

CAPITA

What's New in Bridge Pro 1.5

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About this document

- ◆ This document explains the new and amended functionality in Bridge Pro 1.5.
- ◆ It is intended for System Managers responsible for the maintenance of Bridge. It assumes that the reader is already familiar with Bridge and the Talis Alto LMS.
- ◆ For more information about Bridge Pro 1.5 please refer to the Bridge Pro 1.5 Reference Manual.

Talis Support

- ◆ If you are experiencing difficulties, please contact your System Manager/IT Department in the first instance.
- ◆ **Talis Support Site:** <http://www.talis.com/services/support/>
- ◆ **Telephone:** +44 (0)870 400 5400
- ◆ **Email:** support@talis.com

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Contents

1. Introduction.....	4
2. Upgrading to Bridge Pro 1.5	4
3. Summary of new features	4
3.1 Option to treat renewals as unseen.....	4
3.2 Overpayments & Credit	4
3.3 Borrower email.....	4
3.4 Offline Improvements.....	4
3.5 Self-Issue of Age Restricted AV Material	5
3.6 Automatic Item Relocation for Dynamic Stock System	5
3.7 Borrower Unblocking	5
3.8 Inclusion of Fine in the receipt (applies to 3M only).....	6
3.9 Inclusion of symbol '£' in fine message	6
4. Changes to parameters	6
4.1 Location & Operator configuration parameters	6
5. Discharge configuration parameters	7
6. Changes to Offline exceptions	7

1. Introduction

This document introduces the functional changes in Bridge Pro 1.5

2. Upgrading to Bridge Pro 1.5

To upgrade your current Bridge Pro licences you will need to raise a case through [My Support](#). Bridge Lite customers wanting to find out more about upgrading, please contact sales@talism.com.

3. Summary of new features

3.1 Option to treat renewals as unseen

Due to the ability of self issue kiosks to offer renewal without requiring the item's physical presence, some customers prefer that Bridge treat renewals as unseen and thus reduce renewal limit to that of unseen renewals.

To achieve this, set configuration variable `TAL_RENEW_ACTION_ID` as follows:

```
TAL_RENEW_ACTION_ID = OBR
```

3.2 Overpayments & Credit

Alto 4.3 introduced credit to allow self issue overpayment in case the machine runs out of change. Bridge can now be customized to accept overpayment and record it as credit. An upper credit limit can also be enforced so that it doesn't grow indefinitely. It should be used only with kiosks that support credit display and allow overpayment. Please note that although at present credit can only be consumed at the counter, it will nevertheless be used by Bridge to offset outstanding fees (fines, charges, etc.) that may block issue or renewal.

3.3 Borrower email

Bridge can now be customized to return the borrower's email to support kiosks that offer the option of emailing rather than printing of receipts. The customization can take into account customers that don't use the standard Alto method for storing the borrower's email in the Talis LMS.

3.4 Offline Improvements

The following improvements were introduced:

Disallow upload of out-of-order offline issue

Bridge now rejects offline issues that are uploaded out-of-order or the kiosk attempts to upload an offline issue more than once. The former may occur when an item is discharged offline at kiosk A, then issued at kiosk B but the upload takes place in order B, A. The latter may occur when, for any reason, the kiosk's offline batch is not cleared properly after being uploaded.

Improve clarity of Offline log messages

The wording changed to describe precisely the underlying error condition.

TAL_OFFLINE_OPERATOR

A new configuration variable, namely TAL_OFFLINE_OPERATOR, was added to set the operator for offline transactions. If not defined, the operator will default to the one used for on-line operation, i.e., “Self Issue” or the name provided by the machine at login – see configuration variable TAL_LOAN_OPERATOR, Appendix A, for more detail about the operator used for on-line transactions.

3.5 Self-Issue of Age Restricted AV Material

To conform to Trading Standards unsupervised self-issue kiosks need authenticate borrowers by asking them to provide their PIN whenever an age restricted item is checked out. Bridge can be customized to support PIN authentication at issue of age restricted material.

Pre-requisites

The above method can be applied to customers that meet the following conditions:

1. Talis LMS loan rules already prevent under age borrowers checking out age restricted items. Bridge will not check if the loan rules observe the age restriction rules – it assumes that they do.
2. The PIN is already in use – the customer’s library members, or their majority in the least, have been allocated PINs. Please contact Talis to discuss what to do if not all members have been allocated PINs.
3. Age restricted items are tagged as “Not for offline use” to prevent unauthorized checkout during offline operation (neither barcode nor PIN can be ascertained).

3.6 Automatic Item Relocation for Dynamic Stock System

Some libraries operate a dynamic stock system whereby an item discharged at a site will remain at the discharge site and become re-sited there (known as “sticky stock”). Bridge can now be customized to automatically re-site returned items according to the library rules; this will eliminate manual re-siting at the counter stations and also reduce ‘losing’ stock when items are being shelved at the return site without re-siting.

3.7 Borrower Unblocking

By default Bridge will unblock a borrower **only when** the underlying blocking conditions do not hold **and** the borrower attempts to either issue or renew an item. If the borrower logs on to the kiosk, views account information, discharges or makes payments that potentially remove the blocking conditions without attempting to issue/renew, then the blocking message won’t be expired.

Bridge can now be configured to expire the blocking message when the user logs in (requires borrower’s card scanning) and logs out of the kiosk.

To force unblocking set FORCE_BORROWER_UNBLOCK as follows:

FORCE_BORROWER_UNBLOCK = YES

3.8 Inclusion of Fine in the receipt (applies to 3M only)

Bridge can now direct the machine to include a configurable text in its receipt for overdue items that caused the borrower to incur fines. See the new configuration variable FINE_PRINT_LINE.

3.9 Inclusion of symbol '£' in fine message

Monetary values in the fine message sent to the machine for display will be preceded by sign '£' rather than '#' – (see relevant message, Tag = Fine info (message ID = [11]).

4. Changes to parameters

This section summarises the *changes* to Bridge Parameters. For more information about the entire set of Bridge Parameters, refer to the Bridge Pro Reference Manual.

4.1 Location & Operator configuration parameters

Parameter	Description	Added in Version
FORCE_BORROWER_UNBLOCK	Setting it to YES will force Bridge to evaluate and remove the blocking message, if applicable, as soon as the user removes their card. Note that unblocking will take place only when auto unblock is enabled in the LMS. <i>Mandatory</i> <i>Value range:</i> NO, YES <i>Default:</i> NO	Pro 1.5
TAL_LOAN_OPERATOR	The CREATE_OPERATOR used when a new transaction is inserted into a database table (LOAN for issue, renew and discharge, BORROWER_CREDIT for payments) <i>Optional</i> <i>Value range:</i> Any name, maximum 10 characters <i>Default:</i> Self Issue for a self-check, Telephone for Talis Message <u>NOTE:</u> If you want to audit, or draw reports of, self issue loan and payment transactions per machine name then we suggest that you comment out the parameter – Bridge will use the client's name instead of the generic name Self Issue as operator to record the transaction in Talis LMS	SIP2 server
TAL_RENEW_ACTION_ID	The ACTION_ID used when a renew transaction is inserted into the LOAN table <i>Mandatory</i> <i>Value range:</i> CLIS, OBR <i>Default:</i> CLIS ; if OBR is used then Bridge will treat the renewal as unseen and it will apply the relevant limit	Pro 1.5

5. Discharge configuration parameters

Parameter	Description	Version
FINE_PRINT_LINE	<p>The text to be sent to 3M's print receipt for every discharge of overdue items that incur fines. Bridge will insert the incurred fine in the text after the character '£' - if not present, the fine won't be inserted.</p> <p>NOTE: '£' may appear/display as '\243' in the text when using the vi editor on Unix Talis machines.</p> <p><i>Optional</i></p> <p><i>Value range:</i> any text</p> <p><i>Default:</i> empty (no text)</p> <p><i>Example:</i> FINE_PRINT_LINE = Fine due £</p>	Pro 1.5

6. Changes to Offline exceptions

During upload, the server will refuse offline transactions under certain conditions that are described below. Please note that:

- ◆ **offline date-time** is supplied by the machine – it's the actual date the offline transaction took place
- ◆ **offline due date** is supplied by the machine – it's the issue/renew due date generated by the offline machine
- ◆ **TAL_QUERY_DISCHARGE** is a server configuration variable

A. Discharge offline exceptions

1. Unknown item (item is not on file)
2. Item is not on loan (this may be due to out of order upload)
3. Item's status is queried (QUER) and TAL_QUERY_DISCHARGE = NO
4. Item is a project loan
5. Check-in time out of order – the offline date-time is chronologically before the item's last issue or renewal timestamp.
6. Check-in time not in the past – the offline date-time is chronologically after the server's current date-time.

Exception 5 prevents invalidating the item's history. A possible cause may be out-of-order upload. For example, item was discharged at machine m1 and then issued at machine m2 but the upload took place in the reverse order, i.e., m2, m1. The issue at m1 will be interpreted and recorded as renewal and this will cause the subsequently uploaded discharge to be rejected as out-of-order.

Exception 6 is due to a lack of synchronization between the Self-Check and the Talis machine clocks. Ensure the partner machines are synchronized with the LAN's time server. All other exceptions require staff to manually update the Talis LMS.

B. Issue exceptions

1. Unknown item (item is not on file)
2. Unknown borrower (borrower not on file)
3. Borrower's card has expired
4. No loan rule for Item/Borrower/Location combination
5. Item is on loan to another borrower – this may be due to out of order upload
6. Item is on the reservation shelf for another borrower
7. Item is a project loan
8. Checkout time out of order – the offline date-time is chronologically before the item's most recent transaction.
9. Checkout time not in the past – the offline date-time is chronologically after the server's current date-time
10. Due date not in future - - the item was already overdue at the time of its issue

Exceptions 1 to 7 require staff to manually update the Talis LMS.

Exception 8 may be caused by out-of-order upload (item was discharged at machine m1 and then issued at machine m2 but the upload took place in the reverse order, i.e., m2, m1)

Exception 9 is caused by lack of synchronization between the self-check and the Talis machine clocks – ensure the partner machines are synchronized with the LAN's time server.

Exception 10 is caused by self-issue machine defect.

C. Renew exceptions

1. Unknown item (item is not on file)
2. Unknown borrower (borrower not on file)
3. Borrower's card has expired
4. Borrower other than owner attempts to renew (this may be due to out of order upload)
5. Item is not on loan (this may be due to out of order upload)
6. Item is a project loan
7. Checkout time out of order – the offline date-time is chronologically before the item's most recent transaction.
8. Checkout time not in the past – the offline date-time is chronologically after the server's current date-time
9. Due date not in future - the item was already overdue at the time of its renewal!

Exceptions 1 to 6 require staff to manually update the Talis LMS.

Exception 7 may be caused by out-of-order upload – see Issue exceptions above for an example.

Exception 8 is caused by lack of synchronization between the self-check and the Talis machine clocks – ensure the partner machines are synchronized with the LAN's time server

Exception 10 is caused by self issue machine defect.