

# LIBRARY COLLECTION SERVICES (LCS)

TRANSPORTS COMMUNICATIONS SYSTEM

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## LCS TRANSPORTS APPLICATION: OVERVIEW

This application solicits data for daily LCS pickup runs (AM or PM). The LCS team will use the data entered in order to derive the Driver Run Sheet for daily deliveries.

The LCS management team provides the values for valid locations and cutoff times (via the LCS Manager application).

The application is an MS ACCESS application, with an SQL Server backend. All data is written to tables in the LCSTransports SQL Server database; reports are generated using SQL Server Reporter.

Shortcuts to this application and to reports are found in the shared 'LCSProdShortcuts' in the 'LCSTransports' folder on the newton server; copy and paste this folder or the shortcuts in the folder to your workstation. Consult your supervisor about contacting Library IT to gain access to these functions.

## DATA ENTRY APPLICATION

### OVERVIEW

- Select your unit from the drop-down, as well as date and pickup time; you may enter or change data for future pickups only! The system will determine if the selected time is valid based on current time. For example, a PM pickup will not be allowed after noon of the current day.
- Add each bin for the delivery in separate rows on the form
- Optionally, add barcodes or other designators for the items in any bin

### HEADER AREA

The screenshot shows the header area of the LCSForm application. At the top, there is a tab labeled 'LCSForm' and a title bar 'CUSTOMER RETURN NOTIFICATIONS'. Below the title bar, there are several input fields: 'Sending Unit: SML (SA)' with a dropdown arrow, 'Time: PM' with a dropdown arrow, and 'Transfer Date: 1/16/2016' with a calendar icon and the text 'default = tomorrow'. Below these fields is a table with the following columns: 'BIN #', 'Seal #', 'Quantity', 'Drop Point', 'Edit Barcode', and 'Notes: enter any special instructions'. The table has one row with a '\*' in the first column, and values '1' in the 'Quantity' column and 'No' in the 'Edit Barcode' column.

The following header area fields are required:

1. **Sending Unit** – the unit that is sending the bin/s; select from the drop down list of valid locations or start typing the letters of your unit
2. **Time** – select AM or PM pickup
3. **Transfer Date** – defaults to tomorrow; or click in the data entry field to display a calendar icon to select another date

### PER ROW/BIN

The screenshot shows the per row/bin area of the LCSForm application. It has the same header area as the previous screenshot. Below the header area, there is a table with the following columns: 'BIN #', 'Seal #', 'Quantity', 'Drop Point', 'Edit Barcode', and 'Notes: enter any special instructions'. The table has two rows. The first row has a '\*' in the first column, 'this is a test bin' in the 'BIN #' column, '1' in the 'Quantity' column, 'LSF' in the 'Drop Point' column, 'No' in the 'Edit Barcode' column, and 'testing' in the 'Notes' column. The second row has a '\*' in the first column and '1' in the 'Quantity' column.

### REQUIRED FIELDS

1. **BIN #** – identifies the bin

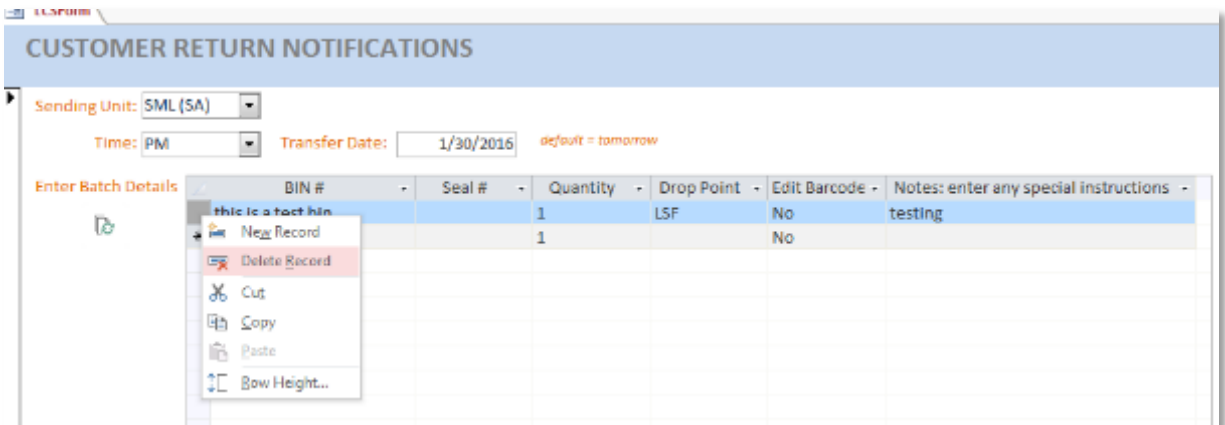
2. Drop Point – identifies the recipient of this bin; select a valid location from the list or begin typing in the letters of the desired location
  - a. Drop Point will default to the last entered value
  - b. note: while there are three drops listed for LSF (LSF, LSF 1, and LSF 2), on-campus staff should always select LSF as their drop point for returns and/or re-deliveries. The other two designations—LSF 1 and LSF 2—are included in the list to allow LCS to split outgoing shipments from LSF to be placed on two different vehicles.
  - c. SML (SR) refers to the SML Shipping Room, which is the hub for the collection and distribution of material between PR 344 and Sterling. SML (SA) refers to the LCS staging area in the Sterling basement. This latter drop will generally only be used BY LCS to announce the delivery of equipment (totes and dollies) for SML transfers or for certain in-bound deliveries for DRMS.

#### OPTIONAL FIELDS

1. Seal # – may be left blank or updated at a later point
2. Quantity – defaults to 1
3. Edit Barcodes – defaults to 'No'; select 'Yes' or begin typing 'yes' to bring up a pop-up window to scan barcodes or other designator for the bin
4. Notes: enter any special instructions – optional, up to 256 characters

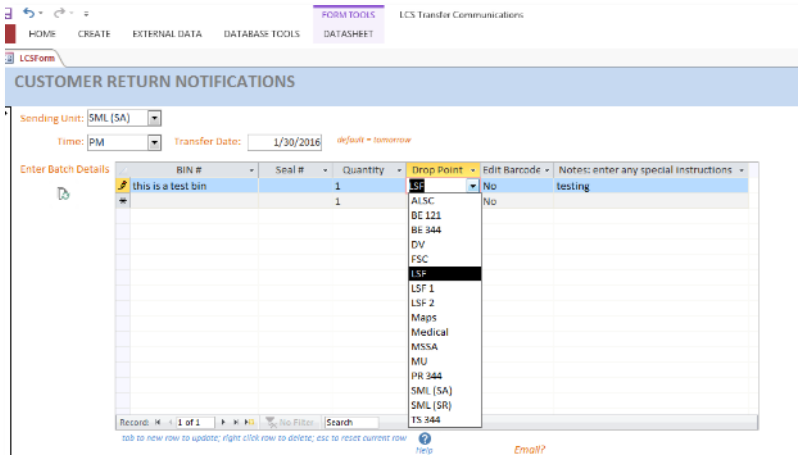
#### EDITING/ADDING ROWS/BINS

- the current row is added only when the cursor proceeds to the next row
  - be sure to place your cursor in the next empty row to complete data entry
- use 'esc' key to revert to prior data before update takes place (or in the case of a system-generated error message)
- right click in a row header to highlight and then 'Delete Record' to delete a row



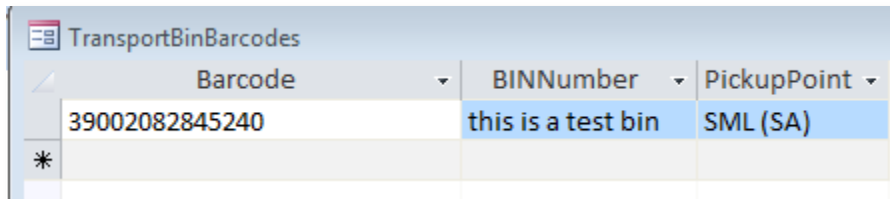
- you will receive a confirmation message; click 'Yes' if you are sure you want to delete the row (see Messages below)
- drop-down selections are offered (Sending Unit, AM/PM, Drop Point, Edit Barcode) when you have clicked in a data entry field

- column header arrows do *not* trigger the dropdown selections

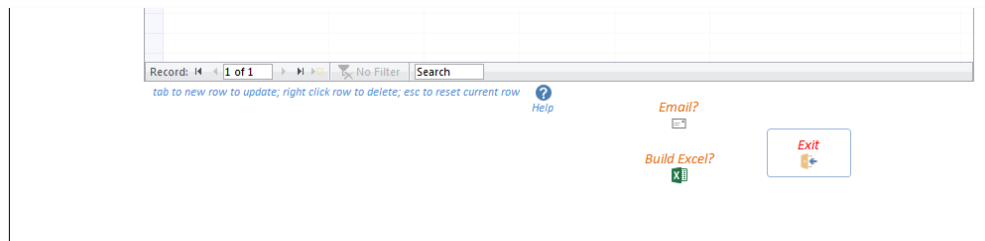


### ADDING BARCODES (OR OTHER DESIGNATORS)

If you type or select 'yes' in the 'Edit Barcode' column, a popup window will appear to allow you to scan or enter barcodes or other designators for items in the associated bin



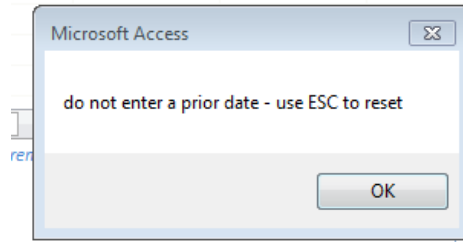
### ADDITIONAL FORM BUTTONS



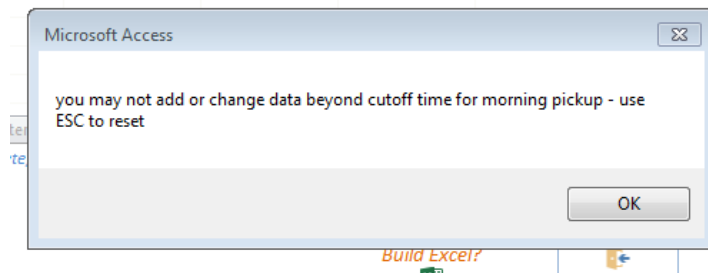
- **? Help** opens a new window with current documentation online
- **Email?** opens a new mail in Outlook with an excel file of the current batch already attached; use if you would like to notify other departments of impending deliveries from your unit. You are responsible for providing the email address/es of the appropriate recipients.
- **Build Excel?** builds an excel file of the current batch and associated bins; you are responsible for saving the file to an appropriate location on the workstation
- **Exit** closes the application (or you may choose to 'X' out of the application, from the top right of your screen).

## POTENTIAL MESSAGES

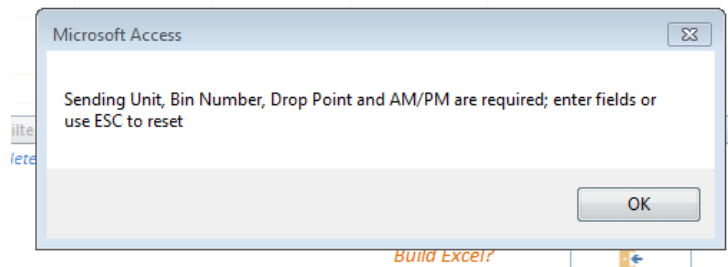
- bin information may be only entered for future pickup; do not enter a prior date



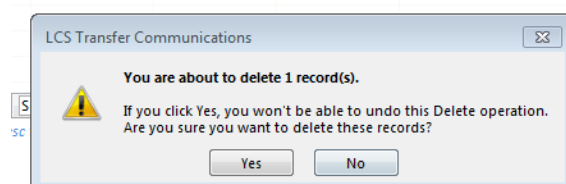
- bin information may be only entered for future pickup; if you miss the cutoff for an AM or PM pickup, the system will inform you



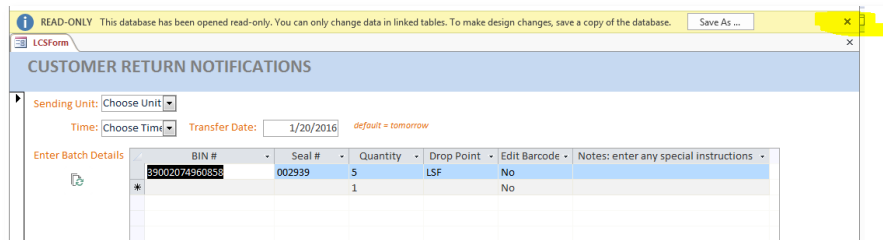
- you must enter required fields



- if you choose to delete a row, the system will ask for confirmation before proceeding



- You may receive a warning about 'read-only' access which indicates multiple use of the application at one time; this does not affect the functionality of the application, so you may 'X' out the warning banner.



- if a user is not authorized for database permissions, he/she will receive a message:

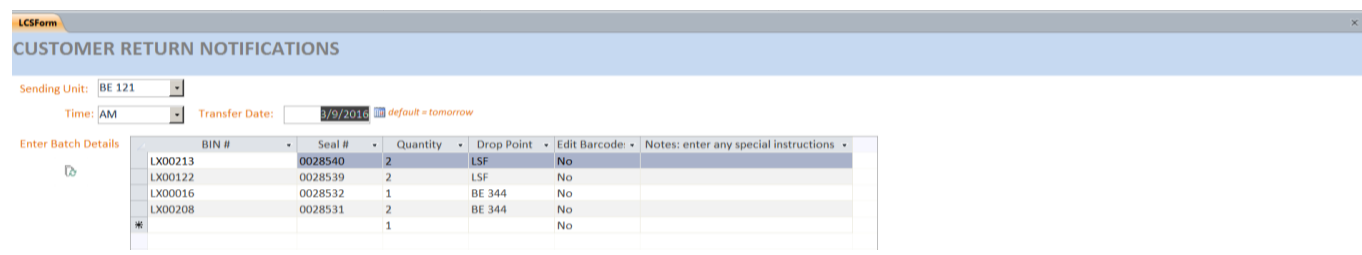
ODBC – connection to SQL Server blues.library.yale.edu failed

**TRANSPORT OF MATERIALS TO DESTINATIONS OTHER THAN LSF**

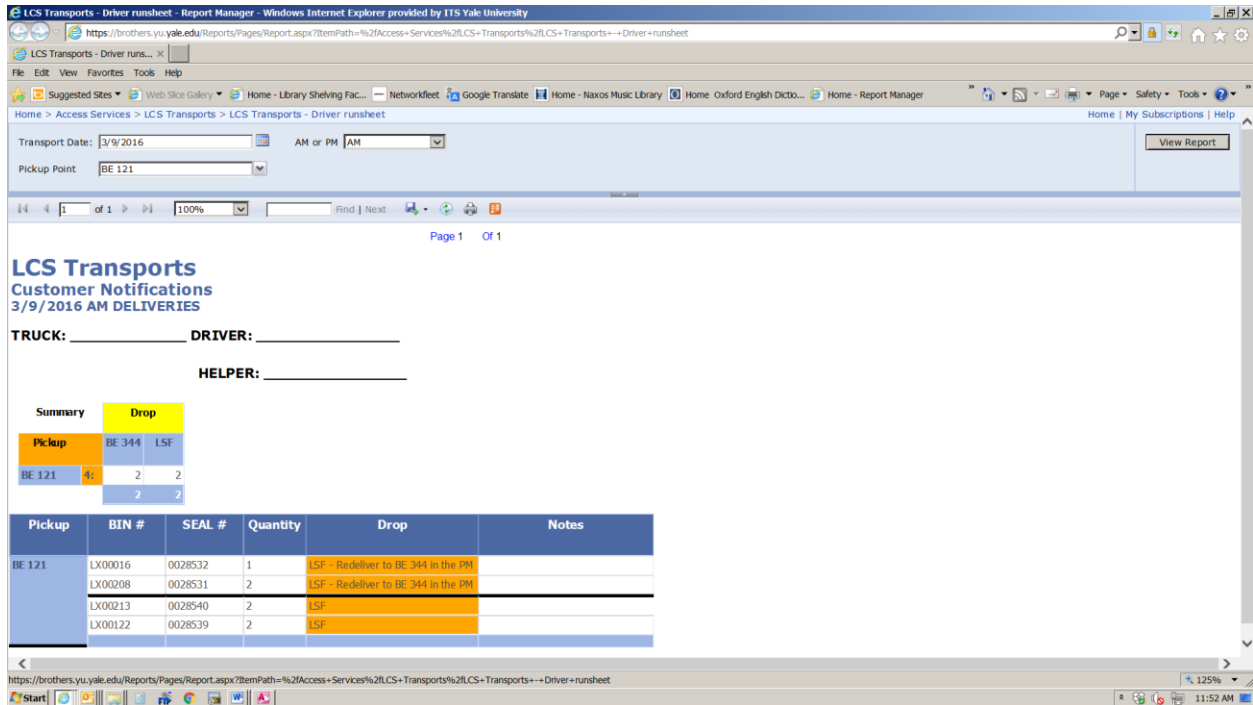
While the majority of transportation requests made using the new notification form will be for returning material to LSF, there will be occasions where a unit wants material delivered somewhere else in the YUL system. For example, BE 121 may want to send materials to BE 344, or SML Access Services may wish to send material to PR 344. Often in such requests, material will be picked up by one LCS vehicle in the morning, brought to LSF, and then re-delivered on another vehicle in the afternoon. **Staff making the request on-campus, however, should select the ultimate destination as the drop point.**

Example:

BE 121 wants two bins delivered to BE 344 in the afternoon. Staff therefore will indicate the delivery destination by selecting BE 344 as the drop point:



When the driver's instruction are printed by LCS, however, the appropriate information concerning the interim delivery to LSF auto-populates the drop point field:



Special mapping has been created to accommodate known traffic between certain on-campus locations: MSSA and Medical Historical, BE 121 and BE 344, and SML and PR 344. While similar arrangements can be made to allow traffic between other units as well, units who would like this service should contact one of the LCS managers before placing a request to confirm that the appropriate mapping exists in the tables governing the form.

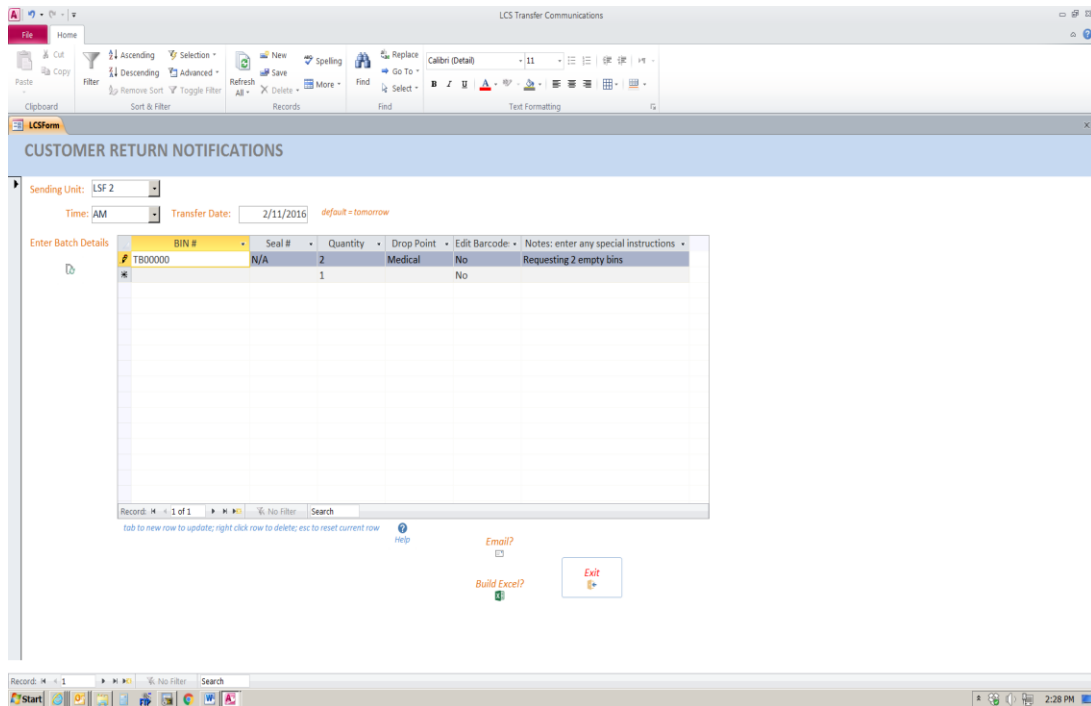
### REQUESTING TRANSPORT EQUIPMENT USING THE CUSTOMER NOTIFICATION FORM

Historically, on-campus units would place a request for equipment (bins/toes, dollies, flatbeds) either by sending an e-mail to a staff member at LCS or by including their request in the Excel notification spreadsheet they would post on SharePoint. Routine requests for equipment are now to be made using the Customer Notification Form, according to the following procedure:

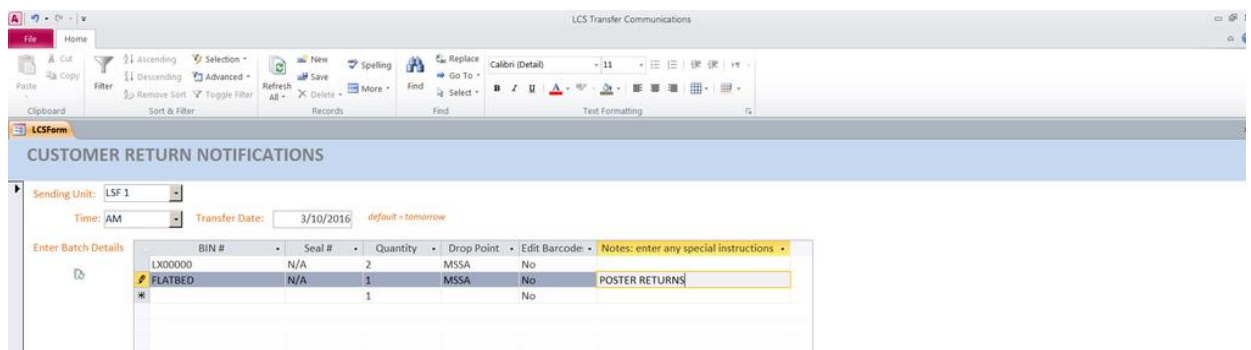
1. Select the proper LSF location (LSF 1 or LSF 2) as the sending unit.
  - a. **When requesting equipment, selecting the proper LSF location as the sending unit is critical.** LCS now runs two vehicles simultaneously twice a day to make special collection deliveries.
    - i. MSSA, BE 121, Maps, Music, SML Shipping Room (SML SR), SML Staging Area (SML SA), and Library IT should use **LSF 1** as the sending unit when requesting equipment.
    - ii. ALSC, Divinity, FSC, YCBA, Medical Historical, BE 344, and PR 344 should use **LSF 2** as the sending unit when requesting equipment.

2. In the Bin# field, type the prefix of the type of tote you require followed by five 0s (Example: LX00000). All of the various types of transport containers with their prefixes used by LCS to make deliveries can be found on our website at <http://web.library.yale.edu/departments/lcs/transport%20containers>).
3. In the Seal# field, type N/A
4. Under quantity, type the number of items of that type you are requesting.
5. For the drop point field, select your own unit.
6. Add any additional information you think necessary in the Notes field.
7. Repeat this procedure if you require additional material of a different type (for example if, in addition to TB totes, you also need lateral crates (LX00000) and a flatbed).

Example 1: Medical Historical request for 2 TB bins



Example 2: MSSA requests 2 LX Totes and a flatbed





## ASSOCIATED REPORTING

### CUSTOMER HISTORY REPORT

Transport Date: 12/27/2015 through 1/30/2016  
 Time: AM, PM Search barcode?  NULL  
 Pickup Point: SML (SA)

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### Library Collection Services Transports History

Pickup Summary		Drop Point	
Pickup Point	ALSC	LSF	
SML (SA)	3	1	2
		1	2

Date	Time	Barcodes Recorded	Transfer Type	BIN #	Seal #	Quantity	Notes	Pickup Point	Drop Point	Barcodes
1/14/2016	PM	0	PickUp: To ALSC	88888		1	test	SML (SA)	ALSC	
		0	PickUp: To LSF	lkiklj		1		SML (SA)	LSF	
		1	PickUp: To LSF	9999999		1	test - lfb	SML (SA)	LSF	

- Select your unit from 'Pickup Point' to view a history of transports from as well as to your unit for the specified date range, or 'Select All' to view all transports over the date range
- The number of barcodes recorded for a bin is indicated in the column 'Barcodes Recorded'; click the '+' to list all barcodes in the associated bin
- To search for transports for a particular barcode, uncheck the 'null' and enter the barcode in the search box. The associated bin/s including the barcode or designator will be indicated via 'Match' in the Barcodes Recorded column

Transport Date: 12/27/2015 through 1/30/2016  
 Time: AM, PM Search barcode? 999999999  NULL  
 Pickup Point: SML (SA)

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### Library Collection Services Transports History

Pickup Summary		Drop Point	
Pickup Point	ALSC	LSF	
SML (SA)	3	1	2
		1	2

Date	Time	Barcodes Recorded	Transfer Type	BIN #	Seal #	Quantity	Notes	Pickup Point	Drop Point	Barcodes
1/14/2016	PM	1 Match	PickUp: To LSF	9999999		1	test - lfb	SML (SA)	LSF	

## DRIVER REPORT

The LCS Management team generates a Driver Run sheet each day for AM and PM deliveries derived from data entered through the LCS Transports application. The report automatically orders locations based on parameters assigned by the LCS team in a separate application.

## MISCELLANEOUS

- Users of the data entry application and the reporting functions must be given database permissions; contact Library IT to add a user's net id to the Active Directory group, 'lib\_lcsTransports\_users'. After being notified that a user has been added to the permissions group, it is recommended to wait 15-20 minutes, or log back into the machine in order to fetch the new permissions
- In order to streamline access for multiple users (who have database permissions) of a workstation to the application and reporting functions, you may find it efficient to copy the 'LCSProdShortcuts' folder or any of the shortcuts in the folder to the 'Public Users' desktop (paste to C:\Users\Public\Desktop)
- A test database has been created for testing or training purposes. Please use the shortcuts to the test instance from the 'LCSTestInstance' folder on newton