

# V7 Calendar Maintenance

## Yearly Calendar Maintenance

The CALENDAR File Maintenance program is used to enter and or update the SERIES-M shipping calendars. Each calendar contains the delivery / pickup schedule and holiday information for a delivery route. SERIES-M calendars are sometimes referred to as Routes. The primary purpose of the file is to define the shipping calendars that will be used when scheduling materials. Once a year, usually in May, June or July, the SERIES-M shipping calendars must be established for the summer and the new school year. Each SERIES-M calendar is 400 days long and should not have a start on or before the date the calendars are reset. Changing the calendars does not have any effect on bookings that are already made. The changes will affect all future bookings.

## Selecting Calendar / Route

Begin by navigating to MAINT → CALENDARS

This will provide a list of calendars in your system. If you need to add an additional route simply select an unused calendar in the list, give it a new name, and save the name. You will add the holidays and adjustments as described later. If there are no open calendars to choose from they are probably “hidden” from the list. Hidden calendars are those calendars whose names begin with an asterisk (\*). You will need to click on the **ALL** button to show these. Now choose an unused previously hidden calendar by clicking on its name. Once the calendar is selected, you can “unhide” it by entering a new name without the leading asterisk and then save that name by clicking the **Save Name** button. It will appear in the calendar list from now on.

## Start with the “0” Calendar

The “0” (zero) calendar is the calendar that represents YOUR center’s holidays and other closings. It is usually referred to as the “Walk In” calendar due to the fact that every day on the calendar that your center is open (a non-holiday) is a day that someone can “walk in” and pickup an item from you – no shipping necessary. The other calendars defer to the “0” calendar when calculating the ship and due dates for a booking. For example, when a particular shipping calendar has a date marked as an open shipping day (non-holiday), the item can’t be shipped if your “0” calendar has that date marked as a holiday. This can cause confusion for an operator (“Why doesn’t the system let me ship this? The route says it’s not a holiday!!!”) if they just look at that shipping calendar without further checking the “0” calendar as well. If your facility is closed...no shipments are possible for any routes.

Because the “0” calendar is checked for valid ship and due dates by the program that adjusts all of the other calendars for holidays, it must be setup first.

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### Reset Calendar “0 “

This calendar must be set for the days that the media library is closed or not shipping media.

- |                                       |   |
|---------------------------------------|---|
| Select the calendar                   | Click on the <i>Calendar #0</i> from the Calendar List.   |
| Set the Start date                    | Click into the <b>Start Date:</b> box and enter today’s date (ex: 6/08/09).   |
| Reset the Calendar                    | Click on the <b>RESET CALENDAR</b> button (right side of the display). This button will reset the calendar to begin on the date that was entered in the previous step. All holidays and the shipping schedule will be lost. Saturdays and Sundays will remain as holidays. The program will prompt to verify that you want to reset the calendar, click the <b>OK</b> button to reset the calendar. |
| Set <b>From:</b> and <b>To:</b> Dates | Now change the working <b>From:</b> and <b>To:</b> date fields below to match the calendar start and end dates. These dates are used to specify the range to be adjusted. It is only for special circumstances that these dates will not match the start and end dates of the calendar.   |
| Mark the Holidays                     | Scroll through the displayed calendar and mark all the days that the library is closed as holidays. To mark a day as a holiday, click on the date number. The date number color will change to <b>red</b> , this indicates that the date is a holiday. If you make a mistake, click the date again and it will not be a holiday.  |
| Select Calendar Adjust Method         | Scroll back up to the top of the page. Verify that the word “Adjust” is in the <b>Adjust:</b> box in the setup parameters grouping on the right of the screen. The Adjust command is used because Calendar #0 has a “Daily” shipment schedule.  |
| Adjust and Save the Calendar          | Click the <b>SAVE AND ADJUST</b> button to adjust the calendar and then save it.  |
| Setup Complete                        | The setup of calendar #0 is now complete. It is recommended that you visually scroll through the months and inspect the ship, call, and due date values, and the marked holidays for accuracy and completeness. These appear in each day in the calendar as “S: C: D:” values with dates after them. It is also recommended that you try some sample bookings.                                      |

Checking the Calendars – Every date in a calendar is a potential view date. The ship date for the view date will be listed on that date next to “S:”. To calculate the call date count the number of non-holidays equal to the booking period value to get to the last view date. The date next to the “C:” on this date is the call date (pickup from user). The date next to the “D:” is the due date (date item must be back in the library).

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### Reset Holiday Calendar

This calendar is optional. If you have a lot of calendars to setup using a holiday calendar will save time. All the school holidays can be specified in this calendar and then copied to the other calendars. You can use any calendar that is not being used as an actual shipping calendar. It will help you if you give this calendar a name like "HOLIDAY" in order to differentiate it in the calendars list.

Display the Calendar List	Click on the <b>Calendar List</b> button to display the list of calendars if they are not displayed at this point.
Select the calendar	Click on the Holiday Calendar from the Calendar List.
Set the Start date	Click into the <b>Start Date:</b> box and enter today's date (ex: 6/08/09). This should be the same date that was used for "0" calendar.
Reset the Calendar	Click on the <b>RESET CALENDAR</b> button (right side of the display). This button will reset the calendar to begin on the date that was entered in the previous step. All holidays and the shipping schedule will be lost. Saturdays and Sundays will remain as holidays. The program will prompt to verify that you want to reset the calendar, click the <b>OK</b> button to reset the calendar.
Set <b>From:</b> and <b>To:</b> Dates	Now change the working <b>From:</b> and <b>To:</b> date fields below to match the calendar start and end dates. These dates are used to specify the range to be adjusted. It is only for special circumstances that these dates will not match the start and end dates of the calendar.
Mark the Holidays	Scroll through the displayed calendar and mark all the days that the schools will be closed as holidays. To mark a day as a holiday, click on the date number. The date number color will change to <b>red</b> , this indicates that the date is a holiday. If you make a mistake, click the date again and it will not be a holiday.
Select Calendar Adjust Method	Scroll back up to the top of the page. Verify that the word "Adjust" is in the <b>Adjust:</b> box in the setup parameters grouping on the right of the screen.
Adjust and Save the Calendar	Click the <b>SAVE AND ADJUST</b> button to adjust the calendar and then save it.
Setup Complete	The setup of the holiday calendar is now complete. It is recommended that you visually scroll through the months and inspect the ship, call, and due date values, and the marked holidays for accuracy and completeness. These appear in each day in the calendar as "S: C: D:" values with dates after them.

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## All Other Calendars

This procedure can be used for all other calendars to be setup. Make sure that you select the correct Adjust method before clicking the **SAVE AND ADJUST** button.

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|---------------------------------------|---|
| Display the Calendar List             | Click on the <b>Calendar List</b> button to display the list of calendars if they are not displayed at this point.  |
| Select the calendar                   | Click on the calendar you wish to change from the Calendar List.  |
| Initialize the Calendar               | Scroll the Calendar screen down until the button and text shown to the right is displayed. Click into the <b>Make this calendar like:</b> box and type the number of the holiday or "0" calendar (previous pages). Then click the <b>SAVE CALENDAR</b> button. This copies the date range and holidays from the chosen calendar to the current calendar.  |
| Mark the Holidays                     | Now mark or unmark any days as holidays that are different for this calendar from what was copied over.   |
| End of Year Date (optional)           | Specifying an end of year date is optional. If an end of year date is marked, then all bookings scheduled on the route will be forced to have a due back date on or before the end of year date. To specify an end of year date, click on the <b>eo</b> box on the desired date. The <b>eo</b> will change to <b>ey</b> when set. The day following the last due date for all routes except Route 0 should be made a holiday and then set to EOY. For example, if Monday June 16th is the last due date for Route 2, Tuesday June 17th should be a holiday and EOY for Route 2. Each route may have a different EOY and that is perfectly acceptable within the system. |
| Noship Days (optional)                | Specifying noship days is optional. A noship day is day that the library is open for returns but, no shipments can be scheduled. For example, some libraries mark the last few days of the school year as noship days. This allows media to be returned on these days but, there will be no shipments scheduled for these days.   |
| Set <b>From:</b> and <b>To:</b> Dates | Verify that the working <b>From:</b> and <b>To:</b> date fields in the setup parameters match the calendar start and end dates.   |
| Select Calendar Adjust Method         | Scroll back up to the top of the page. Verify that the correct adjust method is displayed in the <b>Adjust:</b> box in the setup parameters grouping on the right of the screen. Refer to next page for a list of adjust methods.   |
| Adjust and Save the Calendar          | Click the <b>SAVE AND ADJUST</b> button to adjust the calendar and then save it.  |



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### Setup Complete

The setup of the calendar is now complete. It is recommended that you visually scroll through the months and inspect the ship, call, due date values, and the marked holidays for accuracy and completeness. These appear in each day box as “S: C: D:” values with dates after them. It is also recommended that you try some sample bookings.

### Calendar Adjust Methods –

The following is the list of available calendar adjusts methods.

<u>Method</u>	<u>Delivery/Pickup</u>
Adjust	Daily
MONMON	Mondays only
MONTUE	Mondays & Tuesdays
MONWED	Mondays & Wednesdays
MONTHU	Mondays & Thursdays
MONFRI	Mondays & Fridays
TUETUE	Tuesdays only
TUEWED	Tuesdays & Wednesdays
TUETHU	Tuesdays & Thursdays
TUEFRI	Tuesdays & Fridays
WEDWED	Wednesdays only
WEDTHU	Wednesdays & Thursdays
WEDFRI	Wednesdays & Fridays
THUTHU	Thursdays only
THUFRI	Thursdays & Fridays
FRIFRI	Fridays only
MONWEDFRI	Mondays, Wednesdays, & Fridays

### Description of other setup parameters:

**-SOV** This is the Do Not Ship On View date flag. When selected, the calendar will be adjusted so that the ship date will always be before a requested view date.

**CFS** This is the Count From Ship date flag. When set the booking period will be counted from the ship date rather than the view date.

**CAV** This is the Call After last View date flag. Currently this flag is not active.

**Days:** This setting is used for periodic shipping schedules such as shipments every two days or shipments on even and odd days. Not to be used to specify the booking period.

**Transit:** This is the number of days from the date that media leaves the library until it is delivered to the user. This value is also the number of days from the date media is picked up from the user until it is returned to the library.

**Buffer:** This is the number of days from the date media is picked up from the user until it is returned to the library. A value of 1 means that media will not be due back on the library shelf until the day after it is picked up from the user.

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### Reviewing & Setting the Date and Time Fields That Govern Bookings

Now that you have verified your calendars it's time to open up Web/Max and Series-M for bookings for the next year. These are located in:

ADMIN → PREFERENCES → WEB/MAX SETUP

Near the bottom of the page under the section titled, "*D/MAX setup Options*". There are four option setup values that should be reviewed and changed if necessary each year after the SERIES-M calendars have been updated.

Earliest Shipping Date (typically this setting does not change each year)

Maximum Due Date

Absolute Max Due Date

Cutoff Time for Online Booking (typically this setting does not change each year)

The Earliest Shipping date must not be earlier than the number of days ahead that the copies are assigned by the DAILY ASSIGNS program. For example, if copies are assigned 2 days ahead then the earliest shipping date should be set to 2 days from today.

Materials can be scheduled for shipment on-line for the earliest shipping date up to but not after the cutoff time today. After the cutoff time today, the earliest a booking could be scheduled for would be the day after the Earliest Shipping Date.

To open up booking for next year the Maximum and Absolute Maximum Due date option settings must be changed. The reason for having a Maximum and an Absolute Maximum Due option is to handle situations where libraries only allow on-line booking for a set number of days in advance, not the entire year. For example, to allow on-line booking for only 3 months in advance set the options as follows. At the beginning of the new year (July 1), set the Maximum Due Date to October 1 and the Absolute Max Due Date to June 15 (end of school year). Each day SERIES-M will advance the maximum due date and user can always book on-line for up to 3 months from today. Because the absolute max due date is set to June 15, they can never schedule bookings with a due date after June 15. To allow bookings for the entire year at the beginning of the year set both the Maximum and Absolute Max due dates to June 15 (end of school year).

NOTE: Don't forget to click the **APPLY** button at the bottom of the page when you are finished making changes.

### And Finally...

You might want to investigate the "NEW Items date" field option while you are in the D/Max setup options as well. When titles are displayed by Web/Max, "NEW" titles are identified with a special "NEW" Icon. A "NEW" title is any title that has a date added (TMDATE) after the date specified in this option.

Should you need any additional help please contact the Tek Data Support staff (800-634-6057) and we will be happy to help as always. Best Wishes and success with your new school year!