OCLC

Amlib

Library Management System

Circulation Training Manual - Advanced Circulation

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CIRCULATION TRAINING- ADVANCED CIRCULATION

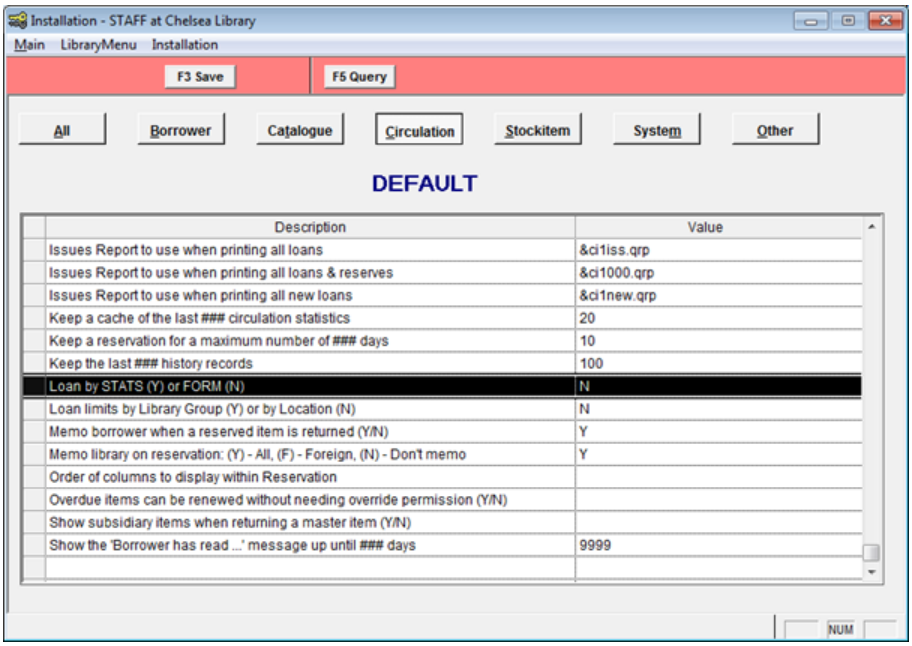
Overview

This course is designed for those sites that have been using Amlib Circulation for some time but would like to know more about using the Circulation and related Applications.

Circulation includes Issues and renewals, Reservation, Returns, Chute Returns, Transfers but also includes Stockitems e.g. Master/Sub, Memos and Borrower e.g. Memos, Borrower Financials.

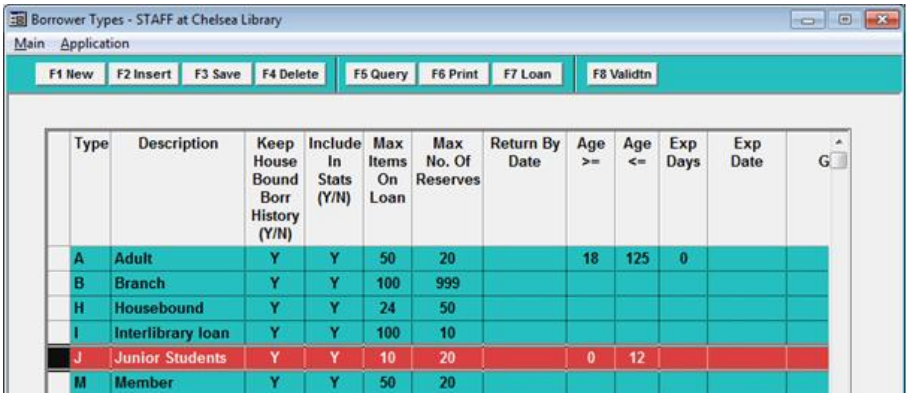
SETTING DEFAULTS FOR CIRCULATION

Amlib can be set to observe loan rules based on either Borrower Types and Form Code (most common) or Borrower Types and Stats Code. This is set in **Main** > **Supervisor** > **Installation** – **Circulation** tab setting: Loan by STATS (Y) or FORM (N). It is ***not*** recommended that libraries switch between these without discussing the issue with *Amlib Support*, as this will have major impacts on your library's statistics.

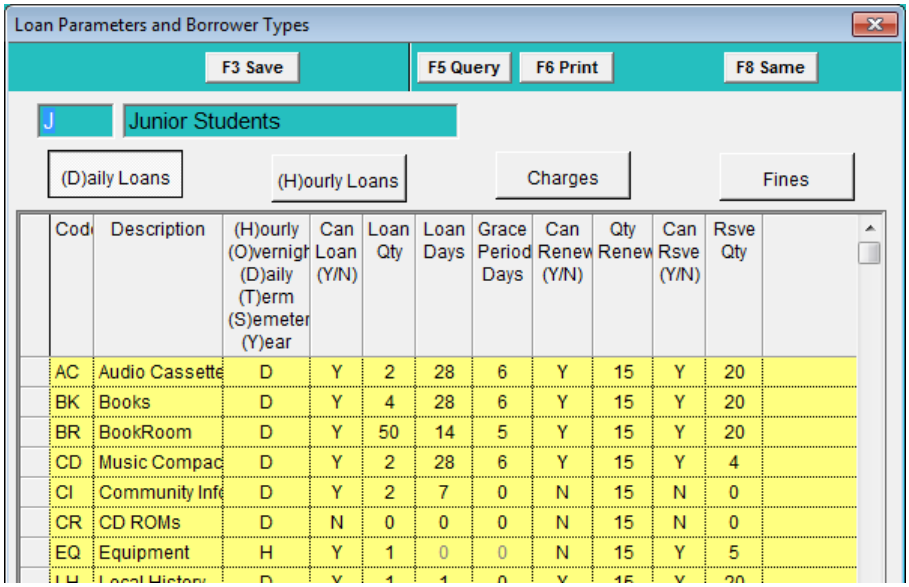


Altering Loan Parameters

1. Launch the *Amlib* client
2. Go to **Main** > **Borrowers** > **Borrower Types** – the Borrower Types screen will display:



3. Highlight the Borrower Type you would like to edit and click the **F7 Loan** button – the Loan Parameters and Borrower Types screen (for that Borrower Type) will display
4. Edit the columns as necessary to control the loan parameters and click the **F3 Save** button when complete



Cod	Description	(H)ourly (O)vernigh (D)aily (T)erm (S)emeter (Y)ear	Can Loan (Y/N)	Loan Qty	Loan Days	Grace Period Days	Can Renew (Y/N)	Qty Renew	Can Rsve (Y/N)	Rsve Qty
AC	Audio Cassette	D	Y	2	28	6	Y	15	Y	20
BK	Books	D	Y	4	28	6	Y	15	Y	20
BR	BookRoom	D	Y	50	14	5	Y	15	Y	20
CD	Music Compac	D	Y	2	28	6	Y	15	Y	4
CI	Community Inf	D	Y	2	7	0	N	15	N	0
CR	CD ROMs	D	N	0	0	0	N	15	N	0
EQ	Equipment	H	Y	1	0	0	N	15	Y	5

The above example uses the combination for Borrower Type and Form Code (the other option is by Borrower Type and Stats Code):

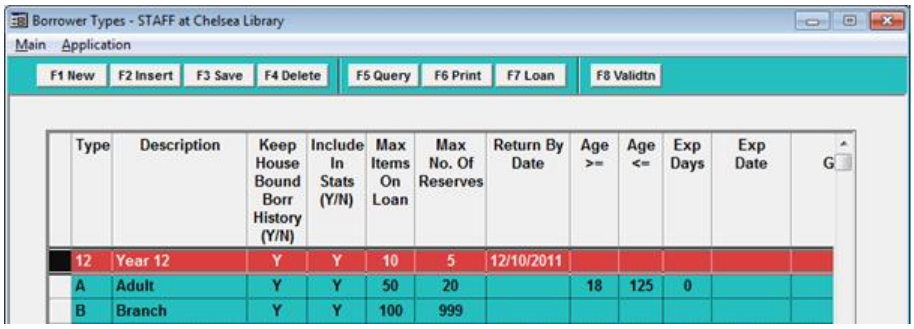
CODE	DEFINITION
Code	The item Form/Stats Codes in the system (from **Main** > **StockItems** > **StockitemForms** or **Main** > **StockItems** > **StockitemStatsCodes**)
Description	Item Form/Stats Code Description
(H)ourly, (O)vernight, etc	Loan period type
Can Loan (Y/N)	Whether or not the patrons with this Borrower Type can loan items with that Form/Stats Code
Loan Qty	The number of items with that Form/Stats Code that a patron with this Borrower Type is allowed to borrow
Loan Days	If the loan term is Daily, how many days can items with that Form/Stats Code be loaned by patrons with this Borrower Type
Grace Period Days	(Fines) How many days overdue can an item be overdue before applying fines
Can Renew (Y/N)	Whether or not patrons with that Borrower Type can renew items with that Form/Stats Code
Qty Renew	The number of times that patrons with that Borrower Type can renew a particular item with that Form/Stats Code
Can Rsve (Y/N)	Whether or not patrons with that Borrower Type can reserve items with that Form/Stats Code
Rsve Qty	The number of items with that Form/Stats Code that patrons with that Borrower Type can have on reserve at one time

Setting Overall Loan, Reservation and Date Due Limits by Borrower Type

It is possible to set overall limits per Borrower Type on the total number of items (regardless of Form/Stats Code) that a patron may loan, the total number of reservations (regardless of Form/Stats Code) a patron my have at once and the date by which all items must be returned with that Borrower Type – for example: Year 12 students who may be finishing earlier than other Year levels.

These settings will over-ride/limit the Loan Parameters settings created above.

1. Launch the *Amlib* client
2. Go to **Main** > **Borrowers** > **Borrower Types** – the Borrower Types screen will display:

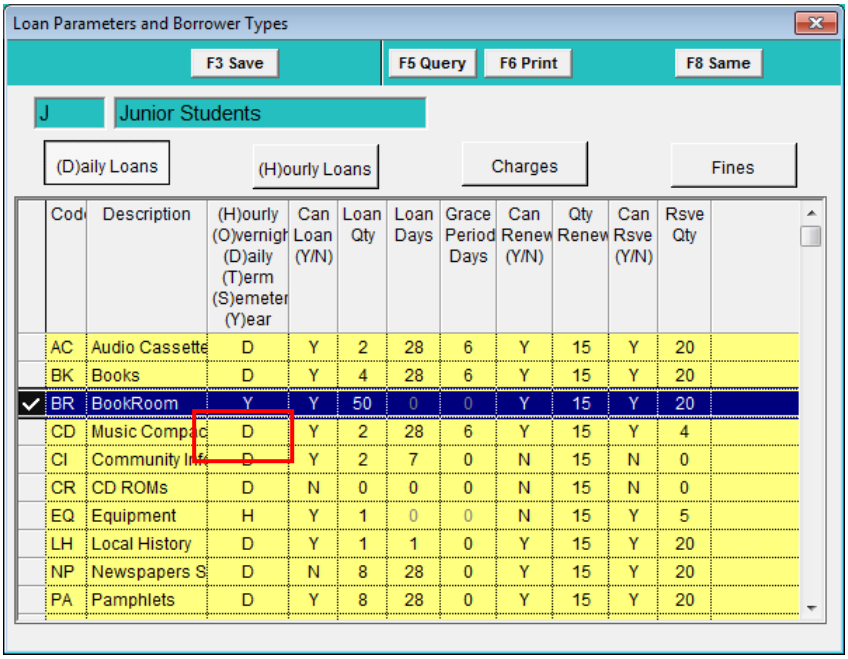


Type	Description	Keep House Bound Borr History (Y/N)	Include In Stats (Y/N)	Max Items On Loan	Max No. Of Reserves	Return By Date	Age >=	Age <=	Exp Days	Exp Date	G
12	Year 12	Y	Y	10	5	12/10/2011					
A	Adult	Y	Y	50	20		18	125	0		
B	Branch	Y	Y	100	999						

3. Locate the Borrower Type you would like to place the overall limit on and alter the columns as necessary – for example: Year 12 – Return By Date = **12/10/2011**
4. Click the **F3 Save** when complete
5. Log off the Borrower and Circulation modules for these settings to take effect

Term, Year and Semester Loan Types

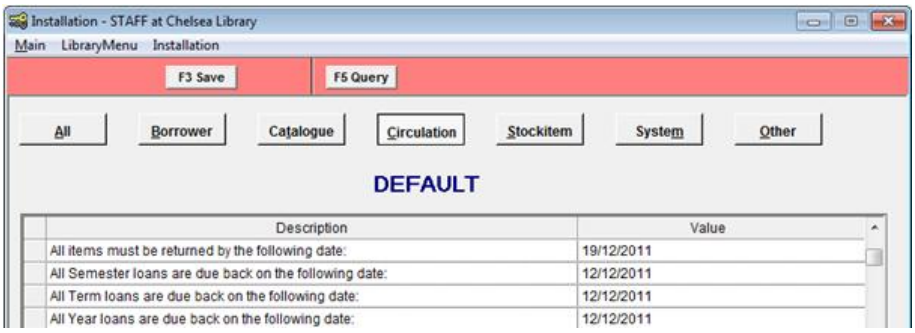
It is also possible to set the loan periods (for items with a particular Form/Stats Code) by **term**, **semester** or **year** loan periods. This requires dates to be set in Supervisor module for the system to use as due dates (see below) and for the loan term column to be set with a Yearly (**Y**), Semester (**S**) or Term (**T**) code.



Code	Description	(H)ourly (O)vernight (D)aily (T)erm (S)emester (Y)ear	Can Loan (Y/N)	Loan Qty	Loan Days	Grace Period Days	Can Renew (Y/N)	Qty Renew	Can Rsve (Y/N)	Rsve Qty
AC	Audio Cassette	D	Y	2	28	6	Y	15	Y	20
BK	Books	D	Y	4	28	6	Y	15	Y	20
BR	BookRoom	Y	Y	50	0	0	Y	15	Y	20
CD	Music Compac	D	Y	2	28	6	Y	15	Y	4
CI	Community In	D	Y	2	7	0	N	15	N	0
CR	CD ROMs	D	N	0	0	0	N	15	N	0
EQ	Equipment	H	Y	1	0	0	N	15	Y	5
LH	Local History	D	Y	1	1	0	Y	15	Y	20
NP	Newspapers S	D	N	8	28	0	Y	15	Y	20
PA	Pamphlets	D	Y	8	28	0	Y	15	Y	20

In the above example, the loan term column has been set to Y for Year – any item with this Borrower Type and Form/Stats Code combination will be limited to the **All Year loans are due back on the following date:** setting in the Supervisor screen:

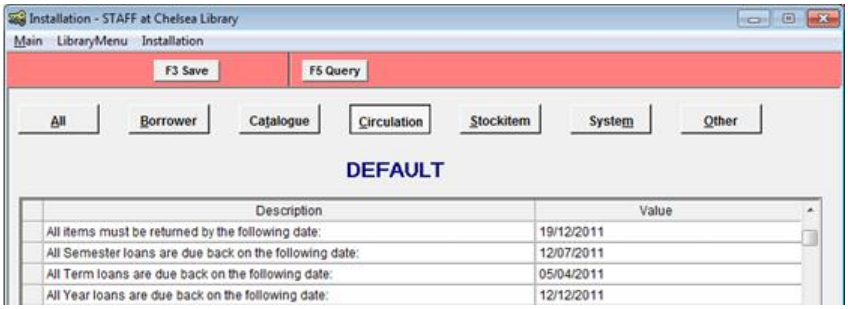
6. Launch the *Amlib* client
7. Go to **Main** > **Supervisor** > **Installation**
8. Click on the **Circulation** tab – the Installation (DEFAULT) screen will display:



Description	Value
All items must be returned by the following date:	19/12/2011
All Semester loans are due back on the following date:	12/12/2011
All Term loans are due back on the following date:	12/12/2011
All Year loans are due back on the following date:	12/12/2011

9. Locate the following settings and change the due date to be used for any item set up with a Yearly (**Y**), Semester (**S**) or Term (**T**) code in the Loan Parameters and Borrower Types screen:

- All items must be returned by the following date: this is mandatory setting but may be set to a date very far in the future – for example **01/01/2080** if you do not have a date that you require **ALL** items to be returned by
- All Semester loans are due back on the following date: end of semester date – for example: **19/07/2011**
- All Term loans are due back on the following date: end of term date – for example: **05/04/2011**
- All Year loans are due back on the following date: end of year date – for example: **12/12/2011**

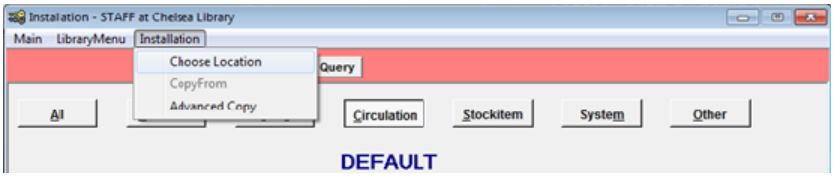


10. Click the **F3 Save** button when complete
11. Exit and restart the *Amlib* client for the settings to take effect

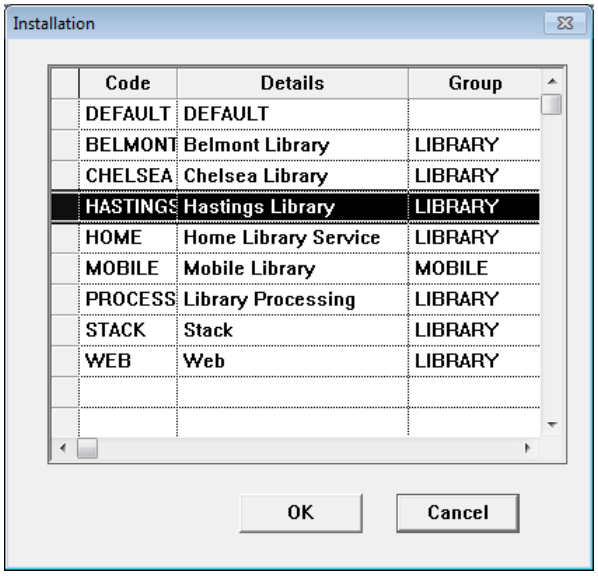
Check the Locations

End of term/ semester/ year dates can also be set by individual location, so it is very important to also check your circulation locations to see if dates need to be updated. For some libraries this may just be the LIB location and for others it may be for each branch:

1. Launch the *Amlib* client
2. Go to **Main** > **Supervisor** > **Installation** - the Installation (DEFAULT) screen will display
3. From the menu, select **Installation** > **Choose Location**



4. The Installation prompt will display
5. Highlight an individual location – for example: **Hastings Library** – and click the **OK** button



6.

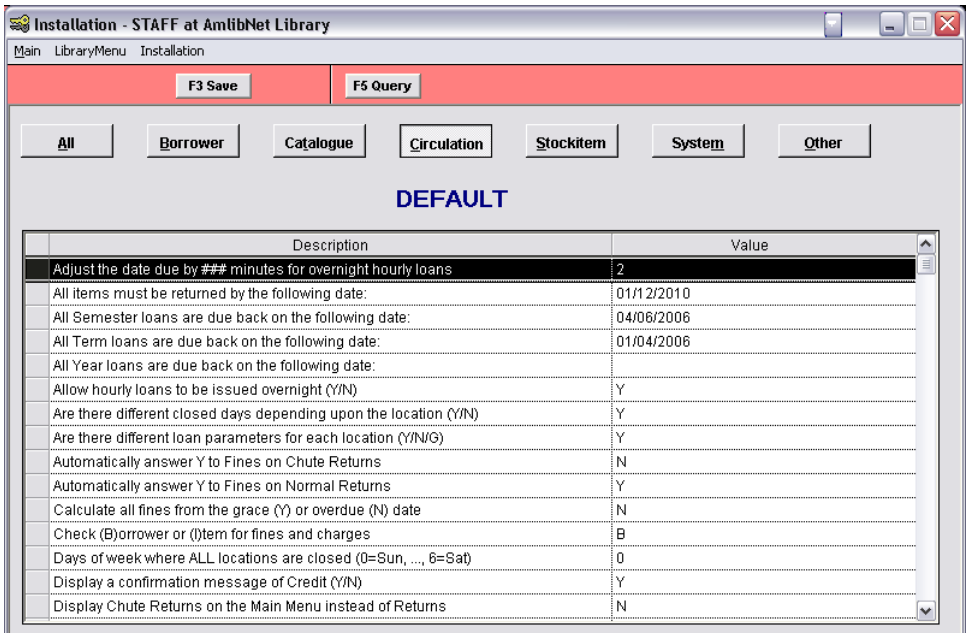
7. Click on the **Circulation** tab – the Installation screen for that location will display
8. Enter the due dates as necessary for that location:

9. Click the **F3 Save** button when complete
10. Exit and restart the *Amlib* client for the settings to take effect

Please Note: It is **not** a requirement to have circulation dates set against individual locations, however if dates do exist in the locations they WILL override what is set in the DEFAULT screen and then need to be updated. If your library does NOT require different dates for different locations, it is recommended that all dates on the locations screens for these setting be removed, leaving only dates in the DEFAULT screen, as this prevents problems with forgetting to update a location and running into circulation blocks .

Supervisor

Circulation parameters can be set in Supervisor, Installation, Circulation.



FIELD	EXPLANATION	EXAMPLE
Adjust the Date due by ### minutes for overnight hourly loans	When an hourly loan is forced into an overnight loan because of the closing time, the loan becomes due back nn minutes/hours after next opening.	20
All items must be returned by the following date	Set a Final Return Date for all Loans. This will override any other Loan parameter. No Loans are allowed past this date. Useful for educational institutions	06/12/12 A Warning message will display when opening the Issue screen if the date has been exceeded
All Semester loans are due back on the following date	Set a date for Semester Loans. Useful for educational institutions	01/07/12 (this date will need to be altered each semester if used)
All Term loans are due back on the following date	Set a date for Term Loans. Useful for educational institutions	01/04/12 (this date will need to be altered each term if used)
All Year loans are due back on the following date	Set a date for Year Loans. Useful for educational institutions	06/12/2012 (this date will need to be altered each year if used)
Allow Hourly loans to be issued overnight (Y,N)	If set to Y will make any hourly loan calculated as being due back after the closing time for the library, actually due back the next day	Y
Are there different closed dates depending on Location (Y,N)	Y: A Location Menu item will be an option in the Calendar menu N: No Location Menu item will exist in the Calendar menu	N
Are there different Loan parameters for each Location (Y,N)	Y: A Location option [F7] button can be set in Borrower, Application, BorTypes, Loans N No Location option [F7] button in Borrower, Application, BorTypes, Loans will be available	Y
Automatically answer Y to Fines on Chute Returns	If set to Y, a borrower a charge is automatically calculated according to the table in Borrower Types on either Chute Returns, Normal Returns or both types of returns	Y
Automatically answer Y to Fines on Normal Returns		Y

Calculate all fines from the grace (Y) or overdue (N) date	Fines may be calculated from the day the item was overdue or an allowance may be made for the grace period. Enter a Y to make the grace period a fine free period	Y
Check (B)orrower or (I)tem for fines and charges	If an automatic charge has been raised via a circulation report for an item, you have the option to cancel the charge. On return, you may check only charges so created for the Returning Borrower (set to B), or for any borrower (set to I)	B
Days of week where ALL locations are closed (0 = Sun,….,6=Sat)	Enter the days of the week where closed dates are to be set within the Calendar and where no Issues will be due for Return. This applies where the closed dates are to be for ALL locations	036(e.g. for Sunday, Wednesday and Saturday) 0 (Sun), 1 (Mon), 2 (Tues), 3 (Weds), 4 (Thurs), 5 (Fri), 6 (Sat)
Display a confirmation message of Credit (Y/N)	When the item is returned as described above you may get a confirmation message. To hide the message but still apply the credit, enter a Y in this parameter.	Y
Display Chute Returns on the Main Menu instead of Returns	When the Returns icon is selected, the Chute Returns Window will display if the parameter is set to Y	Icon has 2 arrows - Chute Returns Icon has one arrow - Returns
Fines for an item cannot exceed the cost of the item	Set as Yes, the fines cannot exceed the cost of the item. Set as No, the fines can exceed the cost of the item	N
Give a Message when an Interlibrary loan is Returned	If set to Y, the Operator is alerted that an Interlibrary loan has been wanded at returns	N
Hide the Message ITEM BELONGS AT LOCATION XX in Returns	If set to Y, the Operator will not get a message about Foreign returns	Y
If a borrower owes money go straight to collect on Issue window	If set to Y, a Collect box displays where you are able to enter an amount paid and Receipt number automatically if the borrower owes money on Issues or Returns.	N
If a borrower owes money go straight to collect on Returns window		

If set to Y allows Issue return date > than the specified ILL Return Date	If set to Y, the Return Date in Issues can exceed the date set in the Stockitem ILLs section at the base of the Stockitem screen ILL Lib: P3ALB ILL Ren: Y ILL Due: 24/03/2002	Y
If set to Y allows renewals to be due after the ILL Return Date	If set to Y, the Renewal Date in Issues can exceed the date set in the Stockitem ILLs section at the base of the Stockitem screen ILL Lib: P3ALB ILL Ren: Y ILL Due: 24/03/2002	N
Increase the date due by ### days if due back on a holiday	When the due date falls only a holiday then you may extend the date due by the number of days in this field.	nn
Issues Report to use when printing all loans	Enables a specific Report Template to be selected when printing loans from the Issues/Print/Print Issues Only Menu [F9]	&ci1iss.qrp
Issues Report to use when printing all loans & reserves	Enables a specific Report Template to be selected when printing loans from the Issues/Print/Print Statement Menu [F10]	&ci1000.qrp
Issues Report to use when printing all new loans	Enables a specific Report Template to be selected when printing loans from the Issues/Print/Print New Issues Only Menu [F8]	&ci1new.qrp
Keep a cache of the last circulation statistics	To improve performance in busy circulation libraries Amlib can store circulation statistics in a cache on each PC	20
Keep a reservation for a maximum ### days	When a reservation is ready for collection it is given an expiry date of this value plus the current date. A report can be run that identifies reservations past the expired date.	14
Keep the last ### history records	Borrower and Item history records are kept until purged by the user. When they are purged at least ### records will be kept despite any user report parameters.	100
Loan by STATS (Y) or FORM (N)	Loan parameters by default are based on Borrower type and Form (N). As an alternative, Borrower type and Iitem Statistics (Y)	N
Loan limits by Library Group (Y) or by Location	For libraries that use Groups	N (Most sites would use Location)

(N)		
Memo borrower when a reserved item is returned (Y/N)	A setting of Y will cause a memo to be created to the next Borrower in the Reservation queue	Y
Memo library on reservations (Y)-All, (F) Foreign, (N) Don't memo	Usually set to F: Memo type RESGET sent to the Borrower with the Borrower ID on the Locations Window if the Reservation is applied to an item on the Shelf at another Branch	F
Order of columns to display within reservation	Users may change the order in which columns are displayed in the potential reservations window. Entering a comma-separated list in this field does this. See the Table below for the field names.	COLSTK_LINE1,COLSTK_FORM, COLSTK_STATS_CODE [Note - it is possible to enter just some of the fields for your customised order, and the system will fill the rest with the default]
Show the 'Borrower read …' message up until ### days	If Borrower Keep History is set to Y, can limit the number of days for which the message " Borrower has read this.." message will display	365

Reservation Fields for Table Sequence

The following fields can be used to create the list:

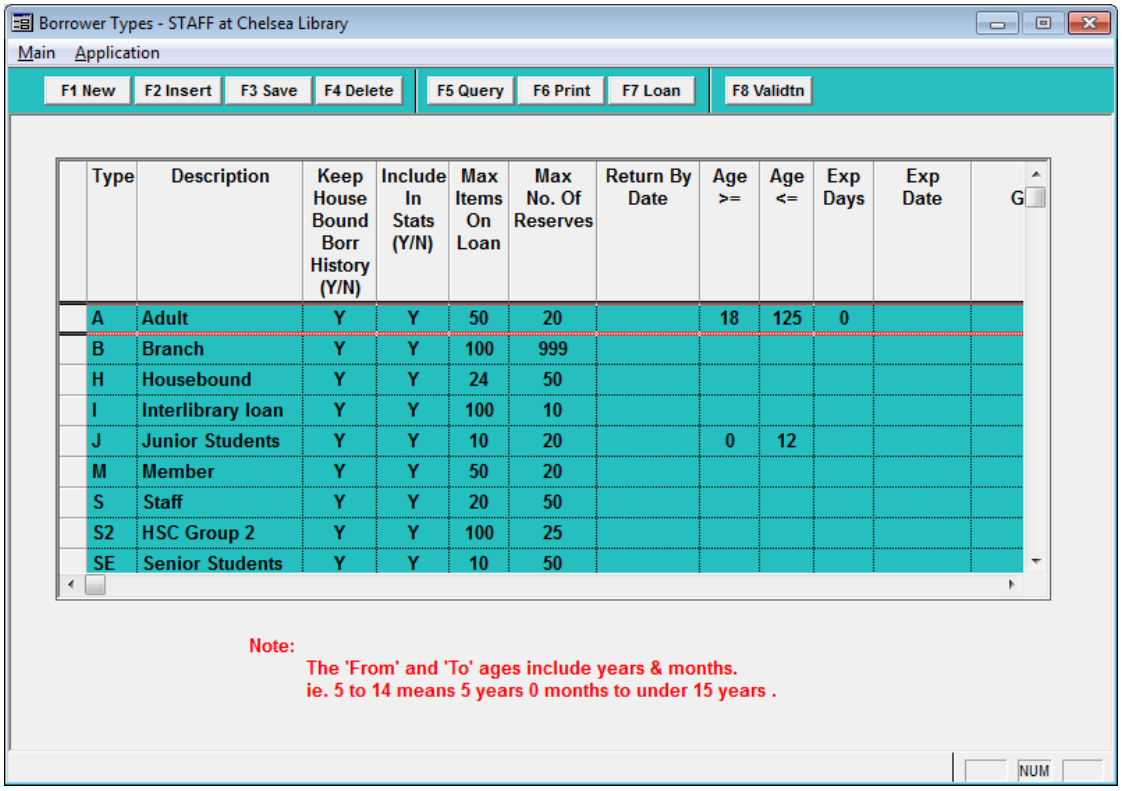
Title in Table	Column Name	Title in Table	Column Name
Title	COLSSTK_TITLE	Volume	COLSSTK_VOLUME
Call No	COLSSTK_LINE6	Temp Location	COLSSTK_LOC_TEMP
Form	COLSSTK_FORM	Floor Location	COLSSTK_LOC_FLOOR
StatsCode	COLSTK_STATS_CODE	Item No (barcode)	COLSSTK_ITEM_NO
On Loan?	COLSSTK_IS_ON_LOAN	Memo Count	COLSSTK_MEMO_COUNT
On Order?	COLSSTK_IS_ON_ORDER	For Loan	COLSSTK_FOR_LOAN
Reserved?	COLSSTK_IS_RESERVED	Alert Operator	COLSSTK_OPER_ALERT
Due Date	COLSSTK_DUE	Process	COLSSTK_PROCESS
Perm Location	COLSSTK_LOC_PERM	Edition	COLSSTK_EDITION

CALENDAR

There are two sets of dates that require adjusting at the start of the year/semester/term: the *Supervisor* Installation settings and the Borrower Type settings.

Borrower Settings

1. Launch the *Amlib* client
2. Go to **Main** > **Borrowers** > **BrorrowerTypes** – the Borrower Types screen will display:



Type	Description	Keep House Bound Borr History (Y/N)	Include In Stats (Y/N)	Max Items On Loan	Max No. Of Reserves	Return By Date	Age >=	Age <=	Exp Days	Exp Date	G
A	Adult	Y	Y	50	20		18	125	0		
B	Branch	Y	Y	100	999						
H	Housebound	Y	Y	24	50						
I	Interlibrary loan	Y	Y	100	10						
J	Junior Students	Y	Y	10	20		0	12			
M	Member	Y	Y	50	20						
S	Staff	Y	Y	20	50						
S2	HSC Group 2	Y	Y	100	25						
SE	Senior Students	Y	Y	10	50						

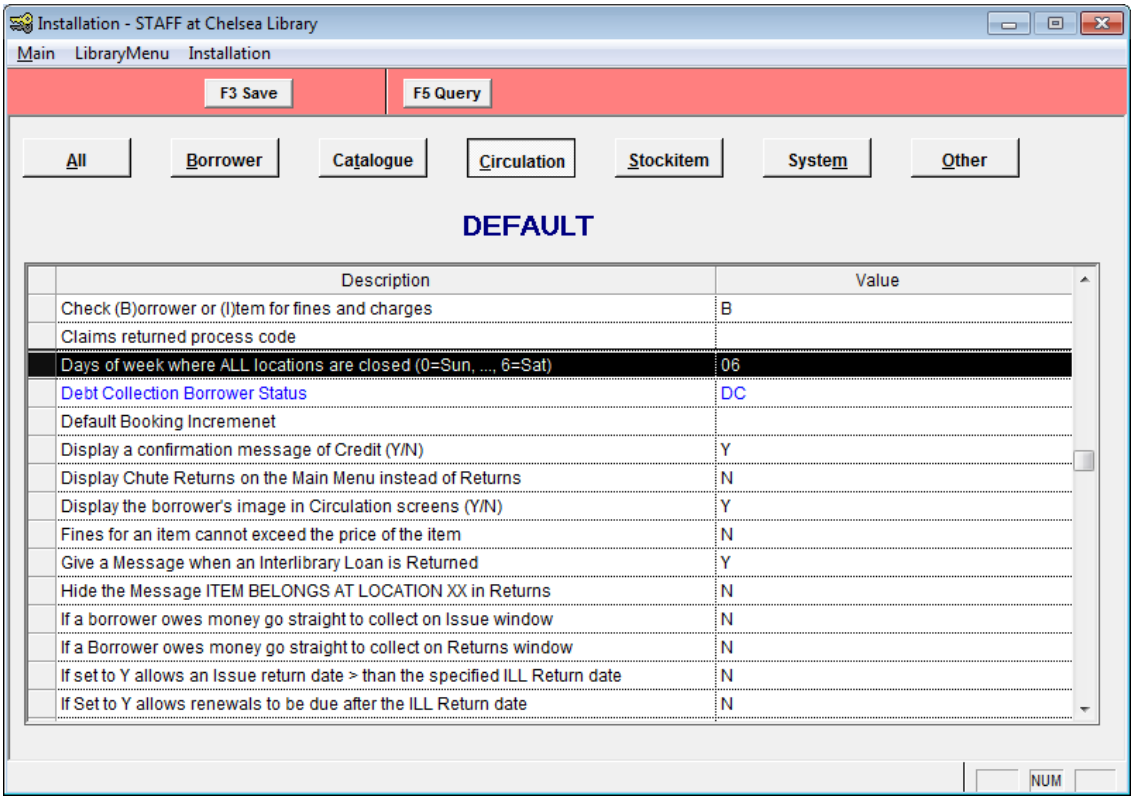
For each borrower type it is possible to enter a Return By Date that overrides the *Supervisor* Date settings and allows for return dates to be set earlier (if the Return By Date is set after the *Supervisor* Date settings, then these *Supervisor* Dates will be the cut off point for returns).

3. Enter a date in **DD/MM/YYYY** format in the Return By Date field of a selected borrower Type – for example: **15/11/2011**
4. Repeat for any borrower Type where the Return By Date is required to be different
5. Click the **F3 Save** button when complete
6. Exit the Borrower module (**Ctrl-L**) for these settings to take effect

Days Closed

If the Libraries at all campuses are closed on common days (for example: weekends) it is possible to set these days closed in the *Supervisor* module:

1. Launch the *Amlib* client
2. Go to **Main** > **Supervisor** > **Installation** – the Installation (**DEFAULT**) screen will display
3. Select the **Circulation** tab



4. Adjust the following settings:
    - Days of the week when ALL Locations are closed (Sun=0, ..., Sat=6) – type in **06** if closed Saturday and Sunday
5. Click the **F3 Save** button when complete
6. Exit and restart the *Amlib* client for the new settings to take effect

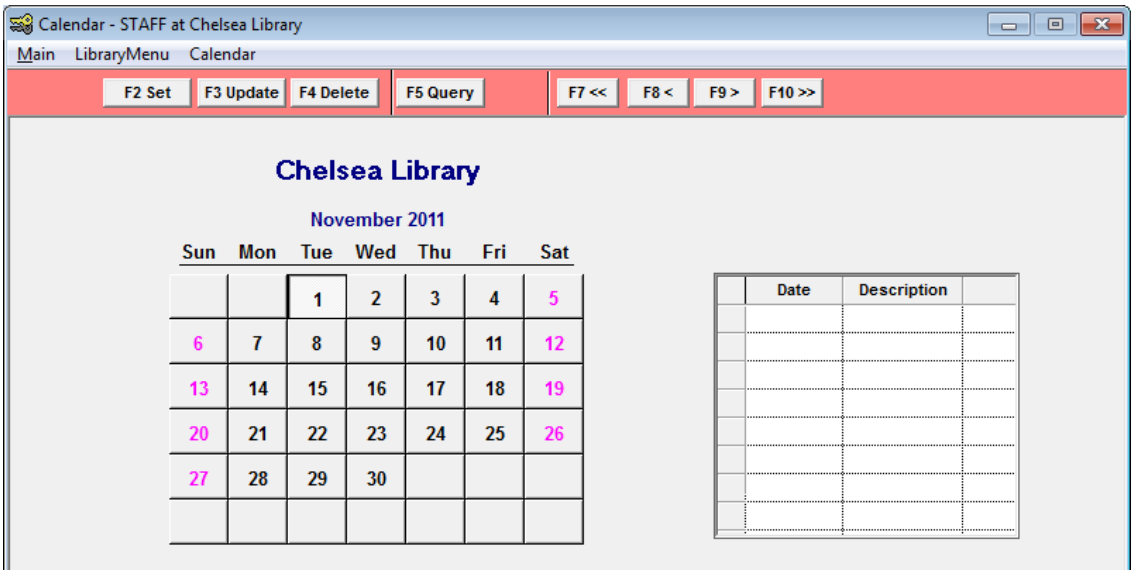
Holidays

It is possible to mark days (holidays) to be 'closed' in the calendar (for example: Easter).

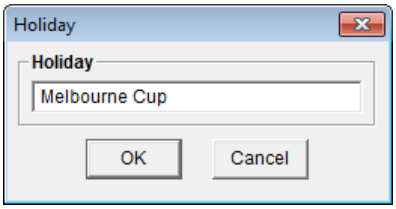
When an item is issued, the program will ensure that it the item is not due for return on closed dates. Reservations will not be due for collection on closed dates. Dates may be entered as far in advance as desired.

To mark a date as a closed:

1. Launch the *Amlib* client
2. Go to **Main** > **Supervisor** > **Calendar** – the Calendar screen will display
3. Use the **F7**, **F8**, **F9** and **F10** buttons to navigate to a month where you want to set a closed date:

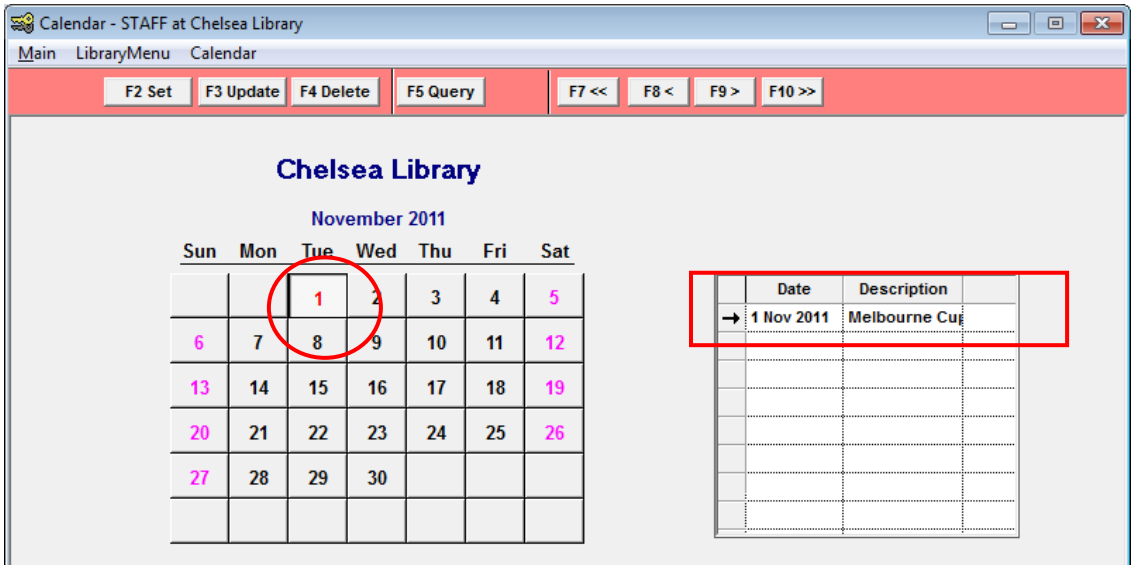


4. Select a date with your mouse – for example: **1 November 2011**
5. Click the **F2 Set** button – the Holiday prompt will display:



- Type in a suitable description in the dialogue box – for example **Melbourne Cup** or **Term Break**
- Click the **OK** button

6. The date will be marked in **red** (indicating it is closed) – the Date and Description will appear in the table to the right of the calendar:



7. Once the dates have been set, click the **F3 Update** button
8. Exit and restart the *Amlib* client for the new settings to take effect

Please Note: Where a Return By date falls on a closed date, the system allocates the next non-closed date past that date.

- **Arrow Keys [F7], [F8], [F9], [F10]**

To scroll through the calendar you may use the **F7** through **F10** keys:

F7	**<<**	Scrolls to the beginning of the year. Clicking again, scrolls back to one year past
F8	**<**	Scrolls to the previous month for the year as displayed
F9	**>**	Scrolls to the next month for the year as displayed
F10	**>>**	Scrolls to the end of the year. Clicking again scrolls one year in advance

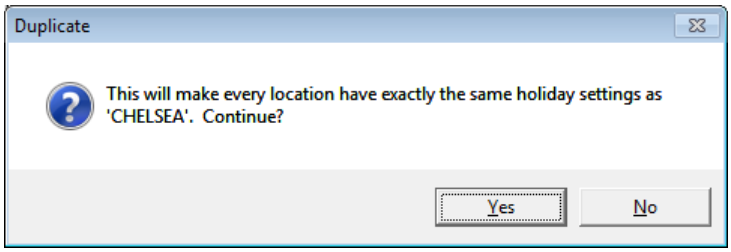
Remove a Closed Date

1. To remove a closed date, highlight the date
2. Click the **F4 Delete** button – this will **mark** [**x**]the Closed date for deletion
3. Click the **F3 Update** button when complete
4. Exit and restart the *Amlib* client for the new settings to take effect

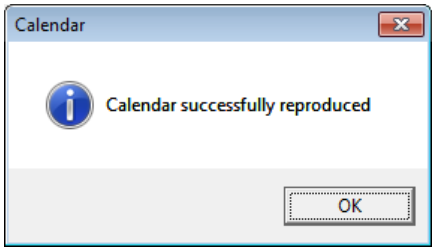
Copy a Closed Date to Other Locations

Closed dates in Calendar can be copied to other Locations.

1. From the menu, select **Calendar** > **Copy To All** – a prompt will display asking: **This will make every location have exactly the same holiday settings as 'XXX'. Continue?**



2. Click the **Yes** button – this will copy the closed settings to ALL locations
3. Once complete, a prompt will display with the following message: **Calendar successfully reproduced.**



4. Click the **OK** button
5. Exit and restart the *Amlib* client for the new settings to take effect

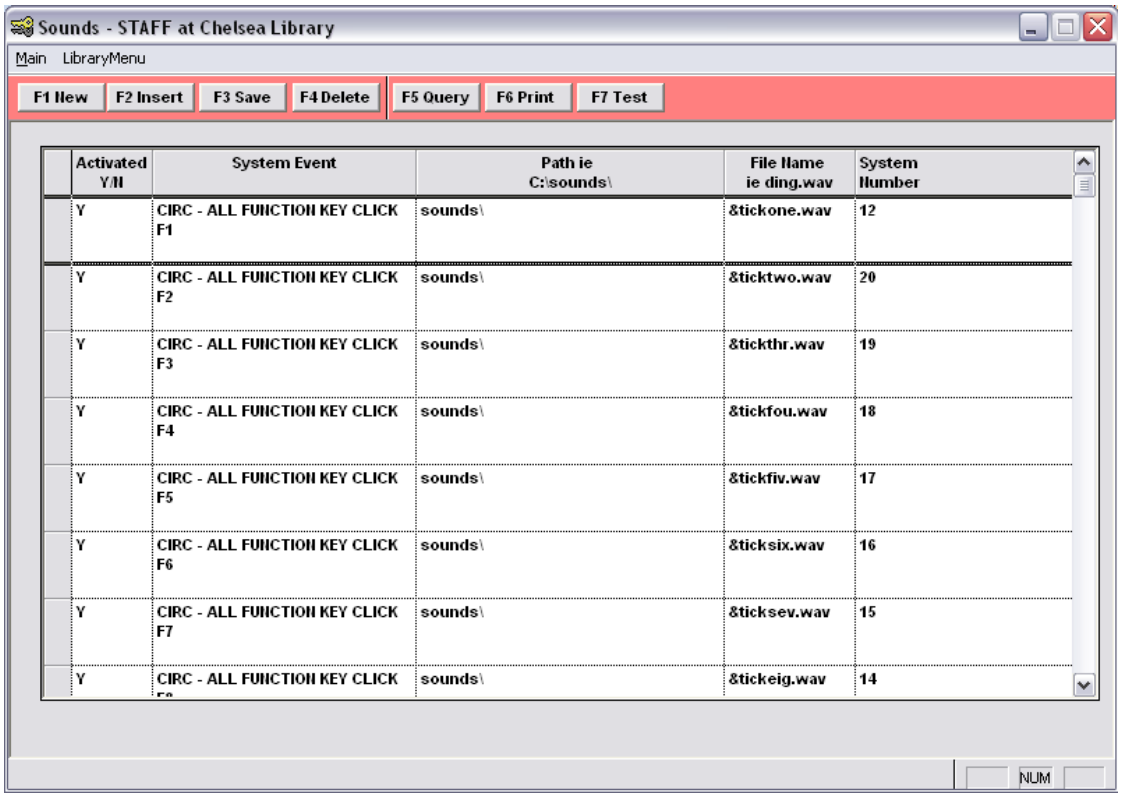
<u>Different Closed Dates for Each Location</u>

If different closed dates are required for different Locations.

1. From the menu, select **Calendar** > **Choose Location** – a Location prompt will display
2. Select the Location and click the **OK** button
3. The set the closed dates for this Location
4. Click the **F3 Update** button when complete
5. Exit and restart the *Amlib* client for the new settings to take effect

SOUNDS WITHIN AMLIB

Certain events within the Circulation module of Amlib will play **.wav** format sounds. These sounds are defined in the Sound Table of the Supervisor module.



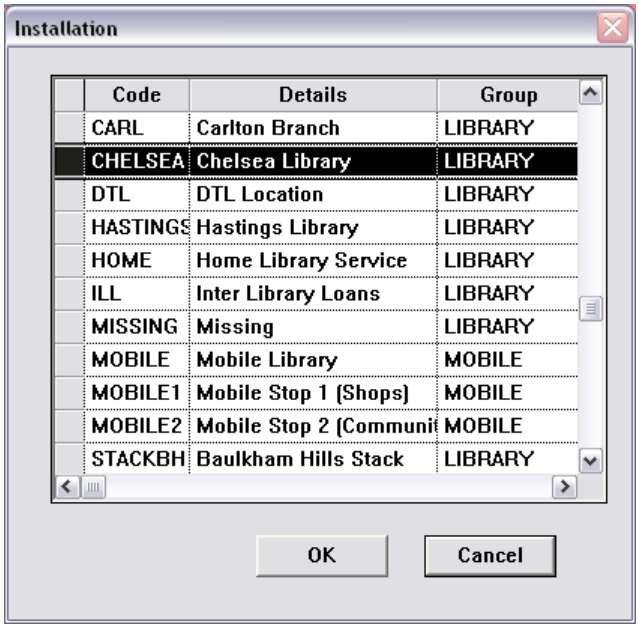
Activated Y/N	System Event	Path ie C:\sounds\	File Name ie ding.wav	System Number
Y	CIRC - ALL FUNCTION KEY CLICK F1	sounds\	&tickone.wav	12
Y	CIRC - ALL FUNCTION KEY CLICK F2	sounds\	&ticktwo.wav	20
Y	CIRC - ALL FUNCTION KEY CLICK F3	sounds\	&tickthr.wav	19
Y	CIRC - ALL FUNCTION KEY CLICK F4	sounds\	&tickfou.wav	18
Y	CIRC - ALL FUNCTION KEY CLICK F5	sounds\	&tickfiv.wav	17
Y	CIRC - ALL FUNCTION KEY CLICK F6	sounds\	&ticksix.wav	16
Y	CIRC - ALL FUNCTION KEY CLICK F7	sounds\	&ticksev.wav	15
Y	CIRC - ALL FUNCTION KEY CLICK	sounds\	&tickeig.wav	14

WARNING	*The sounds may be activated or de-activated by editing the Y / N value in the first column. They should never be deleted.*

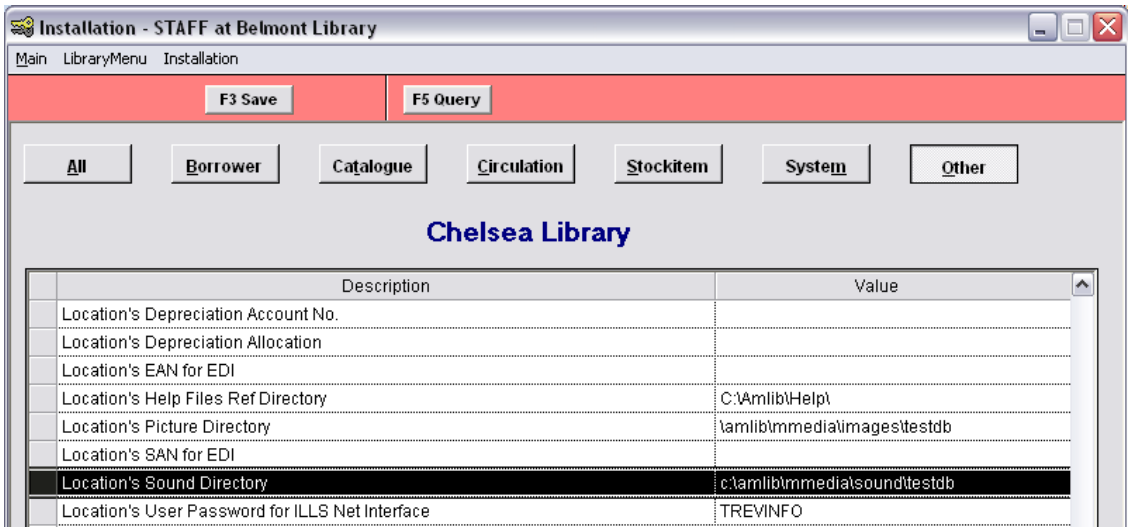
Installation Parameter for the Sound Path

Sound files should be held in a shared folder that is available to all users – sounds stored on a local computer will only be available on that particular computer.

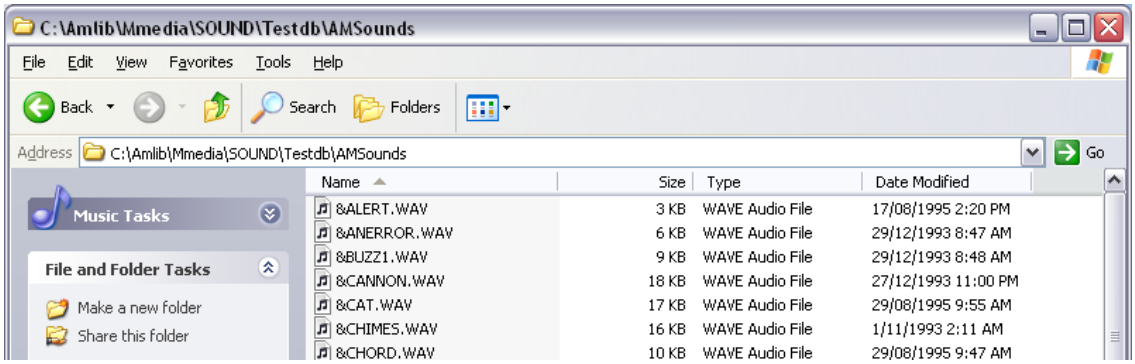
1. In *Amlib* navigate to **Main** > **Supervisor** > **Installation** – the Installation (DEFAULT) screen will open
2. Select **Installation** > **Choose Location**
3. Highlight a circulation location and select **OK**



4. Select the **Other** tab and locate the setting 'Location's Sound Directory'



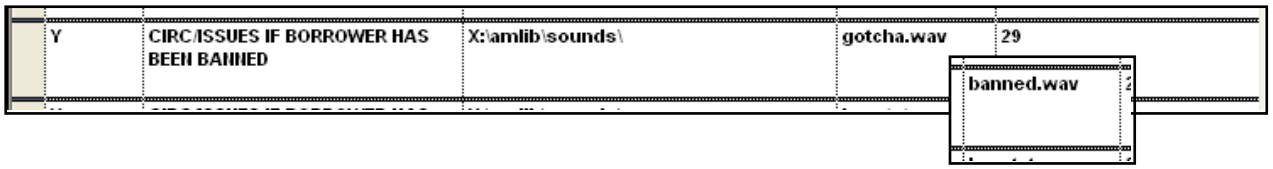
5. This is the current full filename path for your **.wav** files and generally your new sounds should be saved here and then no changes to the setting are required. As outlined above this should be a shared drive that all PCs can access, otherwise any new sounds need to be copied to every PC
6. This Sound Directory full filename path needs to be set for every circulation location if any changes are ever made to it



Changing a sound

1. Place your new short **.wav** files into the **Sounds** directory folder as above
2. In *Amlib* navigate to **Main** > **Supervisor** > **Sound Table**
3. To change a sound simply alter the file name of the relevant event to the new sound name

For example – If you have created a **.wav** file called **banned.wav** and wish this to be applied every time a banned borrower has their barcode scanned during issuing, edit File Name in the line:



CIRC/ISSUES IF BORROWER HAS BEEN BANNED.

Log out of *Amlib* and back in on all PCs

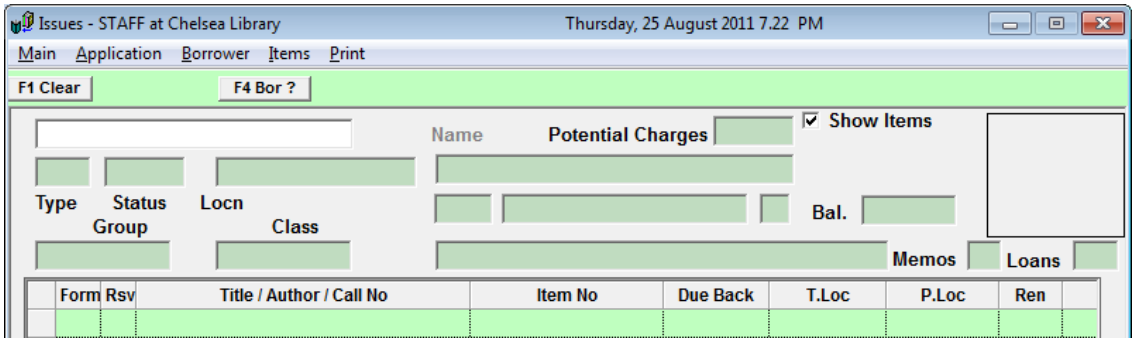
Turning a sound off

To deactivate a sound, change the Activated column's value to a **N**. Do not delete any lines from this table as this will permanently disable the sound and could cause conflicts in future upgrades.

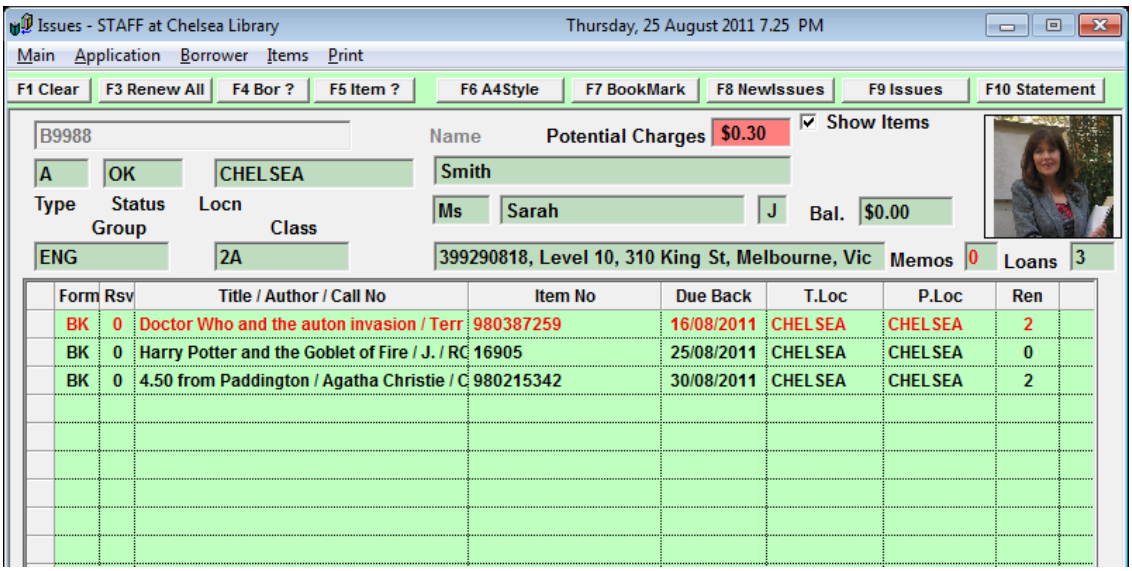
ISSUES

Please Note: Ensure that your default return date settings (see Appendix 6: Setting Default Dates and Holidays) and your Loan Rules have been properly set prior to commencing circulation operations.

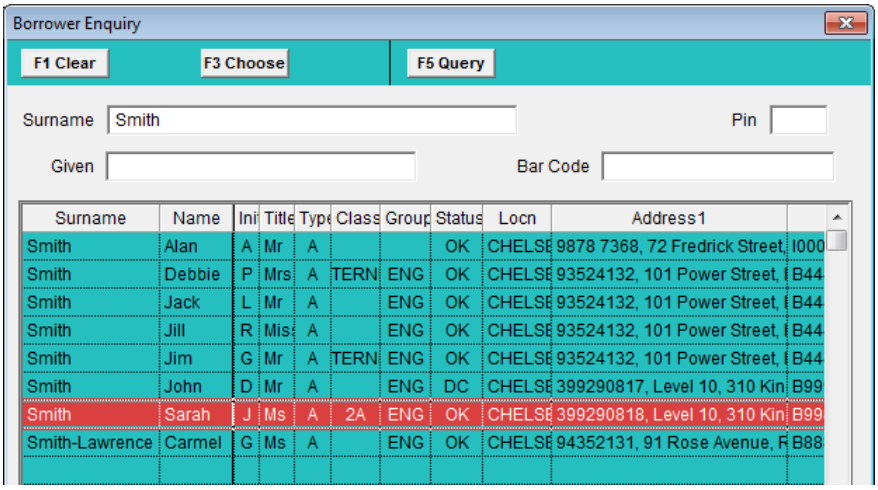
1. Launch the *Amlib* client
2. Go to **Main** > **Circulation** > **Issues** – the Issues screen will display:



3. Wand in the patron barcode (alternatively, you can type in the barcode and hit **<Enter>**) – the borrower details will then display (along with any previously issued items):



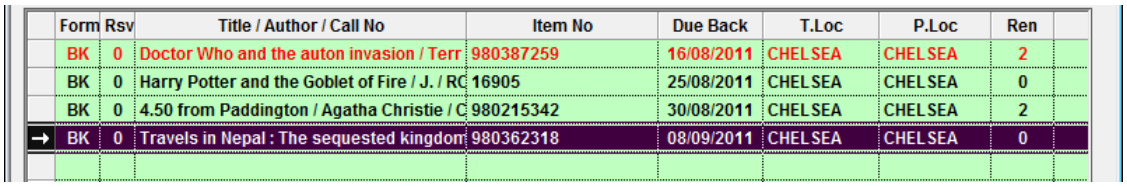
4. If the borrower barcode is not known,:
    a. Click the **F4 Bor ?** button to display the Borrower Enquiry screen:



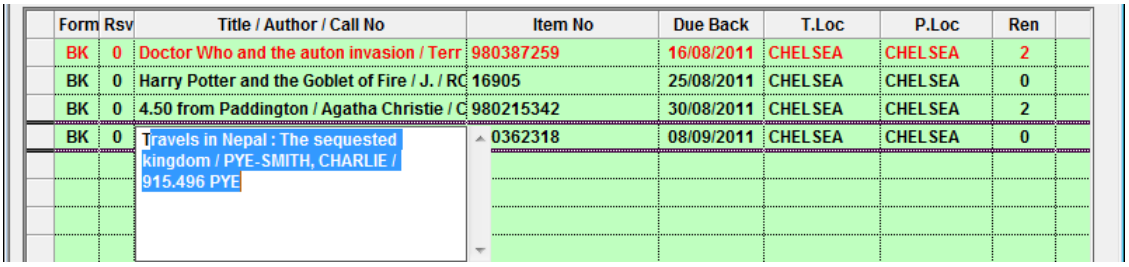
b. you can then perform a patron search: type in the Borrower details and click the **F5 Query** button

c. If there are multiple matches, select the borrower and click the **F3 Choose** button

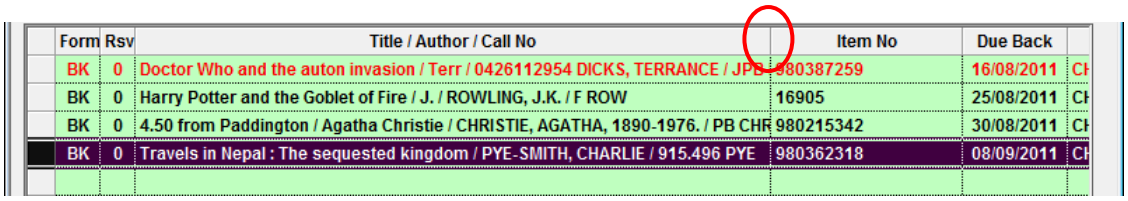
5. Once a borrower record is displaying, the Item box becomes active: wand in the first item to be issued – the item details will display with an arrow (→) preceding it:



6. Clicking in the Title/Author/Call No field shows the full Title, Author and Call No:



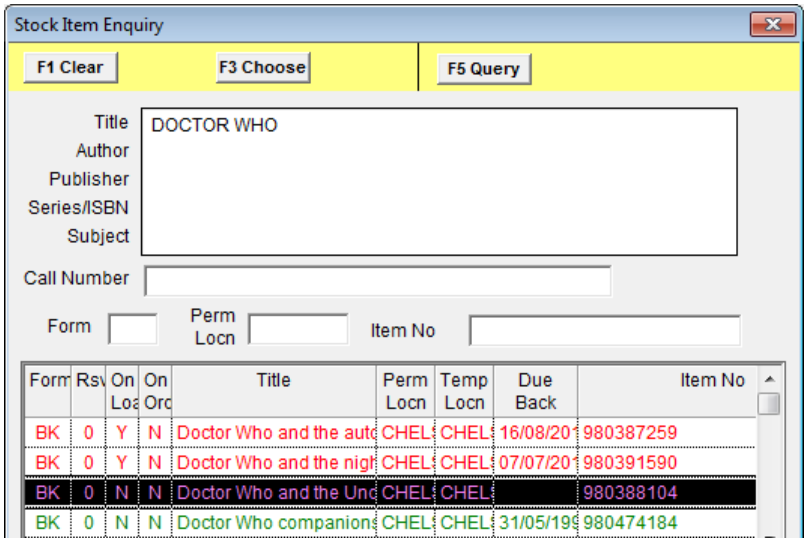
7. Dragging on the column headings will also widen the view of the Title/Author/Call No field:



8. To checkout additional items, simply wand the barcodes of the items to be issued

9. If the item barcode is not known:

a. Click the **F5 Item ?** button to display the Stock Item Enquiry screen:

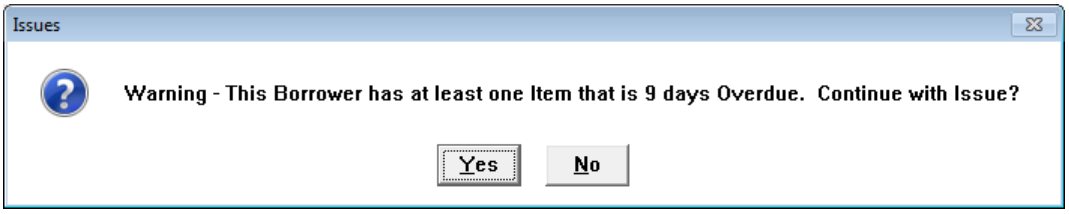


b. You can then perform an item search: type in the item details and click the **F5 Query** button

c. If there are multiple matches, select the item and click the **F3 Choose** button

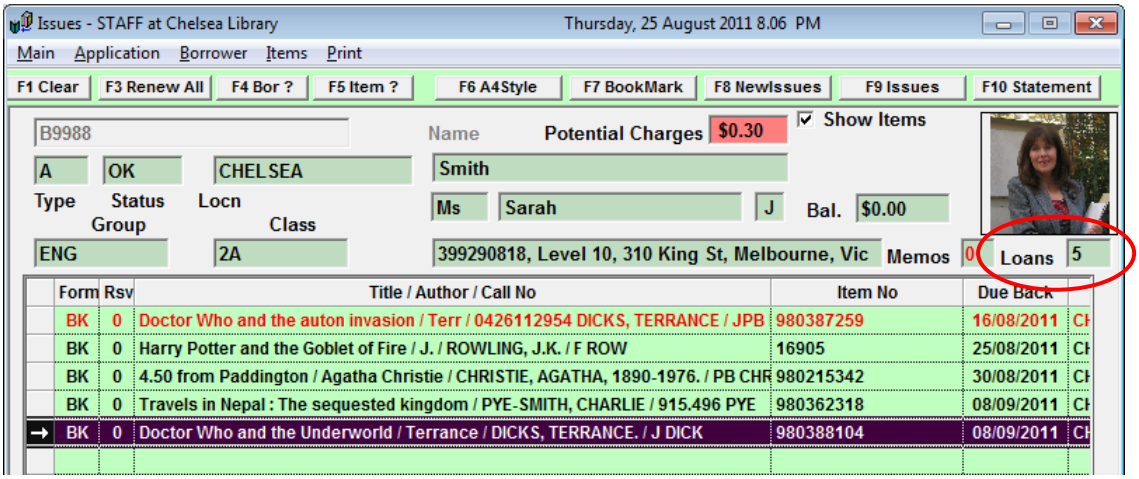
10. If the Borrower has an item overdue when attempting to issue a new item:

a. A prompt with the following message will display: **Warning – This Borrower has at least one Item that is XX days Overdue. Continue with Issue?**



b. Click the **Yes** button to proceed with the issue (otherwise click the **No** button)

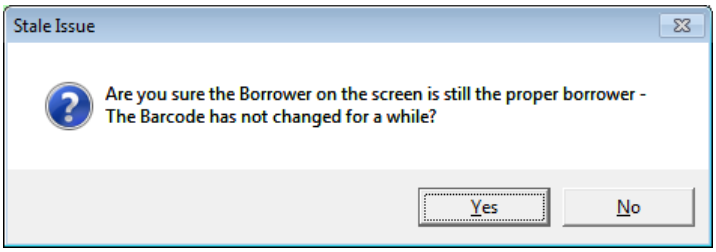
11. The number of items on Loan is shown as a count in the top right corner (the actual loans display if Show Items box is checked):



12. Items on loan display in date Due Back order with overdue items appearing at the top (in **red**)

13. If the borrower displayed in the Issues screen is inactive for a period of time and you attempt to issue an item:

    a. A prompt with the following message will display: **Are you sure the Borrower on the screen is still the proper Borrower – The Barcode has not been changed for a while?**



    b. Click the **Yes** button to proceed with the issue (otherwise click the **No** button)

14. Once the transaction is complete, click the **F8 NewIssues** button to print a receipt of the new items issued (alternatively, click the **F9 Issues** button to print a list of all items the borrower currently has out on loan)

15. To issue items to another borrower, simply wand in the borrower barcode – this will automatically clear the current borrower details (there is no need to clear the screen first)

Colour

Colour is used to indicate certain loan statuses:

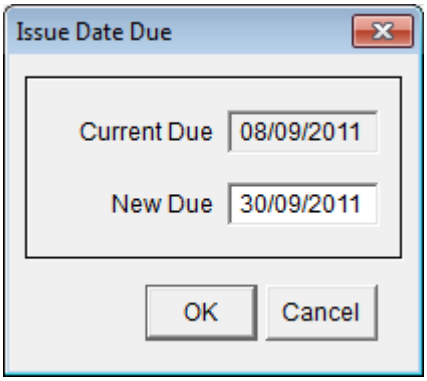
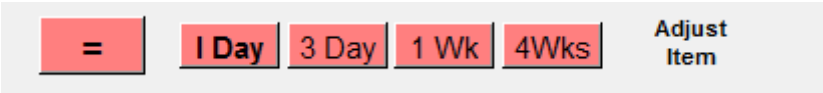
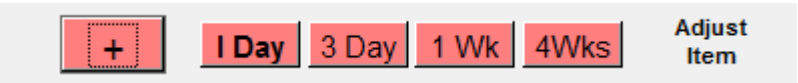
- **Red** Overdues
- **Magenta** Reserved items
- **Black** Normal issues (not overdue)

Messages

Messages appear if an operator attempts to:

- Renew or issue a reserved item
- Issue a book to a patron with a status of **Banned** borrower
- Issue too many items of a particular form type
- Issue to a borrower who has exceeded their privileges
- Item is not available for loan
- Issue to a borrower who has overdues or owes money

Loan Options

OPTION		ACTION
Renew	Renew an item	Double-click on the Date Due for the item: If the Item is *reserved* a message will display (alternatively select the **Items** > **Renew Item** option from the menu).
	Renew All	Click the **F3 Renew All** button; alternatively select the **Items** > **Renew All** option from the menu.
Adjust Loan Date Dues	Specific Date (for example: the Borrower is going on holidays)	1. Highlight the item and select **Items** > **Alter Selected Due Date** from the menu – the Issue Due Date prompt will display:  2. Type in the New Due date in **dd/mm/yyyy** format and click the **OK** button 3. To alter all the due dates for items on loan to the borrower, select **Items** > **Alter All Due Dates In Table** from the menu
	Alter Due Date (for example: to set a 1 day or 1 week loan)	1. Highlight the item and click the **1 Day**, **3 Day**, **1 Wk** or **4Wks** button  2. To add days onto the existing due date, highlight the item and select the **=** button (it will become a **+**) and then click the **1 Day**, **3 Day**, **1 Wk** or **4Wks** button 
Return	From Issues screen	1. Highlight the item and select **Items** > **Return Item** from the menu – this will take you to the *Returns* screen 2. The item is now returned (it will appear with an **X** in front of it 3. Press the **<Esc>** key to close the *Returns* screen
Item Details	XRef to the Item	Highlight the item and select **Items** > **Item Details** from the menu – this will take you to the *Stockitem* module with full details of item

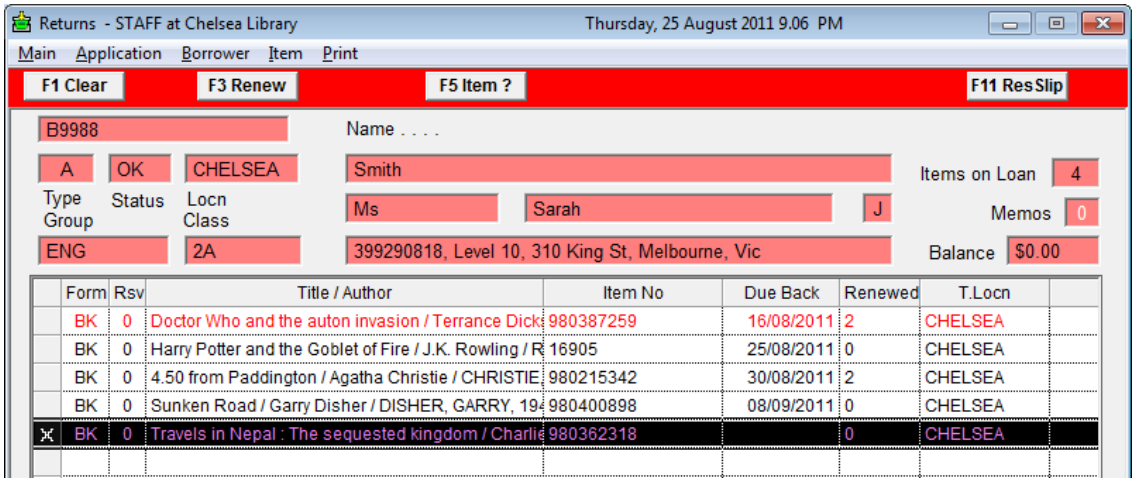
Borrower Details	XRef to the Borrower	Select **Borrower** > **Borrower Details** from the menu – this will take you to the *Borrower* module and show full details of the borrower
Check Privileges	To see Borrower allowances	Select **Borrower** > **Privileges** from the menu: this shows how many items may be borrowed, how often they can be renewed (if at all) and the due date if a particular form type is issued to the borrower

RETURNS

Issues

Returns are available from the issue screen.

1. Highlight the item and select **Items** > **Return Item** from the menu – this will take you to the *Returns* screen:

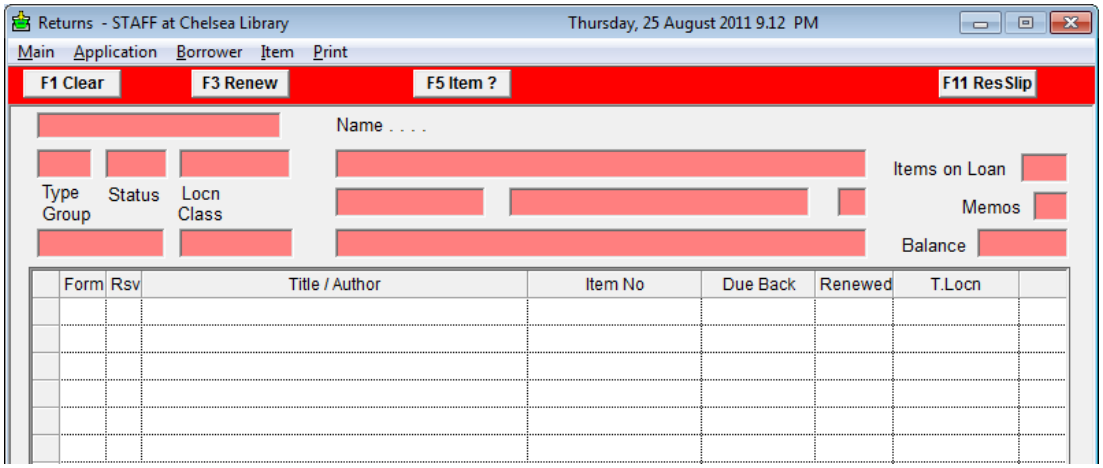


2. The item is now returned (it will appear with an **X** in front of it)
3. Press the **<Esc>** key to close the *Returns* screen

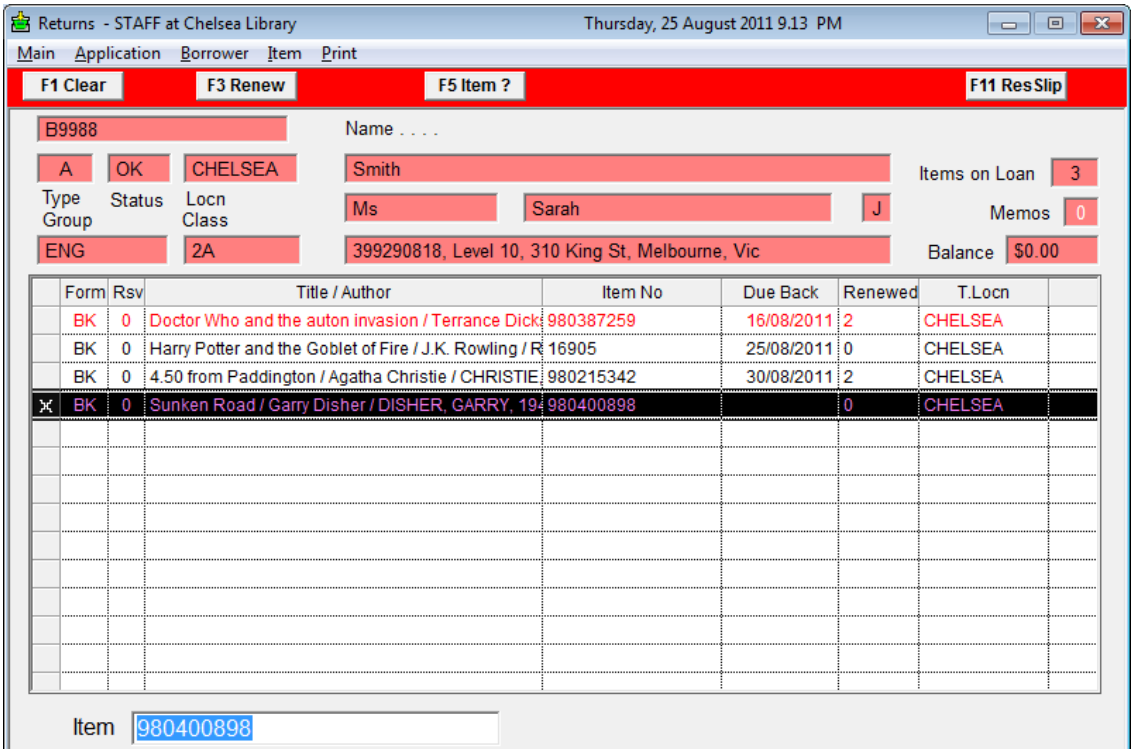
<u>Returns</u>

This screen should be used to return items when the borrower is present, as it is also possible to renew and reissue items.

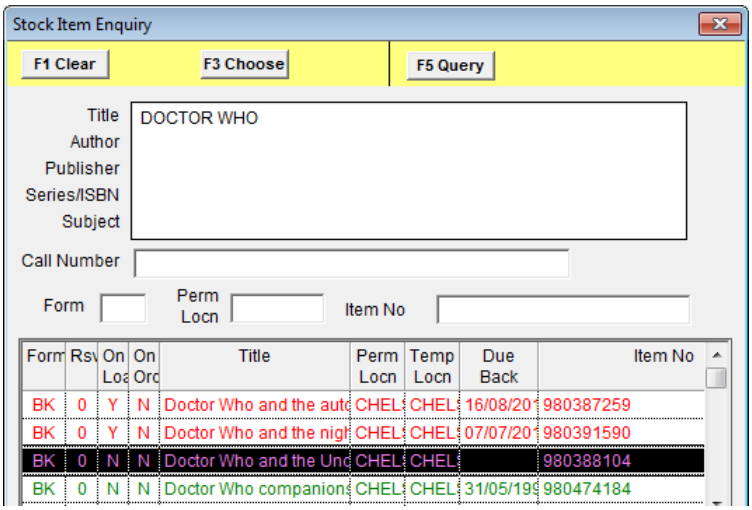
1. Launch the *Amlib* client
2. Go to **Main** > **Circulation** > **Returns** – the <u>Returns</u> screen will display:



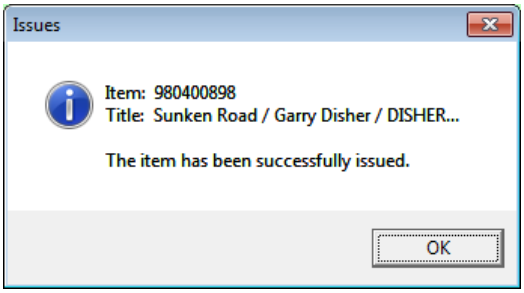
3. Wand in the item barcode into the <u>Item</u> field (alternatively, you can type in the barcode and hit **<Enter>**) – the borrower details will then display (along with any previously issued items):



4. The item is now returned (it will appear with an **X** in front of it)
5. If the item barcode is not known:
    a. Click the **F5 Item ?** button to display the Stock Item Enquiry screen:



    b. You can then perform an item search: type in the item details and click the **F5 Query** button
    c. If there are multiple matches, select the item and click the **F3 Choose** button
6. If you would like to reissue the returned item:
    a. Simply double-click the returned item – the Issue screen will display
    b. The item will be reissued and the a prompt with the following message will display: **The item has been successfully issued.**



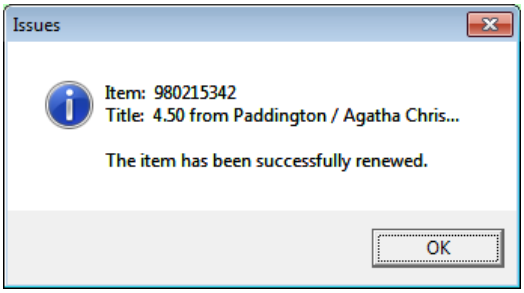
c. Click the **OK** button, the Returns screen will display

d. The item is now reissued (it will appear with an ✓ in front of it)

7. If you would like to renew an item:

a. Simply double-click the returned item – the Issue screen will display

b. The item will be reissued and the a prompt with the following message will display: **The item has been successfully renewed.**



c. Click the **OK** button, the Returns screen will display

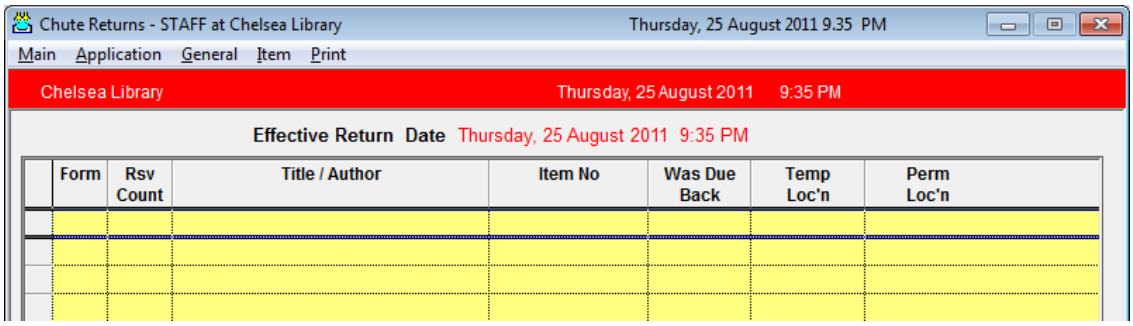
d. The item is now reissued (it will appear with an ✓ in front of it)

8. To return items for another borrower, simply wand in the item barcode – this will automatically clear the current borrower details (there is no need to clear the screen first)

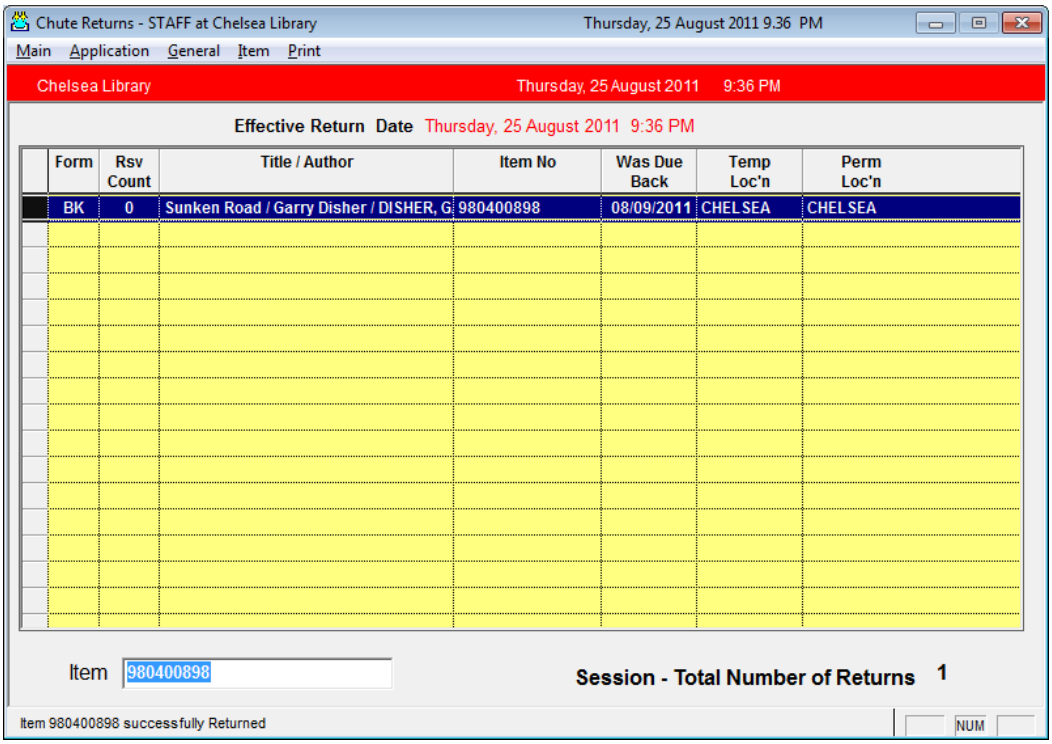
CHUTE RETURNS

This screen should be used to return items when the borrower is not present. This screen does not display borrower information as you return the items and is therefore faster.

1. Launch the *Amlib* client
2. Go to **Main** > **Circulation** > **Chute Returns** – the Chute Returns screen will display:



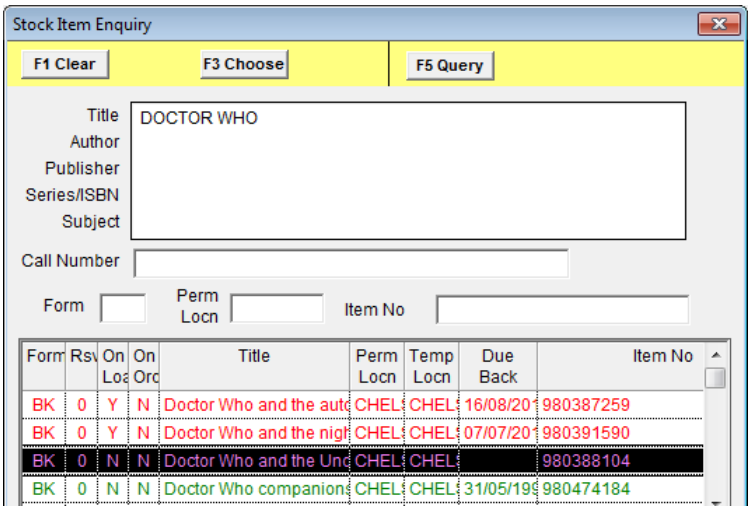
3. Wand in the item barcode into the Item field (alternatively, you can type in the barcode and hit **<Enter>**):



4. The item is now returned

5. If the item barcode is not known:

   a. Click the **F5** key on your keyboard to display the Stock Item Enquiry screen:



   b. You can then perform an item search: type in the item details and click the **F5 Query** button

   c. If there are multiple matches, select the item and click the **F3 Choose** button

Main Menu Returns Button

It is possible to define whether the Returns button on the top menu bar, opens the Returns or Chute Returns screen:

1. **Main** > **Supervisor** > **Installation** – **Circulation** tab: Display Chute Returns on the Main Menu is stead of Returns setting (**Y/N**)

RESERVATIONS

The reservation process enables a patron who requires a particular item/s which is currently unavailable (or located at another branch), to request the item on its return.

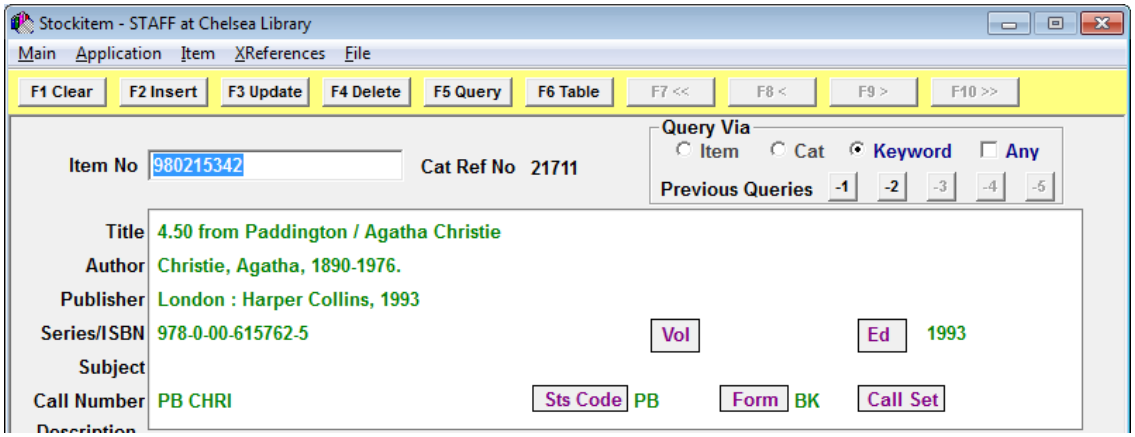
- The number of items that may be reserved by any given borrower are defined in the Loan Rules screens

The Loan parameter record for that borrower and any Item form sets the number of items that can be reserved.

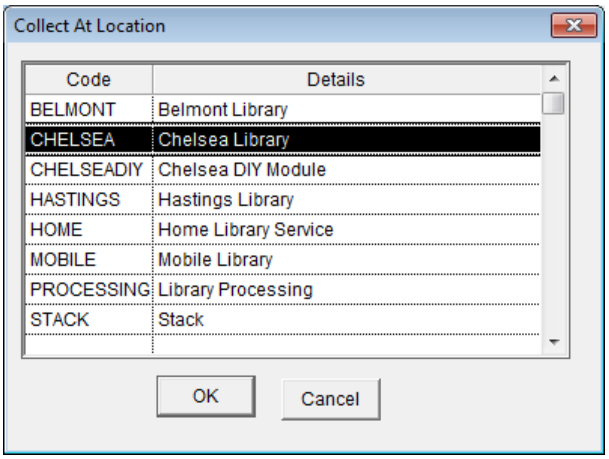
Reserving From Stockitem

It is possible to place a reservation on an item that has been searched for (and displayed) in the Stockitem screen:

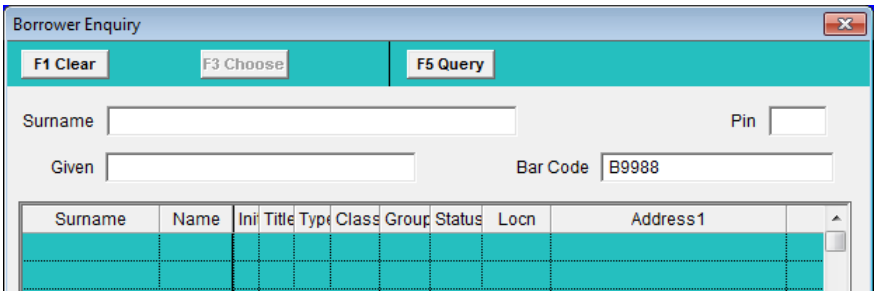
1. Launch the *Amlib* client
2. Go to **Main** > **StockItems** > **Stockitem** – the Stockitem screen will display
3. Locate an item by entering your search terms and clicking the **F5 Query** button:



4. Once the full item details are displayed, select **Item** > **ReserveItem** from the menu – the Collect At Location prompt will display:

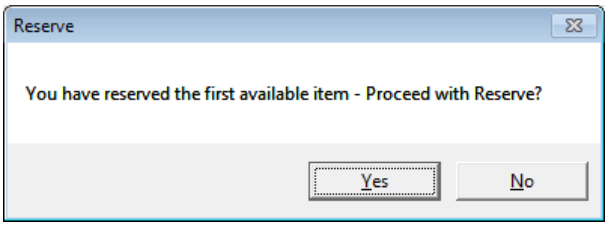


5. Select a location and click the **OK** button the Borrower Enquiry screen will display:



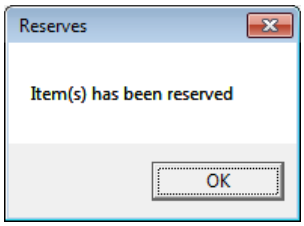
6. You can then perform a patron search: type in the Borrower Bar Code and click the **F5 Query** button

7. The Reservations screen will display and a prompt with the following message will display: You have reserved the first available item – **Proceed with Reserve?**

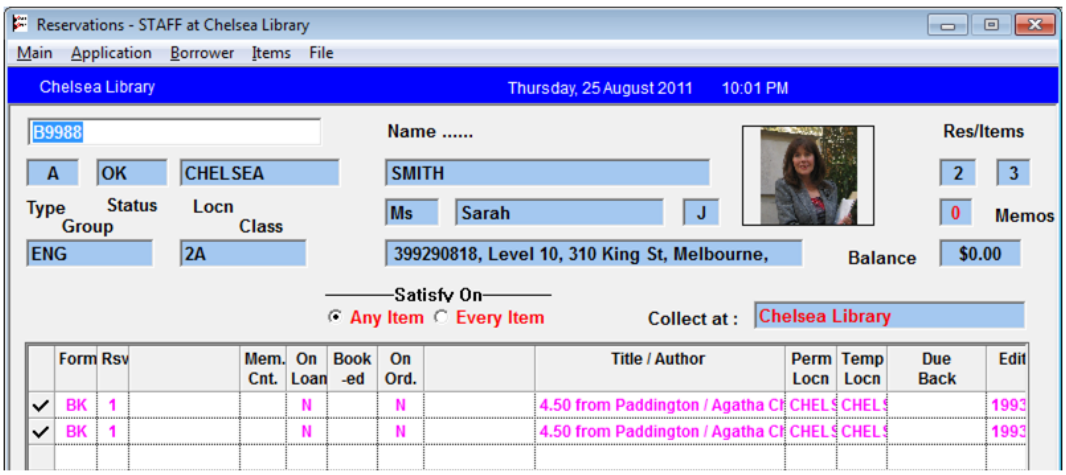


8. Click the **Yes** button to proceed (otherwise click the **No** button)

9. If you click the **Yes** button, a prompt with the following message will display: **Item(s) has been reserved**

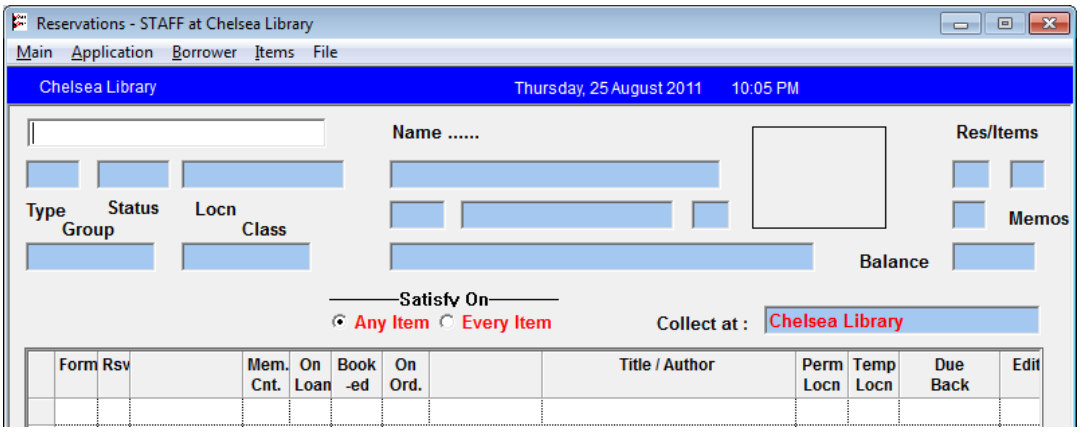


10. Click the **OK** button – reserved items will appear with an ✓ in front of them

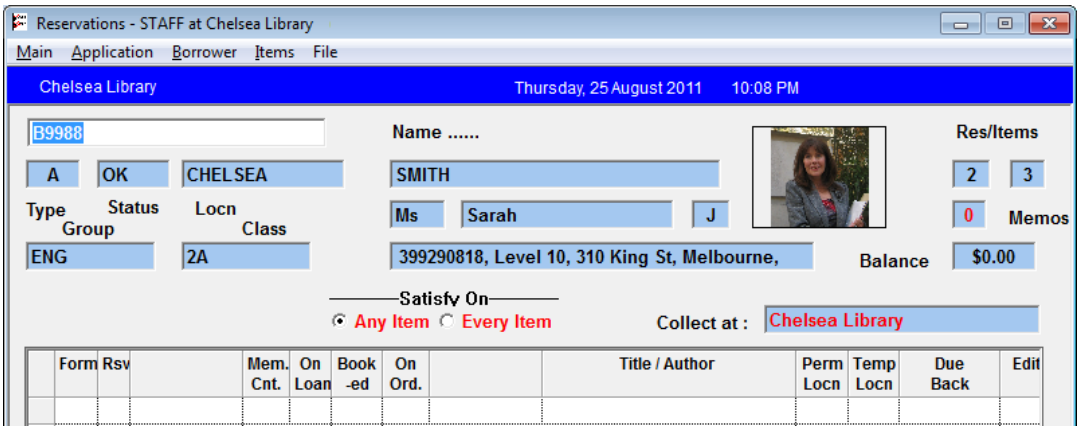


From the Reservations Module

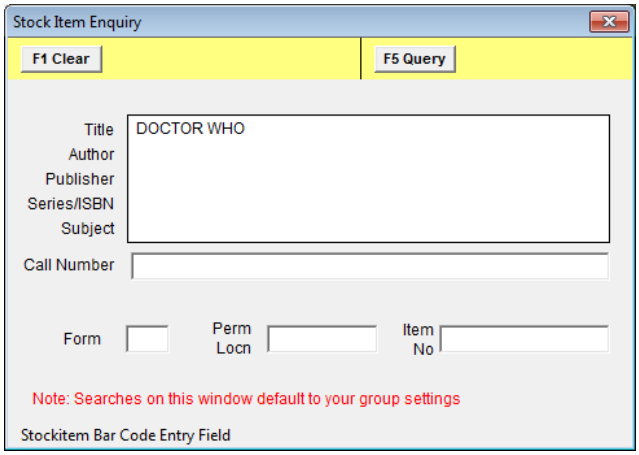
1. Launch the *Amlib* client
2. Go to **Main** > **Circulation** > **Reservations** – the Reservations screen will display:



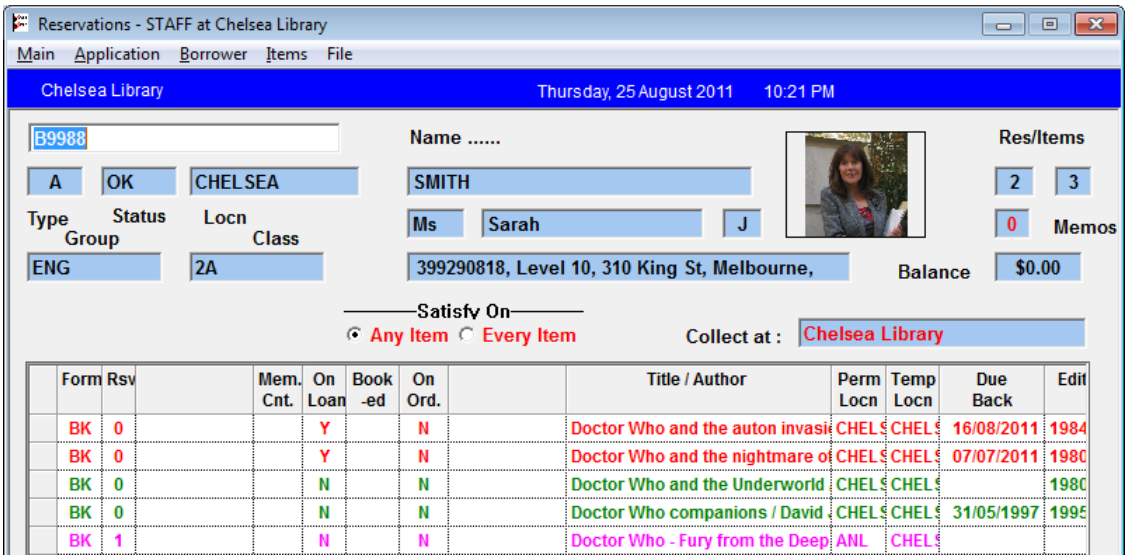
3. Wand in the borrower barcode or click the **F4** key on your keyboard (or select **Borrower** > **Borrower Search** from the menu) to perform a Borrower Enquiry search – the borrower details will display:



4. To search for items, click the **F5** key on your keyboard (or select **Items** > **Item Search** from the menu) to perform a item search – the Stock Item Enquiry screen will display:



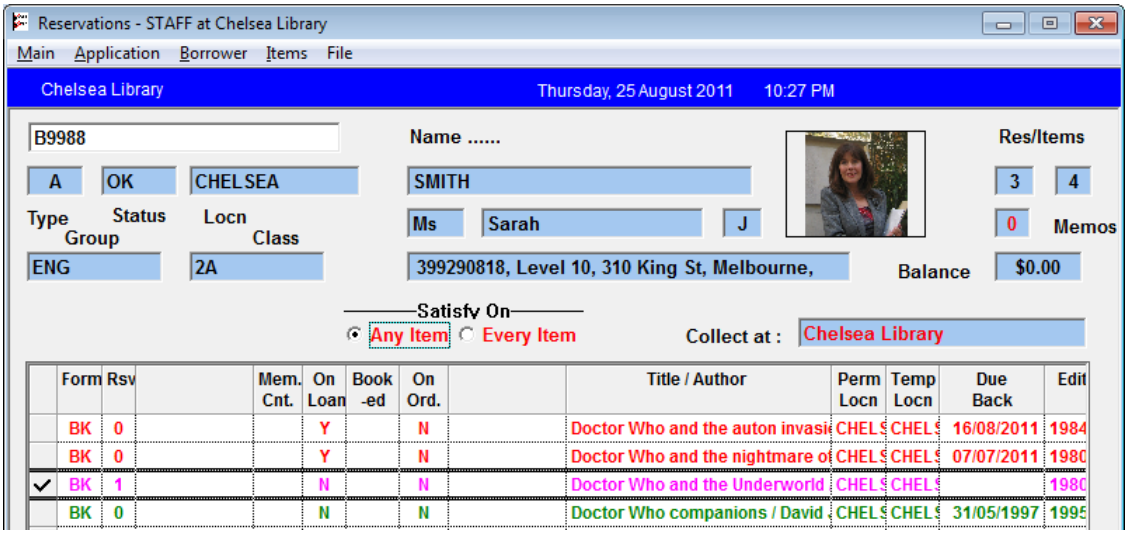
5. You can then perform an item search: type in the item details and click the **F5 Query** button
6. A list of potential reservation items will then display:



Reservations can be satisfied on an **ANY** or **EVERY** item basis for multi reserves.

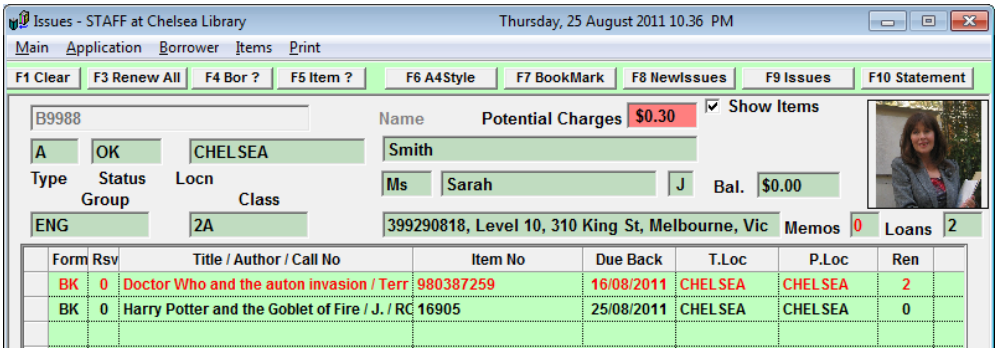
ANY	Any item highlighted will satisfy the reserve and all others will be cancelled – for example: for multiple copies
EVERY	Every item highlighted will stay as reserved. None will be cancelled unless done so by the operator – for example: if reserving several items by the same Author or by Subject

7. Satisfy On – select either the **Any Item** or **Every Item** option (most people select the **Any Item** option)
8. To reserve the item/s highlight and click the **F3** key on your keyboard (or select **Borrower** > **Reserve Items** from the menu)
9. Click the **OK** button – reserved items will appear with an ✓ in front of them

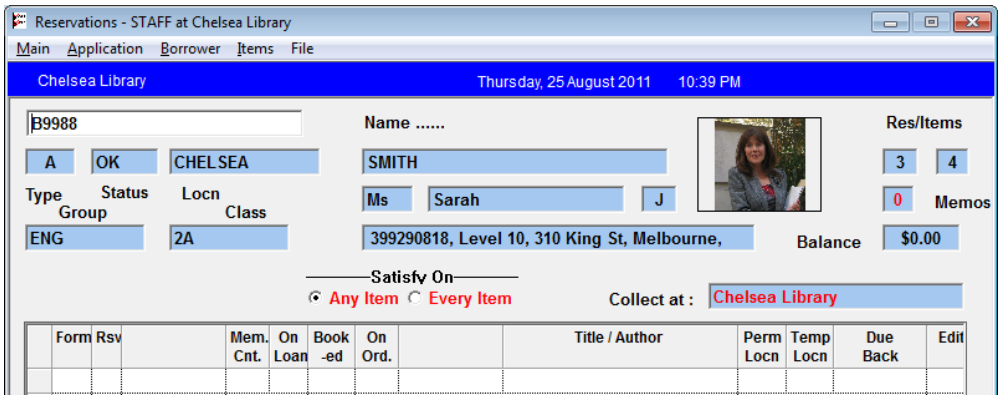


From Circulation

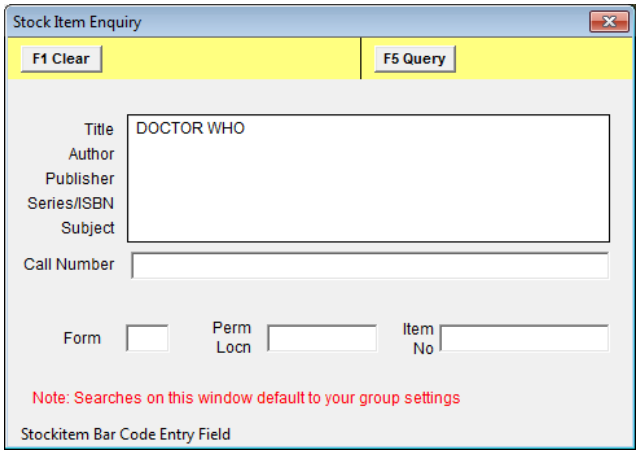
1. Launch the *Amlib* client
2. Go to **Main** > **Circulation** > **Issues** – the Issues screen will display
3. Wand in the borrower barcode or click the **F4** key on your keyboard (or select **Borrower** > **Borrower Search** from the menu) to perform a Borrower Enquiry search – the borrower details will display:



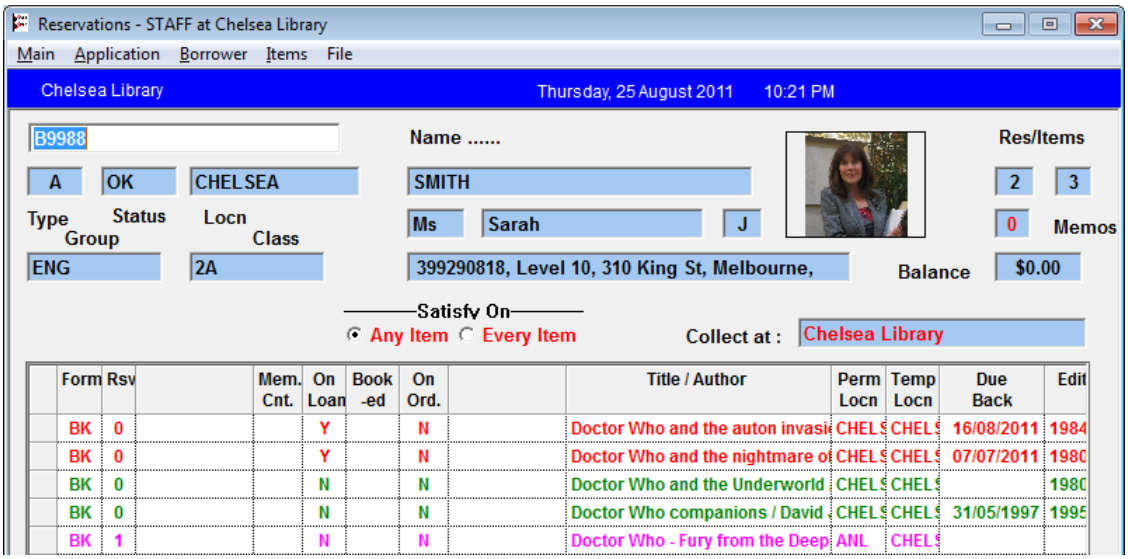
4. From them menu, select **Borrower** > **Go To Reserve For Borrower** – the Reservations screen will display:



5. To search for items, click the **F5** key on your keyboard (or select **Items** > **Item Search** from the menu) to perform a item search – the Stock Item Enquiry screen will display:



6. You can then perform an item search: type in the item details and click the **F5 Query** button
7. A list of potential reservation items will then display:



Reservations can be satisfied on an **ANY** or **EVER**Y item basis for multi reserves.

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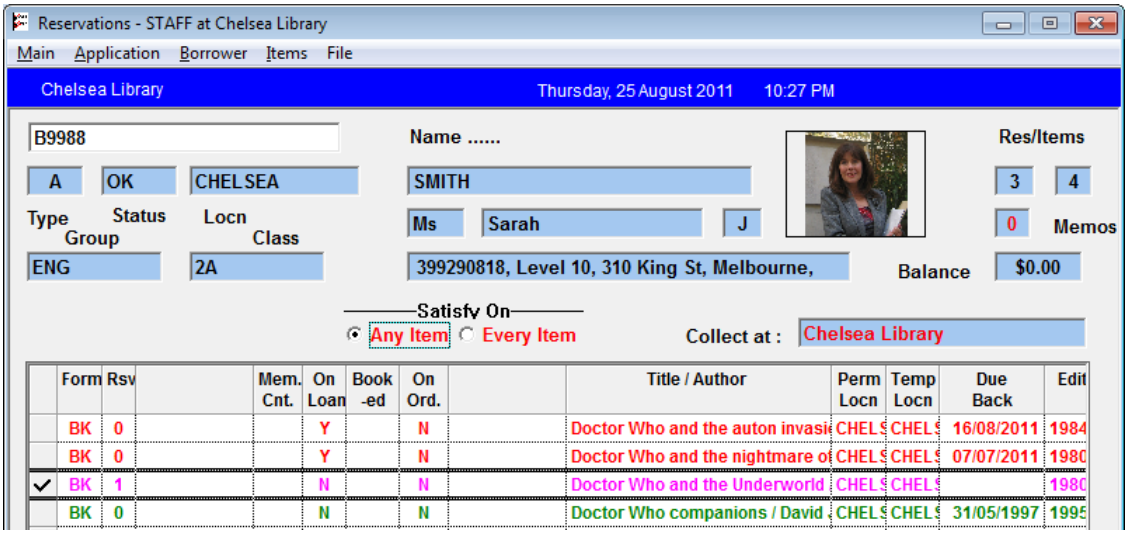
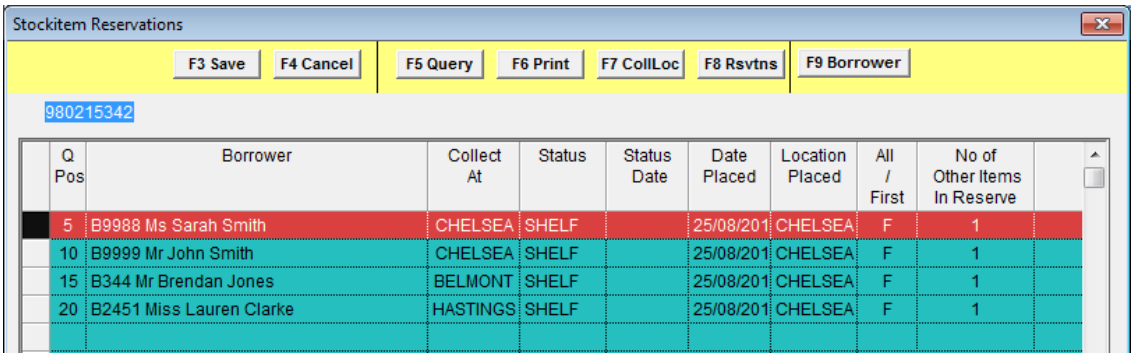
8. Satisfy On – select either the **Any** Item or **Every** Item option (most people select the **Any Item** option)
9. To reserve the item/s highlight and click the **F3** key on your keyboard (or select **Borrower** > **Reserve Items** from the menu)
10. Click the **OK** button – reserved items will appear with an ✓ in front of them



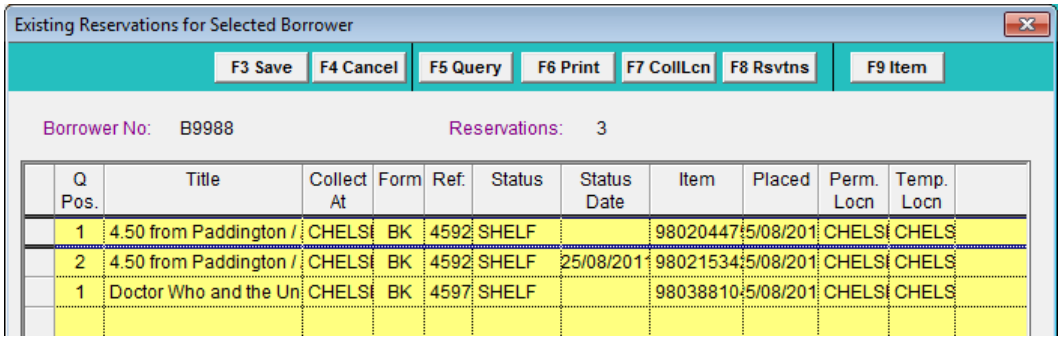
Checking or Cancelling Reservations

Reserves can be checked from *Borrower* or *Stockitem* modules.

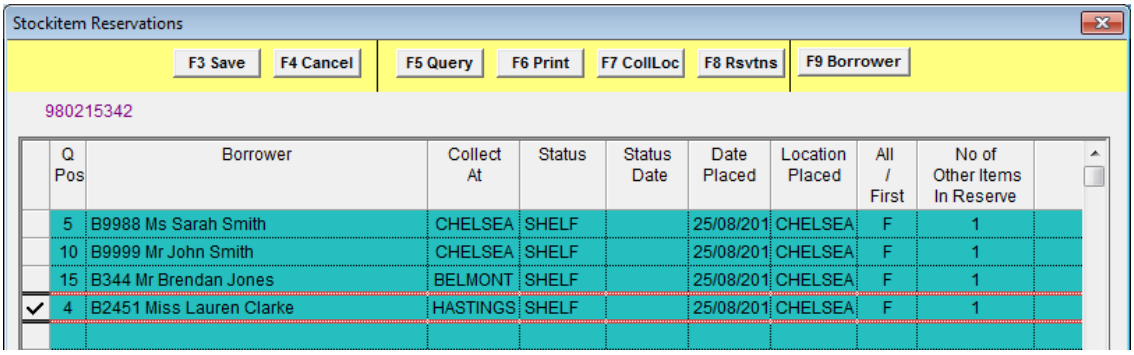
1. On the Stockitem screen (with the item details displaying), select **Item** > **CurrentReserves** from the menu – the Stockitem Reservations screen will display:



2. On the Borrower Details screen (with the borrower details displaying), select **Borrower** > **CurrentReserves** from the menu – the Existing Reservations for Selected Borrower screen will display:

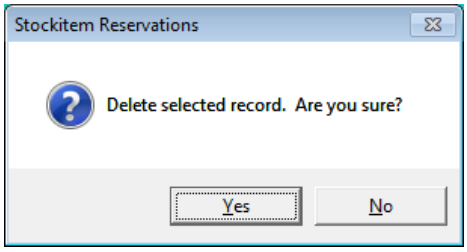


3. The Stockitem Reservations list can be amended by changing the Queue (Q Pos) position – to jump someone in front of someone else, simply type in a number in the Q Pos field that places them before that person:



4. Cancel a reservation:

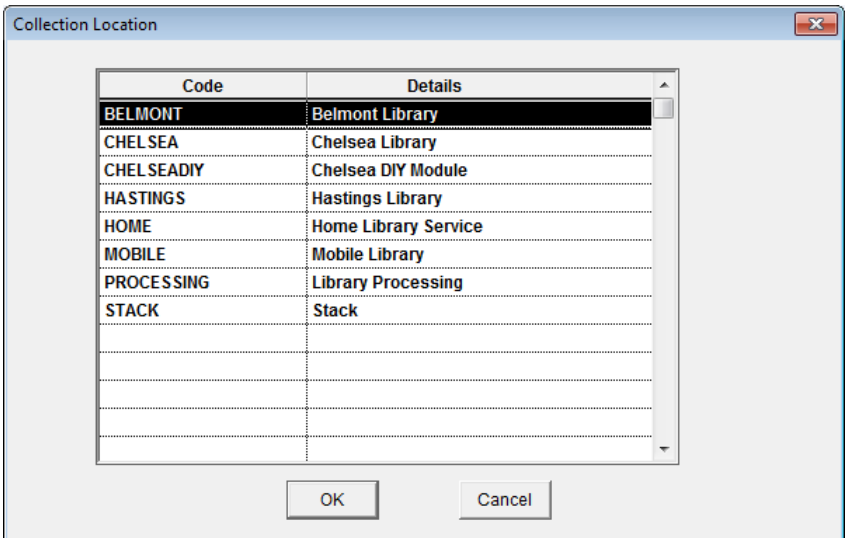
   a. Highlight the reservation and click the **F4 Cancel** button – a prompt with the following message will display: **Delete selected record. Are you sure?**



b. Click the **Yes** button (to delete the reservation) or click the **No** button (to retain it)

5. Change the Location pickup point:

   a. Highlight the reservation and click the **F7 CollLoc** button – a Collection Location prompt will display:

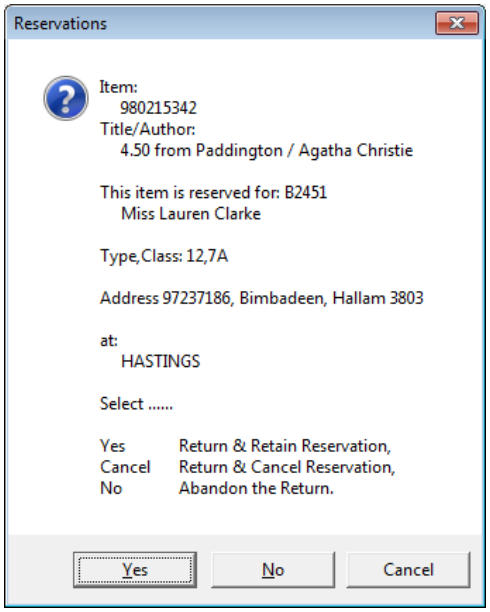


   b. Select the new pickup location and click the **OK** button

6. Click the **F3 Save** button when complete

Checking in an Item on Return

1. Launch the *Amlib* client
2. Go to **Main** > **Circulation** > **Returns** or **Chute Returns** – the (Chute) Returns screen will display
3. Wand in the item
4. If the item has a reservation on it, a Reservations prompt will display:



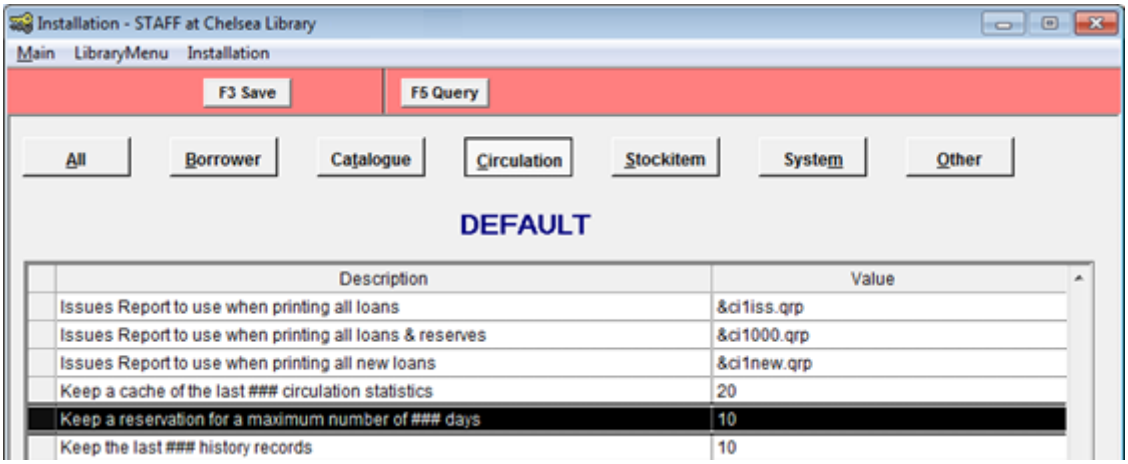
5. The following options are available:
    a. Click the **Yes** button to return the item (and *Retain* the reservation)
    b. Click the **No** button to return the item (and *Cancel* the reservation)
    c. Click the **Cancel** button to not return the item (and *Retain* the reservation)
6. If you click the **Yes** button, a memo will automatically be generated for that Borrower, and a message alerting that the reserved item is available will display when the allocated borrower next loans an item
7. A reservation slip (to place in the item) can be generated by clicking the **F11 ResSlip** button

Mass Cancelling of Reservations

Sites may wish to cancel reserves *en masse*. For example: at the end of each School Year (or for the Year 12s when they leave) or other Libraries may wish to delete after the expiry dates of the Reservations.

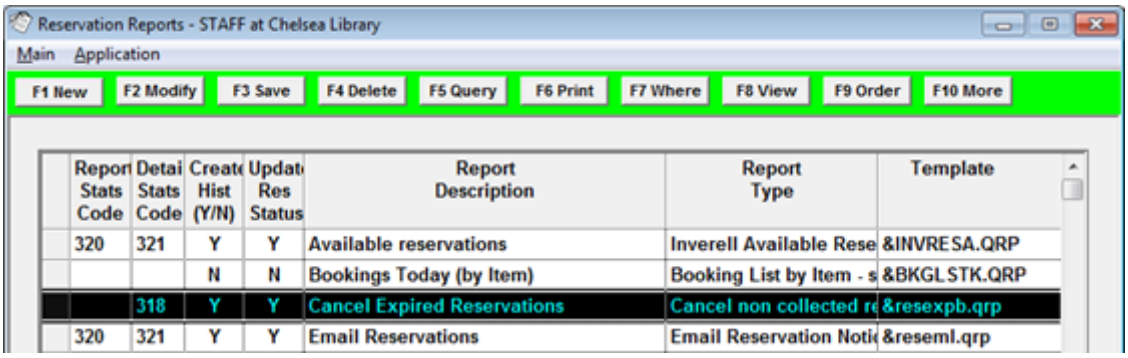
The expiry date for the number of days that an item should remain on the reservation shelf is set in:

- **Main** > **Supervisor** > **Installation** > **Circulation** tab: Keep a reservation for a maximum number of ### days

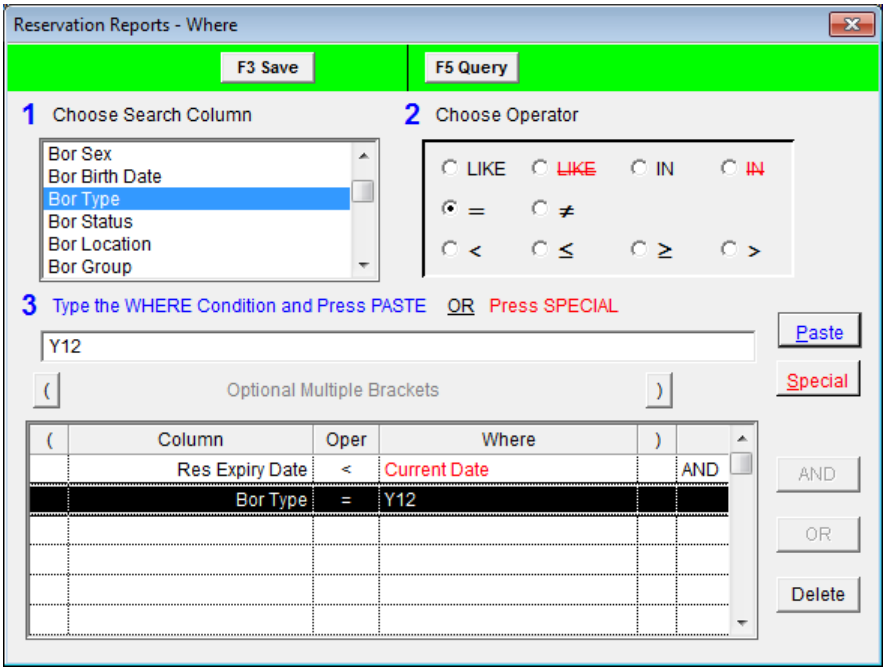


It is possible to cancel large numbers of reserves by running a report:

1. Go to **Main** > **Reports** > **RepReservation** – the Reservation Reports screen will display
2. Click the **F1 New** button – the Select Report Format screen will display
3. Highlight the **&RESEXPB.QRP** template (Cancel no collected res) and click the **Select** button
4. Type in a Report Description
5. Ensure that the Update Res Status = **Y**
6. Click the **F3 Save** button



7. Click the **F7 Where** button and enter your Where statement – for example:
   a. **Res Expiry Date < Current Date** (select via the **Special** button)
   b. **BorType = Y12**
8. Click the **F3 Save** button when complete



9. Click the **F8 View** button and check carefully that this list is **exactly** what you want to delete (click **No** to the Saved File prompt)
10. If you are happy with the report results, close the Report – View window and click the**F6 Print** button run the report through the *Scheduler*
11. From the menu, select **Application** > **RepStartSchedule** and click the **OK** button on the prompt
12. The progress of report can be viewed by selecting **Application** > **RepPrintProgress**
13. When the report enters Printed tab, then the reservations should be all cancelled

WARNING: Once reserves have been deleted they cannot be retrieved. Please use this process with caution.

Reservation Status

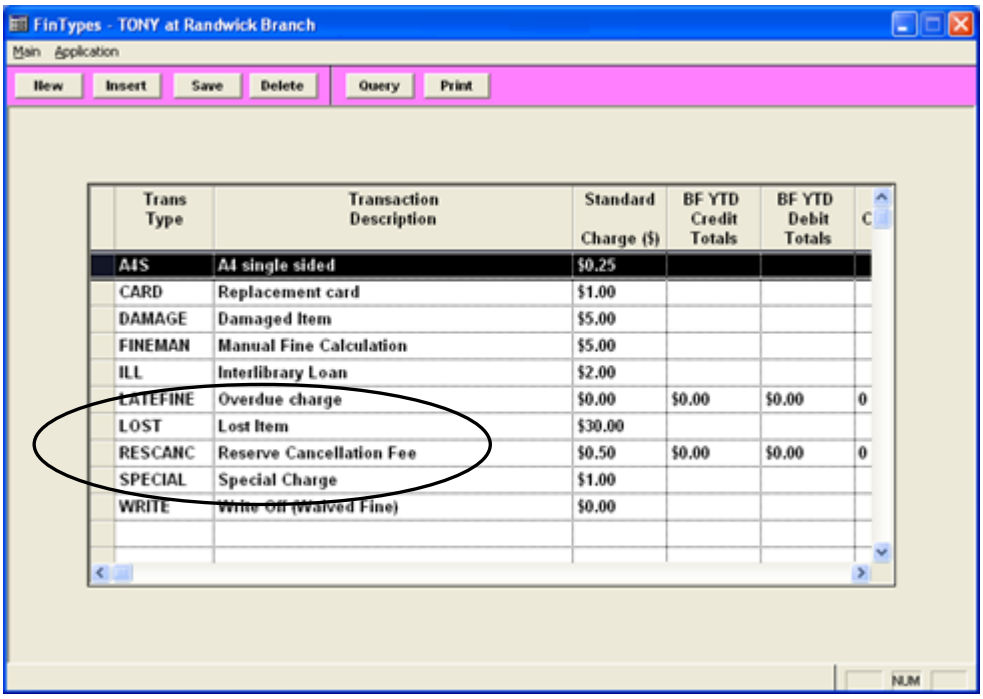
Values for the ResItemStatus fields are:

ISSUE	item was on loan (reservation placed from Circ.)
ON LOAN	Item was on loan at time of reservation (reservation from Opac)
SHELF	item was on shelf when reserved.
RETURN	item has been returned after reservation
TRANSFER	item was on transfer at reservation
ORDER	item was on order

READY	reservation has been cancelled through an Expiry Report and is now ready for the next reader
PRINTED	item was included in the Printout of a Reservation Notice

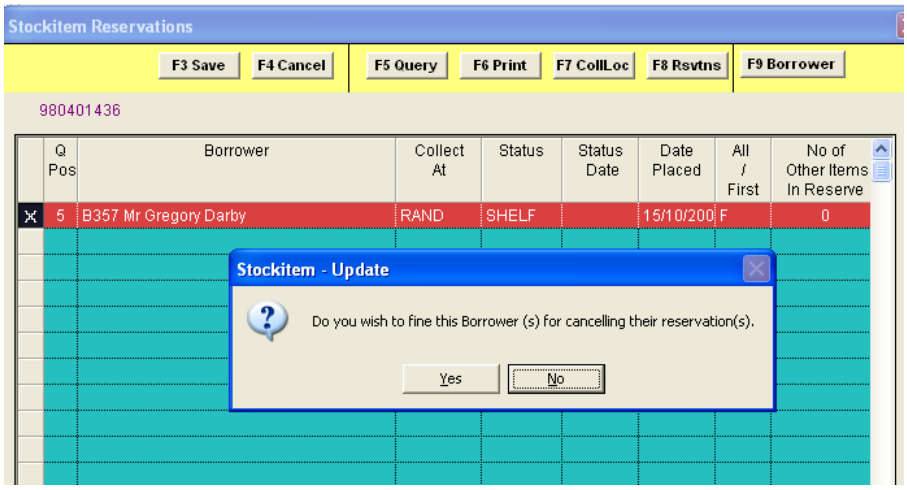
Borrower Reserve Cancellation fee

Amlib provides an option to charge borrowers a reserve cancellation fee. To enable the reserve cancellation fee add the charge to the Circulation Financial types table. (Main>Finance>CircFinTypes)

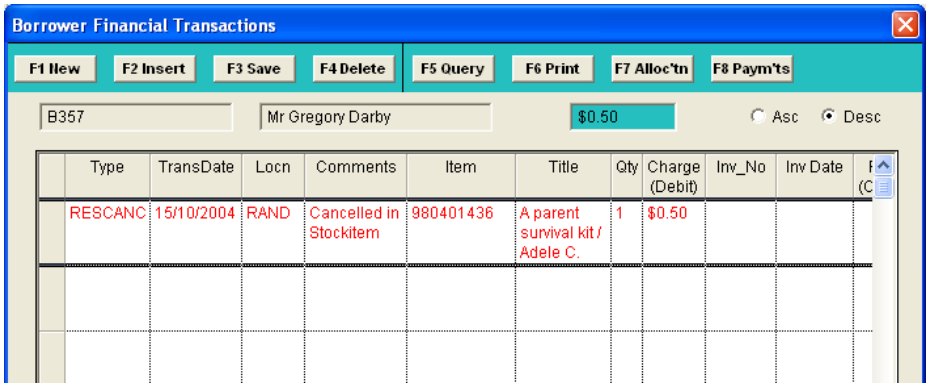


Trans Type	Transaction Description	Standard Charge ($)	BF YTD Credit Totals	BF YTD Debit Totals	C
A4S	A4 single sided	$0.25			
CARD	Replacement card	$1.00			
DAMAGE	Damaged Item	$5.00			
FINEMAN	Manual Fine Calculation	$5.00			
ILL	Interlibrary Loan	$2.00			
LATEFINE	Overdue charge	$0.00	$0.00	$0.00	0
LOST	Lost Item	$30.00			
RESCANC	Reserve Cancellation Fee	$0.50	$0.00	$0.00	0
SPECIAL	Special Charge	$1.00			
WRITE	Write Off (Waived Fine)	$0.00			

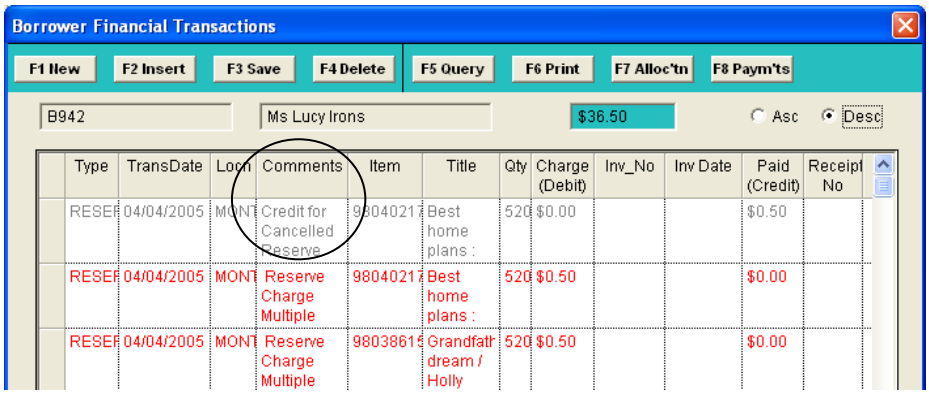
When a reserve is cancelled through Current Reserves or when Returning the item and cancelling the reservation from either Chute or Returns, a prompt will ask the operator if a reservation charge should be applied. When the [F3] Save button is pressed to process the cancellation the pop-up window allows the operator to charge a cancellation fee.



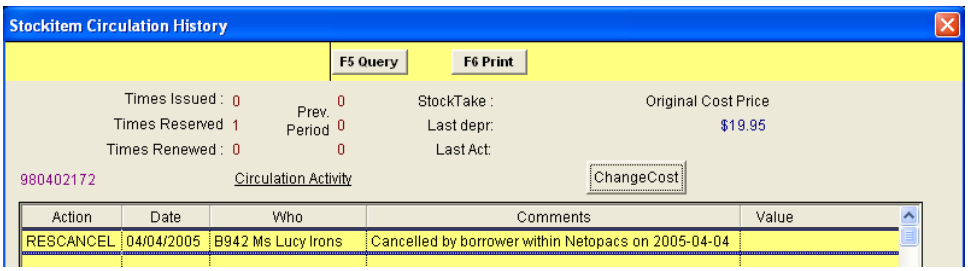
If Yes is selected the charge is carried across to the borrower financial record.



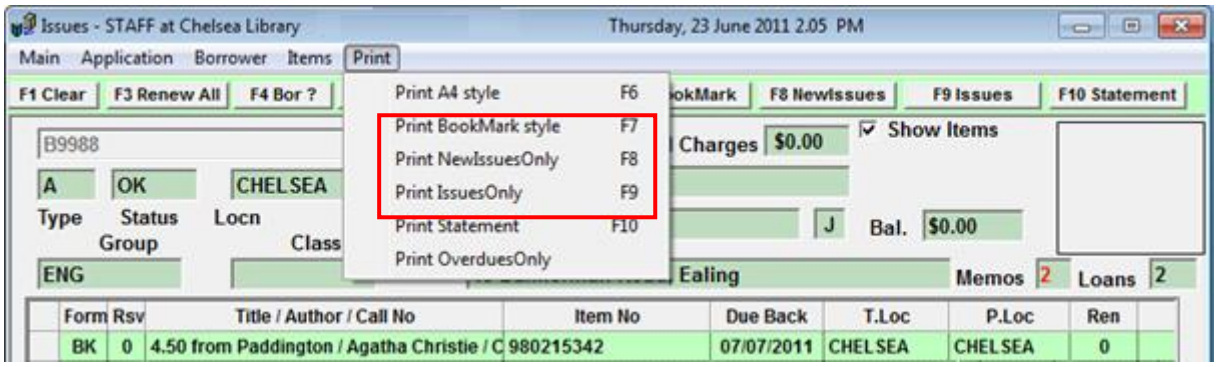
Members can also cancel their reserves via the NetOpacs and have the financial charge refunded.



The item history also includes an entry that the reserve was cancelled by the borrower via the NetOpacs.


Stockitem Circulation History
F5 Query
F6 Print
Times Issued : 0
Times Reserved 1
Times Renewed : 0
Prev. Period
0
0
0
StockTake :
Last depr:
Last Act:
Original Cost Price
$19.95
980402172
Circulation Activity
ChangeCost
Action
Date
Who
Comments
Value
RESCANCEL
04/04/2005
B942 Ms Lucy Irons
Cancelled by borrower within Netopacs on 2005-04-04

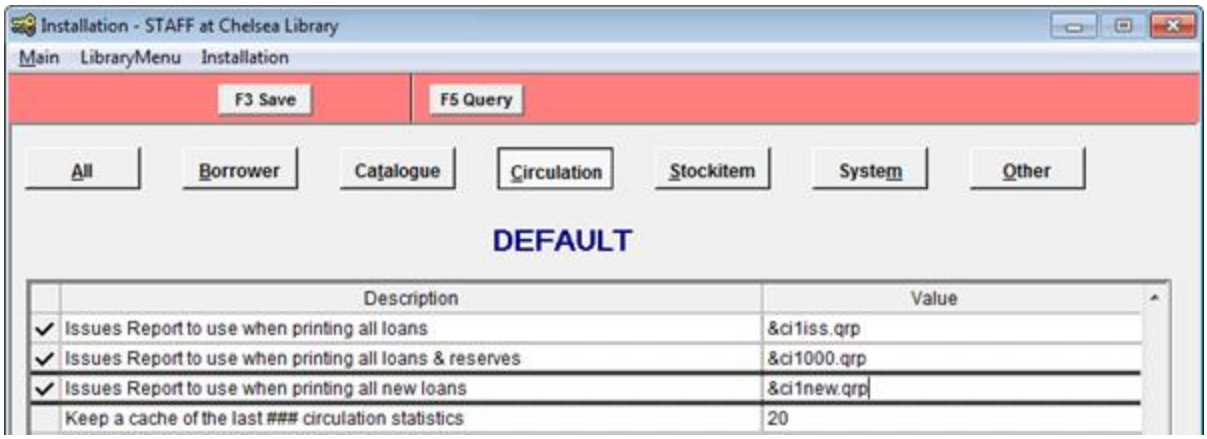
PRINTING OPTIONS IN CIRCULATION

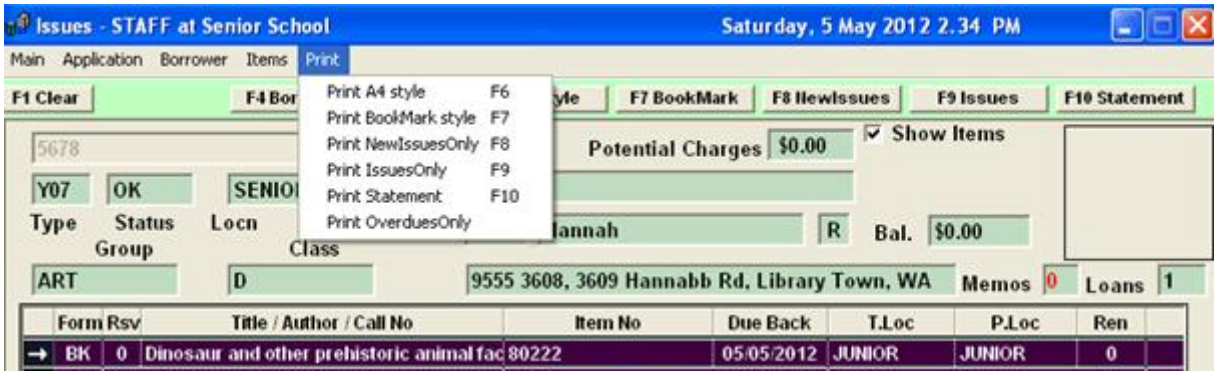


MENU OPTION	DEFAULT REPORT	FUNCTION KEY
Issues Report to use when printing all loans	**&CIISS.QRP**	**F9**
Issues Reports to use when printing all loans & reserves	**&CI1000.QRP**	**F10**
Issues Reports to use when printing all new loans	**&CINEW.QRP**	**F8**

Templates can be customised and saved as different file names – for example: for slip (receipt) printers or to add custom information on the template – ie: Library Name/Opening hours, etc.

1. **Main** > **Supervisor** > **Installation** > **Circulation** tab: Issues report to use when printing options





Print A4 Style [F6]

$blnlist.qrp Current Issues for LANDA ANDERTON as a 26/02/200

Form	Rsved	Title	Item No	Due Bac	Issued at
BK	0	The fisherman's handbook : how to find, identify a / STARLING, STEPHEN.	ASLIB2667064XB	21/11/1	EAS
BK	0	The gold of noon. / SUMMERS, ESSIE.	ASLIB40233359B	21/05/2	EAS
BK	0	One foot in the grave.	ASLIB46810242B	19/03/2	EAS
BK	0	This year it will be different. / BINCHY, MAEVE.	ASLIB46955313B	19/03/2	EAS

Print BookMark Style [F7] ($blnbkmk.qrp)

Reports the current issues for a borrower detailing the Item Number and Due Back Date. This has been designed to print on receipt rolls.

$blnbkmk.qrp
LANDA ANDERTON

Item No	Due Bac
ASLIB2667064XB	21/11/1999
ASLIB40233359B	21/05/2000
ASLIB46810242B	19/03/2001
ASLIB46955313B	19/03/2001

Print New Issues Only [F8] (&ci1new.qrp)

Format as below. Reports only the newly issued items for a borrower (those displaying a tick) detailing the Item Number, Title and Status (Due date). The name, address, phone number and Barcode number of the Borrower displays at the top of the page.

Print Issues Only [F9] (&ci1iss.qrp)

Format as below. Reports the issues items for a borrower detailing the Item Number, Title and Status (Due date). The name, address, phone number and Barcode number of the Borrower displays at the top of the page. Useful for Slip Printers.

CAPEL PUBLIC LIBRARY

Borrowers Receipt - 27/09/02
THOMAS CHAPTER

Horse breaking made easy [videorecordi
Videorecording 4/09/2002
Horse breeding : a practical guide for ow
Books 25/09/2002
Birds of Australian gardens.
Books 1/03/2002

A service provided by the Shire of Capel.

Print Statement [F10] (&ci1000.qrp)

Reports the issues and reservations for a borrower detailing the Item Number, Title and Status (Due date). The name, address, phone number and Barcode number of the Borrower displays at the top of the page

Inverell Shire Library

Phone (067) 22 0103 or (067) 22 127

Borrowers Receipt - 26/02/01

Name: **LANDA ANDERTON**
Address: **507 Thorn Avenue**
Beechboro WA
6063
Phone: Borrower No: +60011352299

(please notify library of any change in address)

	Item No	Title	Status
BK	ASLIB2667064XB	The fisherman's handbook : how to f	*Due 21/11/99*
BK	ASLIB40233359B	The gold of noon.	*Due 21/05/00*
BK	ASLIB46704639B	From Potter's field.	*Due 19/03/01*
BK	ASLIB46810242B	One foot in the grave.	*Due 19/03/01*
BK	ASLIB46955313B	This year it will be different.	*Due 19/03/01*
BK	ASLIB46964932B	Winter chill.	*Due 19/03/01*
BK	ASLIB46997466B	Escape.	*Due 19/03/01*
BK	ASLIB47004142B	The obsession.	*Due 19/03/01*
BK	ASLIB47109424B	The ladykiller.	*Due 19/03/01*
BK	ASLIB47237651B	Heir to a throne.	*Due 19/03/01*
BK	ASLIB48384593B	Complete novels of Anne Bronte.	*Due 19/03/01*
CAS	ASLIB48720526B	The mysterious affair at Styles [sou	*Due 19/03/01*
BK	ASLIB46606270B	Bird designs stained glass pattern b	*Reserved*
VID	ASLIB4728837XB	Bird man of paradise [videorecordin	*Reserved*

Print Overdues Only (&ci1ovd.qrp)

Only the current Overdues are printed for the Borrower displayed on the Issues Window

OTHER CIRCULATION FACILITIES

OverRide

1. Go to **Main** > **Supervisor** > **UserNames** – the User Names screen will display
2. Highlight the User Name you wish to check and select the **F8 Choose** button – the User Security screen will display
3. From the menu, select **CurrentUserMenu** > **Circulation**
4. Check the **StopOverRide** option - *grey* means this in inactive – therefore the operator is able to override stops. If the **StopOverRide** option is active (**bold**), the operator will be unable override stops

The option is available in Issues and Reservations. For example: if a Borrower type has a limit of 5 items and the operator decides to allow 100 items, activating the Override functions allows these loans to be issued without further warning messages.

Please Note: Messages not related to the Privileges of the borrower still display – for example: Overdue items, Financial, Reservations, etc.

Set a Date Prior to Wanding Items

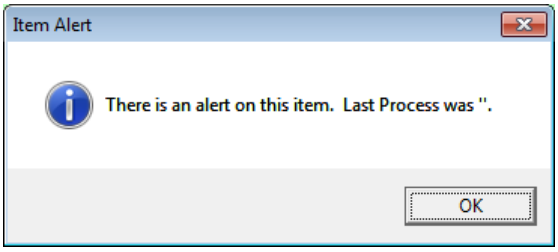
It is possible to set a different due date prior to wanding in items.

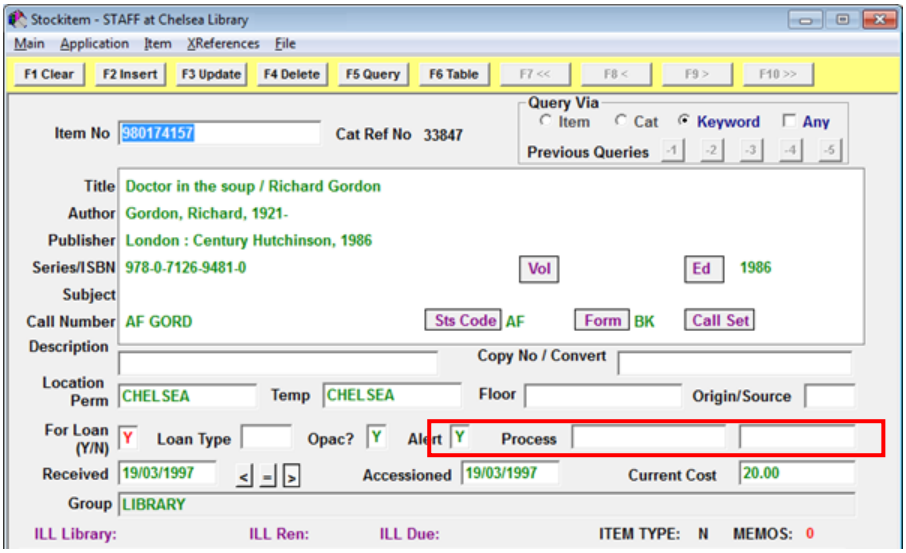
1. Go to **Main** > **Circulation** > **Issues** – the Issues screen will display
2. Bring up a borrower record
3. Select **Borrower** > **Set Date Due For All New Issues for Borrower** – the Issue Date Due prompt will display
4. Type in New Due date and click the **OK** button

Any item issued after this point will use this new due date.

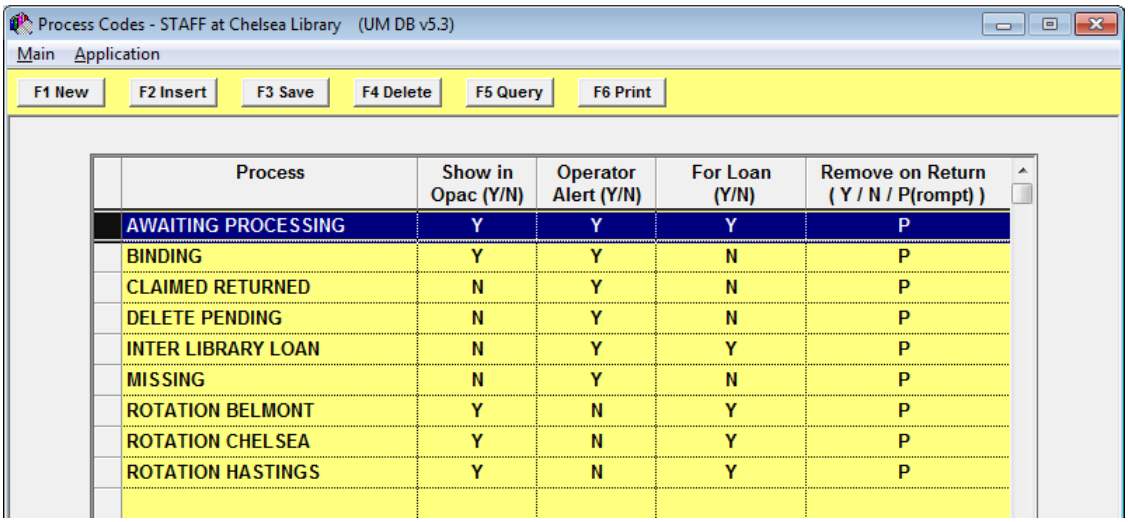
Item Alert Message without a Process

Sometimes in Issues or Returns a message comes up that looks incomplete. This indicates that a Stockitem has the Alert set to **Y**, but there is no corresponding Process – for example: Missing, Damaged, etc.





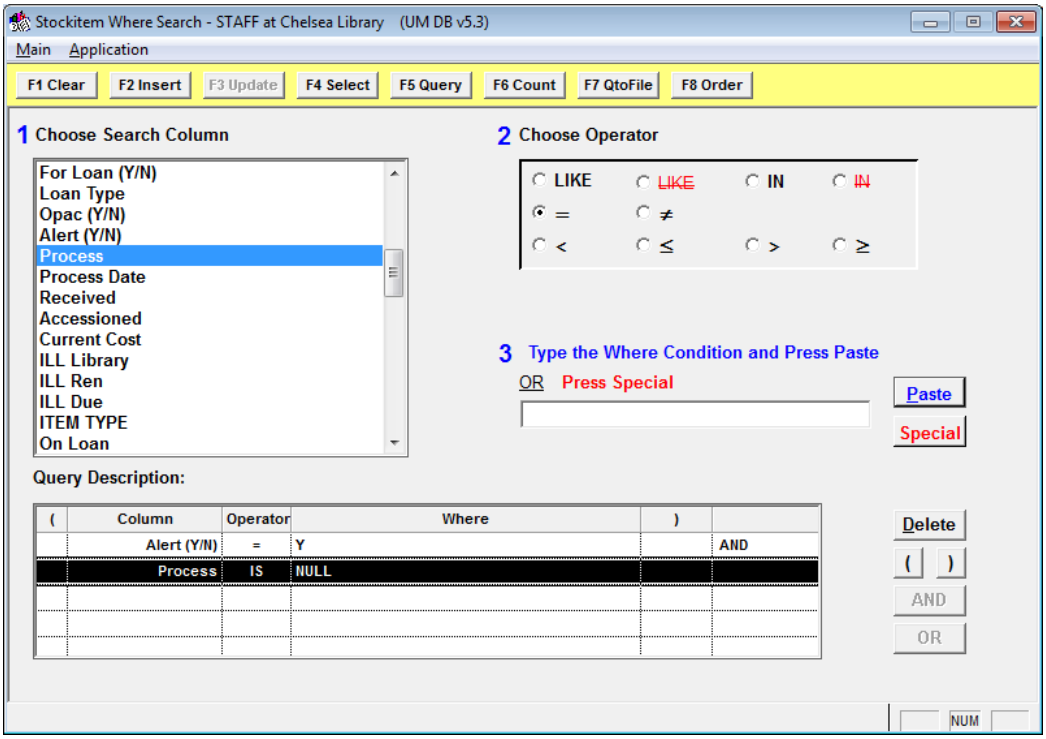
Usually Alerts are set in relation to a Process:



Process	Show in Opac (Y/N)	Operator Alert (Y/N)	For Loan (Y/N)	Remove on Return (Y / N / P(rompt))
AWAITING PROCESSING	Y	Y	Y	P
BINDING	Y	Y	N	P
CLAIMED RETURNED	N	Y	N	P
DELETE PENDING	N	Y	N	P
INTER LIBRARY LOAN	N	Y	Y	P
MISSING	N	Y	N	P
ROTATION BELMONT	Y	N	Y	P
ROTATION CHELSEA	Y	N	Y	P
ROTATION HASTINGS	Y	N	Y	P

You can find all the items with an Alert but no Process through a Stockitem Where Search:

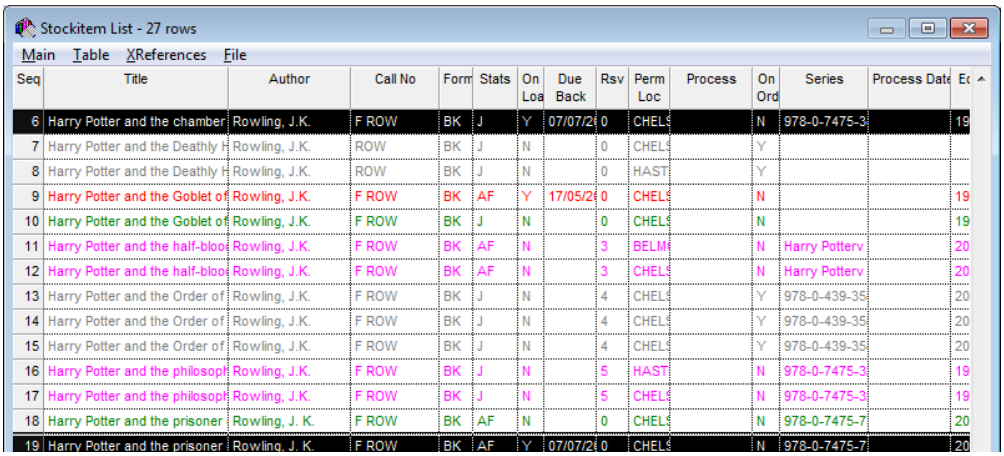
1. Go to **Main** > **StockItems** > **StockitemWhere** – the Stockitem Where Search screen will display
2. Enter the following parameters:
   a. **Alert = Y**
   b. **Process = NULL** (**Paste** without entering a value in 3)



Change of Due Dates

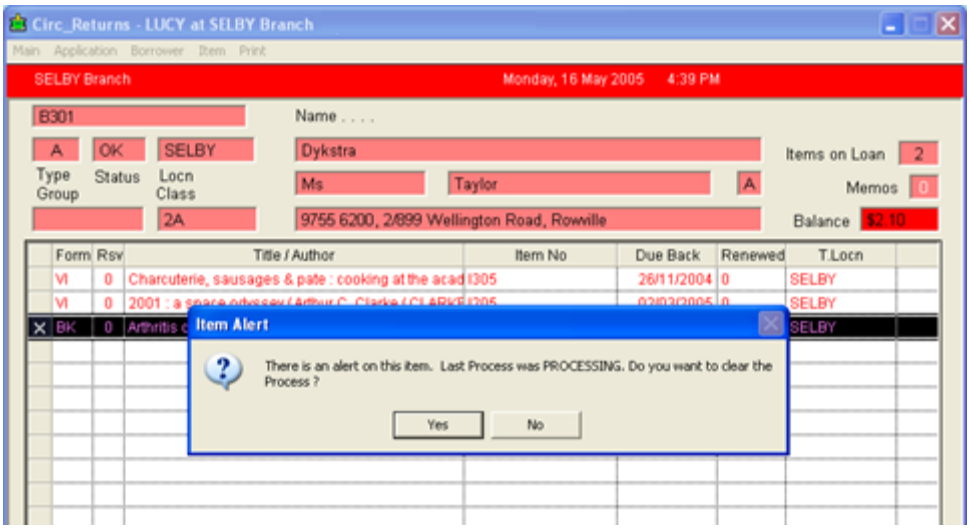
1. On the Stockitem List results screen
2. *Highlight* the items to be altered
3. Select **Table** > **Change Due Dates**

WARNING: This is bypassing the usual system way of renewing the loan or changing the date due, so the links and history will not be valid. Useful when a set of items need altering at the same time - for example, when schools want to change the Date due for certain Classroom sets



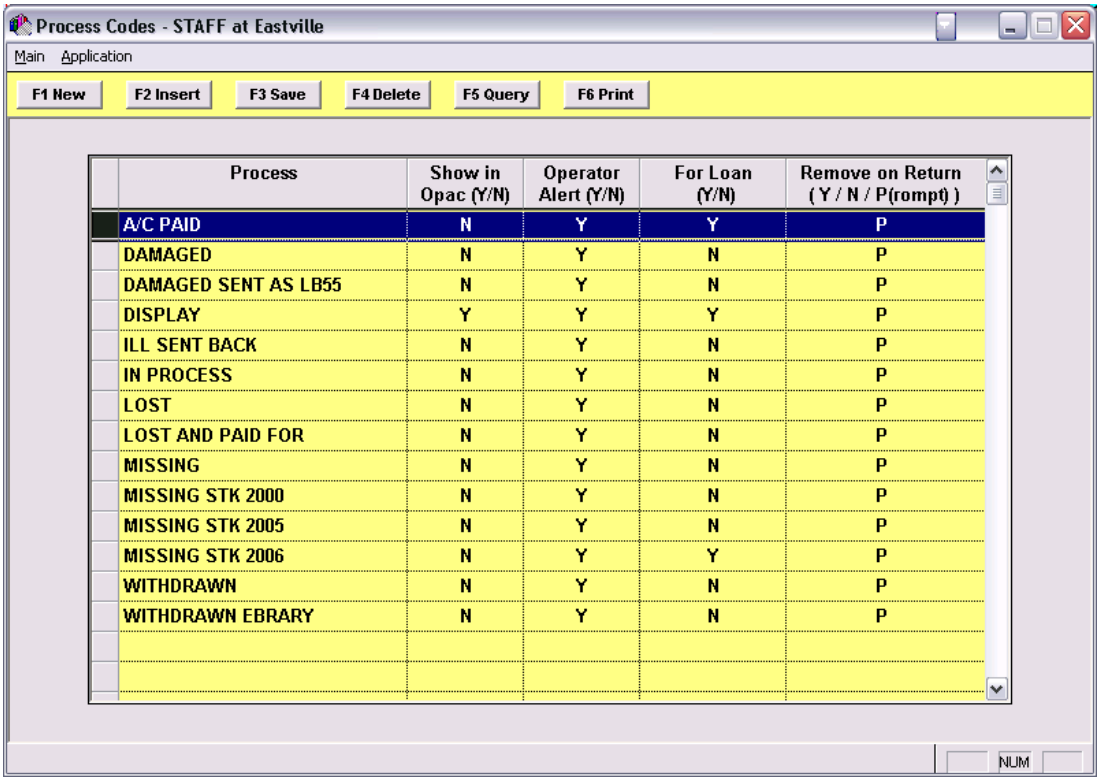
Automatic removal of Process codes on return of Stockitem

You now have the option to remove a process code immediately on return of an item that has a process code attached. On return of the item a message will appear with an option to remove the process. If you select YES the Process code is removed instantly from the Stockitem.



Process Code Table in Stockitem, Application

Note the new column where an option to Prompt of automatically remove the Process can be set.

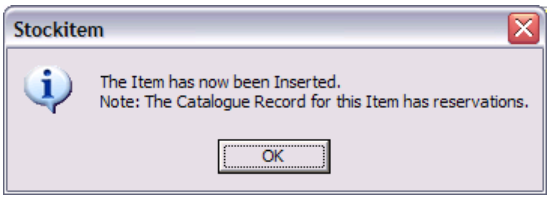


Process	Show in Opac (Y/N)	Operator Alert (Y/N)	For Loan (Y/N)	Remove on Return (Y / N / P(rompt))
A/C PAID	N	Y	Y	P
DAMAGED	N	Y	N	P
DAMAGED SENT AS LB55	N	Y	N	P
DISPLAY	Y	Y	Y	P
ILL SENT BACK	N	Y	N	P
IN PROCESS	N	Y	N	P
LOST	N	Y	N	P
LOST AND PAID FOR	N	Y	N	P
MISSING	N	Y	N	P
MISSING STK 2000	N	Y	N	P
MISSING STK 2005	N	Y	N	P
MISSING STK 2006	N	Y	Y	P
WITHDRAWN	N	Y	N	P
WITHDRAWN EBRARY	N	Y	N	P

ReserveAllocate

Used to add reservations to copies where other items sharing that same Catalogue Reference have reservations. For example, if an item added to the Database shares a Catalogue with other copies

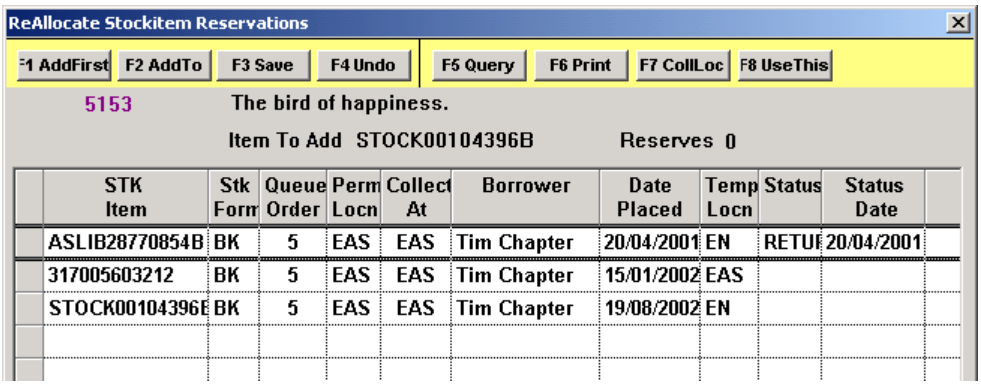
that have reservations. Add items in the usual way. If the other items with the same Catalogue records have Reservations, a message will display.



Highlight the items that have the same Catalogue Reference from the Table and select ReserveAllocate from the Item menu.

A ReAllocate Stockitem Reservation screen is displayed. (Reserve Shuffle will only work if the items have the same catalogue reference).

Highlight the reservations you wish to add to the new item, this is usually the whole list. Select Addto **[F2].**



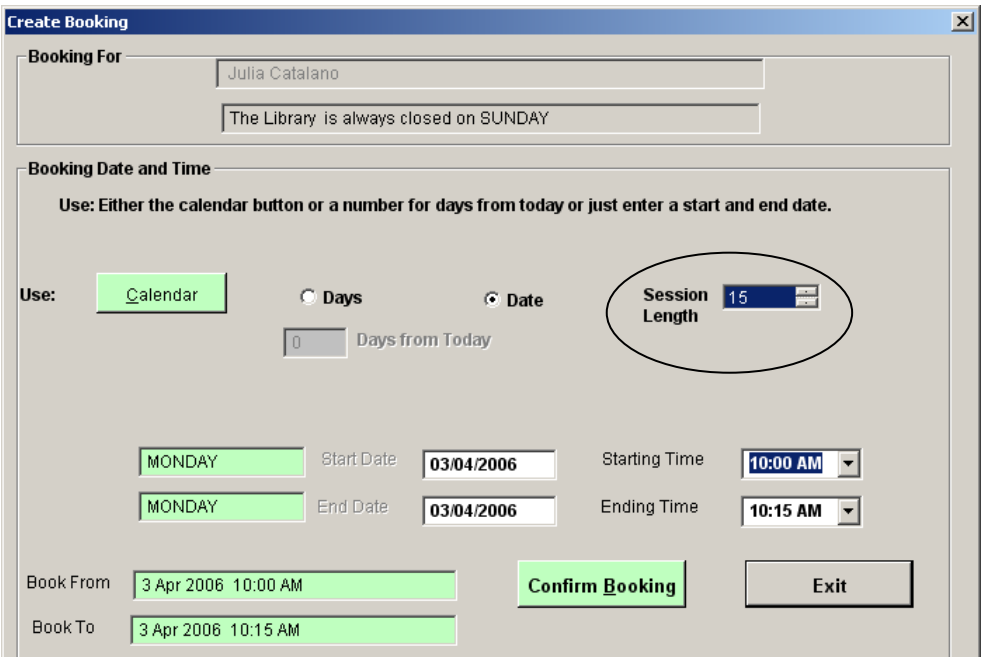
This will add all the highlighted reserves from the existing item to the new item. Select Save **[F3]**.

To trigger the reservation, the new item can be placed through Returns.

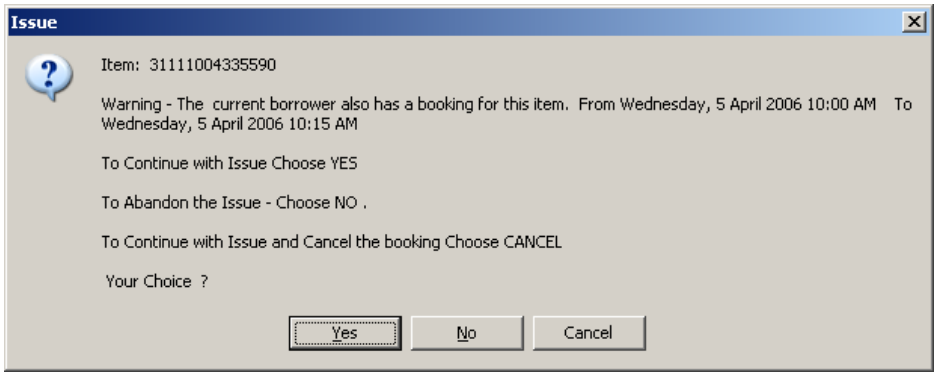
CIRCULATION - BOOKINGS

1. It is now possible to book Stockitems such as Equipment and PCs for borrowers though the Reservations screen.

2. When a borrower is searched and XReference to ReservationsModule selected, or when a Stockitem is searched and AddItemToReserveList selected, the menu option Borrower/Book Marked Items becomes available.
3. When selected the **Create Booking** screen will appear.
4. Library Hours for all locations must first be set in Supervisor/Locations/Hours.
5. When the booked item is issued, Loan period depends on parameters for the item form not the booked period.
6. Booking session lengths can be set from a range of 4 minutes to 120 minutes.



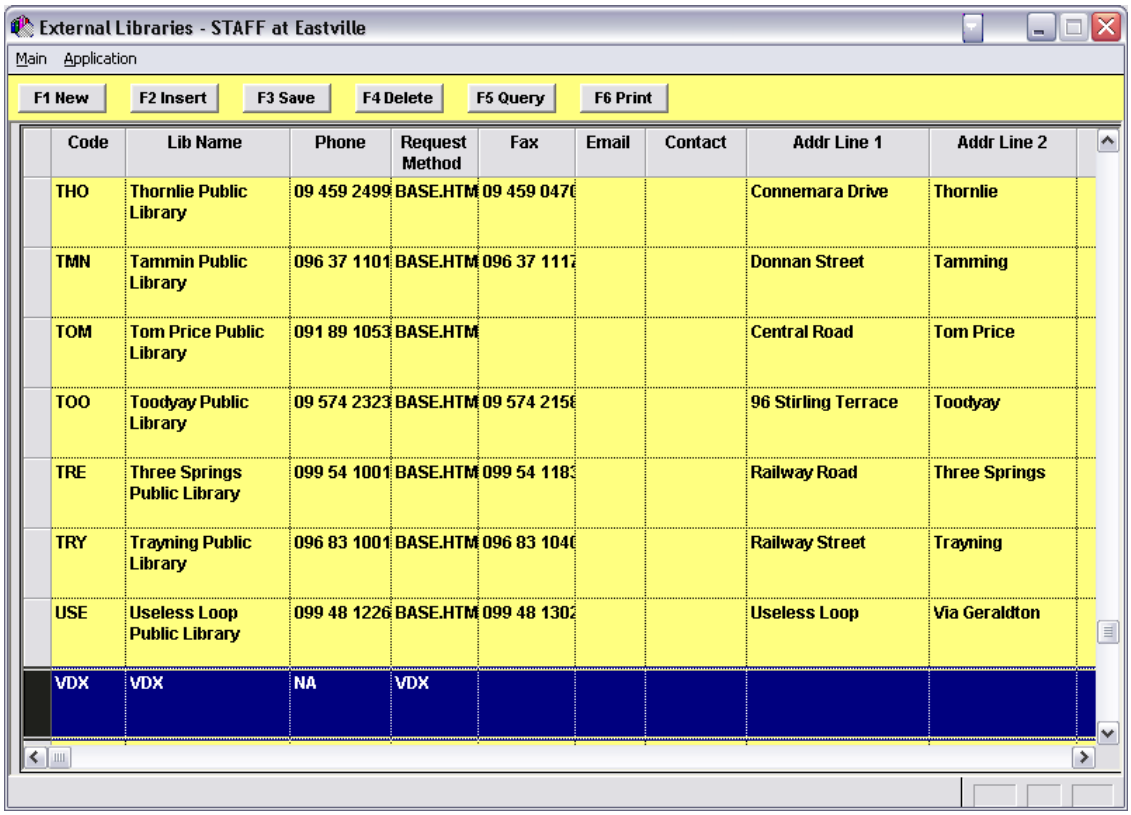
7. A date can either be selected from Calendar, inserted from the Days from Today option, or entered start an end date.
8. The starting time and ending time are selected from dropdown options. If the time slot has been used by another borrower or is not available a message will appear to warn you.
9. A list of bookings for a patron can be viewed from Borrower / Current bookings and a list of bookings for a Stockitem can be viewed from Stockitem / Item / Current Bookings.
10. If the item is issued, the following message will prompt to Issue and Cancel the booking by selecting Cancel. Loan period depends on parameters for the item form not the booked period.



Several new reports for the bookings function are available and are detailed in the Reports section of this document.

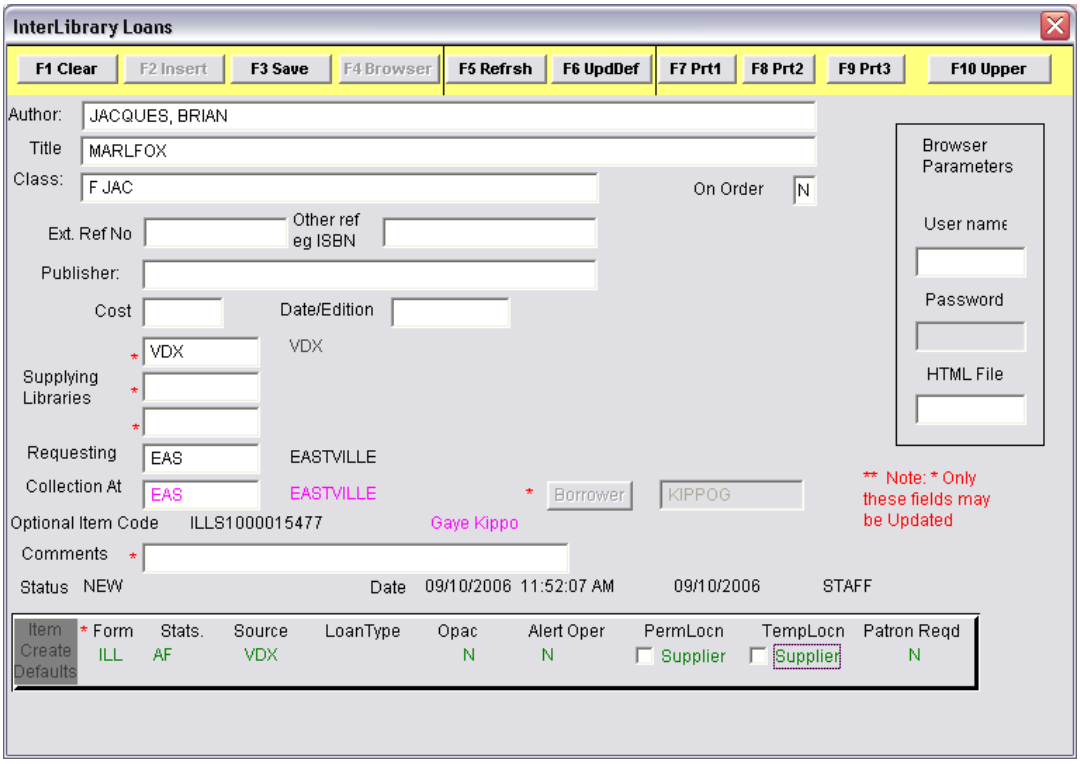
INTERLIBRARY LOANS

1. You will need to set up StockExternalLibs prior to creating the first ILL record. Usually this table is supplied at installation. It is a good idea to have an entry for VDX to use at the time of request.



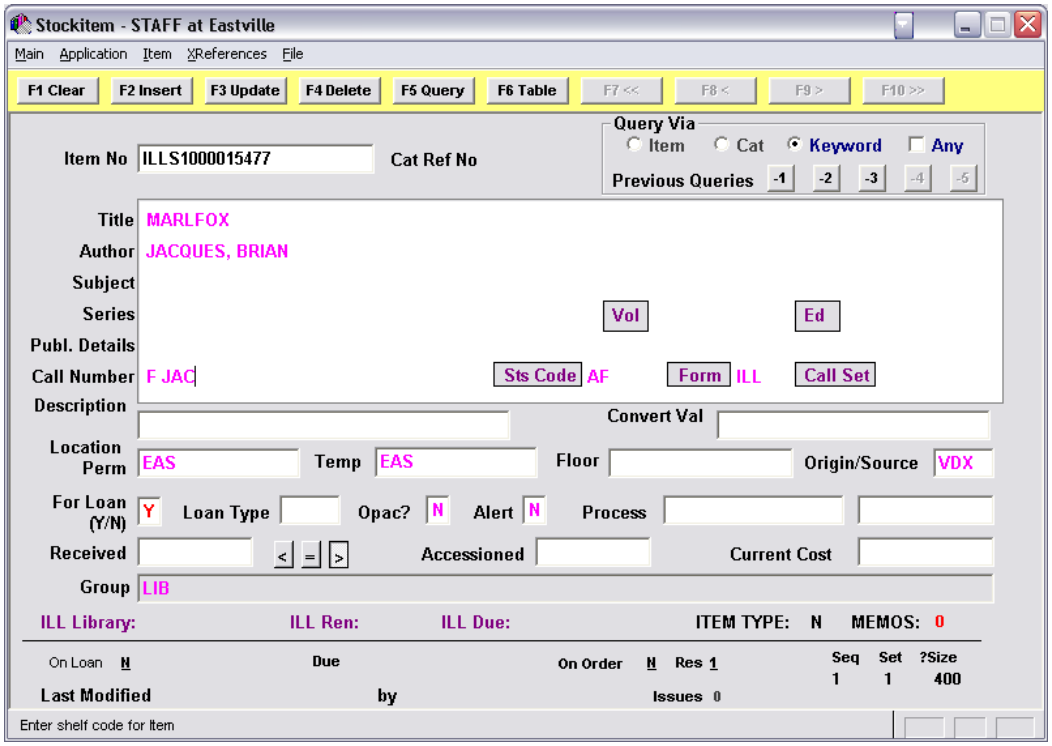
Code	Lib Name	Phone	Request Method	Fax	Email	Contact	Addr Line 1	Addr Line 2
THO	Thornlie Public Library	09 459 2499	BASE.HTM	09 459 0476			Connemara Drive	Thornlie
TMN	Tammin Public Library	096 37 1101	BASE.HTM	096 37 1117			Donnan Street	Tamming
TOM	Tom Price Public Library	091 89 1053	BASE.HTM				Central Road	Tom Price
TOO	Toodyay Public Library	09 574 2323	BASE.HTM	09 574 2158			96 Stirling Terrace	Toodyay
TRE	Three Springs Public Library	099 54 1001	BASE.HTM	099 54 1183			Railway Road	Three Springs
TRY	Trayning Public Library	096 83 1001	BASE.HTM	096 83 1046			Railway Street	Trayning
USE	Useless Loop Public Library	099 48 1226	BASE.HTM	099 48 1302			Useless Loop	Via Geraldton
VDX	VDX	NA	VDX					

2. To create an **ILL record,** go to **Main** > **Stockitems** > **Stockitem** > **Item**> **ILLs**



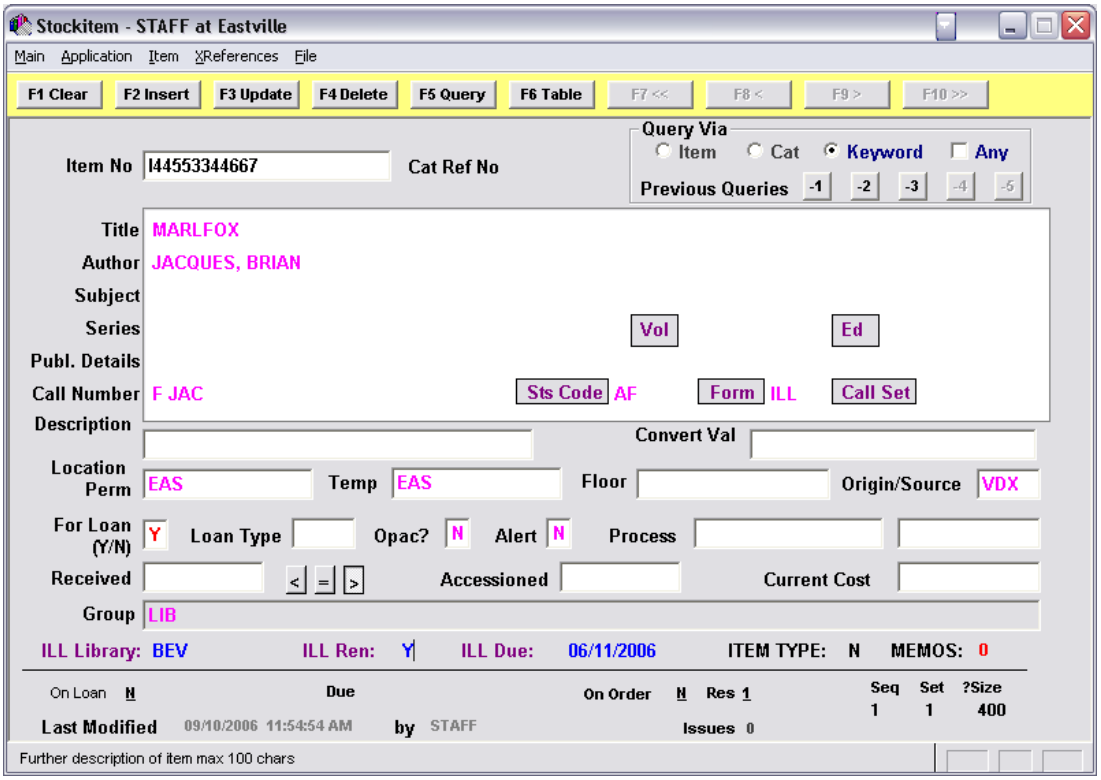
3. Type the data into the fields required. The **F10Upper** button will ensure all the typing on the screen displays in Upper Case to distinguish it as an Inter Library Loan resources from normal stock.
4. The Optional Item Code will be supplied automatically by the system. It will be changed when the item is received from the InterLoanLibrary
5. A Borrower Barcode can be entered or a Borrower can be searched by pressing the Borrower Button, to place the ILL item on reserve for that Borrower.
6. Form and Stats Codes need to be filled in. Source can be used. The information comes from the StockOrigins window
7. The Perm and Temp Locn can be left blank and the Loan Library filled in on the Stockitem screen when the item arrives.
8. When complete, select **F2Insert**
9. An ILLs, Stockitem and Borrower reservation are created.

10. The Stockitem will display. This can be cleared or closed.

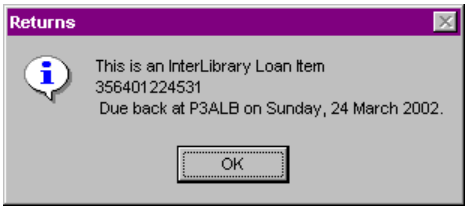


<u>On receipt of the item</u>

1. Change the temporary barcode to match the barcode on the item.
2. Add the date received. Fill in the ILLS lib, ILLRen (Y/N) and ILL Due if required at the base of the Stockitem screen.
3. When **F3Update** is selected, the item will be updated and a message will be displayed about its reservation a borrower barcode has been entered on the <u>ILLS screen.</u>



The item can now be loaned in the usual manner. When the item is returned, it will give a message about the Returning Library and the date to be returned.

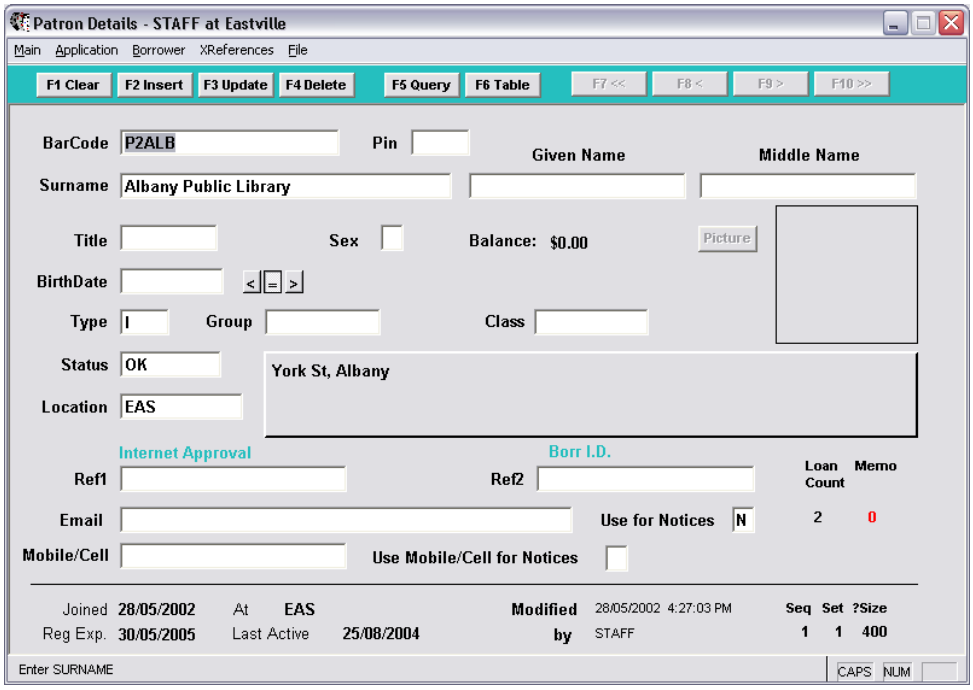


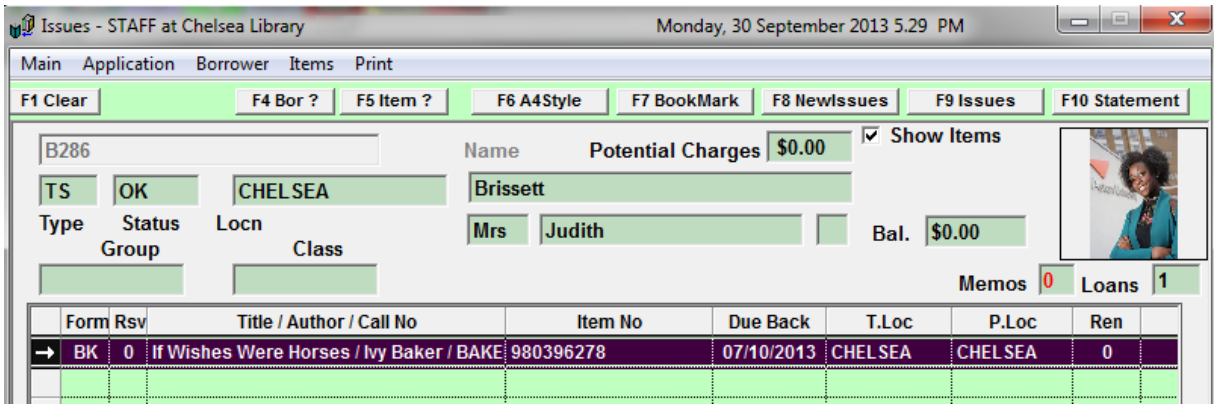
On return of the item

Select **F4Delete** to delete the item from the catalogue. This deletes the corresponding ILLs record.

ILLs Loans from your library

Each ILLs Library can be a Borrower on your system. Make sure that you have a Borrower Type of ILLs and that the loan parameters are set correctly.





Amlib Version 5.3 and higher allows *VDX* to communicate with *Amlib* via the NCIP protocol. Messages include:

- Request items – *Amlib* then determines whether the requested reservation is allowed and creates the reservation if allowed
- Cancel Request – *Amlib* deletes the reservation
- Issuing items – *Amlib* issues an item
- Renewal of items – *Amlib* determines whether the requested renewal is allowed and then renews the item if allowed. A new due date will be returned
- Return of items - *Amlib* returns the item

Separate notes are available in the Amlib/Help folder for Installation and User Guide

TRANSFERS

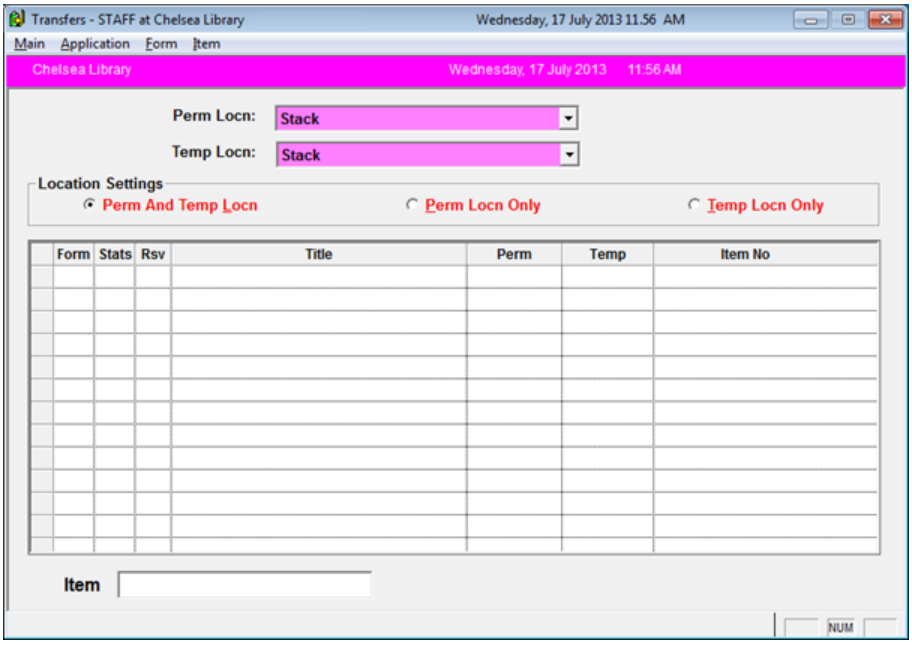
This facility may be used to effect changes to the permanent, temporary or both locations on Stockitems. For example, this could be useful when items are being located at another Branch library.

The Stockitems to be altered can be chosen by:

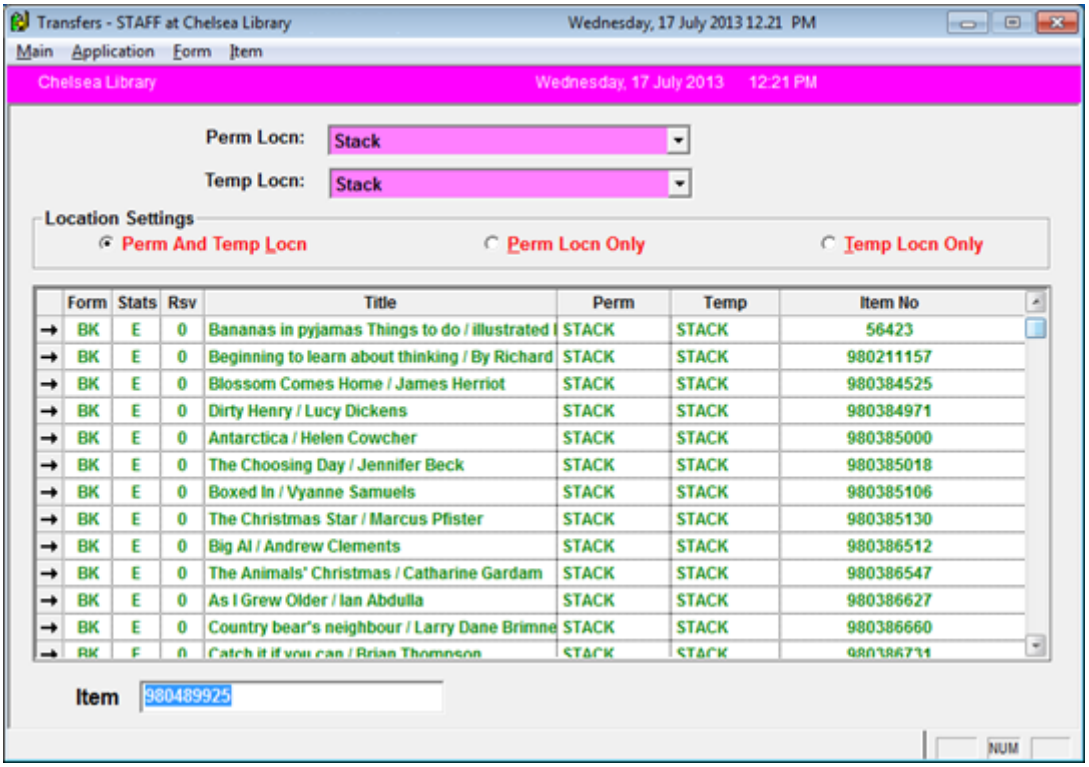
1. Wanding the items
2. Query – searching for the items
3. Item Transfer From a File – Save the items into a Saved File

Wanding the Items

5. Launch the *Amlib* client
6. Go to **Main** > **Circulation** > **Transfers (Ctrl T)** – the Transfers screen will display:
7. Set the Location to change to, by choosing the appropriate Location from the Drop-down box
8. Choose which Locations to change by clicking the appropriate Location setting (radio buttons above the empty listing:
    a. **Perm** And **Temp Locn** (to alter both Permanent and Temporary Locations of the items)
    b. **Perm Locn** Only (to alter just the Permanent Location of the items).
    c. **Temp Locn** Only (to alter just the Temporary Location of the items)



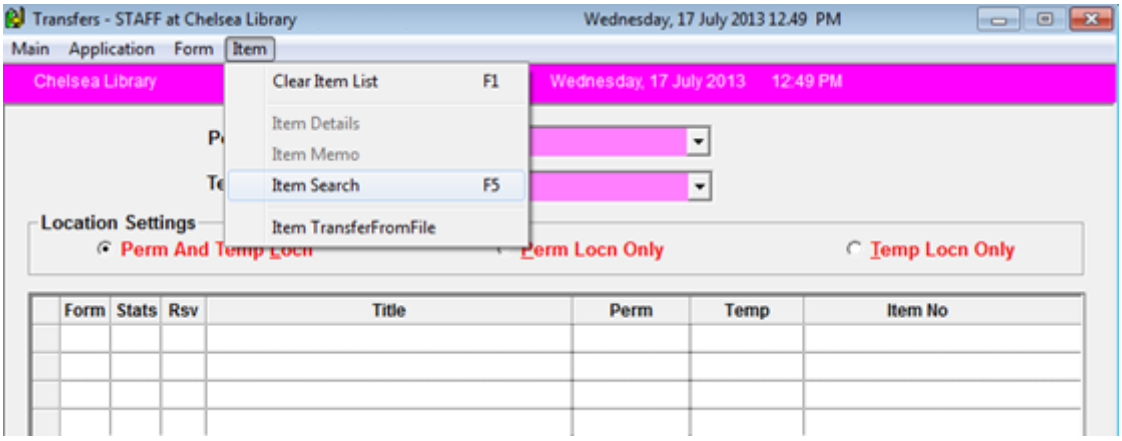
9. Wand each item in the Field labelled Item. The Item details will display in the Table. As it fills it will continue scrolling down.



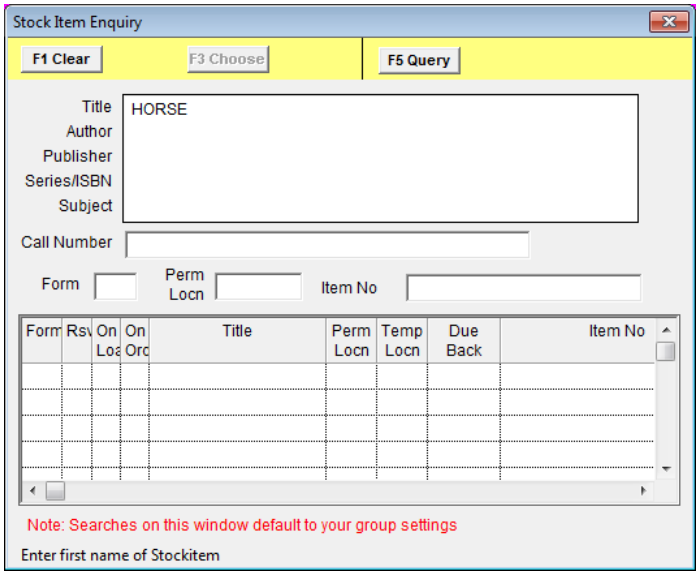
Query

It is possible to search individually for items for the Transfer.

1. Follow the Instructions from 1 – 4 from above
2. From the Item Menu select **Query**



3. A Stockitem Enquiry box will display
4. Enter a query term and press **F5 Query**

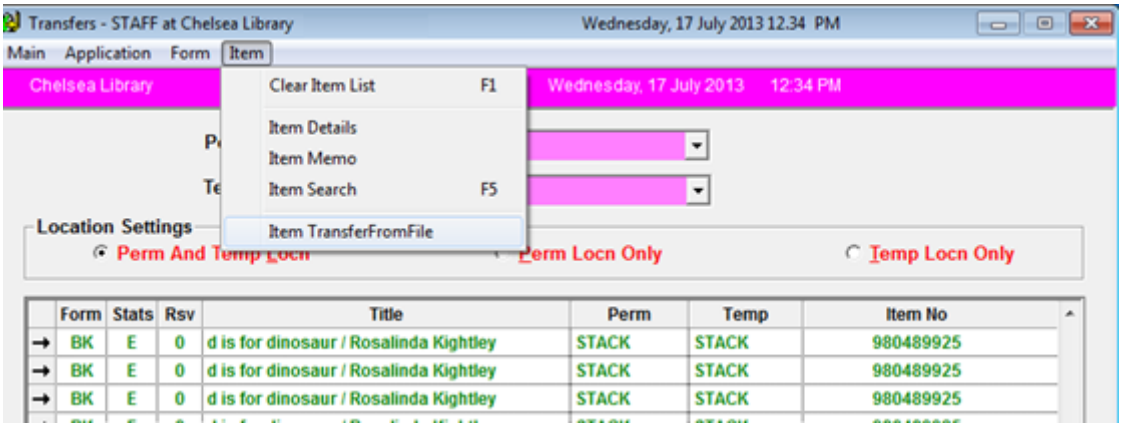


5. The items found for the Query will be changed and added to the list

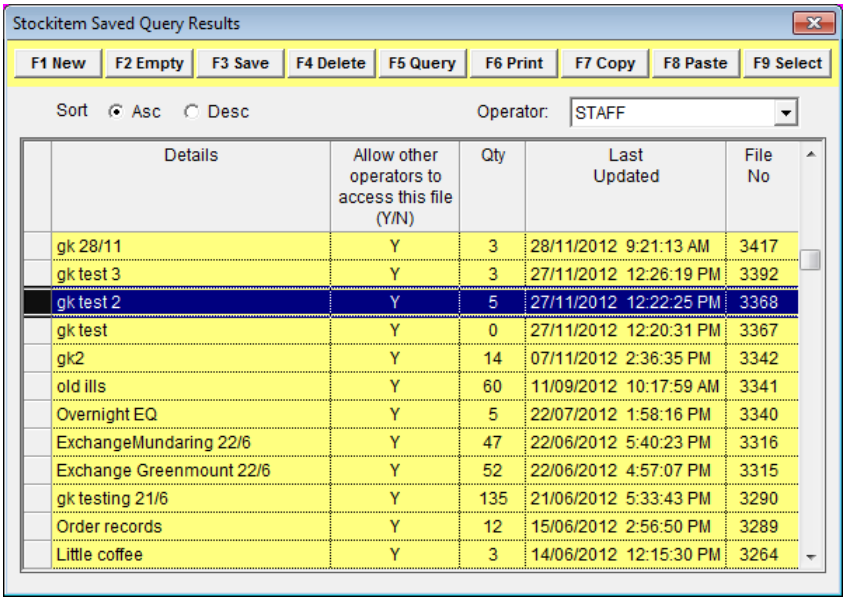
Item Transfer from a File

It is possible to select a File of items for the Transfer.

1. Follow the Instructions from 1 – 4 from above

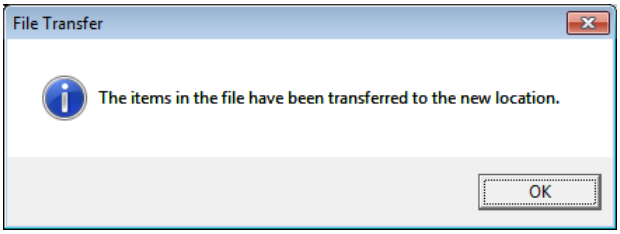


2. From the **Item Menu** select > **Item** > **TransferFromFile**
3. The Stockitem Saved Query Results will display
4. Highlight the relevant File and choose **F9 Select**



Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
gk 28/11	Y	3	28/11/2012 9:21:13 AM	3417
gk test 3	Y	3	27/11/2012 12:26:19 PM	3392
gk test 2	Y	5	27/11/2012 12:22:25 PM	3368
gk test	Y	0	27/11/2012 12:20:31 PM	3367
gk2	Y	14	07/11/2012 2:36:35 PM	3342
old ills	Y	60	11/09/2012 10:17:59 AM	3341
Overnight EQ	Y	5	22/07/2012 1:58:16 PM	3340
ExchangeMundaring 22/6	Y	47	22/06/2012 5:40:23 PM	3316
Exchange Greenmount 22/6	Y	52	22/06/2012 4:57:07 PM	3315
gk testing 21/6	Y	135	21/06/2012 5:33:43 PM	3290
Order records	Y	12	15/06/2012 2:56:50 PM	3289
Little coffee	Y	3	14/06/2012 12:15:30 PM	3264

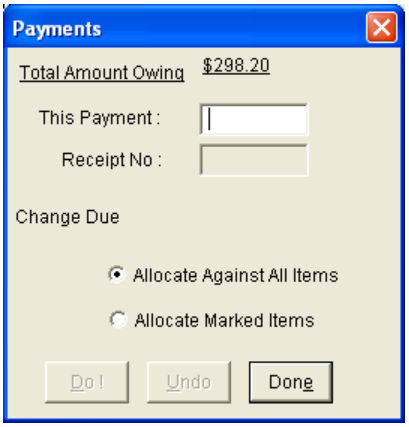
5. The items from the File will change Locations as specified, display on the listing and a message will show:



BORROWER FINANCIAL - MAKING A PAYMENT

Single Entry Accounting

1. Highlight the Debit lines to Allocate Payment – **Note**: the Outstanding Only Field is useful in selection of only those Debits outstanding for payment
2. Click **F7 Allocate**
3. A Payments Window will display.
   a. Enter **this payment** in dollars and cents – for example 7.70 (the $ sign will be generated by the system)
   b. Enter the **Receipt No** if required (**Note**: it can be system generated)
   c. Choose to allocate against **All Items** or **Marked Items**



4. Click the **Do!** Button or click the **Undo** Button if editing is required. Click the **Done** button after checking
5. The Paid column is updated so each Financial remains on a single line

Type	TransDate	Date Modified	Locn	Comme	Item	Title	Qty	Charge (Debit)	Inv_No	Inv Date	Paid (Credit)
OVERE	12/08/2011	07/02/2012	LIB	Auto Charge for	37240	Chocolate dreams : over 125	1	$19.95	155	12/08/2011	$19.95
OVERE	12/08/2011	07/02/2012	LIB	Auto Charge for	14235	Complete book of Australiar	1	$29.95	155	12/08/2011	$29.95
OVERE	12/08/2011	07/02/2012	LIB	Auto Charge for	46213	Lady knight / Tamora	1	$15.00	155	12/08/2011	$15.00
OVERE	12/08/2011	07/02/2012	LIB	Auto Charge for	32717	Pulling the moves /	1	$12.95	155	12/08/2011	$12.95
OVERE	12/08/2011	07/02/2012	LIB	Auto Charge for	43044	Harry Potter and the	1	$17.00	155	12/08/2011	$17.00
OVERE	12/08/2011	07/02/2012	LIB	Auto Charge for	45630	Readings on The importanc	1	$51.00	155	12/08/2011	$51.00

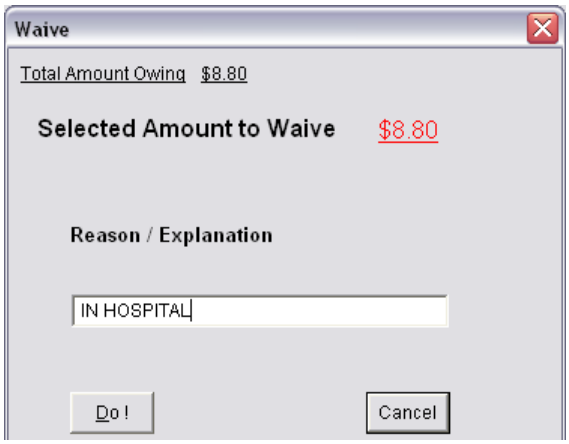
Waive a Payment

The Waive button on the Financial window is available in both Single and Double Line Accounting.

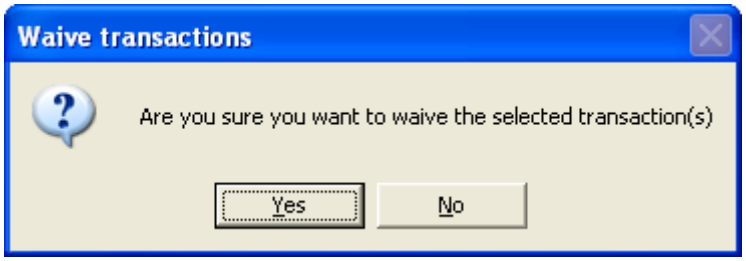
The Waive button may need to have permissions set for it in Supervisor, User Names if it is not available on the Borrower Financial Window.

1. Highlight the Debit lines to Waive – Note the Outstanding Only Field is useful in selection of only those Debits outstanding for payment
2. Click the **F10 Waive** button
3. A Waive Window will display. Enter the **Reason/explanation** which will be entered into the Comments section

4. Click the Do! Button



5. A Waive transactions **confirmation message** will display

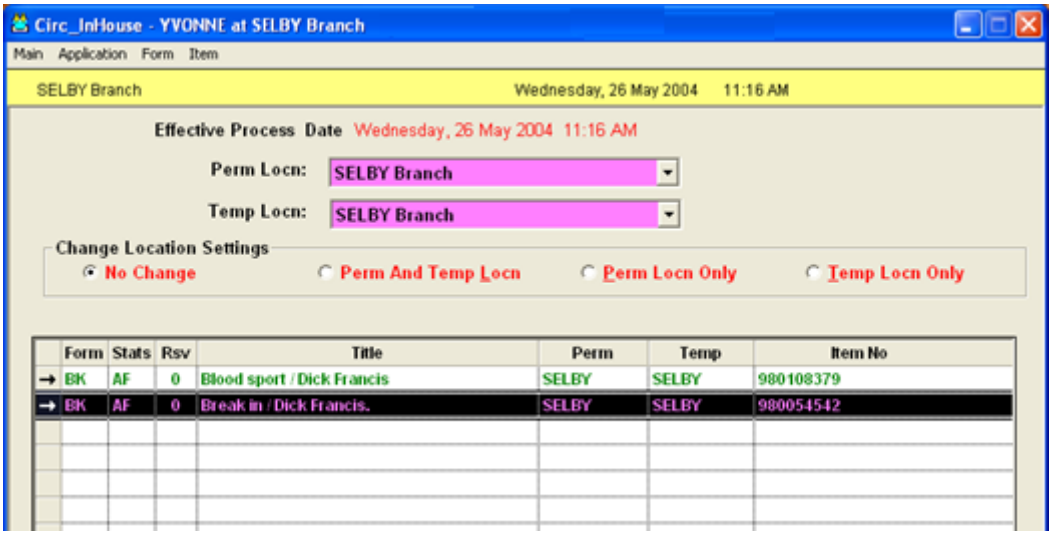


6. Enter **Yes** to continue or No to cancel

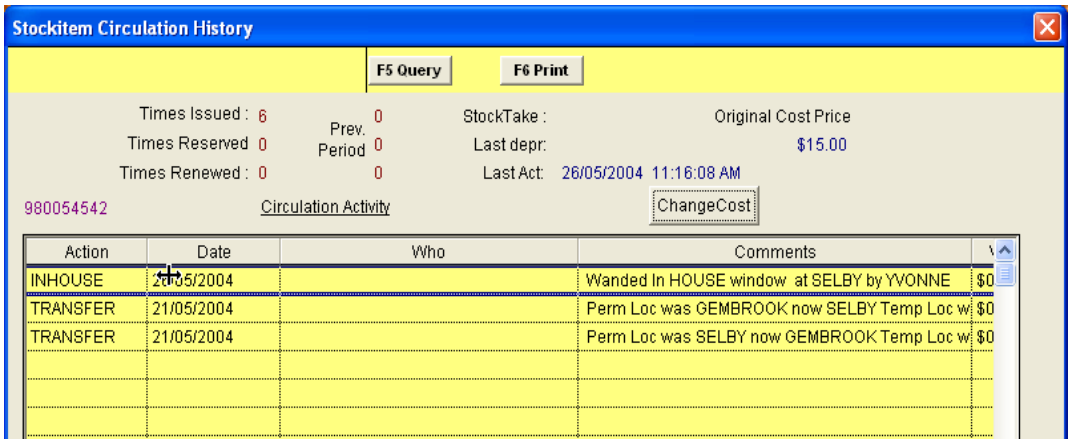
IN HOUSE PROCESSING

The In House process allows libraries to report and to keep statistics on items used within the Library but not borrowed.

1 Access the Window from the **Issues module** > **Application Menu** > **Process In House**
2 Wanding a Stockitem in the In House use window , updates the Last activity date for that Stock item and puts an **INHOUSE** entry in the item History, which is then counted in Amlib statistics.
3 Some libraries collect any items left on tables at the end of each shift change and want to be able to identify materials that are being used but not borrowed.



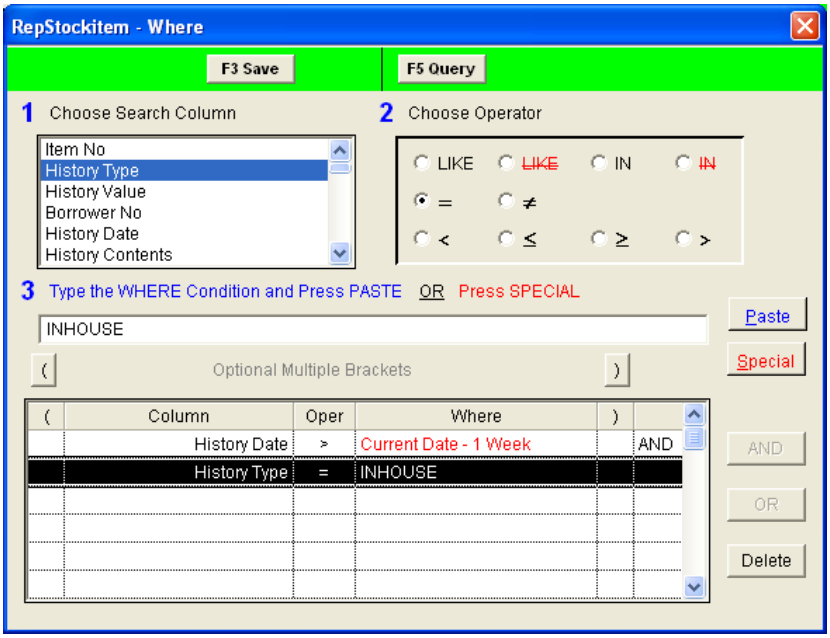
4 Scan as many items as required and close the window when finished. The Item history has been updated.



Reporting In House use

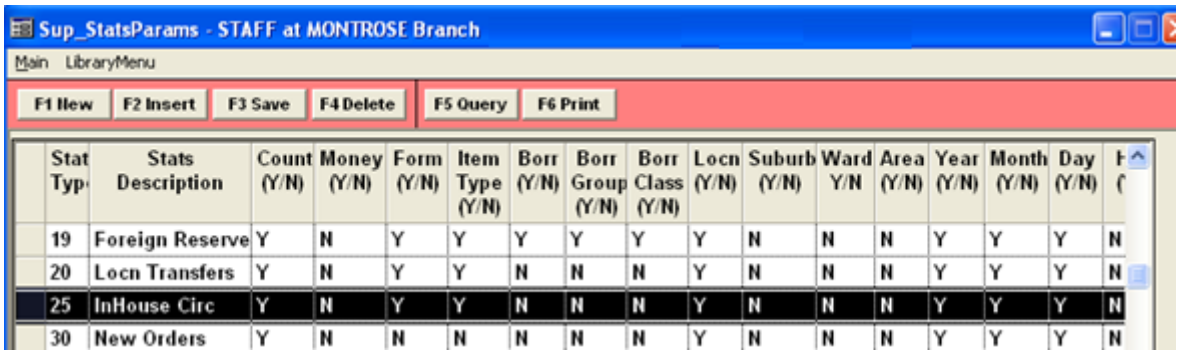
For example to see a list of items used in house in the last 7 days.

In **RepStockitem,** choose a Stock item history report. This example uses **&stkhis2.qrp**.



The **Where parameters** would include:

History Type = INHOUSE **AND**
History date e.g. Greater than >
> **Special** > **Current date – 7 days**
> **F3SAVE**
Statistics can be counted for **InHouse** use, using the Stats Parameter number 25.



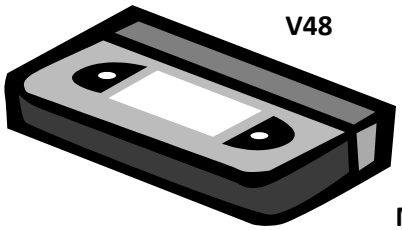
Stat Typ	Stats Description	Count (Y/N)	Money (Y/N)	Form (Y/N)	Item Type (Y/N)	Borr (Y/N)	Borr Group (Y/N)	Borr Class (Y/N)	Locn (Y/N)	Suburb (Y/N)	Ward Y/N	Area (Y/N)	Year (Y/N)	Month (Y/N)	Day (Y/N)	H (
19	Foreign Reserve	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y	Y	N
20	Locn Transfers	Y	N	Y	Y	N	N	N	Y	N	N	N	Y	Y	Y	N
25	InHouse Circ	Y	N	Y	Y	N	N	N	Y	N	N	N	Y	Y	Y	N
30	New Orders	Y	N	N	N	N	N	N	Y	N	N	N	Y	Y	Y	N

CREATING MASTER/SUBSIDIARY ITEMS (KIT LOANS)

It is possible to link stock items to one (*Master*) item. All the linked (or *Subsidiary* items) show as on loan when the Master is on loan. This is useful for sites that want to set up kits or videos (with programs catalogued separately) and do not wish to loan out the separate items independently.

Example 1: Videos with Multiple Programs

Title: ABC for Kids



MASTER

SUBSIDIARY ITEMS

- Big red car (20 mins)
- Wiggle time (30 mins)

Example 2: Kits

SUBSIDIARY ITEMS

- Teacher's Guide Book
- Video
- 24 plastic animals
- Sound cassette
- Worksheets
- Game

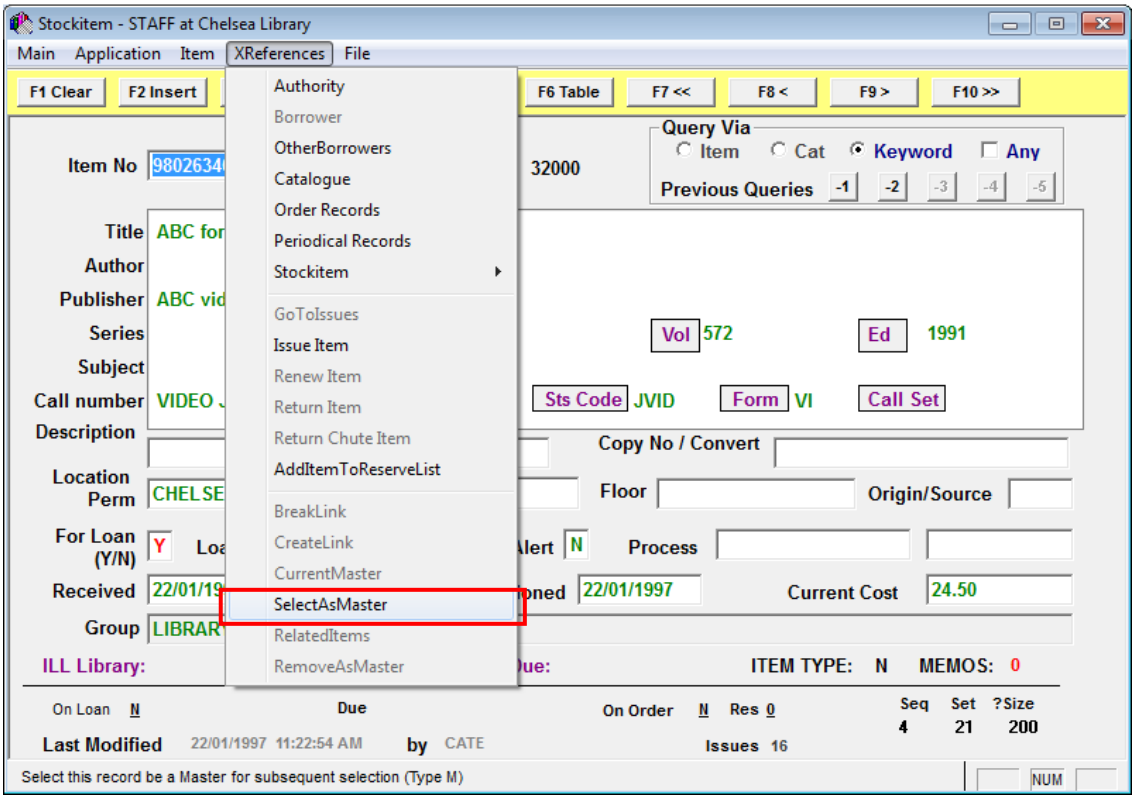
Kits can be added as a Master with Subsidiary items, or alternatively as a single item. Use the former for those instances where you would like the ancillary items to be searchable on the catalogue. Otherwise a Memo on the stock item which lists the ancillary items would suffice.

Creating a Master Record

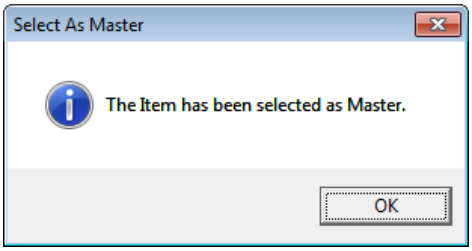
1. Launch the *Amlib* client
2. Go to **Main** > **StockItems** > **Stockitem** – the Stockitem module will display
3. If you are creating a new stockitem: Enter the barcode that you wish to use for circulating the loan. If the item is a kit or box, scan the barcode into the **Item No** field. Otherwise, just do a **F5Search** in the Stockitem module to locate the item which you would like to be the Master Item

HINT: A description relating to the item as a Master can be added to assist in listing Master Items.

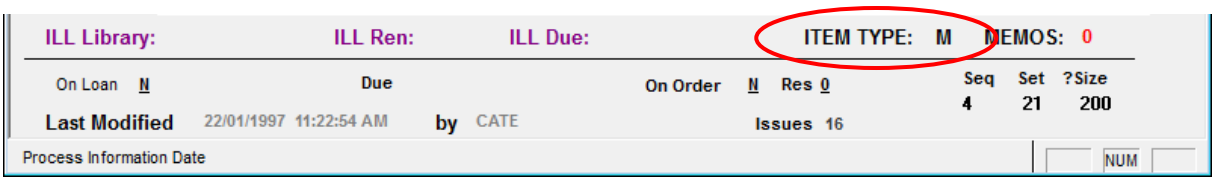
4. From the menu, select **XReferences** > **SelectAsMaster**:



5. The following prompt will then display: **The Item has been selected as Master.**



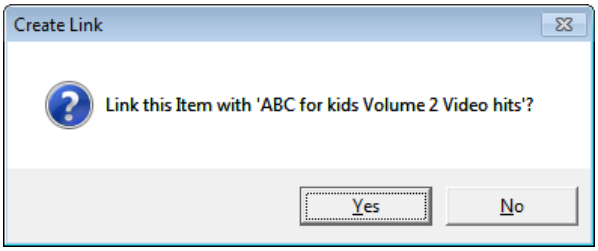
6. Once the item has been selected as a Master, the **ITEM TYPE:** will change from **N** (Normal) to **M** (Master):



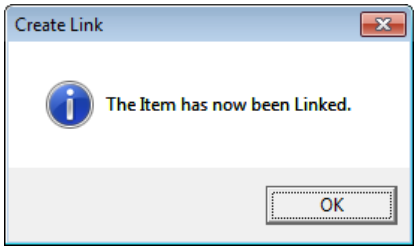
7. Click the **F1 Clear** button – the system will remember the last item to be made a Master Item

8. It is then possible to link other items to this Master Item. You can either create a new stockitem record (attached to the same catalogue record), or use **F5 Search** to locate the stockitem in question (which can be linked to the same Catalogue record – or a separate record if you would like it to be searchable as a unique entity).

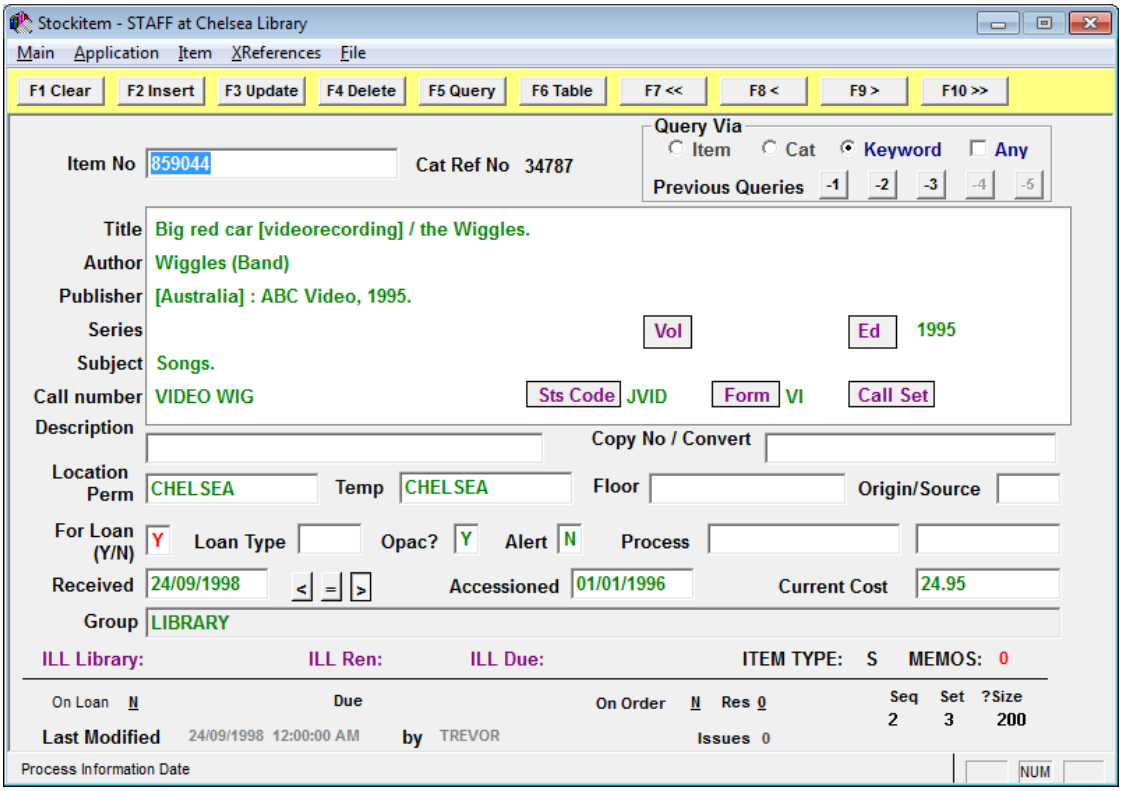
9. Once the stockitem to be linked is displayed on the screen, from the menu, select **XReferences** > **CreateLink** – a prompt will then display, asking you to confirm the **Link this Item with** the **Current Master**:



10. Click the **Yes** button to create the link – the following prompt will then display: **The item has now been Linked.**

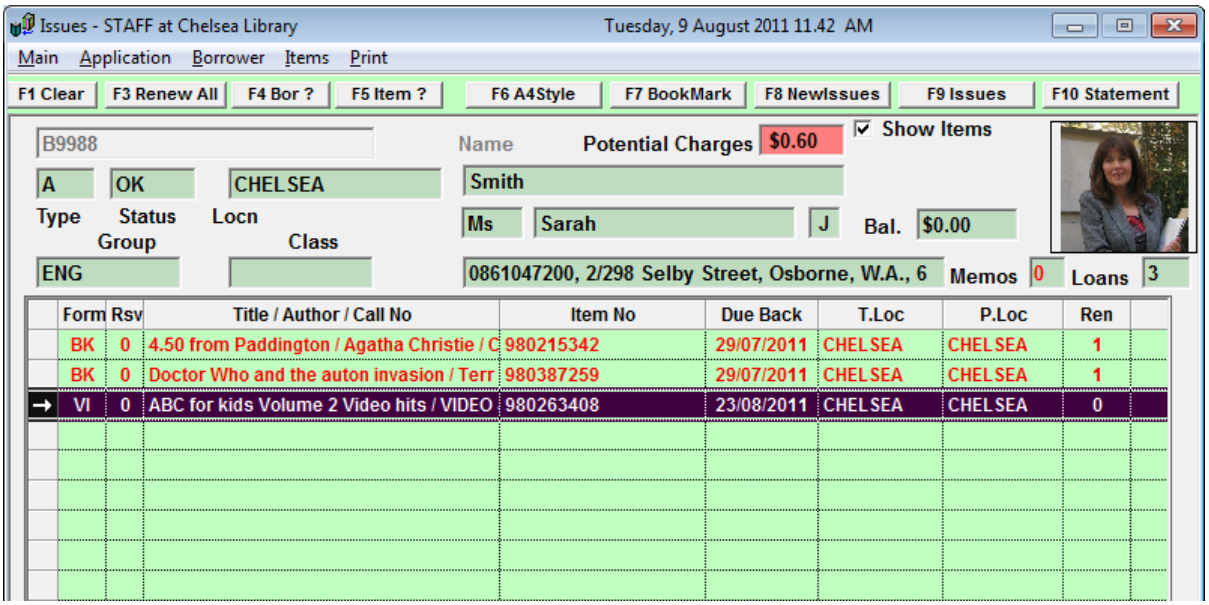


11. The Stockitem will now have an **ITEM TYPE:** of **S** (Subsidiary):

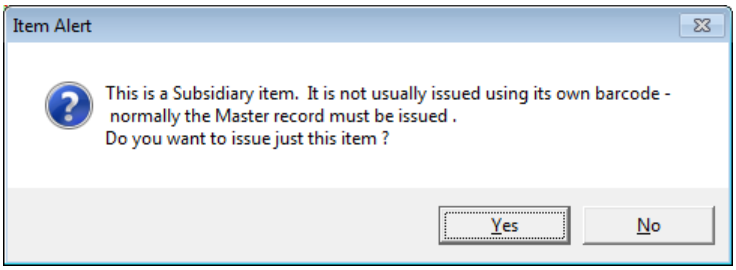


Circulating Linked Items

1 When borrowing out linked Items, only the Master Item will display in the *Issues* module:

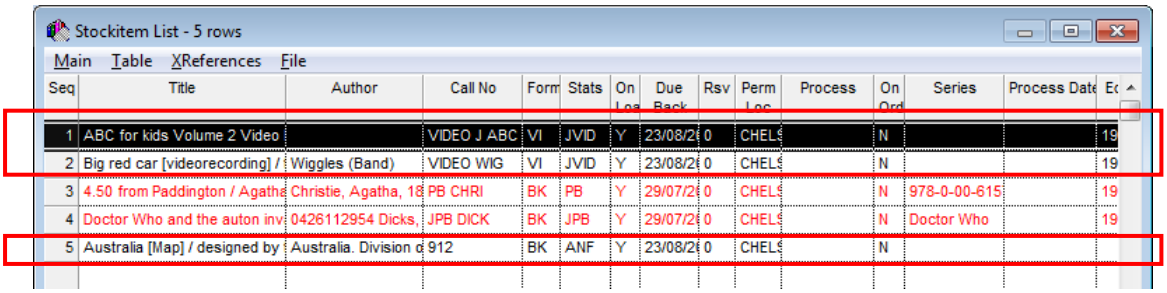


2 Subsidiary items can be circulated independently of the Master – the following Alert will display if a Subsidiary item is circulated: **This is a Subsidiary item. It is not usually issued using its own barcode – normally the Master record must be issued.**
Do you want to issue just this item?

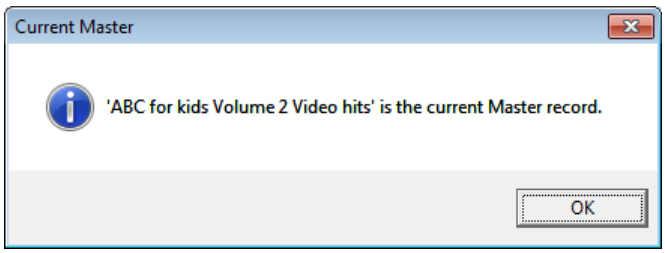


3 When the item is returned another Alert notice will display (see below for more details)

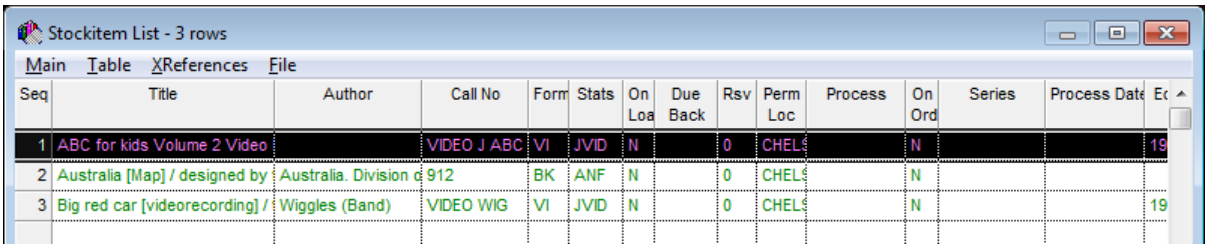
4 Once the Master Item is out on loan, all linked items also show that they are out on loan to that borrower. In the *Borrower* module, from the menu, select **XReferences** > **ShowItemsOnLoan** to see the full list of items on issue to that borrower (including linked items):



5 To check the Master of any Stockitem with an ITEM TYPE of **S**, from the *Stockitem* module menu, select **XReferences** > **CurrentMaster** – the following prompt will display denoting **the current Master record:**



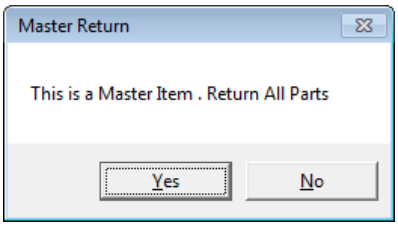
6 To check a listing of linked items, from the *Stockitem* module menu, select **XReferences** > **RelatedItems** –a Stockitem List of Related Items will display:



Returning Master-Subsidiary Items

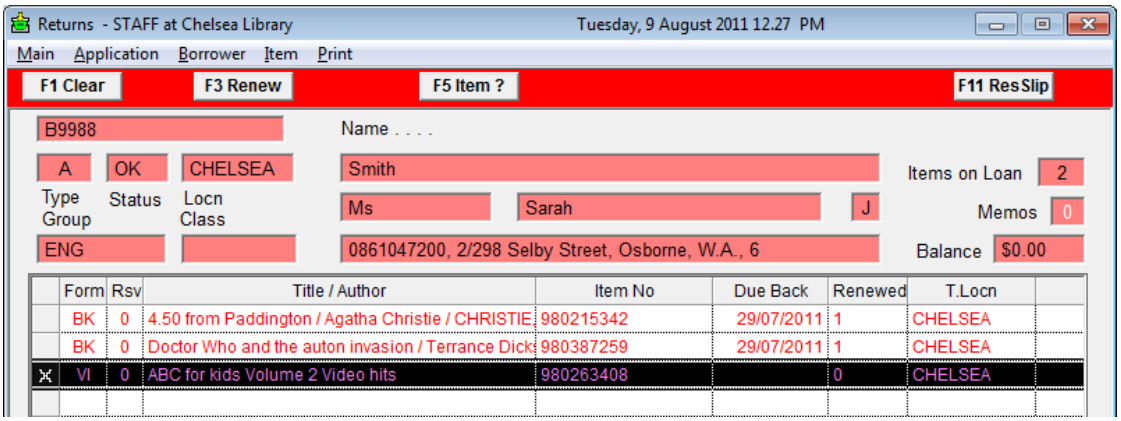
This procedure applies to checking in or scanning through the returns module any items that have been set up with a Master-Subsidiary relationship (for example, kits with several parts or boxes of books and other library items).

1. Launch the *Amlib* client
2. Go to **Main** > **Circulation** > **Returns** – the Returns screen will display
3. Check in the box or Master item – a prompt will display with the following message: **This is the Master Item. Return All Parts**

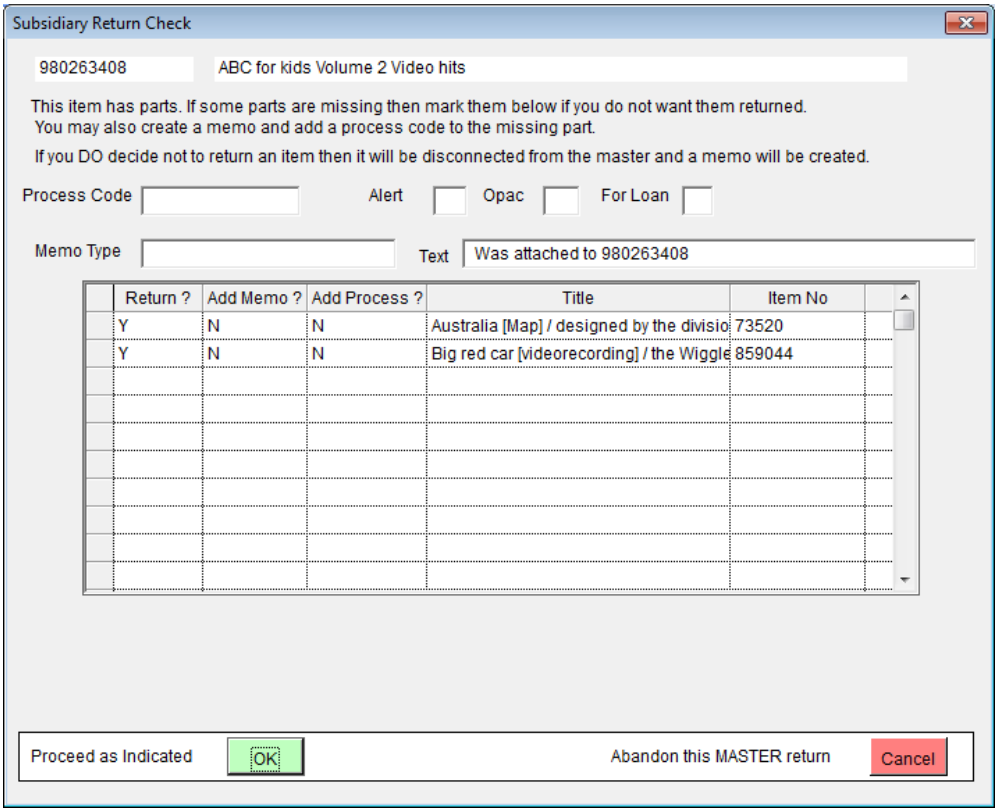


4. If you are sure that all items are present, click the **Yes** button (otherwise click the **No** button)

5. If you clicked the **Yes** button, the returned item will display in the Returns screen:

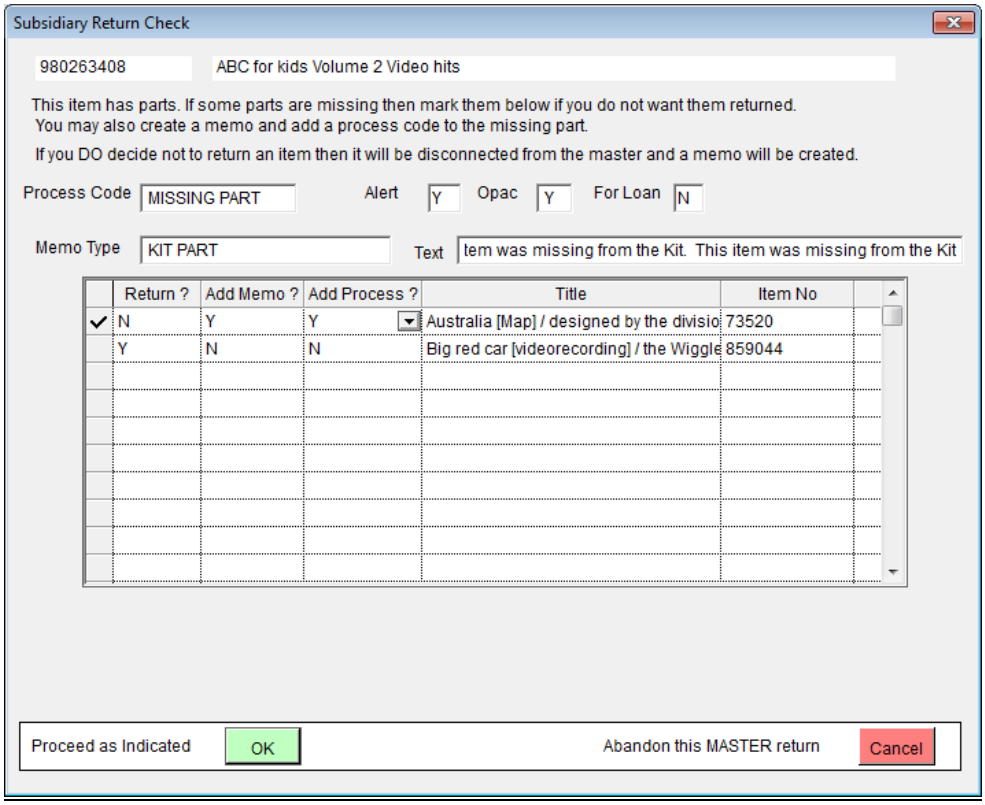


6. To return only some parts of the box or set, click the **No** button – the Subsidiary Return Check screen will display:

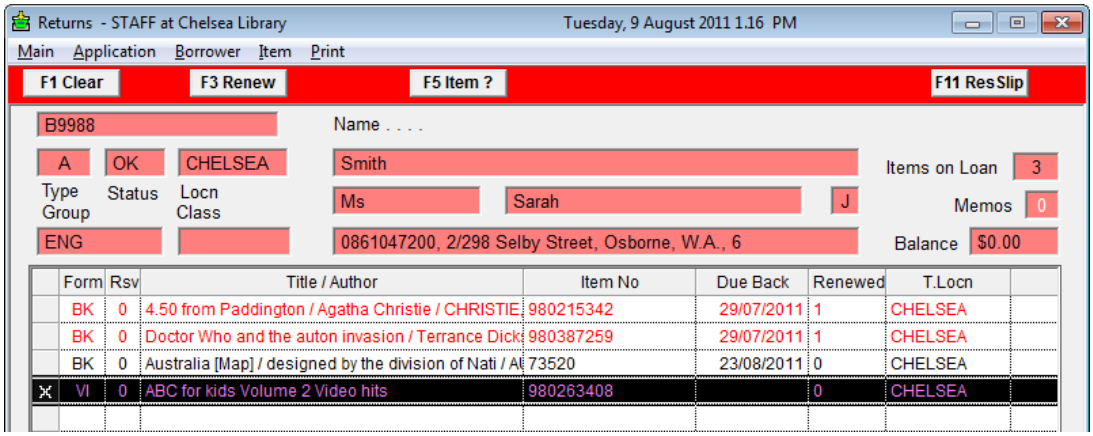


7. Use the list to check if all contents are present. If not, use the options on the screen to process these items according to your library procedures:

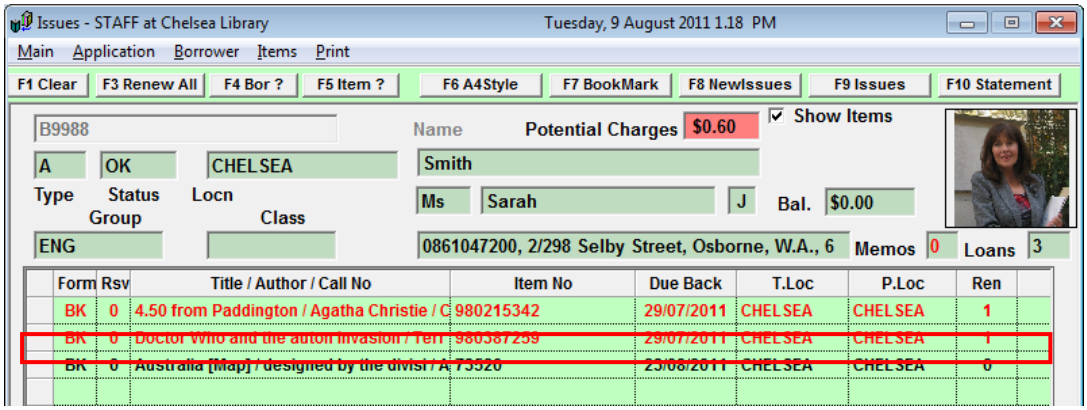
8. Click the green OK button at the bottom of the screen to process the items as indicated



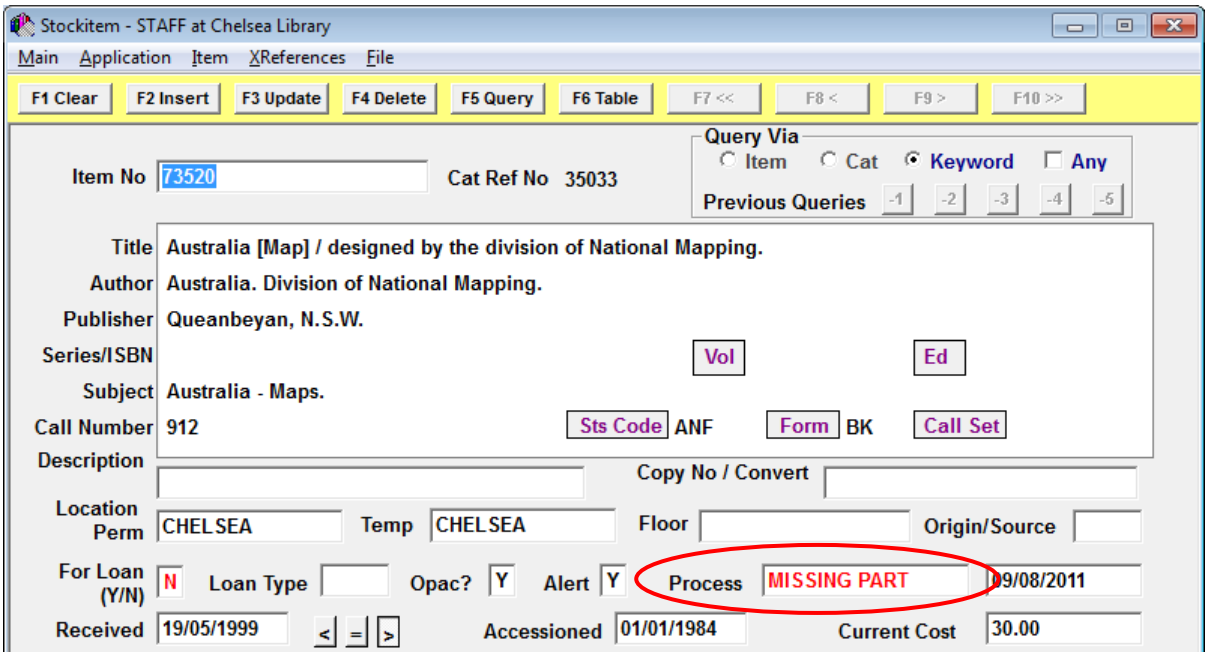
8. Items that were marked as **Y** for return will display on the returns screen:



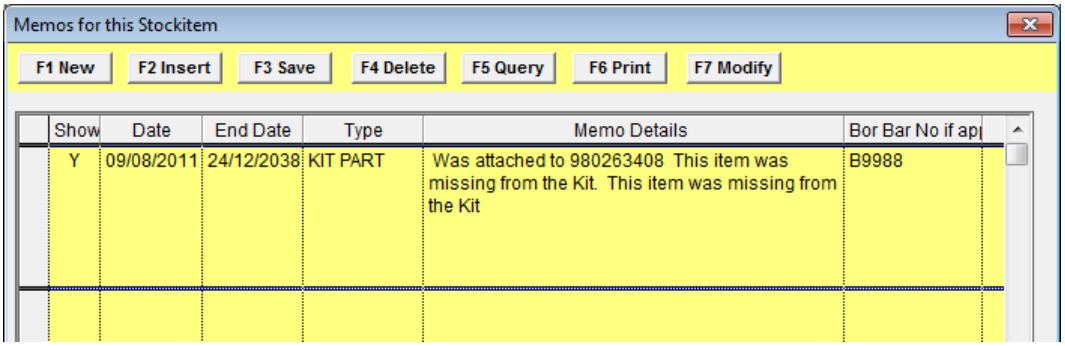
9. If some items were marked as **N** for return, these will display as on loan to the original borrower:



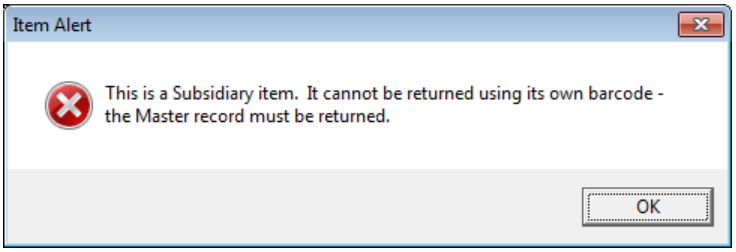
10. Items that were marked with a **Y** for Process Code, will contain the corresponding Process in the *Stockitem* record:



11. If items were marked with a **Y** for Memo, the memo will display on the *Stockitem* record:



12 When returning a linked item, if you attempt to return the Subsidiary Item rather than the Master Item, the following prompt will display: **This is a Subsidiary item. It cannot be returned using its own barcode – the Master record must be returned.**



Supervisor Settings

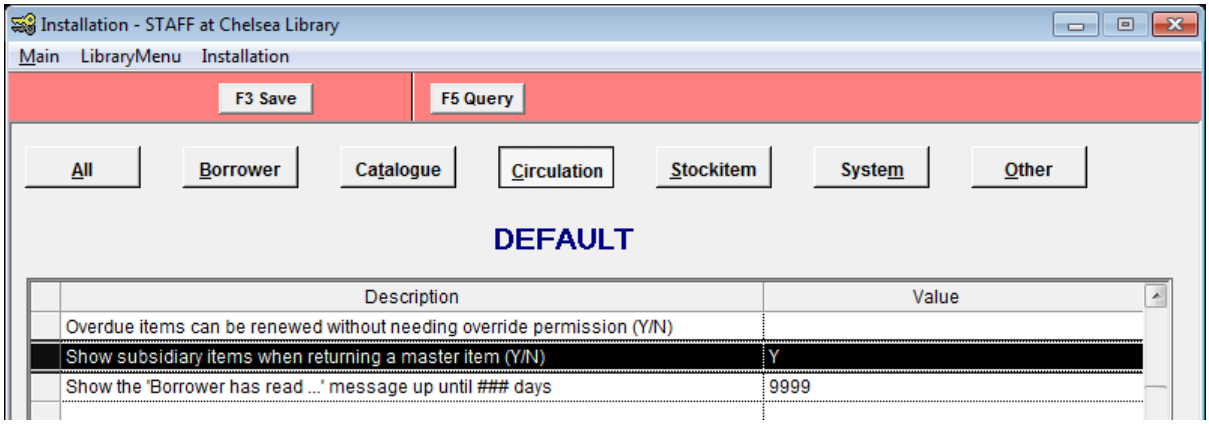
It is possible to change the System settings so that when a Master Item is checked in via the Returns module, it automatically shows Subsidiary Return Check list of the Subsidiary Items:

1 Go to **Main** > **Supervisor** > **Installation** – the Installation (DEFAULT) screen will display

2 Select the Circulation tab

3 Scroll down and adjust the following setting: Show subsidiary items when returning a master item (Y/N) = **Y**

4

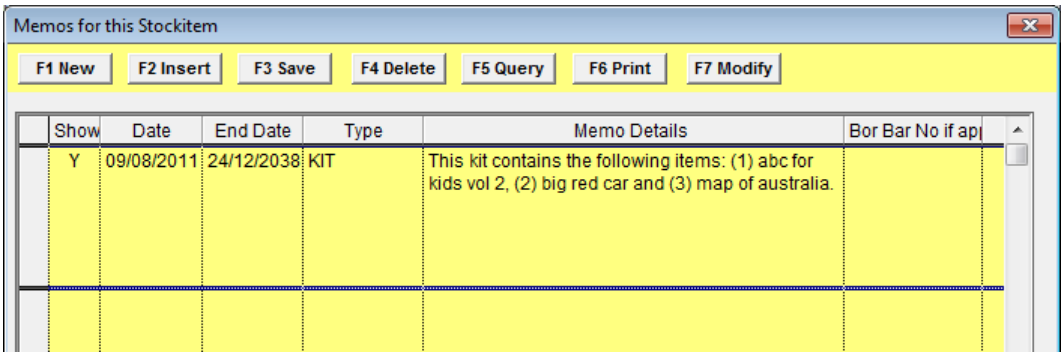


5 Click the **F3 Save** button

6 Exit and restart *Amlib* client for the settings to take effect

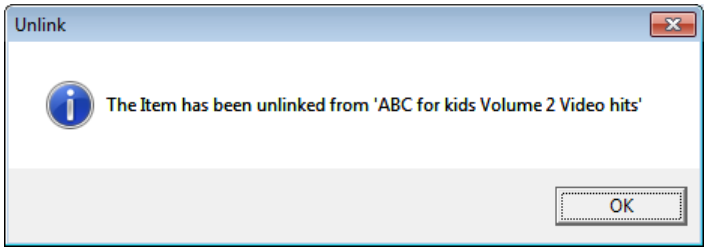
Alternate Method

HINT: Alternatively, you can attach a memo to the Master Item, so that a message displays with an indication of how many items are attached so that this can be checked:



Delinking Items

1. To break the link: from the *Stockitem* module menu, select **XReferences** > **BreakLink** – a prompt with the following message will display: **The Item has been unlinked from 'XXXX'**

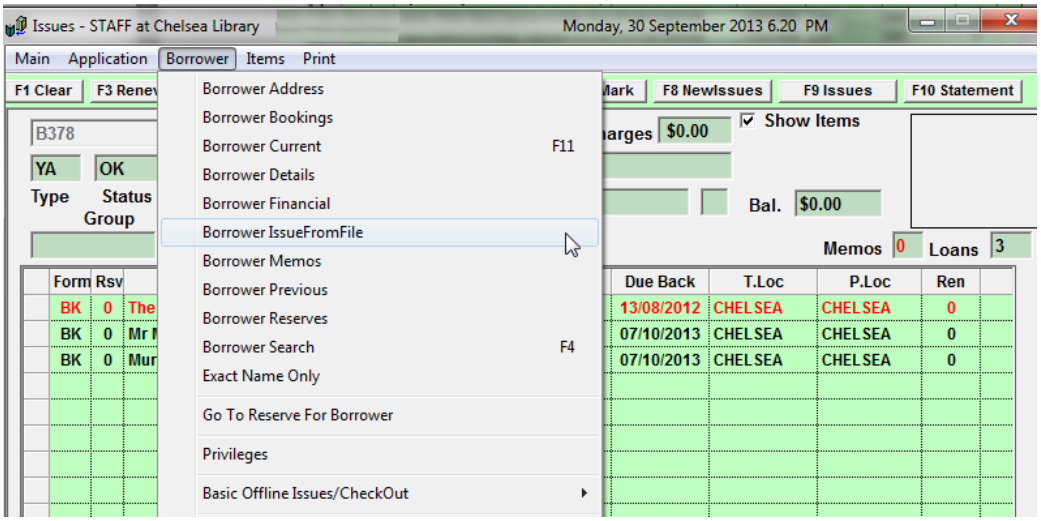


Please Note: You will be unable to delete a Master stockitem record if it has linked items. The Master cannot be removed as a Master until the items are first disconnected.

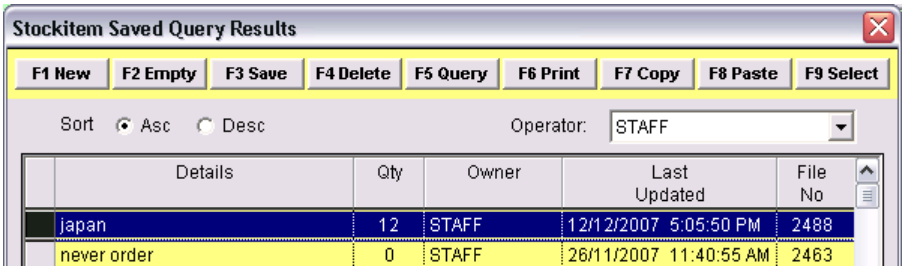
LOANING FILES

Items can be loaned out using files.

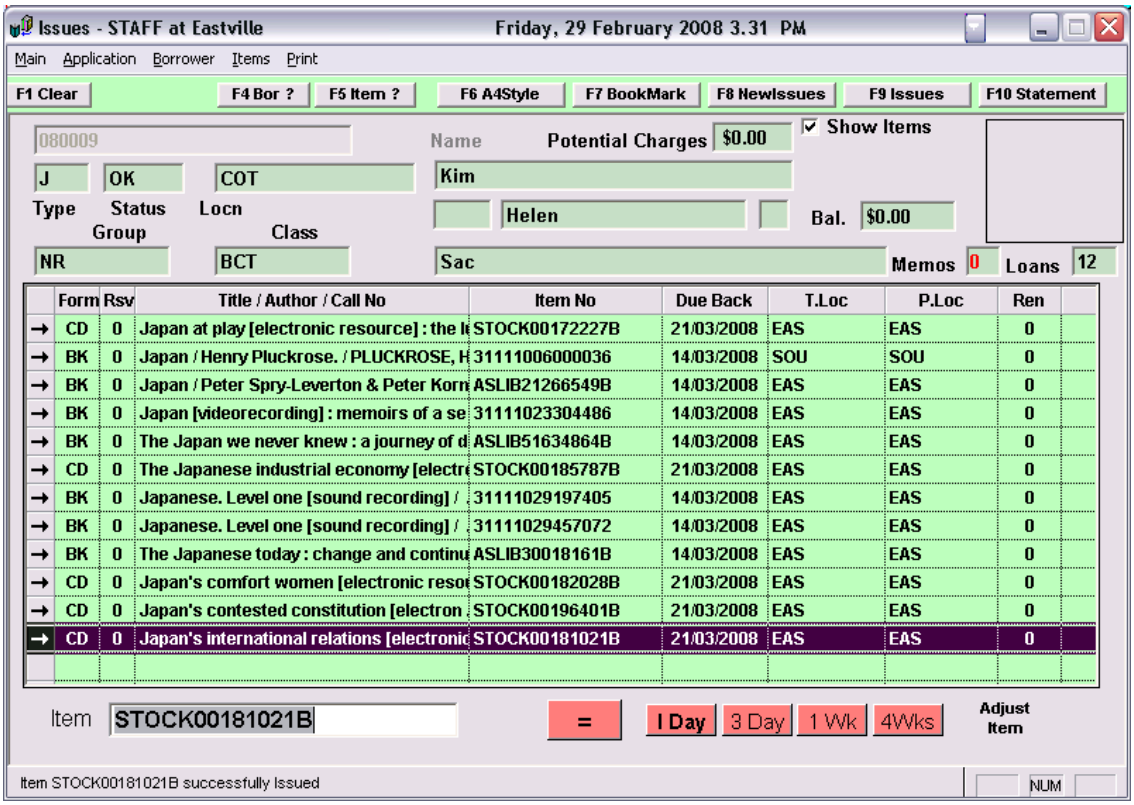
1 Create the file (e.g. By wanding into File from the Stockitem screen).



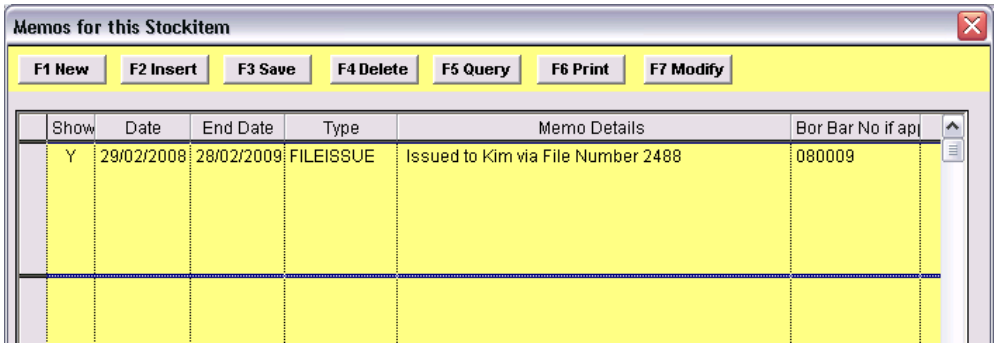
2 The file may be items that you have selected e.g. for a theme.



3 When the file is loaned, all items in the file display on the Issue screen

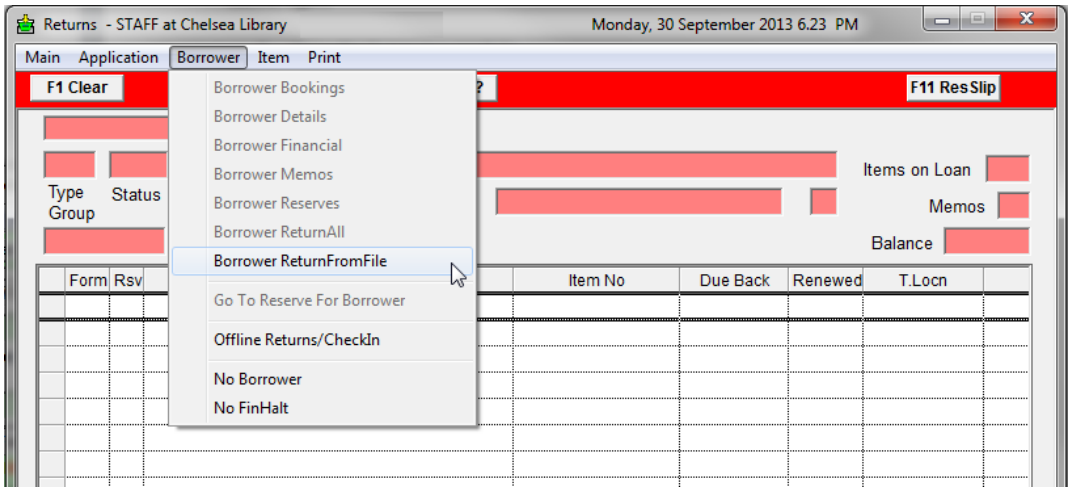


4 Each item is given a Memo showing the file and the borrower.



5 When the items are returned, the file is selected and all items are returned from the Borrower. The items are still attached to the file.

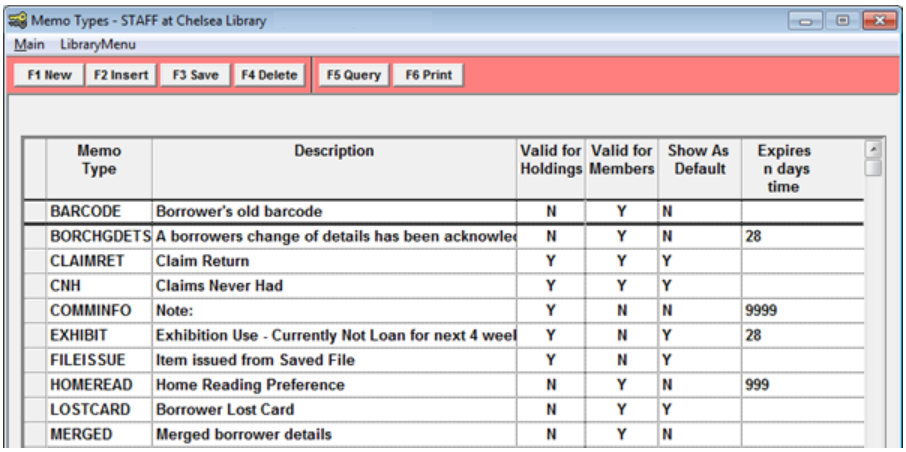
6 The Memos assigned to the items are also deleted when returned.



MEMOS

Memo Types

1. Open the *Supervisor* module
2. From the menu, select **LibraryMenu** > **MemoTypes** – the Memo Types screen will display



Memo Type	Description	Valid for Holdings	Valid for Members	Show As Default	Expires n days time
BARCODE	Borrower's old barcode	N	Y	N	
BORCHGDETS	A borrowers change of details has been acknowle	N	Y	N	28
CLAIMRET	Claim Return	Y	Y	Y	
CNH	Claims Never Had	Y	Y	Y	
COMMINFO	Note:	Y	N	N	9999
EXHIBIT	Exhibition Use - Currently Not Loan for next 4 weel	Y	N	Y	28
FILEISSUE	Item issued from Saved File	Y	N	Y	
HOMEREAD	Home Reading Preference	N	Y	N	999
LOSTCARD	Borrower Lost Card	N	Y	Y	
MERGED	Merged borrower details	N	Y	N	

Memo Types can be set for Borrower and/or Stockitem.

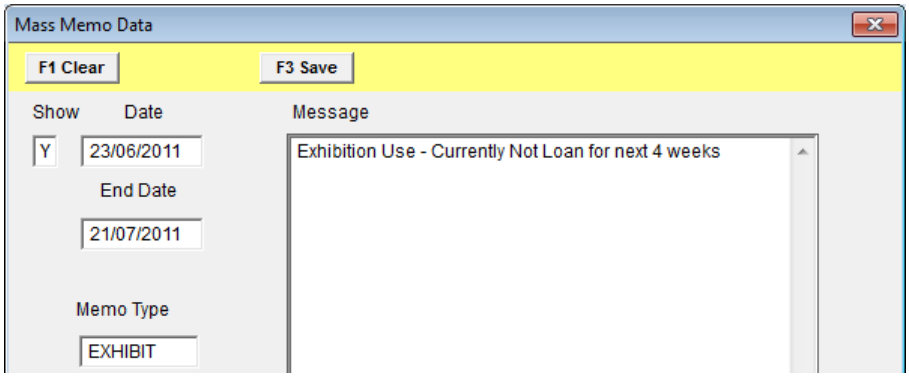
These can be used when:

12 Adding an individual Memo (supplies the Text automatically)

13 Mass Memo (from a Borrower or Stockitem Table)

14 Mass Memo Deletion (from a Borrower or Stockitem Table)

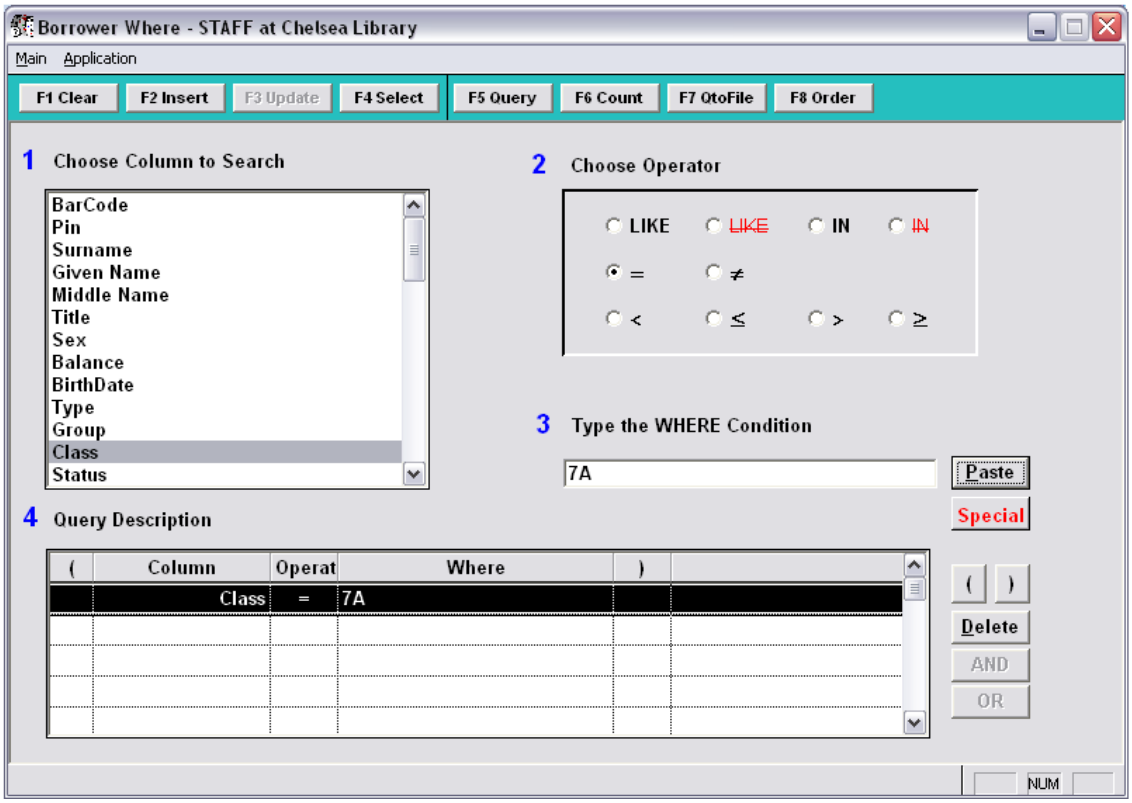
15 Where Searches and reporting



Mass Memo Borrowers

1. Find the Borrowers to whom the Memo will be applied from a Where search or a Query. If they are Borrowers that cannot be queried at the same time, find the assorted Borrowers and save them to a File so that they can be displayed together in a borrower table. This example uses searching for borrowers for a particular class using a Where Statement
2. Go to **Main** > **Borrowers** > **Borrower Where**

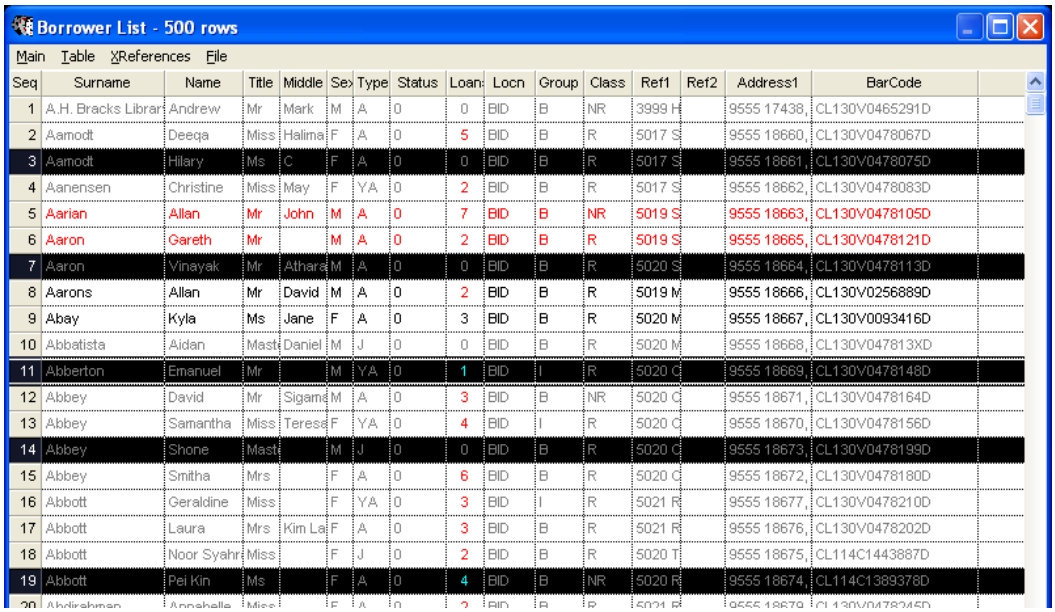
3. Enter an appropriate **Where Statement** to find your borrowers- for example **Class = 7A** and **Paste**



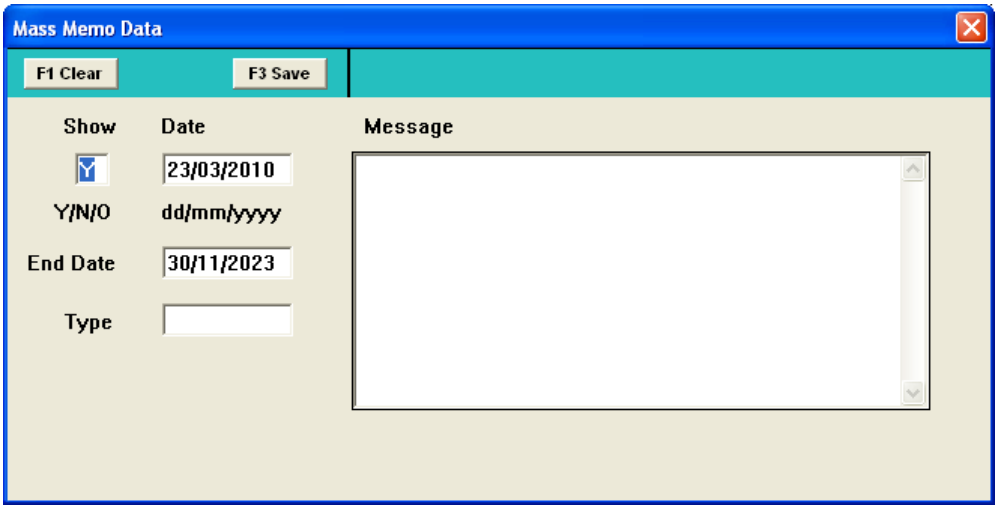
4. Select the **F5 Query** button

5. A Table will display. If only some of the Borrowers from the Table are to be sent Memos, highlight those Borrowers – use Ctrl + Click to select multiples, or Shift + Click to select a range.

6. Select Mass Memo All Borrowers or Mass Memo Marked Borrower as appropriate.

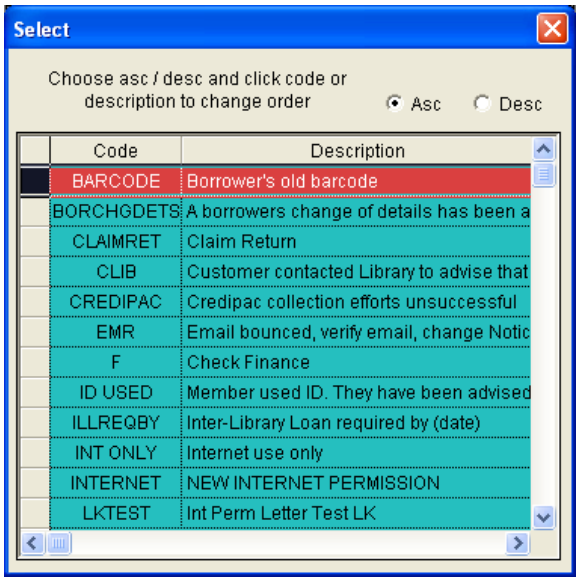


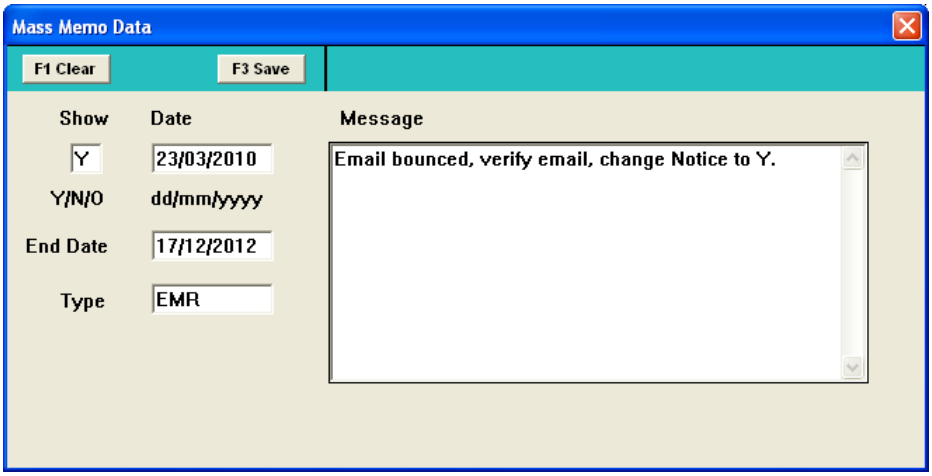
Step 3: The Mass Memo Data screen will display



Enter the details as required:

1. Select Memo Type if appropriate – this will automatically insert the Show Default, the Date Defaults and the Memo Message. To view the Memo Types available, type **.** <TAB> (full stop and press the TAB key)





2. If no Memo Type is to be used, enter the Show, Start and End Dates and Message details.

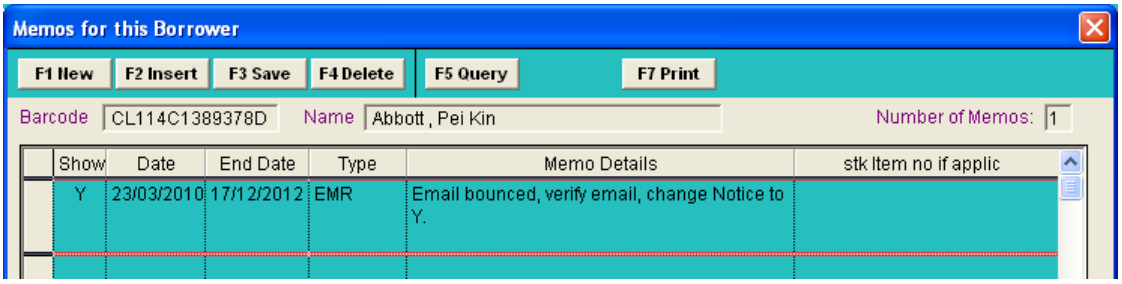
Show: Y/N/O

Y	The operator is alerted every time the Borrower's identity is entered in circulation
N	The memo can be viewed from the Borrower memo option
O	The memo can be viewed from Opac

- **Date**: The date (in the format of dd/mm/yyyy) to begin showing the memo. This is defaulted to today's date but may be altered
- **End Date**: The date (in the format of dd/mm/yyyy) to finish showing the memo. This is defaulted to the date as calculated in Supervisor, Installation, Borrower, "Delete memo after xx days". This may be altered
- **Type**: Optional. A type of memo can be entered to assist with deletions, reporting, queries etc.
- **Message Details**: Text of up to 250 characters can be entered.

3. Select > **F3 SAVE**

Step 4: Memos will be automatically placed against the Borrowers. When the Borrower is displayed in Circulation the memo will display if the Show is set to Y.



NOTE:	*Whether the Memo appears in the Borrower Module depends on the Supervisor, Installation parameter for the relevant Location (from Installation Menu). Check the Borrower button – Parameter is "Show Memos in Borrower automatically"*

OFFLINE MODULE

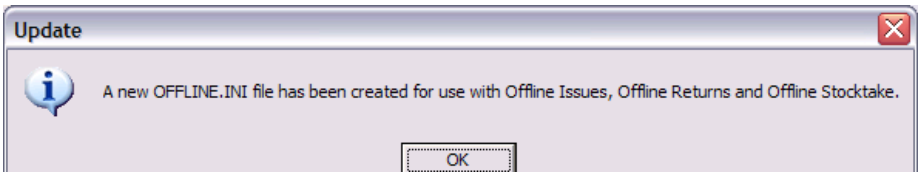
Off-line Circulation allows you to import your issues, returns or reservations from a dos file, created with the Offline Module. This is useful when the Server can't be accessed (for example: there is a power failure where the server is, the IT dept are "doing things" to the server).

1 The ***Offline* module** is only available on PCs that have had the relevant programs installed, before needing it (see separate guide)

2 Check the **Main** > **Supervisor**>**Check Digits** screen to ensure that there is a table of Barcode validations set up.

3 If this is blank, it will be necessary to enter the validations of the Barcodes that are used (see below).

4 Every time this table is updated, a message will display. The new offline.ini that is created will need to be copied to the offline folder on each PC.



The Amlib Offline Wizard (available from Support) will install all that is required and will download the following:

- Offline.exe (Offline Application)
- Offline.ico (Offline Icon)
- Application extensions files from the Amlib folder (these are the dll files which enable to facility to run smoothly).

5 Offline Ini (Offline Parameter File for barcode validations) should be copied to the Offline Folder after the Installation has been done. This will be unique to each site.

6 This is created each time the Supervisor, Check Digits table is saved. If the Check Digits table is altered, the updated offline.ini should be recopied to the PCs running Offline from their C Drives.

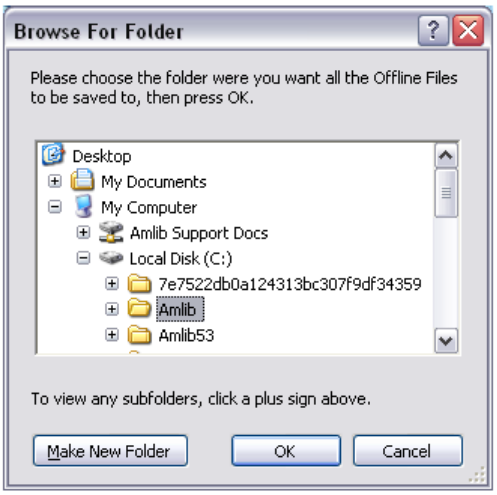
NOTE	*Update the OFFLINE.EXE and OFFLINE.INI from the \AMLIB on the server when new releases are installed or when additional Check Digits are added to the Amlib Barcode Parameters*

7 This menu now contains a Standard Menu as well as the Advanced Menu. The existing Standard Offline (which has been used in the past) method is still available.

Offline Folder

A custom Offline folder can be chosen when using the Offline Module for Issues or Returns.

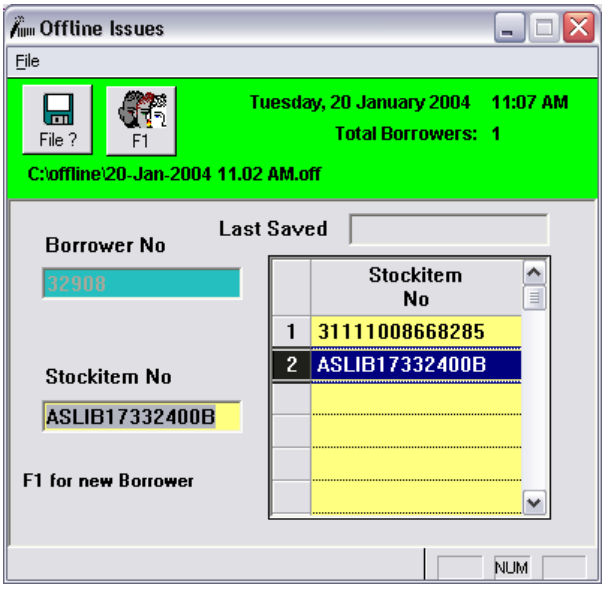
1 Either select an existing Folder or create a new one from the Window option “Make New Folder”.



2 If a New Folder is to be created, select this button.

3 A New Folder will be automatically created which can be renamed.

4 This Folder can then be chosen for any Offline transactions.



<u>Sample Issues file</u>

CL1100000019AASLIB0000027XAL110000000019X

CL1100000019BALSIB00000 \ALSIB00000

Each Borrower Barcode is on a new line, followed by the Item Barcodes on the same line.

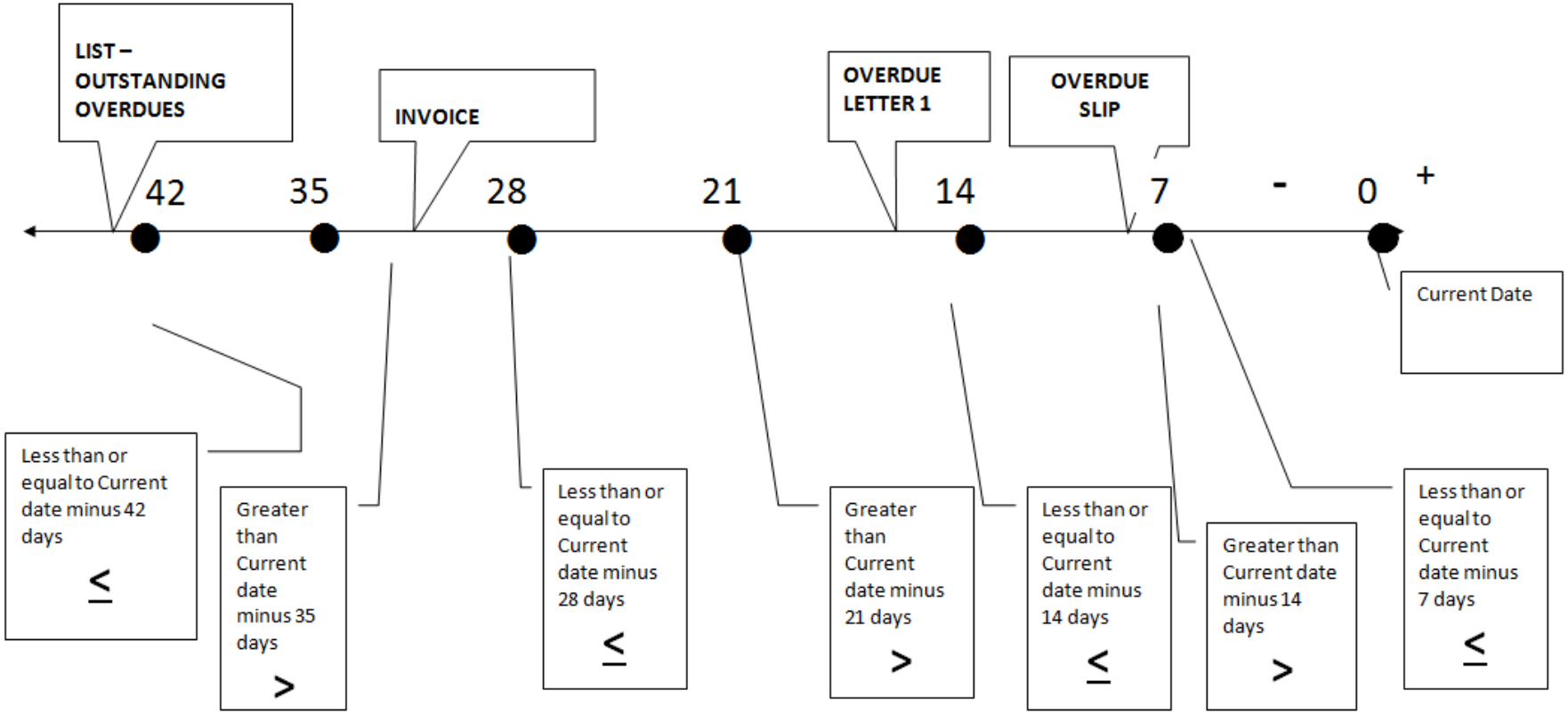
NOTE	*In order for the program to correctly validate checkdigits there must be a file of the name 'offline.ini' in the working directory of the PC. This file is recreated whenever you change the CheckDigits window in the Supervisor module. A sample is shown below.*

A sample offline.ini file

```
[Borrower1]
Length=4
Weights=1
CheckDigits=0
LeadingChars=0
TrailingChars=0
Unusual=1

[Stockitem1]
Length=4
Weights=1
CheckDigits=0
LeadingChars=0
TrailingChars=0
Unusual=1

[Borrower2]
Length=6
Weights=1,2,1,2,1
CheckDigits=0123456789
LeadingChars=
TrailingChars=
Unusual=

[Stockitem2]
Length=9
Weights=11,128,64,32,16,8,4,2
CheckDigits=01234567890
LeadingChars=
TrailingChars=
```

APPENDIX 3: SAMPLE OVERDUE DATE LINE