

# NEW FEATURES FOR IRC

7.8.15 – 7.8.25

Nancy Honeycutt –  
Manager, Customer Support  
Keystone Systems



# AGENDA

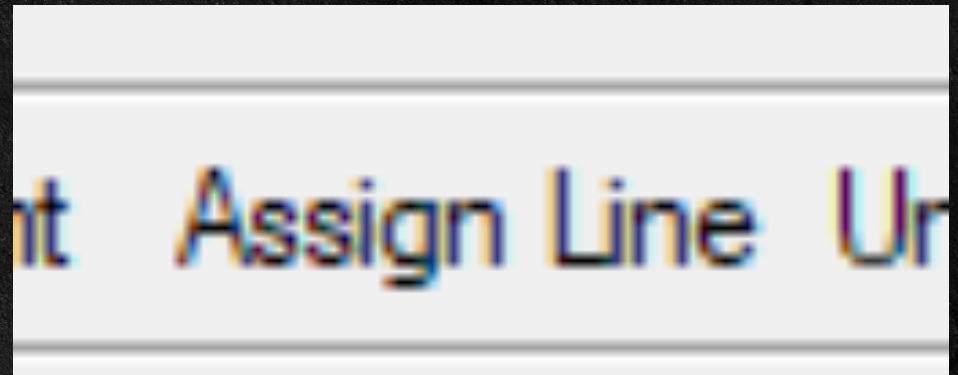
- Materials Request
- Acquisitions
- Patron
- Circulation / Catalog
- WebOrder and other updates





# MATERIALS REQUEST

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





# MATERIALS REQUEST - EMAILS

- New Options:
  - Tracking number
  - Reporting period

===== Forwarded message =====

From: <[no-reply@klas.com](mailto:no-reply@klas.com)>

To: <[Marion@klas.com](mailto: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

Code Maintenance

File Edit Function Window Help

Cancel Exit Help

Code Name: MatReqLineStatus

Code	Description	Code Xref	Final State	Code Types
Closed	Closed		Final	
Open	Open			
Pending	Pending			

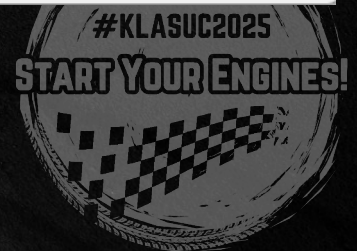
User Code: Closed

Description: Closed

Code Xref:

Final State: Final

Code Types:





# MAT REQUEST / ACQUISITIONS

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

1	Action Code:	PO / Purchase Order Issued	
TA00116	Action Date:	03/03/2025	Date Needed: / /
			Vols:
<div>Model ID : TA00116 Accession # : 1-08865-00 MFG Part Num : 1-08865-00 Model Name : Feel 'n Peel Stickers II: Numbers (over 650 stickers) Cost \$ : 24</div>			
	Requisition ID:	PO: 250227-001 / 1	
	Proposed Vendor:		







# 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

ORANGE COUNTY SCHOOLS

Generate Invoices for Mat Requests

About Invoice To Create

Type Of Invoice To Create: Production / Production Invoice

What To Invoice

Mat Requests of Type: / No Type Specified

School Year: [ ] [ ]

Mat Request ID From: [ ] [ ] Through: [ ] [ ]

Action Code: / Added Mat Request Line

Action Date From: / / ... Through: ...

Matrequests that Have Cir Pattern: [ ]

Resp1: [ ] [ ]

Resp2: [ ] [ ]

Child: [ ] [ ]

Invoice Creation Options

Invoice Patron: [ ]

Combine For: [ ]

Apply to Account: [ ] [ ] Fiscal Period: [ ] [ ]

Total Generate Show Query Close



# 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

The screenshot shows the 'Invoices' application window with the following details:

Field	Value	Field	Value	Field	Value
Invoice ID	7942	Invoice Type	Production	Amount Invoiced	\$51.00
Invoice Date	02/21/2023	Invoice Status	Paid In Full	Amount Credited	\$0.00
Report Period	22-23	Status Date	02/21/2023	Line Credits	\$0.00
Patron ID	BCO	Patron Name	BALFOUR COUNTY SCHOOLS	Amount Paid	\$51.00
Account ID	LSS - BCO	Fiscal Period	22-23	Balance Due	\$0.00
Terms	(Dropdown menu, circled in red)				

OrderID	LineNum	ISBN	Title/Description	Amt Paid	Bal Due	KLAS ID
91606	1		AG LC2 Superbugs Summative Assessment	0.00	23.25	BUP01476
91607	1		AG LC2 Superbugs Summative Assessment	0.00	0.00	BUP01477



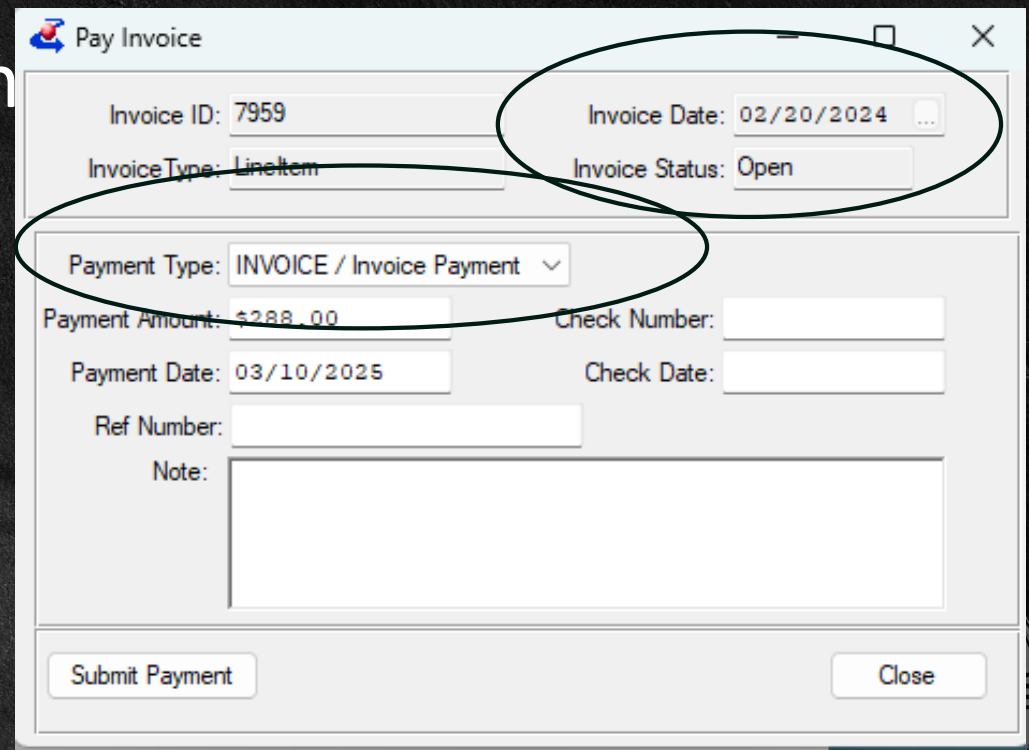
# ACQUISITIONS – INVOICES

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

[illegible]

# ACQUISITIONS – INVOICE PAYMENTS

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



The screenshot shows a 'Pay Invoice' window with the following fields and annotations:

- Invoice ID:** 7959
- Invoice Date:** 02/20/2024 (circled in red)
- Invoice Type:** Linetitem
- Invoice Status:** Open (circled in red)
- Payment Type:** INVOICE / Invoice Payment (circled in red)
- Payment Amount:** \$288.00
- Check Number:** (empty)
- Payment Date:** 03/10/2025
- Check Date:** (empty)
- Ref Number:** (empty)
- Note:** (empty text area)

Buttons at the bottom: Submit Payment, Close.



# ACQUISITIONS – INVOICE LISTING REPORT

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

Invoice Listing Report

Report Parameters

KLAS LRC 2025

Invoice Listing Report

03/10/2025 11:51 am

Invoice Status: Open  
 Invoice Type: ALL  
 Archive Status: Current  
 Break By: InvoiceType  
 Sort By: InvoiceID  
 Show Invoice Lines? yes

LinItem

Patron ID	Patron / Customer Name	Patron Type	Invoice Type	Invoice Status	Invoice Date	Invoice ID	Amount Invoiced	Amount Paid
OCC	Off Campus Customer	PROD	LinItem	Open	02/20/2024	7959	\$288.00	\$0.00

Line Num	Description	KLAS ID	Ext Cost	Process Fee	Line Total
1	Lessons in a Lunchbox	BUP01485	\$288.00	\$0.00	\$288.00

LastOf

Patron ID	Patron / Customer Name	Patron Type	Invoice Type	Invoice Status	Invoice Date	Invoice ID	Amount Invoiced	Amount Paid
Total							\$288.00	\$0.00

Line Num	Description	KLAS ID	Ext Cost	Process Fee	Line Total
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NewBook

Output Parameters

☒ Preview  
☐ Email

Format: KLAS Default

Run Run As Batch Job Cancel

UC2025  
R ENGINES!

# ACQUISITIONS – PAST DUE INVOICES REPORT

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

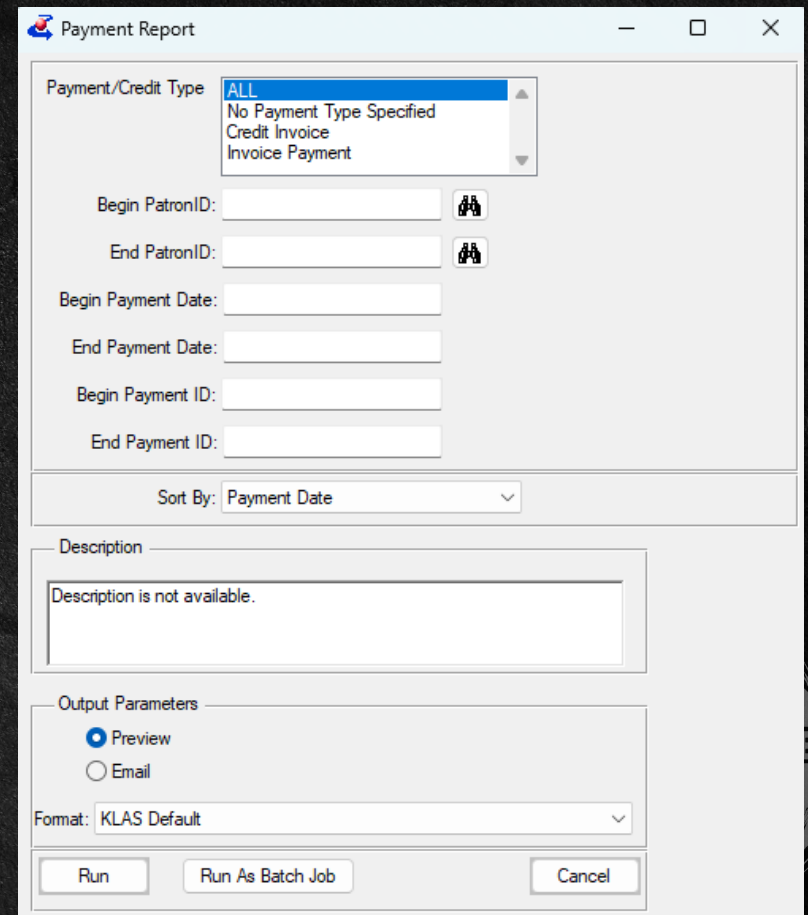
The screenshot shows a software window titled "Past Due Invoices Report". It contains several sections for configuring the report:

- Report Parameters:**
  - Invoice Status:** A dropdown menu with "ALL" selected. Other options visible are "Closed", "Open", and "Paid Partially".
  - Invoice Type:** A dropdown menu with "ALL" selected. Other options visible are "'Line Item' Invoice", "New Book Invoice", and "Production Invoice".
  - Begin Invoice Date:** and **End Invoice Date:** text input fields.
  - Begin Invoice ID:** and **End Invoice ID:** text input fields.
  - Begin Status Date:** and **End Status Date:** text input fields.
  - Archive Status:** A dropdown menu with "Current" selected.
  - Begin Patron ID:** and **End Patron ID:** text input fields, each with a small icon of two people.
- Break By:** A dropdown menu.
- Primary Sort By:** A dropdown menu with "Patron ID" selected.
- Secondary Sort By:** A dropdown menu with "Invoice ID" selected.
- Show Aging Summary:** An unchecked checkbox.
- Description:** A text box containing the text: "Lists invoices and amounts owed for invoices that are past due." Below this, a list of column headers is shown: "Patron ID - Invoice ID - Invoice Status - Invoice Date - Amount Invoiced - Balance Due".
- Output Parameters:**
  - Preview:** A radio button that is selected.
  - Email:** An unselected radio button.
  - Format:** A dropdown menu with "KLAS Default" selected.



# ACQUISITIONS – PAYMENT REPORT

- Improvements
  - fixing labels
  - sort options



The screenshot shows a 'Payment Report' dialog box with the following fields and options:

- Payment/Credit Type:** A dropdown menu with 'ALL' selected. Other options include 'No Payment Type Specified', 'Credit Invoice', and 'Invoice Payment'.
- Begin PatronID:** A text input field with a user icon.
- End PatronID:** A text input field with a user icon.
- Begin Payment Date:** A text input field.
- End Payment Date:** A text input field.
- Begin Payment ID:** A text input field.
- End Payment ID:** A text input field.
- Sort By:** A dropdown menu with 'Payment Date' selected.
- Description:** A text area containing the text 'Description is not available.'
- Output Parameters:** Radio buttons for 'Preview' (selected) and 'Email'.
- Format:** A dropdown menu with 'KLAS Default' selected.
- Buttons:** 'Run', 'Run As Batch Job', and 'Cancel'.

# PATRON MAINTENANCE

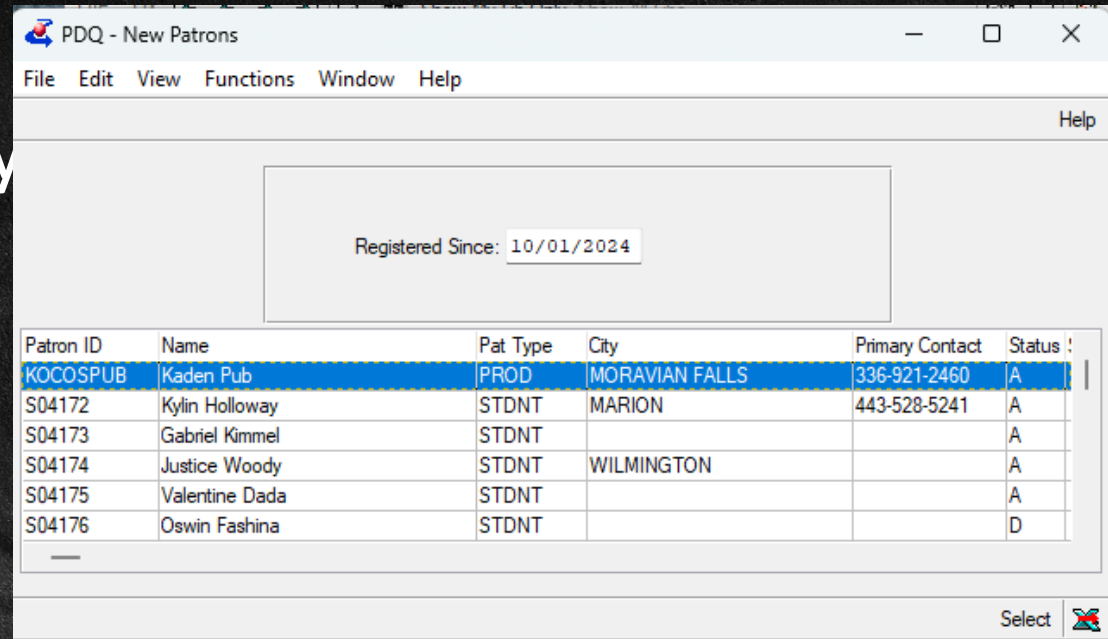
- Add Date bug fix
- Merge Patron fixes:
  - Was not setting desired new status
  - Service Queue titles going into wrong queue
- Restore Deleted patrons bug fix & improvement





# PATRON QUERIES

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



Patron ID	Name	Pat Type	City	Primary Contact	Status
KOCOSPUB	Kaden Pub	PROD	MORAVIAN FALLS	336-921-2460	A
S04172	Kylin Holloway	STDNT	MARION	443-528-5241	A
S04173	Gabriel Kimmel	STDNT			A
S04174	Justice Woody	STDNT	WILMINGTON		A
S04175	Valentine Dada	STDNT			A
S04176	Oswin Fashina	STDNT			D



# 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

Find Patron

File Edit View Functions Window Help

Cancel Exit Help

Patron ID:

Last Name:

First Name:

City:

Phone:

Barcode:

Other ID:

Postal Code:

EMail Addr:

Order Number:

Org Name:

Patron ID	Name	Pat Type	City	Primary Contac	Status	Ban
ACQ	Coordinator	MGR	PFAFFTOWN	3369242630	A	ACQ
ALL	ALLEGHENY COUNTY SCHOOLS	LSS			A	ALL
AVY	AVERY COUNTY SCHOOLS	LSS	STANLEY	704-825-6124	I	AVY
AVY-SP	Superintendent	SUPR	ASHEVILLE	8282549197	A	AVY
BCO	BALFOUR COUNTY SCHOOLS	LSS	GREENSBORO	336-697-3177	A	BCO
BCO-SP	Superintendent	SUPR	HENDERSON	2524921718	A	BCO

Select

Search, Delete, and other icons

# CENSUS / WEBORDER

- Fixed columns so they don't overwrite each other

APH-Qualified students					
Student	Age	Language	Eye Function	IEP	Reading Mode
[REDACTED]	n/a years Blank				

Braylon Hurst	12 years	English	IDEA		Pro Reader
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# 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

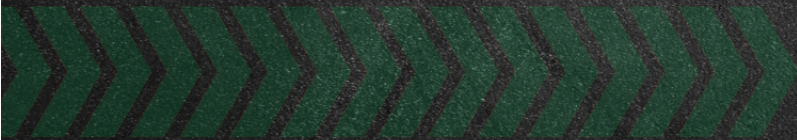
- Where did my patrons go?!
  - KLAS needs 1 blank PatSearchResults record to display and move between records in the module
  - A minor change unexpectedly caused adding or deleting a patron to **also** add/delete this record
  - KLAS now auto-restores this record if needed
  - Logging added to catch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

The screenshot displays the 'Add Materials Request - Results (3 of 6)' window. At the top, a 'Search Summary' section shows 'Number of hits: 43' and 'Search Statement: ISBN begins 9780375'. Below this is a table of search results. The table has columns for KLAS ID, Title, Author, CallNum, ISBN, and Gradecode. The results list books such as 'Barn Storm' by Charles Ghigna, 'Before We Were Free (Grades 7-10)' by Alvarez, Julia, and 'Book Thief, The' by Markus Zusak. Below the table, there is a form for adding a new line item. This form includes fields for KLAS ID (LP10134), CallNum, Medium (L), Pub Date (2019), Title (Barn Storm), Length, Author, Narrator, Grade, Num Vols (0), Series, Ser Seq (0.00), ISBN (9780375861147), and AccessionNum. An 'Annotations' text area is located at the bottom left of the form. At the bottom of the window, there are four buttons: '<< Back', 'Add Temp Title', 'Cancel', and 'Add Line >>'.

KLAS ID	Title	Author	CallNum	ISBN	Gradecode
LP10134	Barn Storm			9780375861147	
BUPO0209	Barn Storm	Charles Ghigna, Debra Ghigna		9780375861147:01	
BR06390	Before We Were Free (Grades 7-10)	Alvarez, Julia	BR LIB	9780375815447:07	
LP09346	Book Thief, The			9780375831003	
BUE00056	Book Thief, The	Markus Zusak	BR LIB	9780375842207:07	
BUE00486	The Boy Who Loved Words	Roni Schotter		9780375836015	PS
LP02382	City of Ember (Grades 4-7)	Du Prau, Jeanne	LP LIB	0375822739	04

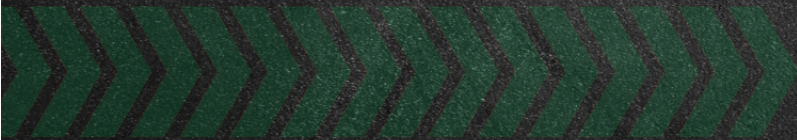
KLASID: LP10134    CallNum:    Medium: L    Pub Date: 2019  
Title: Barn Storm    Length:     
Author:    Narrator:     
Grade:    Num Vols: 0    Series:    Ser Seq: 0.00  
ISBN: 9780375861147    AccessionNum:     
Annotations:

<< Back    Add Temp Title    Cancel    Add Line >>



# 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”

The screenshot shows a library catalog interface with a record for 'The Hope Chest'. The record details include:

- KlasID: BUE00558
- CallNum: [empty]
- Status: A
- Title: The Hope Chest

A dropdown menu is open, showing the following fields:

- Type: Loc BRF / Locally stored Web-Braille.
- Description: Locally stored Web-Braille.
- Security: Staff Only / Only staff persons can view the package docu
- Source: Internal / Documents represent an intenal publication.
- Status: Available / The Documents are available for use.
- Usage: Unlimited / No limit to how many items are 'OUT' at one tim
- Price: 0 . 00

The 'Security' field is circled in red, indicating the setting for suppressing download links.

- Batch Check-in directory fix

[illegible]



# 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

