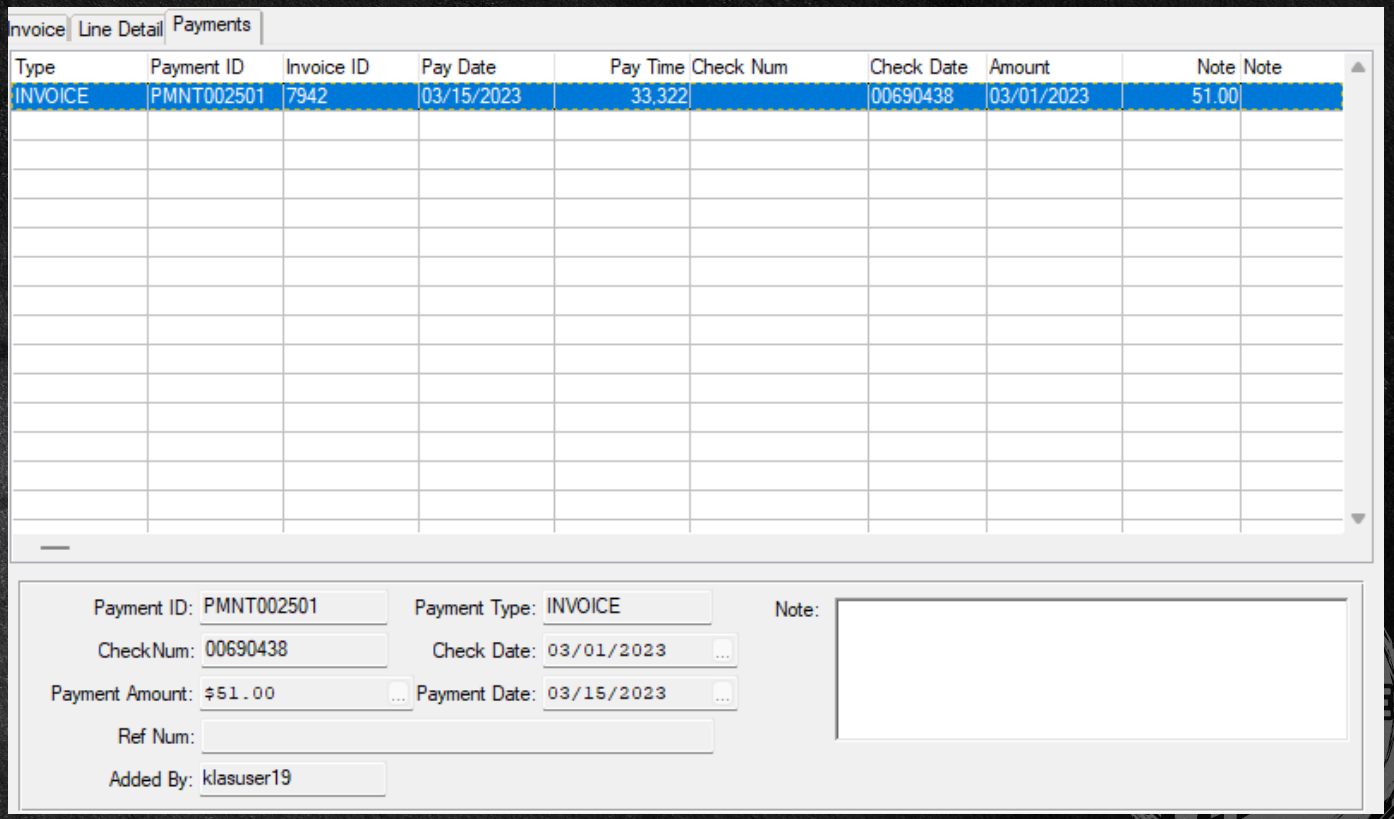
Acquisitions - Invoices

- Added Terms
- Corrected Tab order



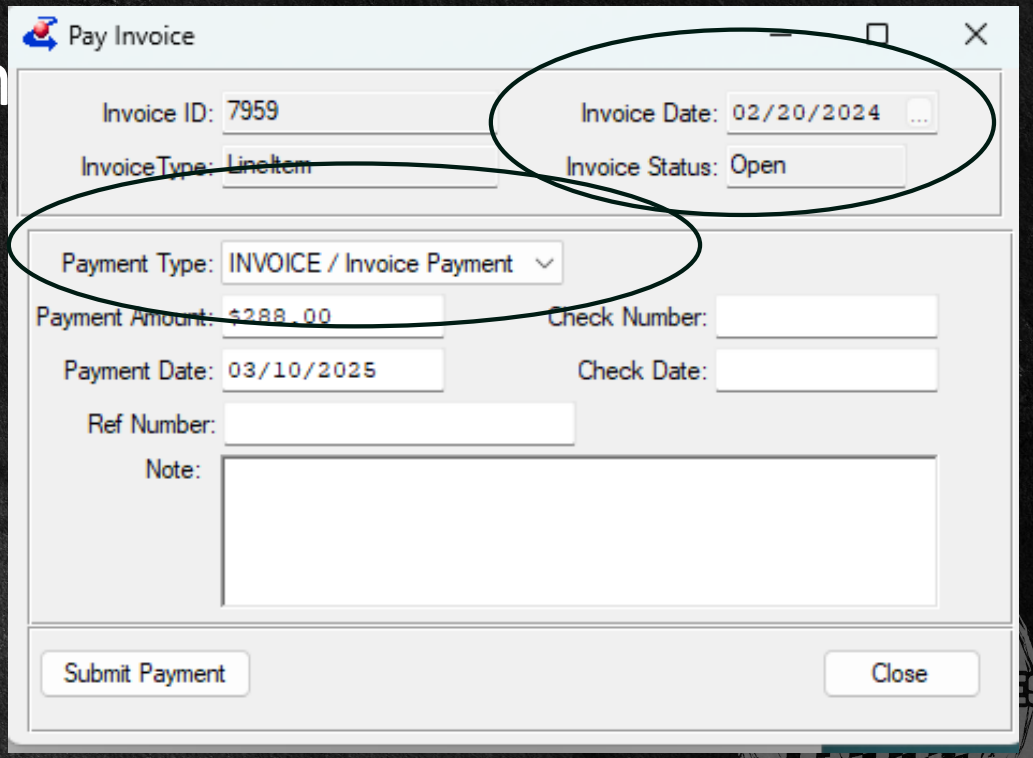
Acquisitions - Invoices

- Ability to Add / Modify/ Delete payments
- Payments get displayed



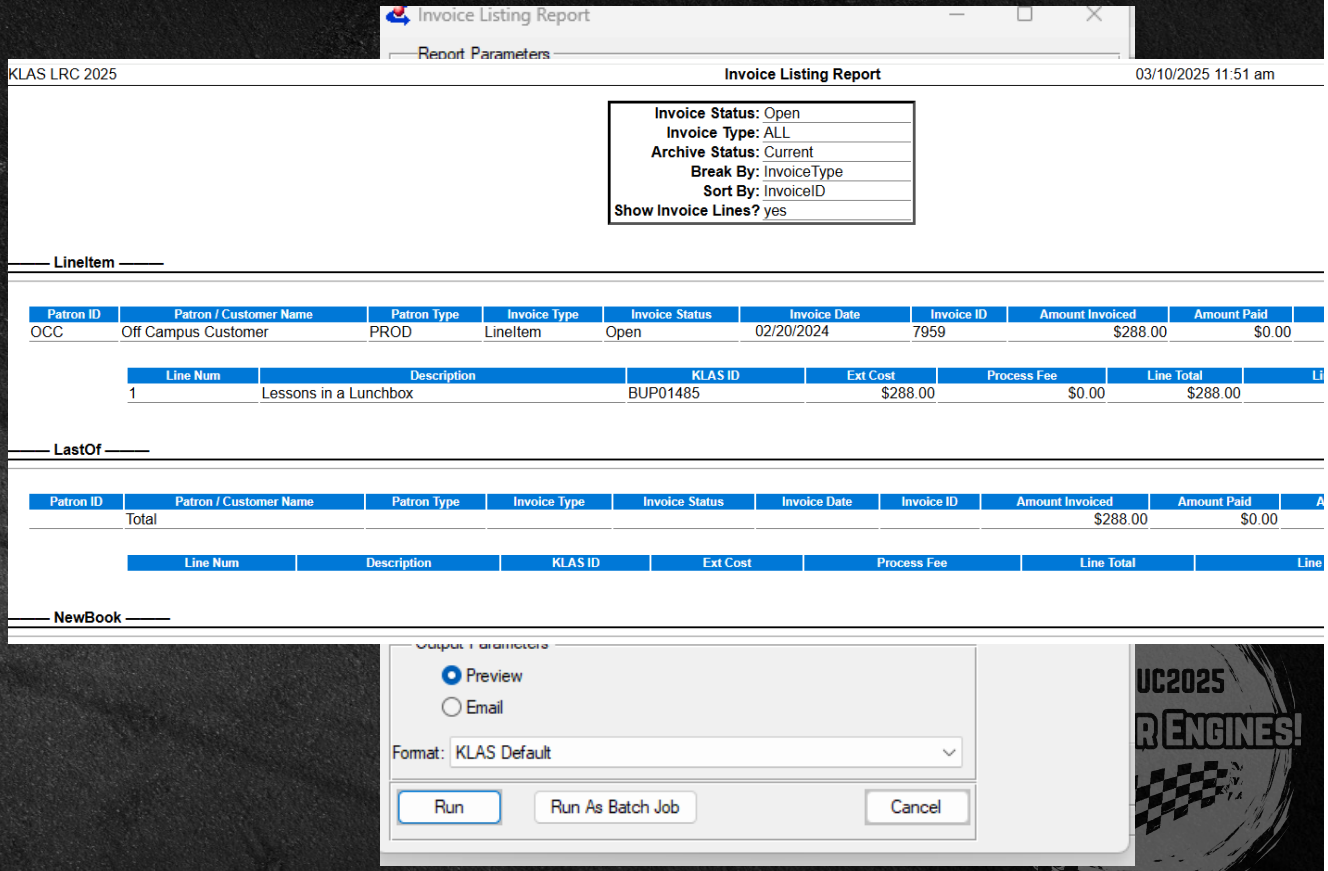
Acquisitions – Invoice Payments

- pay/credit invoice with various types
- validate payment dates



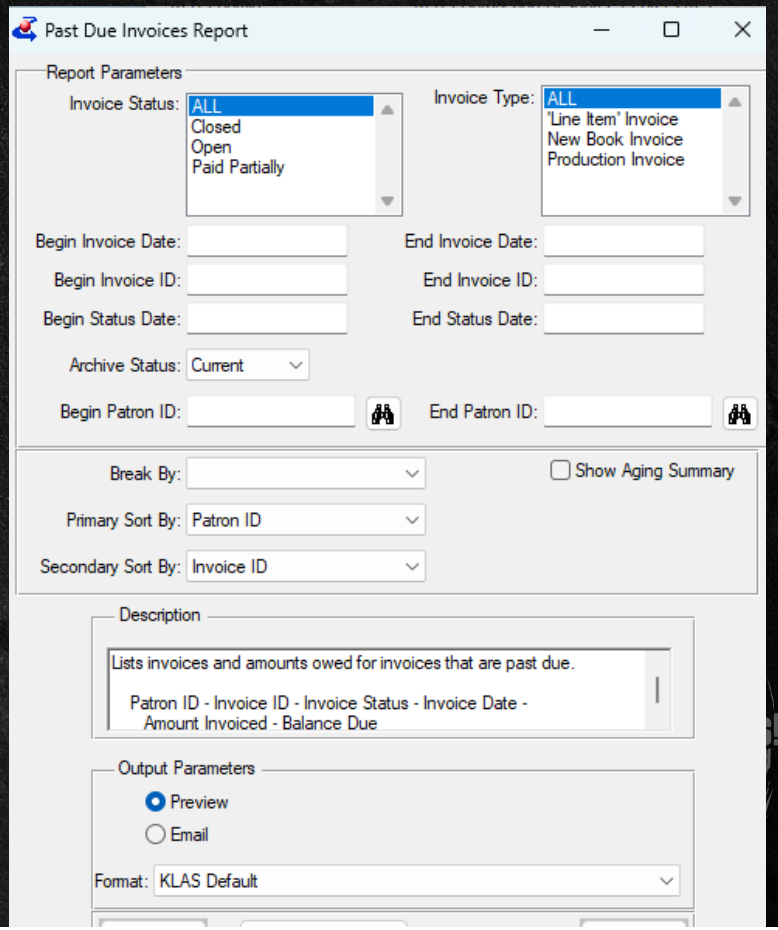
Acquisitions – Invoice Listing Report

- Includes:
  - Amt Paid
  - Amt Credit
  - Subtotal
  - Total row
  - Name formatting



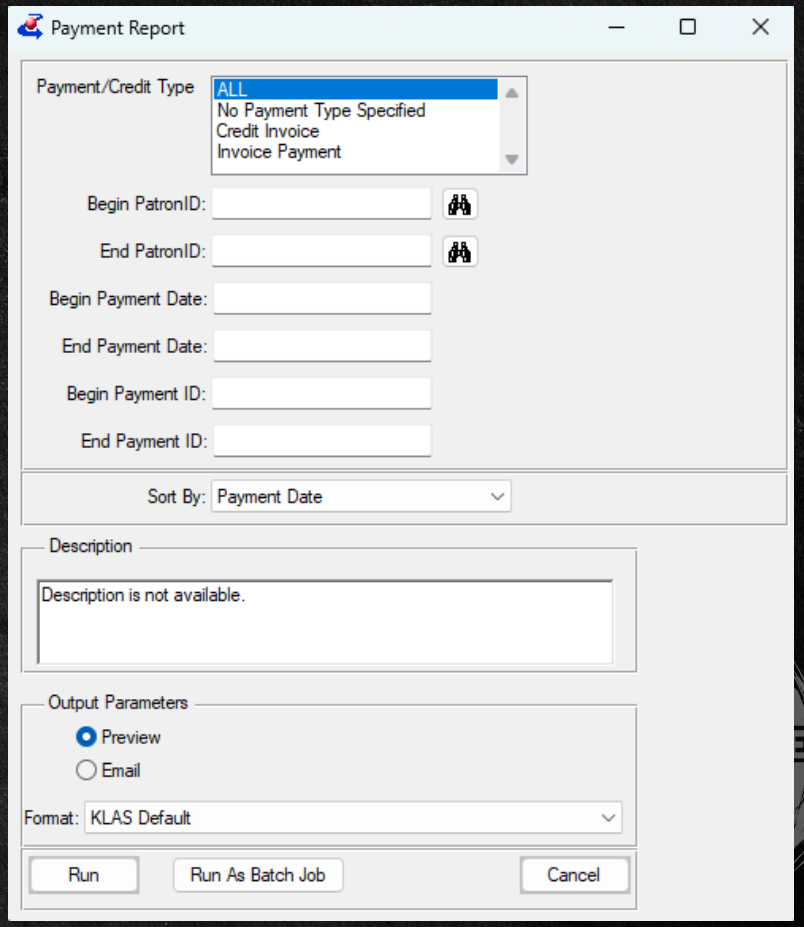
Acquisitions - Past Due Invoices Report

- Include the ability to select a patron
- aging summary
- output changes



Acquisitions - Payment Report

- Improvements
  - fixing labels
  - sort options

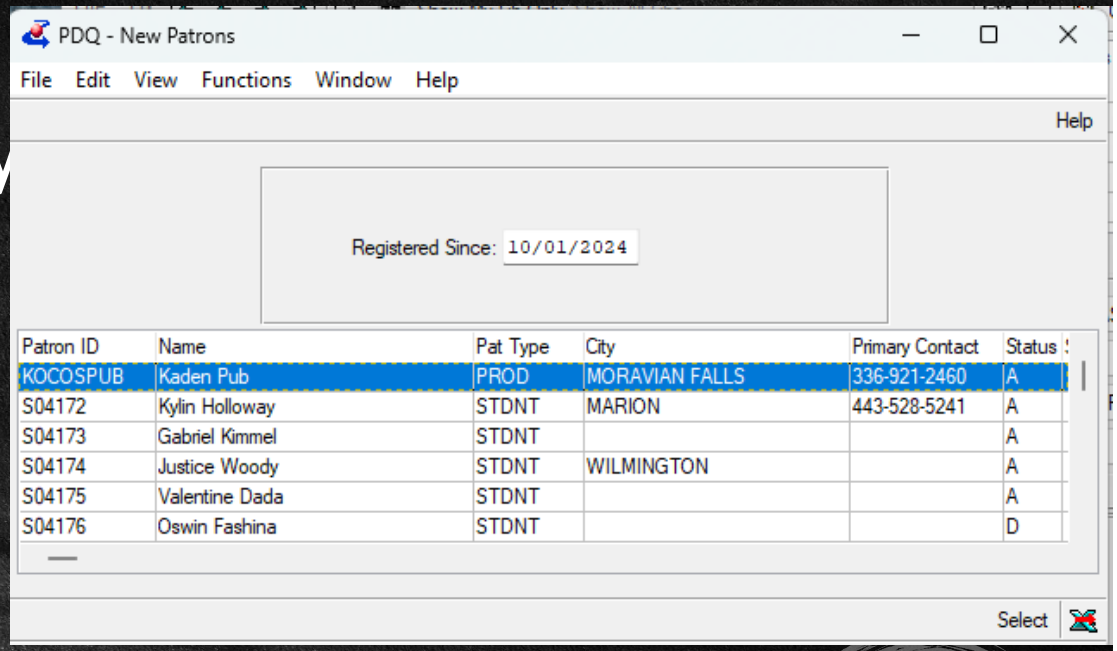


Patron Maintenance

- Add Date bug fix
- Merge Patron fixes:
  - Was not setting desired new status
  - Service Queue titles going into wrong queue
- Restore Deleted patrons bug fix & improvement

Patron Queries

- Import Query sorts by Patron ID again
- PDQ bug fixes:
  - New Patrons
- Merge Queries performance fix

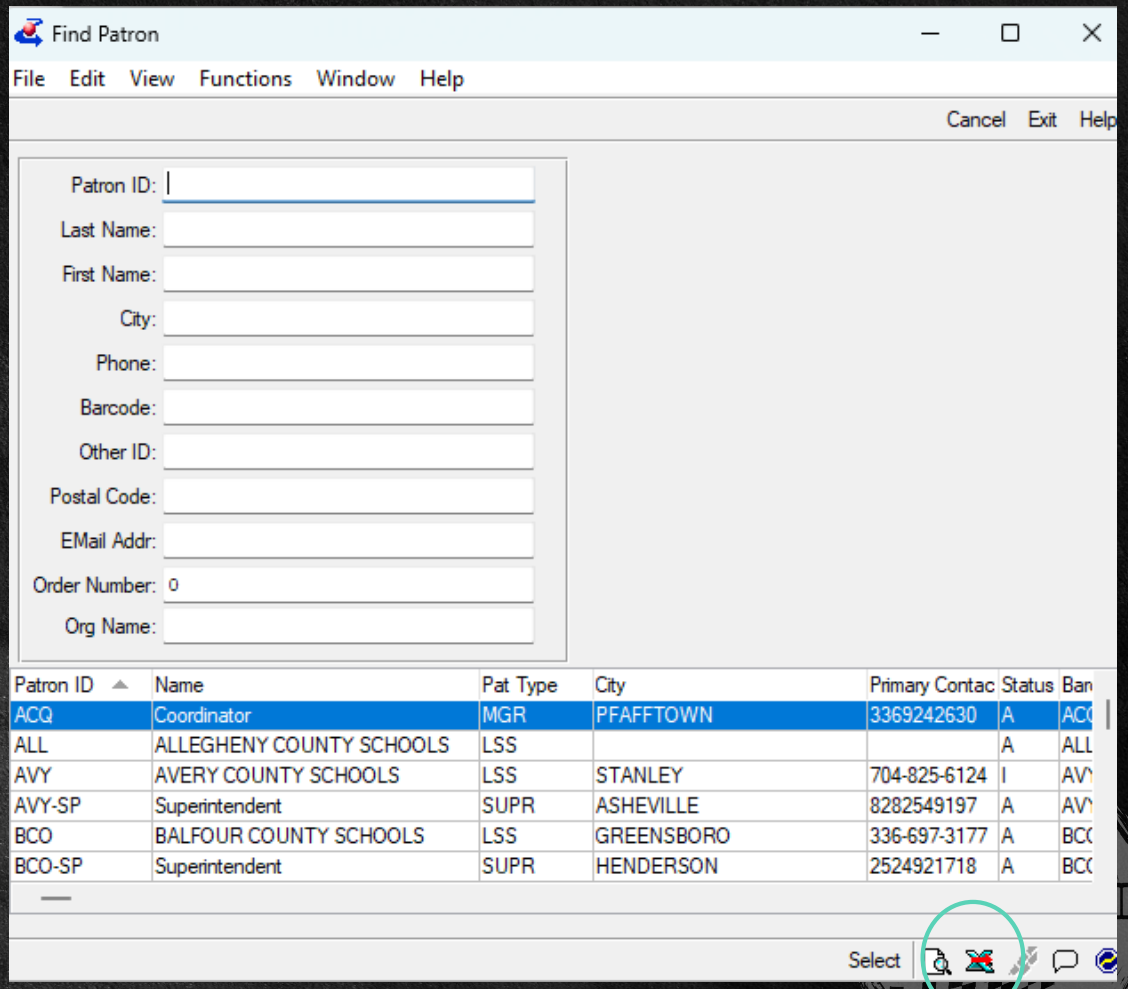


Patron Export

- Patron Query Results fields for Export:
  - Primary Language, Primary Reading Level, Disability, Referral Source, Service Code, Last Served Date
  - Export All Fields, or request customization of Visible

Patron Find

- Export fixed to only Export currently listed patrons



Census / Weborder

- Fixed columns so they don't overwrite each other

[redacted] APH-Qualified students

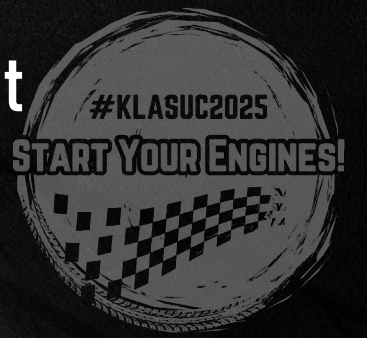
Student	Age	Language	Eye Function	IEP	Reading Mode
[redacted]	n/a years Blank				
Braylon Hurst	12 years	English	IDEA		Pre-Reader

WebOrder / WebOPAC

- Set language tag in html for screen readers
- COMING SOON:
  - Ability to mark literacy modes to keep from being displayed online

Patron – Empty module bug

- Where did my patrons go?!
  - KLAS needs 1 blank PatSearchResults record to display and move between records in the module
  - A minor change unexpectedly caused adding or deleting a patron to **also** add/delete this record
  - KLAS now auto-restores this record if needed
  - Logging added to catch anything that removes it



Catalog

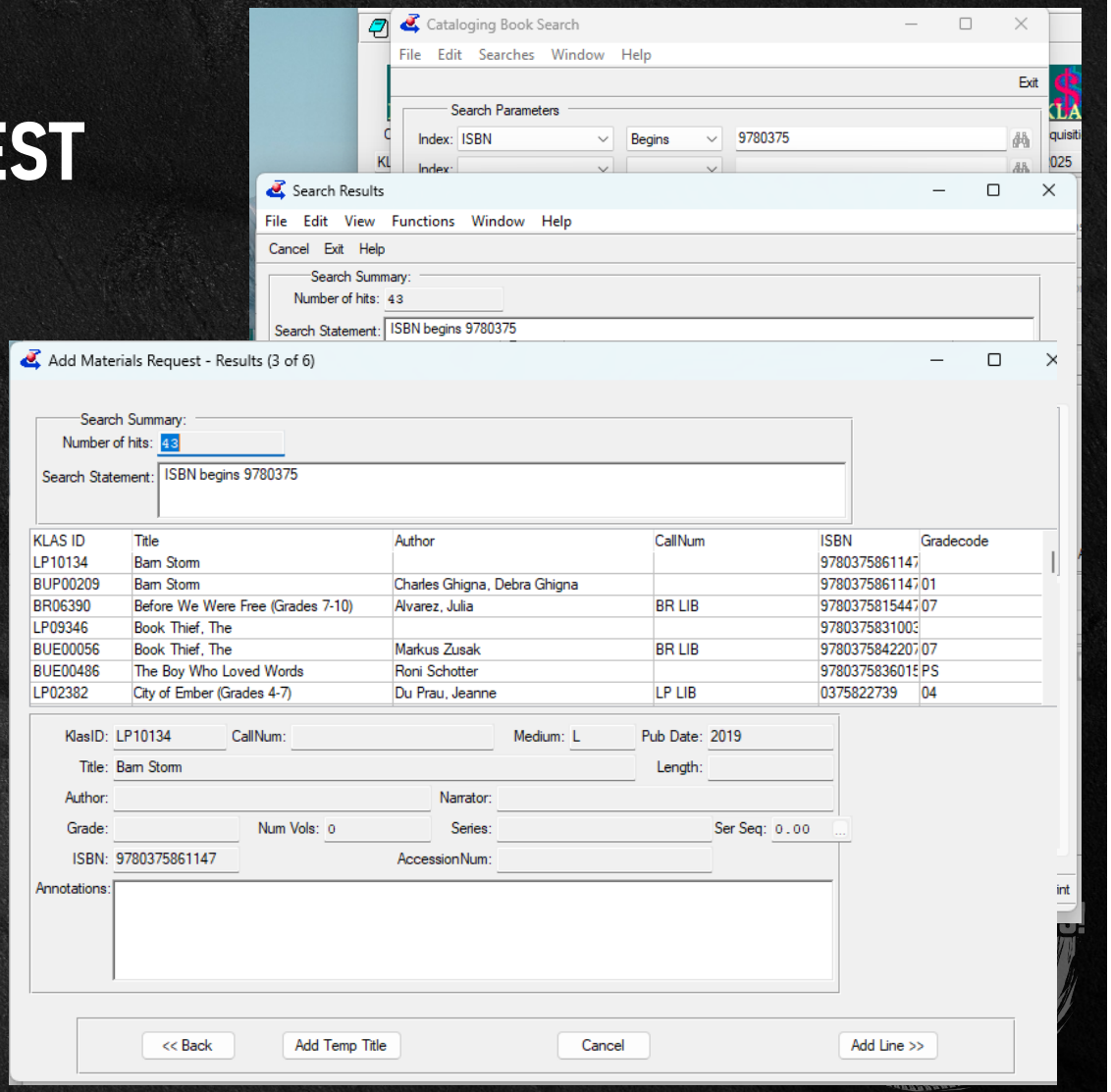
- Chasing performance issues at certain libraries
  - Bad SDO configurations are resolved
  - Is your catalog crashing? Slower than molasses? Please tell us!

Catalog

- Undo Merge Title
  - We now have the ability to undo an erroneous merge, moving the copies/items back to their original titles. Just let us know ASAP!

Catalog / Mat Request

- Make search results consistent between Catalog search and the Add Line search

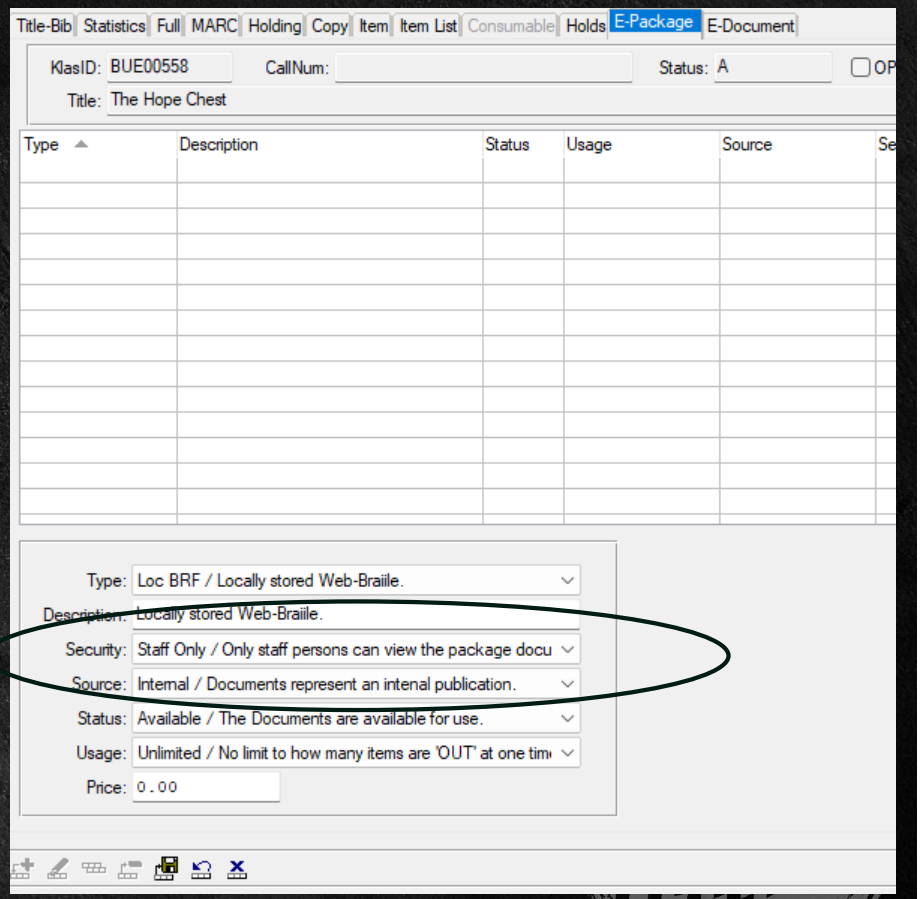


Catalog / Aquisitions

- Add a Part Number when adding items, if the Collation Final is not checked

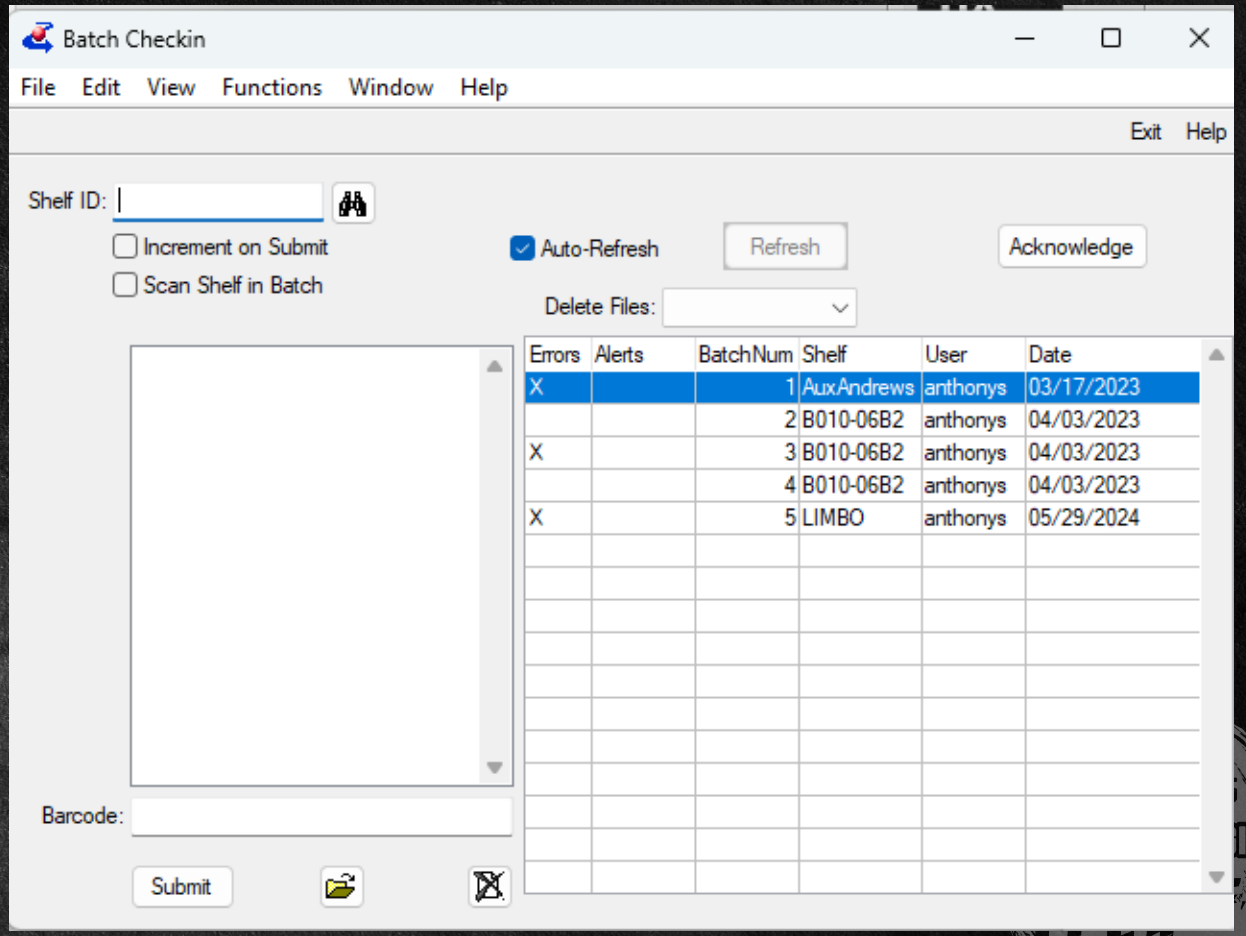
Catalog / Weborder / Webopac

- Suppress download links for epackages that are designated “Staff only”



CIRCULATION

- Batch Check-in directory fix



KLAS Core

- Full System Backup temp storage improvement
- Code File Maintenance
  - Character limit for Codes increased to 15
- Blocks Maintenance
  - Blocks now sort by Block ID Number
  - System Blocks can no longer be Copied
  - IDs lower than 1000 can no longer be manually entered

Questions & Answers

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