



Caia Colleague Virtual Conference

26 MARCH 2021

WWW.CAIA-SOLUTIONS.COM

Agenda (Session be Recorded)

- I. Introductions (15 minutes)
- II. Review of new CaiaSoft® development (45 minutes)
- III. Discussion – possible topics: (60 minutes)
 - I. How are you and your libraries coping with the pandemic?
 - I. How have services changed? Will those changes be lasting or temporary?
 - II. Lessons learned: driving development
 - III. CORE Management Group: Library Storage Discussion Group? Anyone have news?
- IV. Conclusion (5 minutes)
 - I. Next CCVC proposed for June
 - I. Drop in session?
 - II. Dates? Concurrent with ALA Annual? Other dates?

Caia Colleague Virtual Conference

University of Alabama
University of Albany
University of Arkansas
Bangor University
Binghamton University
Boston Public Library
Bowdoin College
University at Buffalo
University of California

Clemson University
Cornell University
Duke University
Emory-Georgia Tech
University of Florida
University of Illinois Urbana-Champaign
University of Kansas
Kansas State University
University of Maryland

University of New Mexico
Oklahoma State University
University of Pittsburgh
Rochester institute of Technology
University of South Carolina
Texas State University
Tri-State Depository
West Virginia University
University of Virginia

CaiaSoft® New Accession Development Add Item Flag by Barcode Scan

- ▶ Create barcodes for your Item Flags
- ▶ Scan Item ID barcode
- ▶ Scan Item Flag barcode
 - Flag populates next field
 - Field turns yellow
 - Items Scanned counter will *not* advance
- ▶ Limit to one flag per item

Add Items to Job

Container	DH747474	<input type="text" value="88885005"/>	<input type="text" value="BIND"/>	<input type="text" value="88885006"/>
Type	DH	<input type="text" value="BPS"/>	<input type="text" value="88885007"/>	<input type="text" value="88885008"/>
Material	A	<input type="text"/>	<input type="text"/>	<input type="text"/>
Collection	XX	<input type="text"/>	<input type="text"/>	<input type="text"/>

Items Scanned

Grey item boxes are for expected count overflow - the item scanned count will turn red if boxes are utilized

Items				
Barcode	Container	Scan Seq	Validated	Committed
88885005 BIND;	DH747474	1	N	N
88885006 BPS;	DH747474	2	N	N
88885007	DH747474	3	N	N
88885008	DH747474	4	N	N

CaiaSoft® New Circulation Development Interactive Page Scan Counts

Identify pending requests for items that have already been pulled for ERT

Circulation Operations

 Create a New Circulation Job

 Interactive Pick List

 Interactive Page Scan Counts

 Interactive Refile

 Refile Validation Upload

 Retrieval Request File

 Transit Bins & Courier Runs 

 SH-I-P: Special Handling,
Internal & Preservation

 Complete Circulation Jobs

 Consolidate Jobs or Streams

Interactive Page Scan Counts

Record Scanned Pages or Mark Cannot Fulfill

Item

Scan Barcode or use "Scan" button in list

Scan

Scan List

Barcode	Stop	Title	E-Retrieval Details	API/TN #	# Pages
31207029710526	F	India through the lens :photography, 1840-1911 /[edited by] Vidya Dehejia ; with contributions by Charles Allen ... [et al.].	Requestor: A 110-160		Scan
31162045171650	N	Tarentiner Goldschmuck in Berlin /von Edilberto Formigli und Wolf-Dieter Heilmeyer.	Requestor: ID 938128 : 0-50	ILLXML 938128	Scan
31142061336981	N	Making medieval manuscripts /Christopher de Hamel.	Requestor: ID 937646 : 95-144	ILLXML 937646	Scan
31142054890564 RESTRICT 1	N	Maria Irene Fornes Papers,1909-2005(bulk 1980-1999).Box 26	Requestor: ID 69542 : Special Collections Patron test	AEONnyu 69542	Scan
31142040988480	N	Amor amicitiae =On the love that is friendship : essays in medieval thought and beyond in honor of the Rev. Professor James McEvoy /edited by Thomas A.F. Kelly and Philipp W. Rosemann.	Requestor: ID 937678 : 269-312 Thanks!	ILLXML 937678	Scan

As with Interactive Pick and Refile displays, all pending validated ERT scans from all jobs appear on this screen.

► Scan the item or use the Scan button to designate the item being scanned.

► If there are multiple requests for the item, all will appear on the Scan List, so that item only needs to be touched for scanning once.

► The currently active item will appear highlighted in blue on the Scan List.

Record Scanned Pages or Mark Cannot Fulfill

Barcode	Stop	Title	E-Retrieval Details	API/TN #	# Pages	Errors/ Cannot Fulfill
31142023404406	N	What I have learned;a collection of twenty autobiographical essays by great contemporaries from the Saturday review.	entire essay by RB Fuller	ILLXML 937757	<input type="text" value="0"/>	<input type="checkbox"/> NFC / Other <input type="text"/>
31142023404406	N	What I have learned;a collection of twenty autobiographical essays by great contemporaries from the Saturday review.	314-321	ILLXML 938085	<input type="text" value="0"/>	<input type="checkbox"/> NFC / Other <input type="text"/>

[Record Pages](#)

Scan List

Barcode	Stop	Title	E-Retrieval Details	API/TN #	# Pages
31142012129683	N	Florence and the Medici :the pattern of control /J.R. Hale.	Requestor: ID 937729 : 76-127 section ends on pg 127, which makes 51 pp. I hope	ILLXML 937729	Scan
31142022737855	N	Colonial narratives/cultural dialogues ."discoveries" of India in the language of colonialism /Jyotsna G. Singh.	Requestor: ID 000005610 : 1-50	000005610	Scan
31142023404406	N	What I have learned;a collection of twenty autobiographical essays by great contemporaries from the Saturday review.	Requestor: ID 938085 : 314-321	ILLXML 938085	Scan
31142023404406	N	What I have learned;a collection of twenty autobiographical essays by great contemporaries from the Saturday review.	Requestor: ID 937757 : entire essay by RB Fuller	ILLXML 937757	Scan

•NOTE: Page Counts must be set as "optional" or "required" in System & Module Settings for this option to appear

CaiaSoft®

New Circulation Development

Reading Room Retrievals

- ▶ Select a Reading Room Retrieval Job (RRR) for on-demand, on-site retrieval and delivery.
- ▶ Once validated on an RRR Job, the item must be discharged to either a PYR or SHP job to leave the building, or, assigned to a Refile Queue or Job.
- ▶ RRR jobs cannot be closed until all items have been discharged

Circulation Job: Reading Room Retrievals

Add Items

Assign Item Notes & Flags

Job#	Cam	Status	Stops	Items	Val	Date	Job By
10084	N	In Queue	1	3	3	09/21/20	

Delete Items

Discharge from Reading Room

Discharge Items From Reading Room

Refile Item	Item Out to PYR	Item Out to SHP	Barcode	When PYR or SHP, Stop Code	Requestor	Details/Notes	Discharged to Job #
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	ED101641	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	JR 57 432	<input type="text"/>		<input type="text"/>	
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	WC 12 873	<input type="text"/>		<input type="text"/>	

Discharge Items

Add Items

Add Items & Stage to Carts

Validate Items

Assign Item Notes & Flags

Job#	Status	Items	Val	Date	Job By
6188	In Queue	67	0	02/03/21	Ed Lewis

Delete Items

Cancel

Add Items and Stage to Carts

Scan Single Item -> Place on Cart

Scan Cart -> All Items on Cart



Recommendation of Cart given individually based on Item Location & Open Carts

Scan All Items on Cart, with Outliers and Errors Displayed after last Item Scan

Two options:

1. Fill a cart and then scan all items on cart to a refile job, or

2. Scan each item and be directed to a cart by location destination, ex. Aisles 1-5, Aisles 6-10, etc.

Carts Currently Staging Refiles			
Cart #	Staged to Location	Status	Item Count
 CART123	Mod 1 Aisles 5-7	Loading	3
 CART888	Mod 2 Aisle(s) 11;	Loading	1

Choose Cart

Item	31142048085206
Module	2
Aisle	10

Stage on Cart

CART888

☐ Last Item/Mark Cart Full

Stage to Cart

CaiaSoft®
 New Circulation Development
 Refile Carts

Active Refile Carts are displayed on the Circulation Module dashboard

Circulation Operations

Create a New Circulation Job

Interactive Pick List

Interactive Page Scan Counts

Interactive Refile

Refile Validation Upload

Retrieval Request File

Transit Bins & Courier Runs

SH-I-P: Special Handling, Internal & Preservation

Complete Circulation Jobs

Consolidate Jobs or Streams

Search Circulation Jobs

Job #



Job Type

Job Date -

Item Circulated

Locate

Refile Carts

Cart #	Status	Days Staged	Item Count
 CART123	Loading	1	3
 CART888	Loading	1	1

Refile Cart # View Cart


Refile Carts: View Detail

Refile Carts

 Interactive Refile for Cart

 Refile List

 Mark Cart Full

 Refile Cart CART123 - 3 Items on Cart

Staged to Location Mod 1 Aisles 5-7

Item	Refile Job #	Status	Address	Mod	Aisle	Side	Lad	Step	FP	Container	Staged Date	Shelved Date
0023135050	187625	On Cart	24382	1	5	L	6	24	8	BH222974	03/22/21	
0029242568	187625	On Cart	24381	1	5	L	6	19	26	BH222829	03/22/21	
35042013223608	187625	On Cart	26182	1	6	R	15	22	23	BH108213	03/22/21	

CaiaSoft®

New Storage Management Development

Item Bibliographic Details Display

Item Bibliographic Details

Bibliographic Identification

Title	Perspectives in organic chemistry.	Volume	
Author	Todd, Alexander R. 1907- ed. (Alexander Robertus),	Edition	
Copy #	1	Enumeration A	
# Pages		Call Number	QD245 .T633
Publisher	Interscience Publishers,	Pub Year	
Pub Place		Chronology	

Bibliographic and Serial Numbers

Bibliographic Status

Condition & Site Specific

- ▶ Accordion-style listing uses less page space
- ▶ Bibliographic Identification field is the default display.

- ▶ Field organization remains consistent even as more information is added – no left/right column switching
- ▶ Edit screen displays all editable fields concurrently

Item Bibliographic Details

Bibliographic Identification

Bibliographic and Serial Numbers

OCLC		ISSN	
ISBN		Bib Item ID	994784933406236
Bib Record #	22361402640006236		

Bibliographic Status

Condition & Site Specific

CaiaSoft®

New Storage Management Development

Missing and Problem Shelf

System & Module Settings

Click on a Category to see the Applicable Settings

Click on the ⓘ icon for details on each operation

Accession

Circulation

Inventory Management

Storage Management

ⓘ Storage Module Default Locate Display:	detail
ⓘ Anchored Search Bar:	top
ⓘ Missing Shelf Address (Virtual):	888888
ⓘ Problem Shelf Address (Physical):	777777

Edit System Settings

- Creates designated system locations for Temporarily Alternatively Located items and items that need intervention.

Missing Shelf (Virtual) 888888

This a virtual location for items that are missing from their assigned shelves.

Items on Shelf (2)

Item	Collection	Material	Cont Type	Status	Last Circulation Type	Last Circulation Date	Last Circulation Job
15014438	UNIV	DVD		IN	Items in Containers	07/20/16	65
15071717	DEMO	BOOK		IN	Items in Containers	07/21/16	98

CaiaSoft® New Reporting Development Job Export

► Job Export now includes the option to export all Audit scan history for jobs. Previously this was only available individually by Audit Job.

Job Export

If the export result is for a large data set, please use the Large-Scale export section to place the report in Queue for download upon completion.

Jobs From

03/01/2021

Jobs To

03/31/2021


Job Type

All

Job Status

All

☐ Include Audit Scans

 Generate

CaiaSoft®

New API Enhancements

- ▶ API Activity Dashboard now accessible through the CaiaSoft® Main Console.
- ▶ All API panels shaded grey for easy recognition on screen in all CaiaSoft® modules.

CaiaSoft Main Console Metrics

Accession Jobs

In Queue	#
Jobs	1
Items	0
Containers	0
Incoming Accessions Stream	184

Circulation Jobs


Direction	# In Queue	# Items
Incoming	0	0
Outgoing	1	2
Retrieval Requests	1	11
Items Circulating		25258
E-Retrievals Picked		30
SH-I-P Service		1

Storage

Type
Addresses
Containers
Items in Containers
Items Direct to Address

Inventory Total: 6,4

Data Snapshot - Quick

 **API Activity Dashboard**

Administration

API Dashboard

The top half of the API Dashboard displays last interaction dates, and both the API/Link Source, and Transaction Type.

Incoming & Request Feeds

API Link	Last Activity Date
AEON	03/22/21
ILLIAD	03/22/21
SIERRA (TR)	03/22/21
ALEPH	03/22/21

Activity by Function

API Link	API Call Type	# Calls Today	# Calls Last 7 Days	# Calls Last 30 Days	Last Call Date
AEON	Check In / Request Finished	0	29	262	03/16/21
AEON	Check In / Request Finished Errors	0	1	18	03/18/21
AEON	Check Out/ In Transit	18	59	273	03/22/21
AEON	Requests	23	66	272	03/22/21
ALEPH	Check Out/ In Transit Errors	3	18	88	03/22/21

The bottom half shows all transactions (in and out) for the day.

Filtering is also available for specific date ranges, API/Link Sources, and Transaction Types

API History - 03/22/2021

Filter Transactions: Link Direction Type Status From To 

API Link	Incoming /Outgoing	API Call Type	Item	Status	Call Date	Details	Action
ALMA	Incoming	Request	31735065140455	Completed	03/22/21 00:05:03	ID/TN: 9847396890006236	View
ALMA	Incoming	Request	31735034719082	Completed	03/22/21 00:05:03	ID/TN: 9847974220006236	View
ALMA	Incoming	Request	31735043168685	Completed	03/22/21 00:05:03	ID/TN: 9847302550006236	View
ALMA	Incoming	Request	31735028515199	Completed	03/22/21 00:05:03	ID/TN: 9847819300006236	View
ALMA	Outgoing	Check Out	31735046171314	Completed	03/22/21 10:11:25	Successful NCIP POST	View
ALMA	Outgoing	Check Out	31735059367064	Completed	03/22/21 10:11:25	Successful NCIP POST	View

100

Circulation	SUS-112	6627	ID CDS1163614X
Desk			View Details


An API Request Streams summary panel been added to show the API request feeds.


For those using ALMA, the API call to ALMA is accessible via the Refresh Request Details button to update information about the request directly from ALMA, ex. to grab info not sent on the original stream.

CaiaSoft®

New API Enhancements: Storage Management Module


14 Items in Container							
Item Barcode	Sequence	Collection	Material	Item Status	Last Circulation Type	Last Circulation Date	Last Circulation Job
39072029792334	1	U	A	IN	Items in Containers	03/06/07	939
39072029792342	2	U	A	IN	Items in Containers	03/06/07	939
39072029792359	3	U	A	IN	Items in Containers	03/06/07	939
39072029792375	4	U	A	IN	Items in Containers	03/06/07	939
39072029792383	5	U	A	IN	Items in Containers	03/06/07	939
39072029792391	6	U	A	IN	Items in Containers	03/06/07	939
39072029792409	7	U	A	IN	Items in Containers	03/06/07	939
39072029792417	8	U	A	IN	Items in Containers	03/06/07	939
39072029792425	9	U	A	IN	Items in Containers	03/06/07	939
39072029792433	10	U	A	IN	Items in Containers	03/06/07	939
39072029792516	11	U	A	IN	Items in Containers	03/06/07	939
39072029792532	12	U	A	IN	Items in Containers	03/06/07	939
39072029792565	13	U	A	IN	Items in Containers	03/06/07	939
39072030043404	14	U	A	IN	Items in Containers	03/06/07	939


 Refresh Items via API


 Print


For sites using eligible APIs – a refresh button will appear on the container/direct address or item level to refresh the items details via the API on demand

Circulation Records						
Circulation Date	Circulation Type	Job #	Job Status	Stop	Retrieval Requestor	Retrieval Details
03/06/07	Item in Container	939	Complete			

 Refresh Items via API

 API History

 Accession Audit

 Print

CaiaSoft®

New API Features by API Source

▶ ALMA:

- CaiaSoft® can now update back to ALMA: used for updating location, additional fields on Accession
- Digitization Requests sent via XML enhanced with additional call for detailed info (page count, article title)
- Analytics report functionality to keep up with modification in records to ALMA

▶ Sierra:

- Request Pulls updated to incorporate status and due date into Request Stream/avoid duplicates
- Sierra API Version 6 allows item updates – if you have this version installed, CaiaSoft® can update item on accession (location) and status on retrieval and refile

▶ FOLIO:

- Caia has been on weekly calls with FOLIO and the early adopters of FOLIO in order to define the remote storage process. CaiaSoft® will be launching its API in tandem with the production launch of FOLIO at a client site in July 2021.

▶ AEON:

- Ability to utilize queues in Accession and Deaccession processes

Page Count by Item							
Barcode	Stop	Title	E-Retrieval Details	API/TN #	# Pages	Errors/ Cannot Fulfill	Action
31924059214019	ERT- E-Retrieval Default	Oligodeoxynucleotides antisense inhibitors of gene expression	Article Title: chapter including pages 97-117 + title and copyright pages Pages: chapter + title and copyright	ILLIAD 1623586	23	<input type="checkbox"/> NFC / Other <input type="text"/> <input type="checkbox"/> No API Update	Record

- Update queue on page scan completion in addition to/in lieu of validation on pick

- Not Found as Cited update to TN - queue change and note transfer

Page Count / Deliver Scan by Item							
Barcode	Stop	Title	E-Retrieval Details	API/TN #	# Pages	Deliver Scan Errors/ Cannot Fulfill	Action
31142009881536	NB	IMAGE OF THE FUTURE	1-8	ILLXML 937704	8	Required Browse... No file selected. <input type="checkbox"/> NFC / Other <input type="text"/>	Record

- Automatic Scan Delivery to local SFTP server

CaiaSoft® Application Security: PEN Test

- ▶ Successful PEN test completed; final result will be available in Q2 2021.
- ▶ PEN Test-based changes to User Login functionality
 - Passwords expire after 90 days
 - Password requirements expand to include 1 special character
 - Temp Pins and Password updates will have a text message/PIN notification
 - If you are using local login to access the system, you will receive a PDF detailing the changes and the launch date (Q2)

CaiaSoft®

New Version CaiaStacks 2.0



Collect CaiaSoft® Information in Batch while Offline

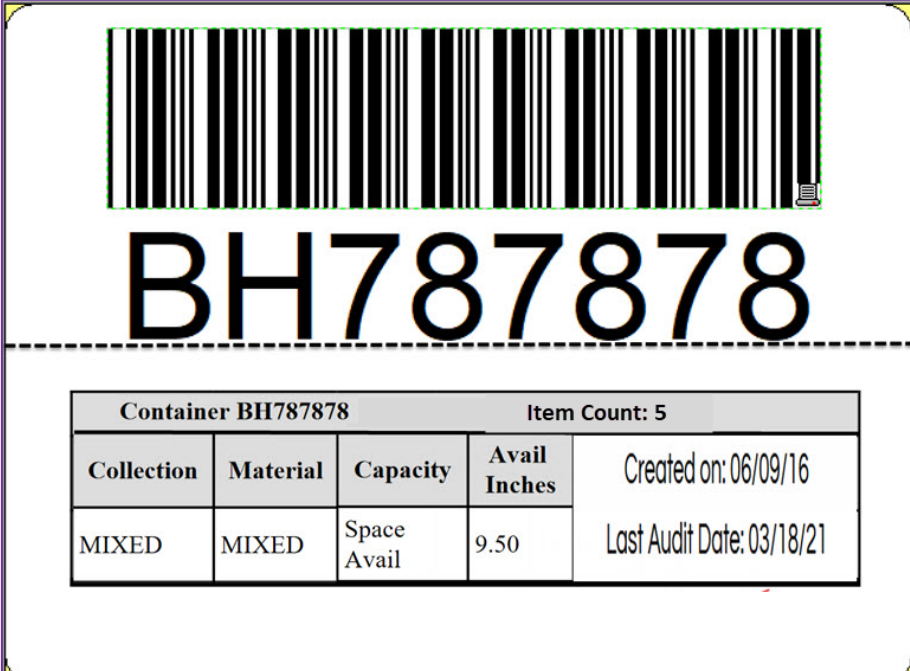
CaiaStacks App Version 2.0.10

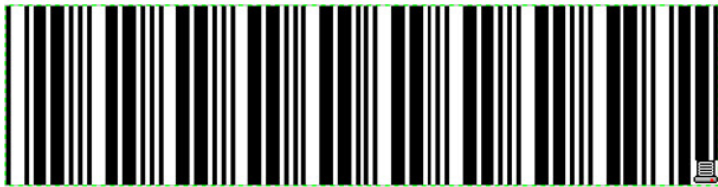
Batch files data path: C:\Use
Batches Depository: https://
Last Config File Update: 03/25/2021

Modul	Aisle	Side	Lad	Step	FP	Address	Container	Item	Title	Volume	Call Nbr	Validate Container/ Address (Direct)	Validate Item
1	2	L	1	12	16	37600	DH44290	31207024927059	Art in America.	v.71:no.6- 10(1983:June- Nov.)	N1 .A75 Library Use Only	<input type="text"/>	<input type="text"/>
1	5	L	6	19	26	24381	BH222829	0029242568				<input type="text"/>	<input type="text"/>
1	5	L	6	24	8	24382	BH222974	0023135050				<input type="text"/>	<input type="text"/>
1	6	R	15	22	23	26182	BH108213	35042013223608				<input type="text"/>	<input type="text"/>
2	11	R	11	17	26	38386	BH119105	31142048083433	Parlons otomi :une langue indienne du Mexique /Yolanda Lastra.		PM4146 .L37 2009	<input type="text"/>	<input type="text"/>

Upcoming CaiaSoft® Development

- ▶ Container ID Label printing from within CaiaSoft®
 - ▶ 2-part label: Container ID and Container Details
 - ▶ Reprint of Container Details portion after audit, move, etc.
 - ▶ Workflow considerations: when to print? Quantities?
- ▶ Union Holdings Search parameters
- ▶ FAQ Section
- ▶ Upgraded Help Ticketing system





BH787878

Container BH787878				Item Count: 5
Collection	Material	Capacity	Avail Inches	Created on: 06/09/16
MIXED	MIXED	Space Avail	9.50	Last Audit Date: 03/18/21



www.caia-solutions.com