Library Management System

Reports Training-Advanced Reports

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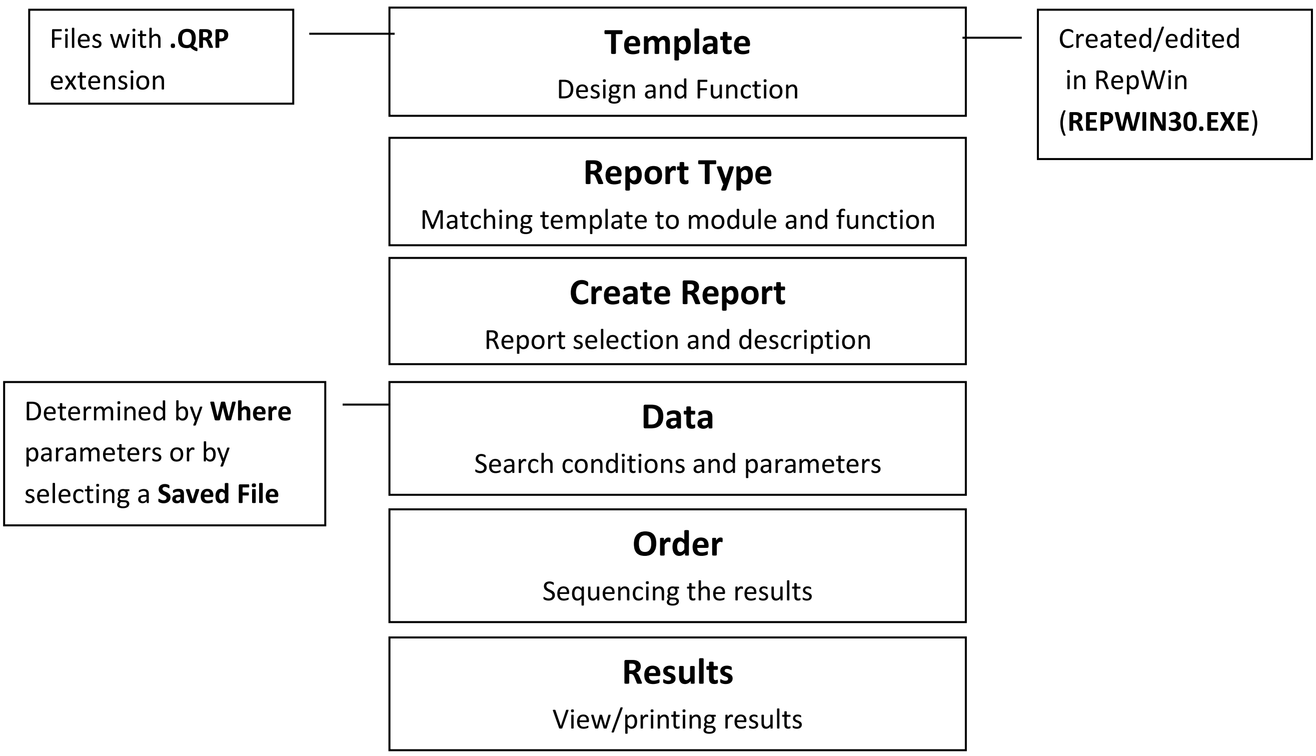
REPORTS – OVERVIEW

Reports are used for every conceivable purpose within *Amlib*, from printing up tables and updating borrower records to printing out overdue notices.

It is possible to create and run a huge variety of reports covering every single module. In addition, it is possible for you to customise these reports in both their design and functionality.

The creation of a report is covered in broad terms by the following flowchart:



Report Module Categories

The Reports module is split into the following categories:

REPORT	DESCRIPTION	EXAMPLES
RepAccounts	Accounts Reports	Account Reprints without creating a Financial record for the borrower.
RepAuthority	Authority Reports	Author, Series, Subject Heading Listings, etc
RepBibliographic	Bibliographic (Catalogue Data) Reports	New items displaying Title, Author, Subject Headings, Notes etc.
RepBorrower	Borrower Reports	Listings of borrowers, loan histories, address labels
RepCatalogue	Catalogue Report – for more tag displays use RepBibliographic	4 lines of data to show items by a particular author etc.
RepCirculation	Circulation Reports	Items on Loan, Overdue lists, slips, Letters, Invoices etc.
RepFinancial	Financial Reports	Budget categories and expenditure etc.
RepILLS	Inter Library Loan Reports	ILL notices including request & renewal notices etc.
RepOrders	Order Reports	Orders, Supplier Listings
RepPeriodicals	Periodical Reports	Full journal listing, Suppliers, Renewal reminders, Claims etc.
RepReservation	Reservation Reports	Pick-up lists, reservation collection notices and expired reservations lists
RepStatistics	Statistics Reports	Statistics summary and detailed reports on library activity. Daily, Weekly, Monthly, Yearly etc. Issues by Borrower Type or by Form or Stats code. The Order MUST be correct!
RepStockitem	Stockitem Reports	Listing of items, Value of the collection

UNDERSTANDING REPORT TEMPLATES

A Guide to Report Template Names

PREFIX	DESCRIPTION
#, &, $	System reports – these are supplied with *Amlib*
RS, MM, MC	Customised reports – any reports beginning with letters are customised reports, specific to a library with their own wording

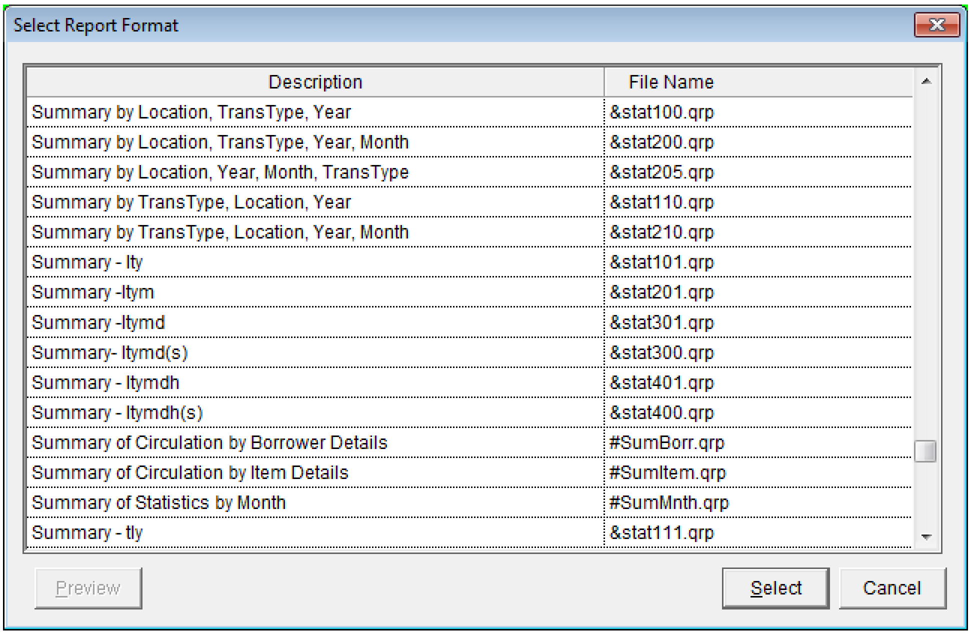
ABBREVIATION	DESCRIPTION	EXAMPLE
AUTH	Authority templates	**&AUTHSB2.QRP** **&AUTHFUL.QRP**
B	Borrower templates	**&BCT.QRP** **&BCLT.QRP**
BOR	Borrower templates	**&BORDATA.QRP** **&BORSHT.QRP**
BIB	Bibliographic templates	**&BIB.QRP** **&BIB2.QRP**
BORH	Borrower history templates	**&BORHIST.QRP** **&BORHISC.QRP** **&BORH10.QRP**
CI	Circulation issues slips	**&CI1ISS.QRP** **&CI1NEW.QRP** **&CI1000.QRP**
FIN	Financial templates	**&FINBUDG.QRP** **&FINCURR.QRP** **&FINTRAN.QRP**
ILL	Inter-library loan templates	**&ILLEREM.QRP** **&ILLLET.QRP**
N	Standard letter templates	**&N1ADD10.QRP** **&N1ADDEM.QRP**
NC, NEC, NEI	NetOpac programmed templates	**&NCTBRF.QRP** **&NECTBRF.QRP** **&NEITBRF.QRP**
OD	Circulation templates: **Overdues**	**&ODEMAIL.QRP** **&ODLET.QRP** **&ODLET1C.QRP** **&ODLET1G.QRP**

EMAIL, EML	E-mail templates	**&ODEMAIL.QRP** **&RESEML.QRP**
LET	Letter templates	**&ODLET1C.QRP** **ODLET1G.QRP**
OR, OS	Order templates	**&ORSI.QRP** **&ORSICL.QRP** **&OSD100.QRP**
PE	Periodical templates: **Periodicals and Suppliers**	**&PE0010.QRP** **&PE0100.QRP** **&PE1000.QRP**
PI	Periodical templates: **Periodicals and Issues**	**&PI0001.QRP** **&PI0100.QRP** **&PI0010.QRP**
PIC	Periodical templates: **Periodicals, Issues, Copies**	**&PIC010.QRP** **&PICLAIM.QRP**
PICS	Periodical templates: **Periodicals, Issues, Copies, Stockitems**	**&PICS010.QRP** **&PICS001.QRP**
SU	Periodical templates: **Suppliers only**	**&SU1000.QRP**
RES	Reservation templates	**&RESBRF.QRP** **&RESEML.QRP** **&RESLIST.QRP**
SAD	Stockitem audit templates	**&SADDET.QRP** **&SADBR.QRP**
SPINE, SPN	Spine label templates	**&SPN9C.QRP** **&SPINE9.QRP**
STAC	Statistics Reports: **Grouped by borrower class**	**&STAC511.QRP** **&STAC520.QRP**
STAG	Statistics Reports: **Grouped by borrower group**	**&STAG531.QRP** **&STAG540.QRP**
STAT	Statistics Reports: **General**	**&STAT100.QRP** **&STAT210.QRP**
STK	Stockitem Reports	**&STKTACT.QRP** **&STKCFS.QRP**
STKH	Stockitem History	**&STKHIST.QRP** **&STKHISU.QRP** **&STKHCSC.QRP**
STKTUR	Stockitem Turnover reports	**&STKTUR1.QRP** **&STKTUR2.QRP**
X	Reports that output to Microsoft Excel	**&XSTKFS.QRP** **&XSTAT20.QRP**

		&XSTKCSV.QRP

Statistics Templates

NUMBER/LETTER	DESCRIPTION	EXAMPLE
100	Summary by year	**&STAT110.QRP, &STAT111.QRP**
200	Summary by month	**&STAT200.QRP, &STAT205.QRP**
300	Summary by day	**&STAT300.QRP, &STAT310.QRP**
400	Summary by hour	**&STAT410.QRP, &STAT411.QRP**
500	More detailed reports - for example: containing borrower type, suburb, etc.	**&STAT500.QRP, &STAT502.QRP**
600	Detailed reports	**&STAT620.QRP, &STAT630.QRP**
l	Subdivides by location	See screenshot below
t	Subdivides by type (statistical type)	See screenshot below
b	Subdivides by borrower	See screenshot below
f	Subdivides by form code	See screenshot below
s	Subdivides by stats code	See screenshot below
y	Subdivides by year	See screenshot below
m	Subdivides by month	See screenshot below
d	Subdivides by day	See screenshot below
h	Subdivides by hour	See screenshot below


Select Report Format

Description	File Name
Summary by Location, TransType, Year	&stat100.qrp
Summary by Location, TransType, Year, Month	&stat200.qrp
Summary by Location, Year, Month, TransType	&stat205.qrp
Summary by TransType, Location, Year	&stat110.qrp
Summary by TransType, Location, Year, Month	&stat210.qrp
Summary - lty	&stat101.qrp
Summary -ltym	&stat201.qrp
Summary -ltymd	&stat301.qrp
Summary- ltymd(s)	&stat300.qrp
Summary - ltymdh	&stat401.qrp
Summary - ltymdh(s)	&stat400.qrp
Summary of Circulation by Borrower Details	#SumBorr.qrp
Summary of Circulation by Item Details	#SumItem.qrp
Summary of Statistics by Month	#SumMnth.qrp
Summary - tly	&stat111.qrp

Preview Select Cancel

UNDERSTANDING REPORT TYPES

Report Types and their Associated Templates

REPORT TYPES AVAILABLE	DESCRIPTION	EXAMPLE
	ACCOUNT	
No report types	Reprint of accounts	**&ACI100.QRP**
	AUTHORITY	
Authority (Default)	Lists of Authorities - for example: Subjects	**&AUTHBR2.QRP**
See References	Lists of Authorities that use See References	**&AUTHSB2.QRP**
See / See Also References	Lists of Authorities that use See Also References	**&AUTHSAB.QRP**
Authority Audits	Authority audits - for example: Deleted Authorities	**&AUTHAUD.QRP**
Authority with See and See Alsos	Lists of Authorities that use both See & See Also References	**&AUTHFS2.QRP**
	BIBIOLOGRAPHIC	
Bibliographic (Default)	List of Catalogues with Bibliographic data (for example: Subjects, Notes) using Where parameters to select the Tags	**&BIB2.QRP**
Fixed layout Reports	List of Catalogues with Bibliographic data (for example: Subjects, Notes) using **F10 More** to select the Tags	**&BIBFL28.QRP**
Bib with Image + stock	List of Catalogues with Bibliographic data & some Stockitem set Fields with image included	**&CTITEMX.QRP**
	BORROWER	
Borrower (Default)	Borrower listings, counts	**&BORMED.QRP**
Audit Reports	Audits - for example: Deleted, New borrowers	**&BORRAUD.QRP**
Borrower History	Items the borrower has lent and returned + items generated in reports (overdues, reserves)	**&BORHIST.QRP**
Borrower (purge) Financial	Deletion of Borrower financial records	**&BORFINP.QRP**
Borrower (list) Financial	List of Borrower Financial - for example: money owing	**&BOFINTO.QRP**
Name and Addresses x 1 across	Borrower Letter	**&N1ADD10.QRP**
Name and Addresses x 1 across Email	Borrower Letter by email - for example: Welcome letter	**&N1ADDEM.QRP**
Name and Addresses x 3 across	Address Labels	**&N3ADD20.QRP**

Borrower Interest Reports	New items alert for Borrowers with Interests	**&BORINT.QRP**
Borrower Interest Reports - Email	New items email alert for Borrowers with Interests	**&BORINEM.QRP**
Borrower Profile Reports	Borrower Profiles - for example: Age Groups	**&BORPROS.QRP**
Borrower Memos	Report that allows print of text in Memos	**&BORMEMO.QPR**
Borrower Images	Includes Image of Borrower - for example: Borrower card	**&BORCRDP.QRP**
Borrower Automatic Update	Enables mass changing of Borrower Types, Classes, Groups and Status. Details are changed through the **F10 More** options	**&BORUPD.QRP**
Borrower Circulation Automatic Update	Enables mass changing of Borrower Types, Classes, Groups and Status based on due date parameters in the 'where' statement. Details are changed through the **F10 More** options	**&BORCUPD.QRP**
CATALOGUE		
No report types	Catalogue list with the Display lines	**&CATFULL.QRP**
CIRCULATION These templates are often customised for each individual site		
Title, Author, Form, Item No, Location (Default)	Lists & Letters with 8 items/borrower (often used with preprinted slips	**&OD2000.QRP**
Title, Call No, Stats Code, Item No, Location	Lists & Letters with 8 items/borrower	
Res, Title, Author, Form, Item No, Location	Recall list for overdue items with attached reservations – Author in line 2	**&CIRRESA.QRP**
Res, Title, Call No, Stats Code, Item No, Location	Recall list for overdue items with attached reservations – Call No in line 2	**&CIRRESC.QRP**
Type, Group, Class, AuthForm, Item.locn	Lists & Letters with 8 items/borrower displaying Type, Group and/or Class	**&BTCIRC.QRP**
Continuous - Full Descriptions	Lists & Letters with unlimited items	**&ODLST.QRP**
Continuous - E-mail	Letters with unlimited items via Email	**&ODEMAIL.QRP**
Offline files export	For Advanced Offline only to copy Borrower & Item tables	**&OFFLINE.QRP**
Offline process report	Report for Advanced Offline Process	**&AOLPROC.QRP**

FINANCIAL		
Account Listing	Listing of Budget Accounts	**&FINACCT.QRP**
Allocation Codes	Listing of Budget Allocations	**&FINALL.QRP**
Budget Summary	Analysis of Budget	**&FINBUDG.QRP**
Currency Codes	Listing of Budget Currency Codes	**&FINCURR.QRP**
GL Codes Listing	Listing of General Ledger showing levels	**&FINGLC.QRP**
Ledger Format	Account Transaction Totals for Budget	**&FINLEDG.QRP**
Circulation Trans	Circulation Transactions	**&CFINDET.QRP**
Aged Borrower (4 mths) Transactions	Borrower Monthly Transaction Totals (single line Accounting) over 4 months	**&FINAGE4.QRP**
Aged Borrower (6 mths) Transactions	Borrower Monthly Transaction Totals (single line Accounting) over 6 months	**&FINAGE6.QRP**
Aged Borrower (12 mth s) Transactions	Borrower Monthly Transaction Totals (single line Accounting) over 12 months	**&FINAGE12.QRP**
Borrower Fin. Trans. Audit	Borrower Financial Transaction Audit (single line Accounting)	**&FBFAUD.QRP**
Borrower Summary Fin. Trans. Audit	Borrower Financial Transaction Audit (single line Accounting) if set to Update, YTD is updated	**&FBFSUM.QRP**
Borrower Owing	Details of borrowers' fines. For use with print letter format templates.	**&FINOWE.QRP**
Borrower Owing Email	Details of borrowers' fines. For use with e-mail templates.	**&FINOWEE.QRP**
INTER-LIBRARY LOAN		
Default	Letters, Lists	**&ILLREM.QRP**
E-Mail Request	Letters via Email to first supplying library	**&ILLEREM.QRP**
E-Mail Request to all Suppliers	Letters via Email to ALL supplying libraries	**&ILLEREQ.QRP**

ORDER		
Supplier, Order Header & Order Line (Default)	Order Forms	**&ORDGST.QRP**
Order Header, Order Line & Received StockItems	Run in update mode, posts Date Printed to Order Header	**&OSI100.QRP**
Order Header, Order Line & Order Items/Non-Items	Summary of Orders with Stockitems etc.	**&OON100.QRP**
Supplier	Supplier Listing	**&OSU100.QRP**
Supplier, Order Header & Order Line - E-Mail	Email Order	**&OSEGST.QRP**
Supplier, Order Header & Order Line - EDIFACT	EDIFACT Order	**&OREDL.QRP**
Supplier, Order Header, Order Line & Order Items/Non-Items	Order Status report	**&ORSI.QRP**
Supplier, Order Header, Order Line & Order Items/Non-Items to Claimed	Order Claims notices. Update Entity will set status to claimed for Order Lines	**&ORSICL.QRP**
Supplier, Order Header, Order Line & Order Items/Non-Items to Returned	Returns notice for Orders. Update Entity will set status to Returned for Order Lines	**&ORSIR.QRP**
Supplier, Order Header, Order Line & Order Items/Non-Items to Cancelled	Cancellation of Orders. Update Entity will set status to Cancelled for Order Lines	**&ORSICAL.QRP**
Supplier, Order Header, Order Line & Order Items/Non-Items E-mail	Order status report via Email	**&ORSIE.QRP**
Supplier, Order Header, Order Line & Order Items/Non-Items E-mail to Claimed	Order Claims notices via Email. Update entity will set status to claimed for Order Lines	**&ORSIECL.QRP**
Supplier, Order Header, Order Line & Order Items/Non-Items E-mail to Returned	Returns notice for Orders via Email. Update Entity will set status to Returned for Order Lines	**&ORSIER.QRP**
Supplier, Order Header, Order Line & Order Items/Non-Items E-mail to Cancelled	Cancellation of Orders via Email. Update Entity will set status to Cancelled for Order Lines	**&ORSIECA.QRP**
Supplier, Invoice Header &	Invoice details Update entity would post Report Date	**&OSINV.QRP**

Invoice Line	to Invoice screen	
PERIODICAL		
Periodical, Issue, Copy & Item (Default)	Listings with Stockitems	**&PICS001.QRP**
Periodical, Issue & Copy	Listings with Copies, Claim letter	**&PICLAIM.QRP**
Periodical & Issue	Listing with Issues	**&PI0100.QRP**
Periodical	Listings	**&PE0001.QRP**
Supplier	Suppliers only	**&SU1000.QRP**
Periodical, Issue, Copy Email	Claim letter by Email	**&PICLE.QRP**
RESERVATION		
Reservations (Default)	Reservation notice or list (8 per notice)	**&RESBRF.QRP**
Expired Reservation Clear	Clear reservations en masse	**&RESEXPB.QRP**
- E-Mail	Reservation notice via email	**&RESEML.QRP**
Unlimited Reservation Format	Reservation notice or list (unlimited)	**&RESLIST.QRP**
STATISTICS		
Statistics	Most Statistics Reports	**&STAT200.QRP**
Access Audit	Access to Authorities by Operator - for example: Viewed Attachments, view Authorities giving Date and Time	**&SAAUDIT.QRP**
Logon Audit	Date and Time Operators logged onto certain modules	**&SLAUDIT.QRP**
Search Audit	Search terms used within the Programs and the Type of search done	**&SSAUDIT.QRP**
STOCKITEM		
Stockitems (Default)	Lists of items	**&STKTACT.QRP**
Item Audit	Item Audits - for example: Items deleted	**&SADBR.QRP**
Item History	Item History	**&STKHIST.QRP**
Memos	Stockitem memo list	**&STKMEMOS.QRP**
Most Recent Return	Last Borrower - for example: Damaged Item Notice	**&STKMRR.QRP**
Most Recent ReturnEmail	Last Borrower - for example: Damaged Item Notice	**&STKMRRE.QRP**

	via Email	
Spine Labels 1 label wide	Spine Labels - 1 label across	
Spine Labels 2 label wide	Spine Labels - 2 labels across	
Spine Labels 3 label wide	Spine Labels - 3 labels across	
Spine Labels 4 label wide	Spine Labels - 4 labels across	
Spine Labels 5 label wide	Spine Labels - 5 labels across	
Spine Labels 6 label wide	Spine Labels - 6 labels across	
Spine Labels 7 label wide	Spine Labels - 7 labels across	**&STKSPN7C.QRP**
Spine Labels 8 label wide	Spine Labels - 8 labels across	
Spine Labels 9 label wide	Spine Labels - 9 labels across	**&STKSPN7C.QRP**
Spine Labels 10 label wide	Spine Labels - 10 labels across	
Spine Labels 11 label wide	Spine Labels - 11 labels across	
Spine Labels 12 label wide	Spine Labels - 12 labels across	

UNDERSTANDING REPORT DESIGN

Report Templates: Basics

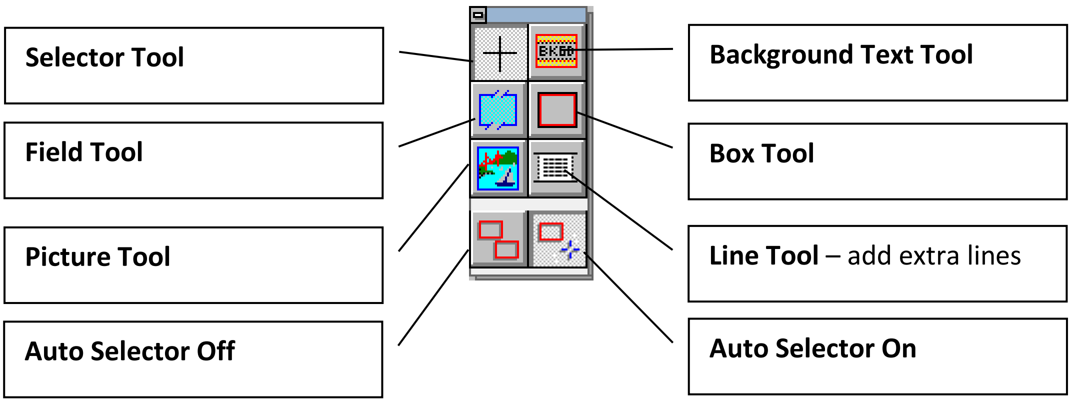
RepWin is made up of:

- Background Text
- Fields
- Headers
- Footers
- Break Groups
- Input Items

Palette

It may be convenient to have the Palette available for selection purposes.

1. From the menu, select **View** > **Palette** – the Palette will then display:



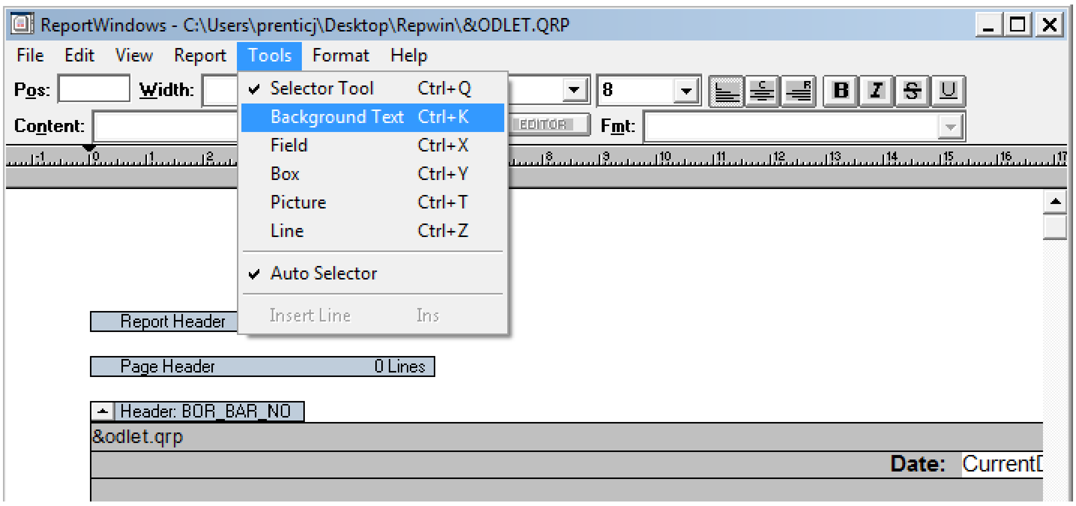
2. It is possible to right-click on your mouse (in the middle of the screen) to change the tool being used

Background Text

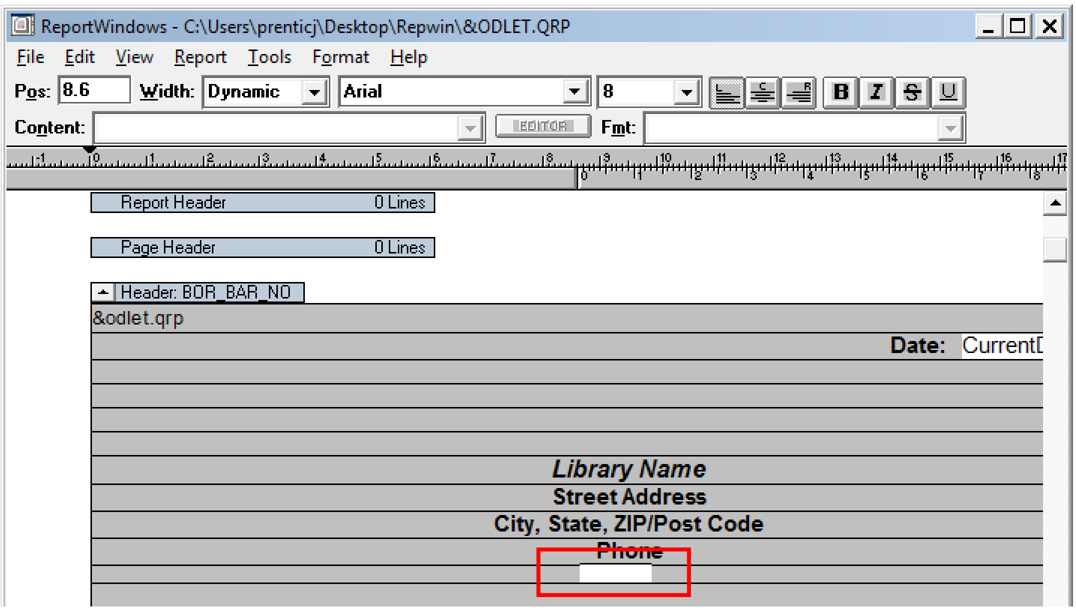
- Text with no FIELD information included – for example: **Street Address**

To insert Background Text

1. From the menu, select **Tools** > **Background Text**

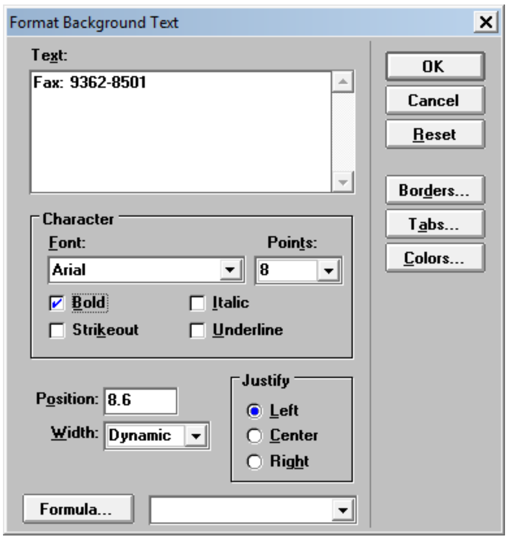


2. Position the tool where you want the text to be inserted (the text will be left-justified)
3. Click the left mouse button once – a white text box will be inserted



4. The cursor will remain in the text box so you can start typing the background text that you want to display each time the report is printed

5. Alternately, click out of the box and then double-click on the text box – the Format Background Text screen will display:



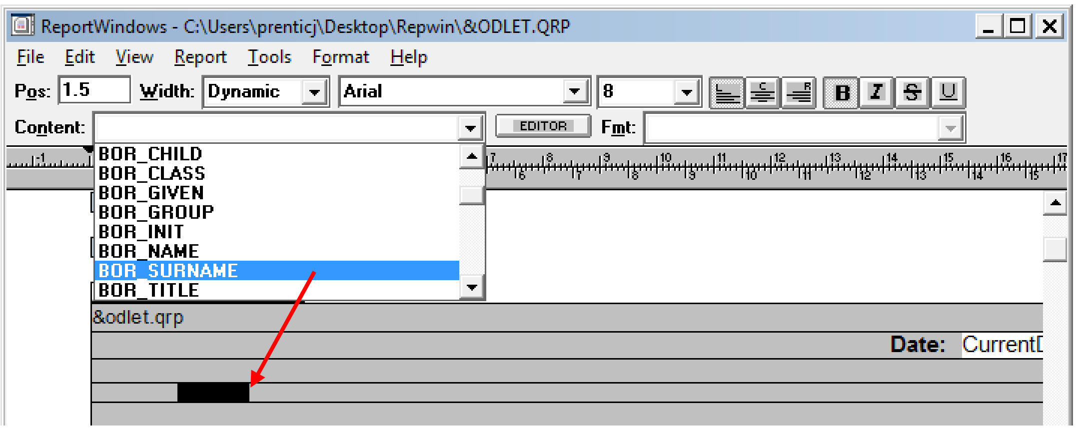
6. Insert the text to be displayed in the Text: box
7. Font-style, font-size, justification, borders, etc, options can also be adjusted (this can also be done from the ruler at the top of the screen)
8. Click the **OK** button when complete

Fields

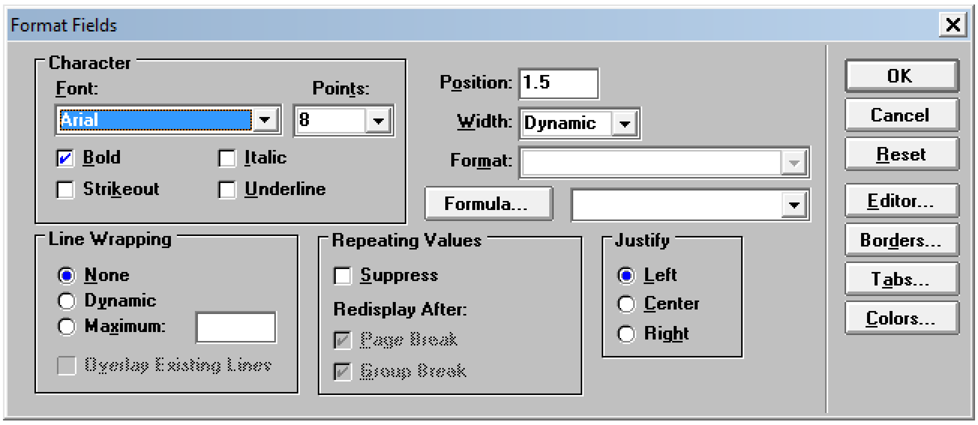
Fields can be **Inputs** (objects that are derived from the *Amlib* database – for example: **Borrower Name**, **Address**, etc.), a **string** value (combining **Input** items *and* background text), **formulas** and **functions** (many of which can be used on **Inputs**).

To insert a Field

1. From the menu, select **Tools** > **Field**
2. Position the tool where you want the field to be inserted (the field will be left-justified)
3. Click the left mouse button once – a white field box will be inserted
4. The cursor will remain in the field – at this point it is possible to select an **Input** option from the Content: drop-down box at the top of the screen – for example: **BOR_SURNAME** (Borrower Surname)



5. Alternatively, click out of the box and then double-click on the field box – the Format Fields screen will display:



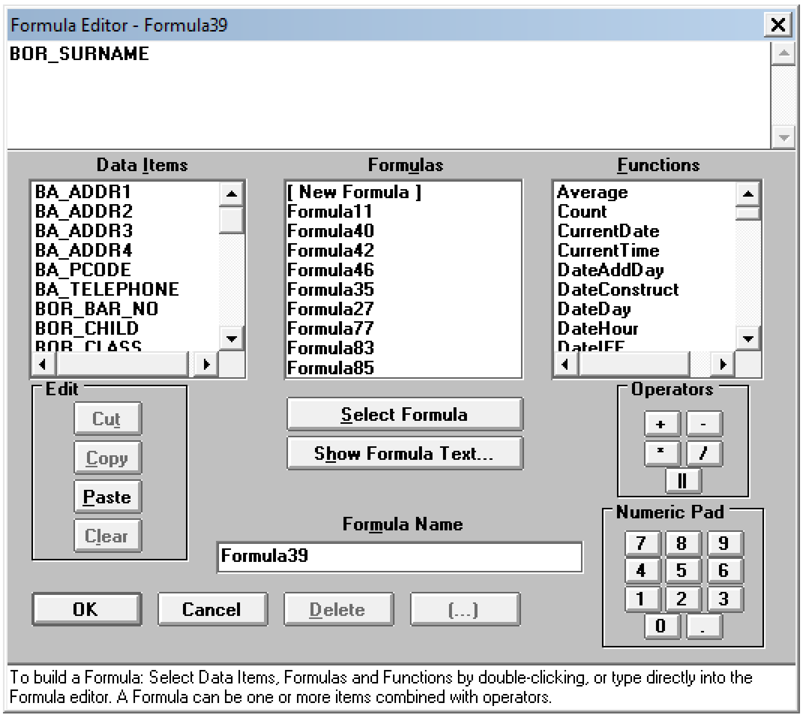
6. This screen allows the formatting of the fields in the following ways (some formatting can also be done from the ruler at the top of the screen):

    - Character - for example: **Font size**
    - Line Wrapping: this sets whether or not the line can wrap to the next line, and the number of lines which can be used
    - Repeating Values: this allows repeated values to be suppressed
    - Justification: **Left**, **Center** or **Right**-justified
    - Format: determine the way in which a field may be displayed – for example: date formats

7. Click the **OK** button when complete

Editor

1. From the ruler menu, select the **Editor** button (alternatively, you can select the **Editor...** button within the Format Fields screen) – the Formula Editor screen will display:



2. **Input** Items can be selected from the Data Items window, Formulas from the Formulas window (for example: and Functions from the Functions window (for example: **CurrentDate**)
3. Click the **OK** button when complete

Blocks

Blocks form the backbone of the report and can come in the form of:

<table>
<tr><th>TYPES</th><th>BLOCK</th><th>COMMENT</th></tr>
<tr><td rowspan="3">Headers (Optional)</td><td>Report Header</td><td>Contains a Report Title – only appears at the very beginning of the Report</td></tr>
<tr><td>Page Header</td><td>Contains information to appear at the top of every page</td></tr>
<tr><td>Group Header</td><td>Contains information to appear at the beginning of every Break Group. Will only appear if Break Groups are defined</td></tr>
<tr><td rowspan="3">Footers (Optional)</td><td>Group Footer</td><td>Contains information to appear at the end of every Break Group. Will only appear if Break Groups are defined</td></tr>
<tr><td>Page Footer</td><td>Contains information to appear at the bottom of every page – for example: Page Numbers</td></tr>
<tr><td>Report Footer</td><td>Contains Report totals and summaries – only appears at the very end of the Report</td></tr>
<tr><td>Detail Block</td><td colspan="2">Contains data that is sourced from the Amlib database. There is only one Detail Block per Report Template</td></tr>
</table>

Each block is essentially nested inside another block with the Detail Block sitting at its centre:

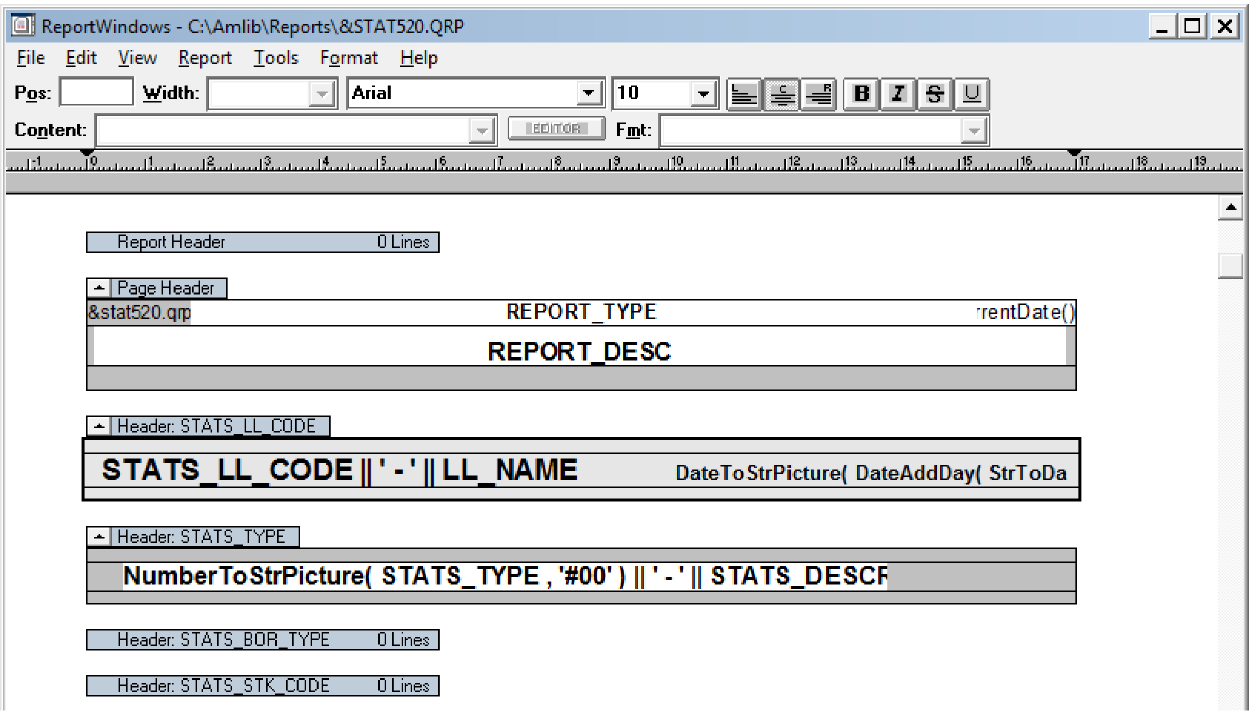
- Report Header
  - Page Header
    - Detail Block
  - Page Footer
- Report Footer

<u>Headers</u>

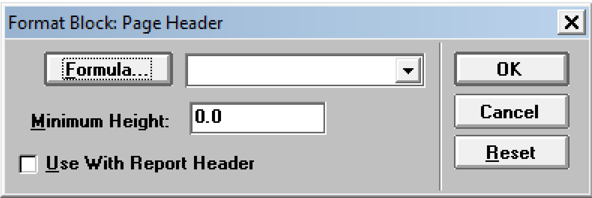
These are optional and can be defined as follows:

- **Report Header:** Appears only once, containing a title
- **Page Header:** Contains messages, references, page numbers etc. and appears on each page
- **Group Header:** Appears before the first line of a group of records (these do not display until Break groups are defined)

The Statistics report below has numerous Group Headers:

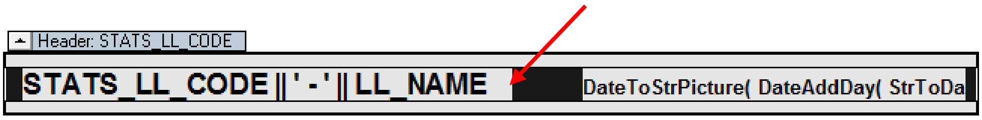


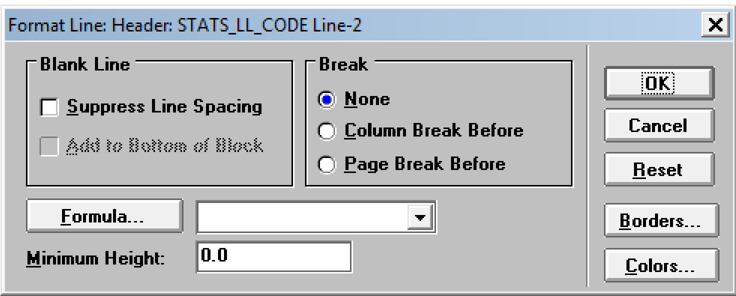
- Each Header can have settings (for example: minimum height) and can be accessed by double-clicking the Header name – for example: **Page Header**



The first line after a header can also have settings defined – for example: **Page Break Before**

- Check this by double-clicking on the first line after the Header (in the grey space rather than on a field or background text box





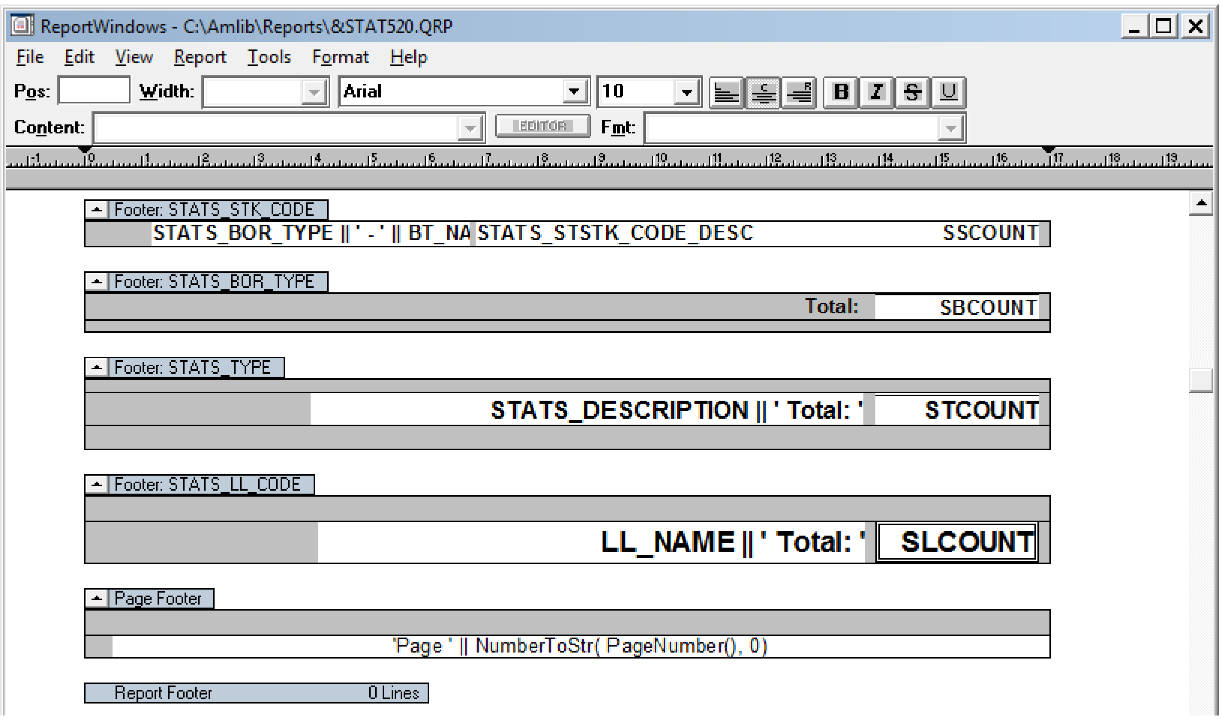
Footers

These are also optional and can be defined as follows: **Report Footer**, **Page Footer** and **Group Footer**.

- **Group Footers** may contain Totals for the group.
- **Page Footers** can contain Page Numbers or copyright information that would need to be shown on each page of the Report.

Please Note: It is possible to keep Group information from splitting across a page (where there is less than 1 page of information) – for example: to prevent a page break forming in the middle of an Overdue Slip.

- See: Formatting – Keep on Page



Detail Block

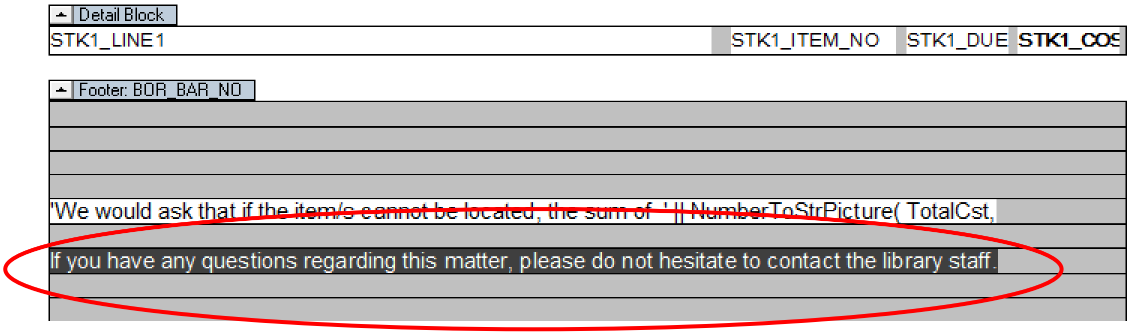
- Prints information from individual rows showing data from the *Amlib* database – there is only one Detail Block per report template

FORMATTING TASKS

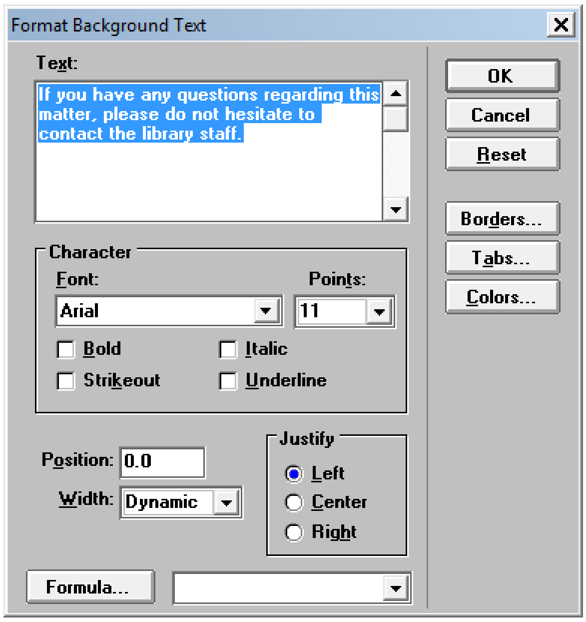
Edit Background Text

For example: Changing the wording in an overdue letter.

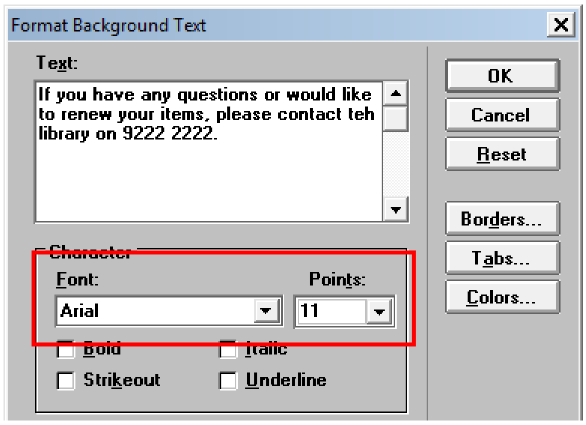
1. Open the template you want to change – be sure to save a back-up copy first, in case you want/need to go back to it later



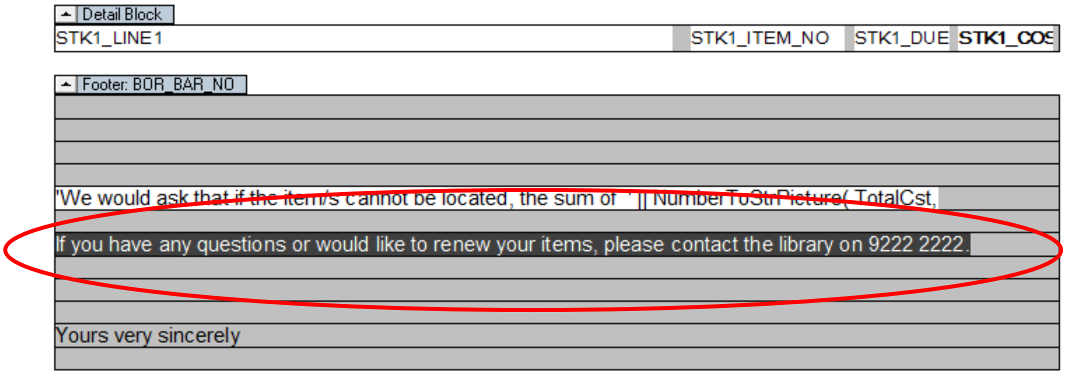
2. Double-click on the background text that you wish to change – the Format Background Text screen will display:



3. Click into the main Text: box, highlight and add/delete text as necessary – you can also change the font-size and style:



4. Click the **OK** button when complete

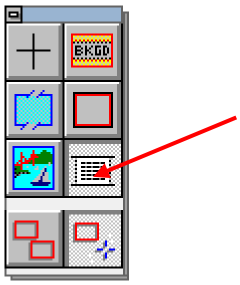


4. For long sentences, use your cursor to stretch your background text to the edge of the page and the text will automatically continue to the next line

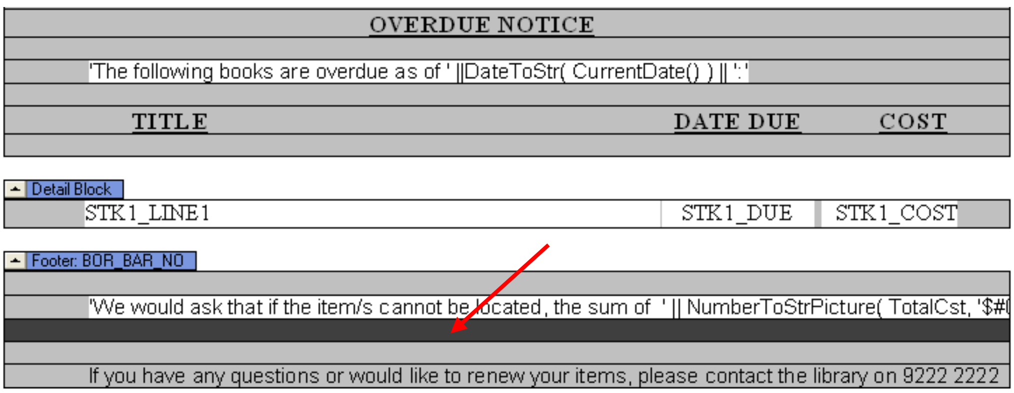
<u>Add Extra Space (by Adding Lines)</u>

If you want to have spaces in your letter to separate some of the areas of text, you can add some extra lines to your template.

1. Open the template you want to change – be sure to save a back-up copy first, in case you want/need to go back to it later
2. From the menu, select **Tools** > **Line** or alternately, select the **Line** icon on the Palette:

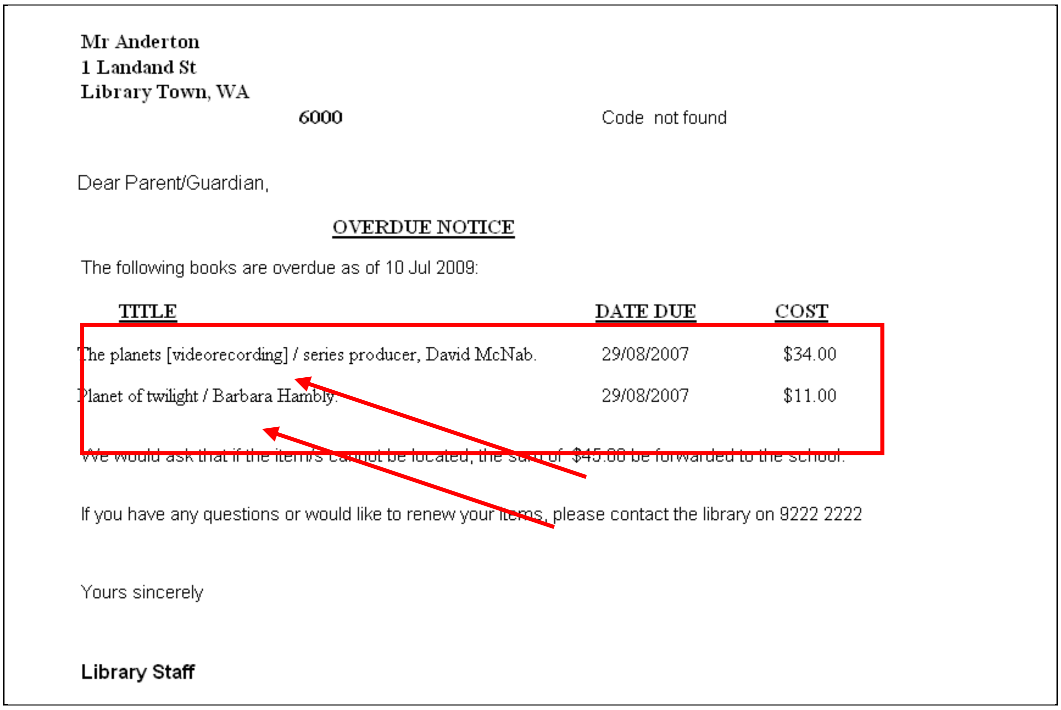


3. Hover your mouse over the area in the template where you wish to put the line, until your cursor turns into the square line tool symbol (you may have to put your cursor on the top or bottom edge of an existing line)
4. Left-click to insert the extra line



Please Note: Be careful where you place your lines!

- If you add a line to the detail block, with most templates, this will add a line between each item that is listed:


Mr Anderton
1 Landand St
Library Town, WA
6000 Code not found

Dear Parent/Guardian,

OVERDUE NOTICE

The following books are overdue as of 10 Jul 2009:

TITLE	DATE DUE	COST
The planets [videorecording] / series producer, David McNab.	29/08/2007	$34.00
Planet of twilight / Barbara Hambly.	29/08/2007	$11.00

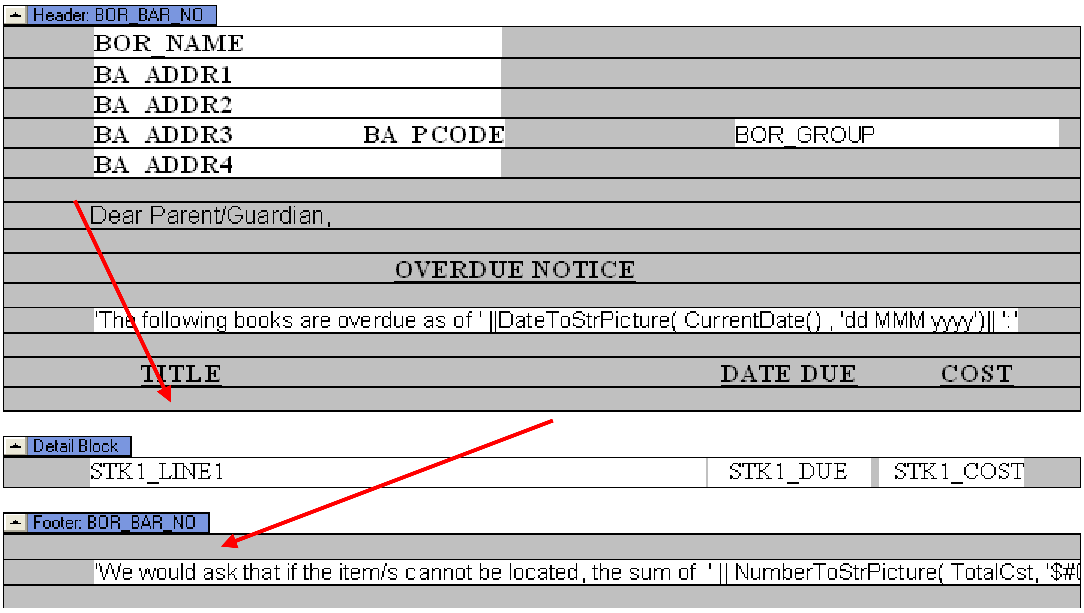
We would ask that if the item/s cannot be located, the sum of $45.00 be forwarded to the school.

If you have any questions or would like to renew your items, please contact the library on 9222 2222

Yours sincerely

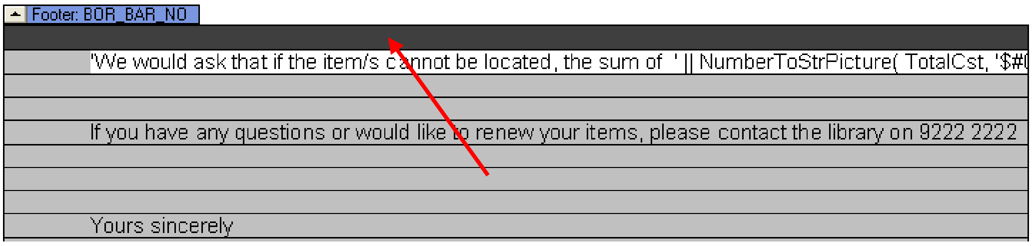
Library Staff

- If you want to add space between the existing text around the details, add the extra lines to the bottom of the header above the Detail Block or to top of the footer directly following it:



Reduce Space by Deleting Lines

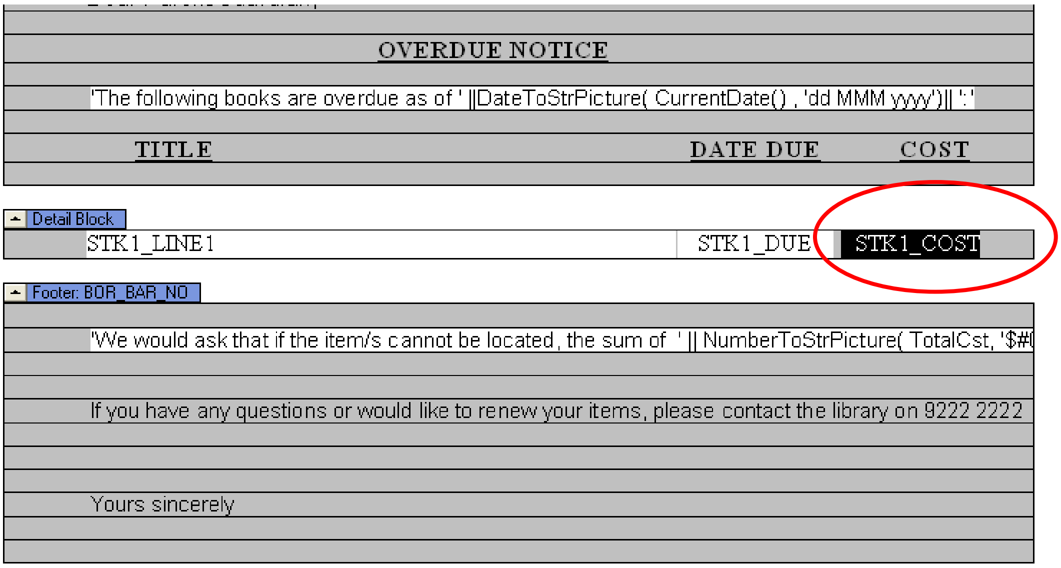
1. Click on the line to highlight it:



2. Click the **Delete** button on your keyboard

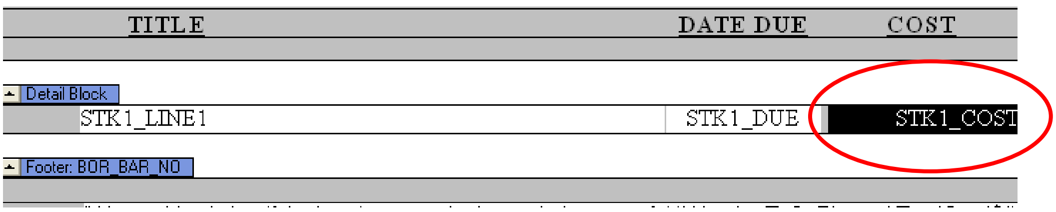
Adjust the Size of Your Fields or Background Text

1. Click on the field/background text you want to change:



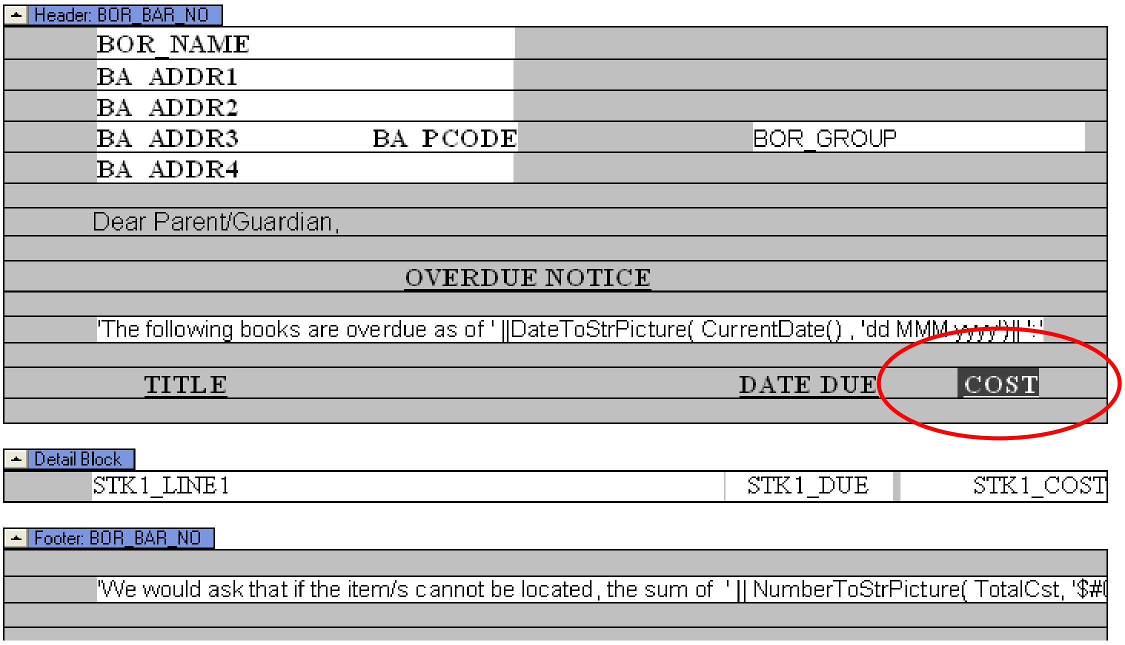
2. Move your cursor to the edge you want to expand, until the cursor becomes a double-arrow: ↔

3. Then click on the edge of the field, drag it to where you want it to be:



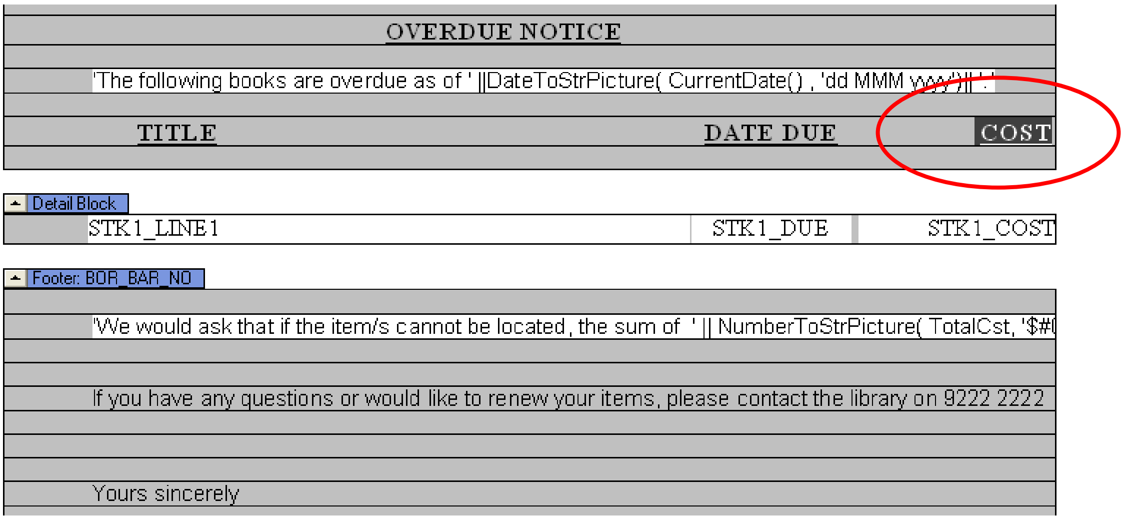
Move Fields or Background Text

1. Click on the field or background text you want to change:



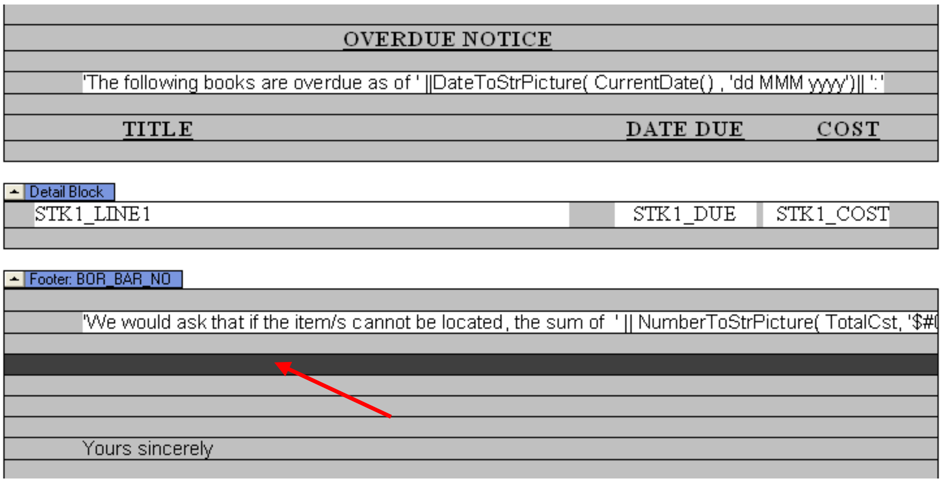
2. Hover your mouse cursor over the highlighted background text or field until the cursor becomes a four-way set of white arrows: 

3. Click and drag to the place where you want it to be:

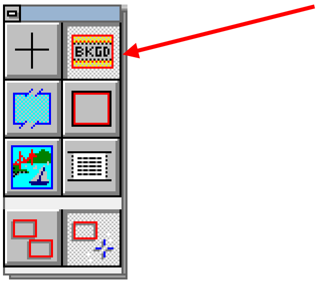


Add Text

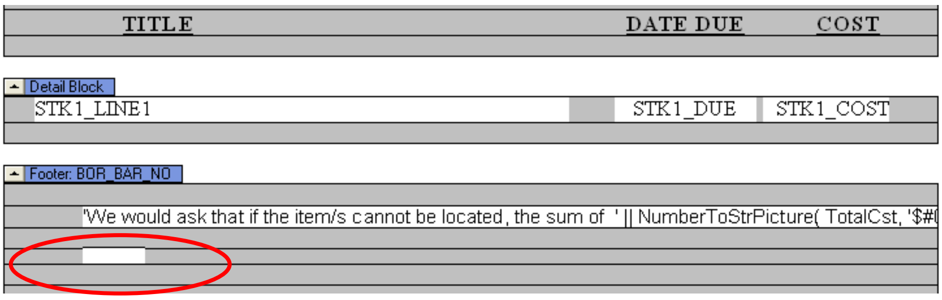
1. Create a line, if needed:



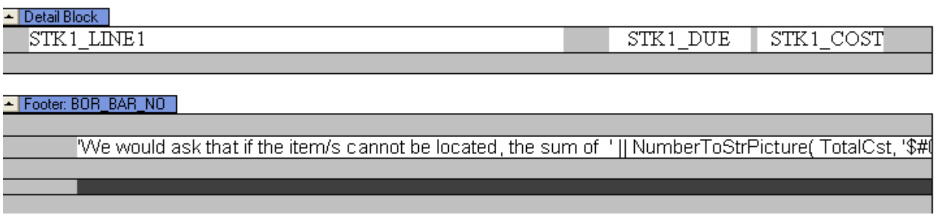
2. From the menu, select **Tools** > **Background Text** or alternately, select the **Background Text** icon on the Palette:



3. Click in the line where you want your text to display – a white block will appear:

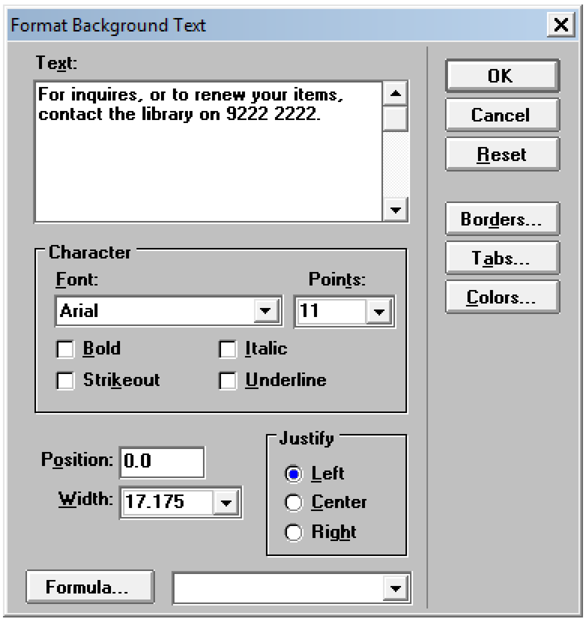


4. Stretch out the background text box to fit the whole line – if it's a large sentence, it will need the space across the whole line:

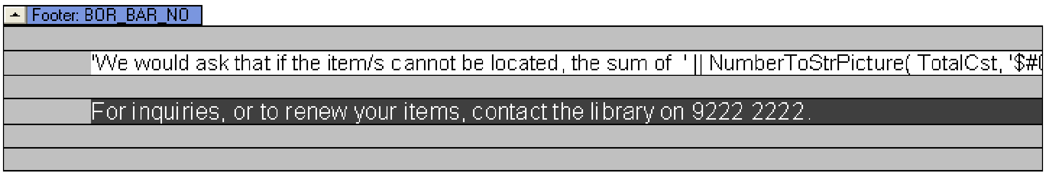


TIP: If you can't select your text box, try clicking on the line space behind it, then clicking onto the text box.

5. Select the background text box by double-clicking it – the Format Background Text screen will display:

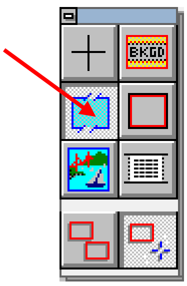


6. Add in the text you want to the Text: box
7. Set the font size, style and add bold or italics as needed
8. Click the **OK** button when complete

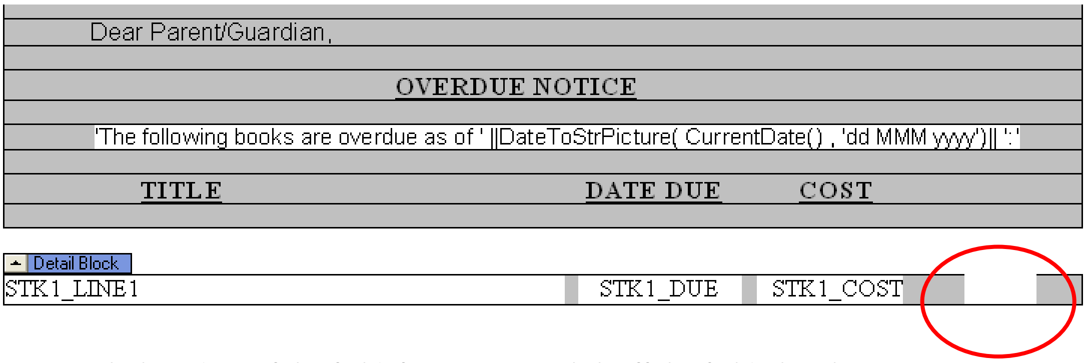


Add Fields

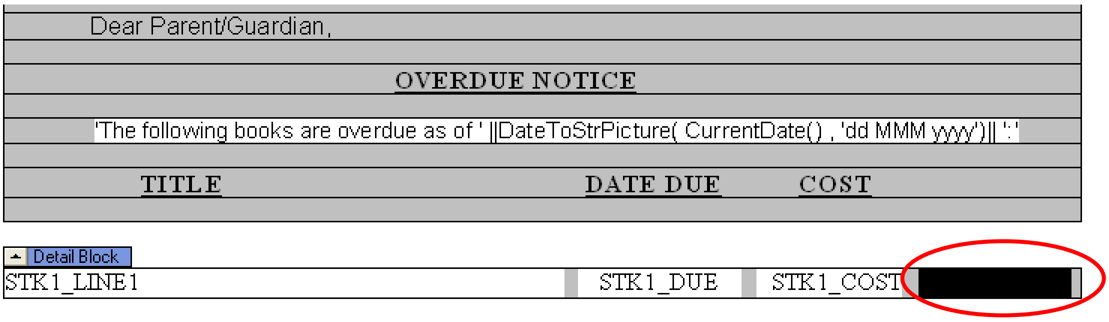
1. Add a line if necessary
2. From the menu, select **Tools** > **Field** or alternately, select the **Field** icon on the Palette:



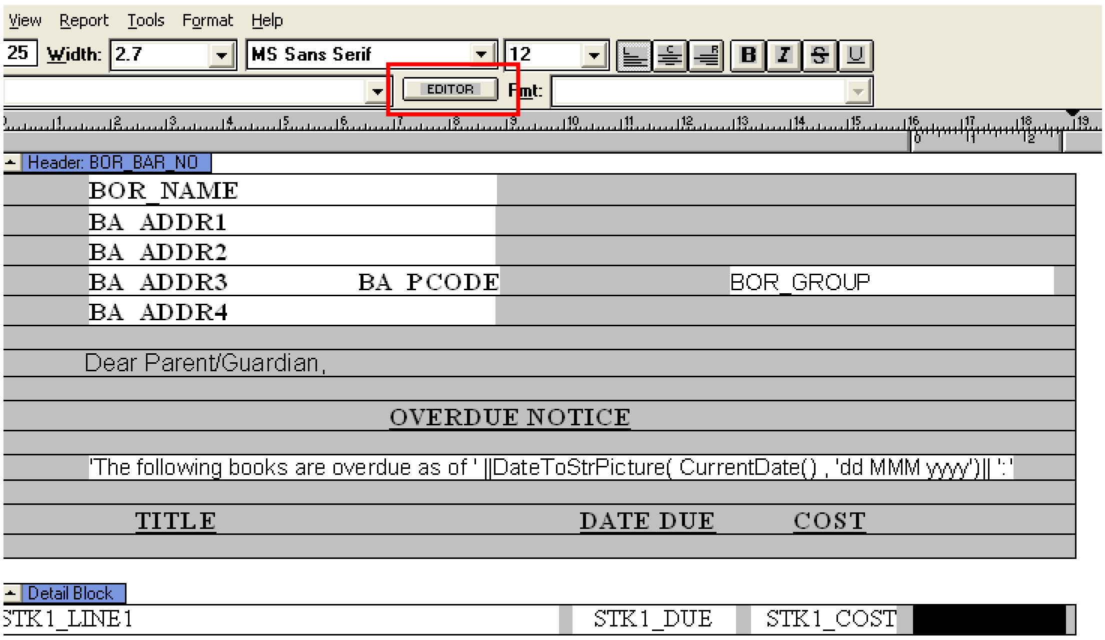
3. Click in the line where you want to place the field – a white block will appear:



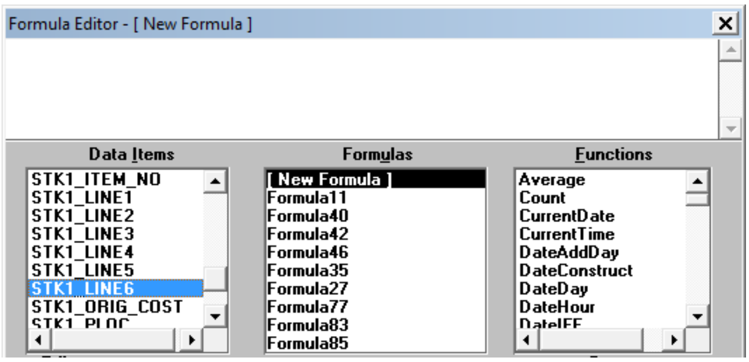
4. Stretch the edges of the field if necessary – click off the field, then hover your mouse over the edge of the field to get the double arrows and then adjust the size:



5. Select the field with your mouse:

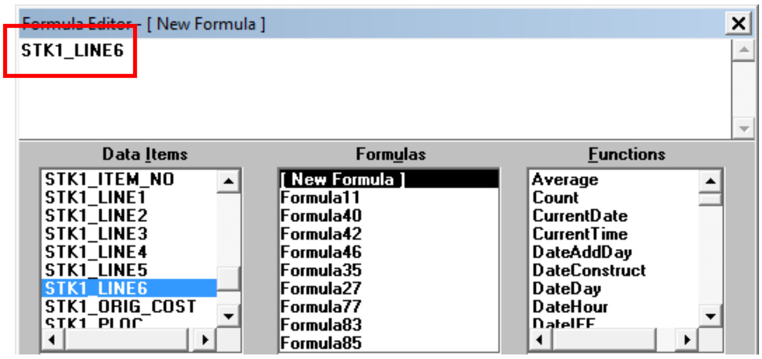


6. Click the **Editor** button on the toolbar – the Formula Editor screen will display:

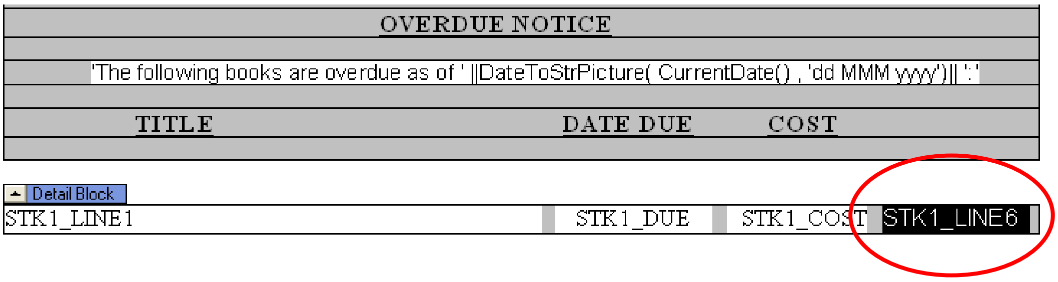


7. From the Data Items box, select the field you want to add – in this example, we want to add the call number, which is **Line 6** in the Stockitem screen

8. Double-click the item to display it in the top section of the screen:



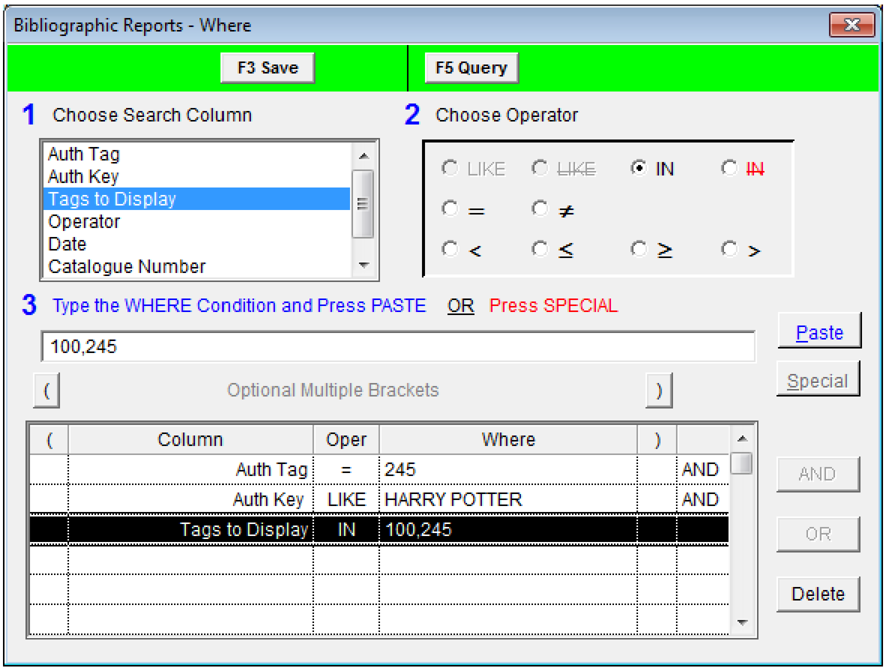
8. Click the **OK** button when complete



BIBLIOGRAPHIC REPORTS

Create a Report

1. Launch the *Amlib* client
2. Go to **Main** > **Reports** > **RepBibliographic** – the Bibliographic Reports screen will display
3. Click the **F1 New** button – the Select Report Format screen will display
4. Highlight the report template you would like to use (for example: **&BIB.QRP** or **&BIB2.QRP**) and click the **Select** button
5. Type in a Description – for example: **Harry Potter**
6. Click the **F3 Save** button
7. Highlight the report and click the **F7 Where** button – the Bibliographic Reports – Where screen will display:



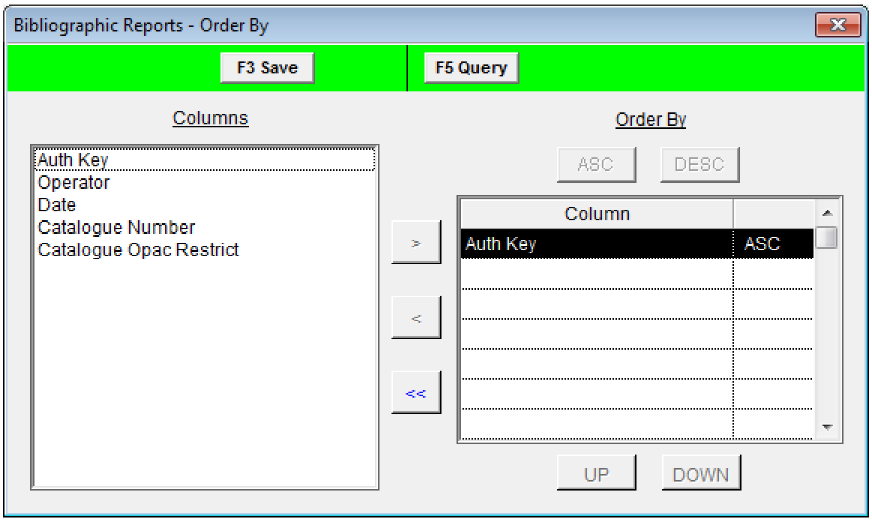
8. There are three unique parameters:
   - **Auth Tag**: Search for a particular MARC tag
   - **Auth Key**: Check for particular data contained in the MARC tag
   - **Tags to Display**: MARC tags to display in report
9. The statement can include the following settings:
   a. Auth Tag – for example: **Auth Tag = 245** (Title)
   b. Auth Key – for example: **Auth Key LIKE Harry Potter** (looks for all matching items where the Title BEGINS with **Harry Potter**)
   c. Tags to Display – for example: **Tags to Display IN 100, 245** (will display Author and Title in report)

d. (optional) Enter a start date: **Date >=** enter a date in DD/MM/YYYY format – for example: **01/01/2010**

e. (optional) Enter a finish date: **Date <=** enter a date in DD/MM/YYYY format – for example: **10/10/2010** (a finish date is optional – if not inserted, the report will go up to the current date).

f. You may also want to limit by **Catalogue Number**(s)

10. Click the **F3 Save** button when complete
11. Click on the **F9 Order** button – the Bibliographic Reports – Order By screen will display:



Sorting of Bibliographic reports is different to other reports. The **Auth Tag** that you wish to sort by is set in the Where Parameters – for example: **245** (**Title**) and the Order is set to be sorted by is the **Auth Key**.

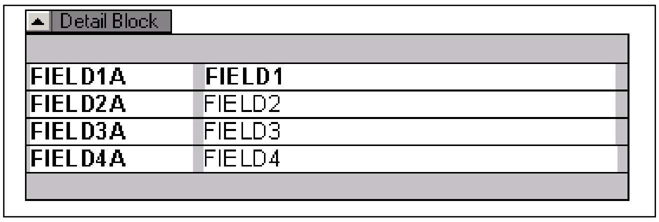
12. Use the arrow keys to select and move the fields to be sorted by – for example: **Auth Key**
13. Click the **F3 Save** button when complete
14. Click the **F8 View** button to view/print the report

Advanced Bibliographic Reports: Fixed Layout Reports using F10 More

This function is used for mapping data to fields in Fixed Layout reports – for example: the DVD Cover template (**&DVDCOV.QRP**).

Each row of this table may be used to collect 1 of the 20 fields on the report template. These first 20 fields contain Tag or Subfield data (**Fields 1-20**), and the next 20 fields (**Fields 1A – 20A**) contain the associated Tag Descriptions (Go to **Main** > **Authorities** > **MarcTags** to see a complete list of Tag Nos and Tag Descriptions). The report outputs all the MARC data to the report. The inclusion of **Fields 1A – 20A** in the report is optional.

FIELDS 1A – 20A: Display **Tag Descriptors** held in **Main** > **Authorities** > **MarcTags**



FIELDS 1 – 20: Display actual data for the relevant Tags within Authority

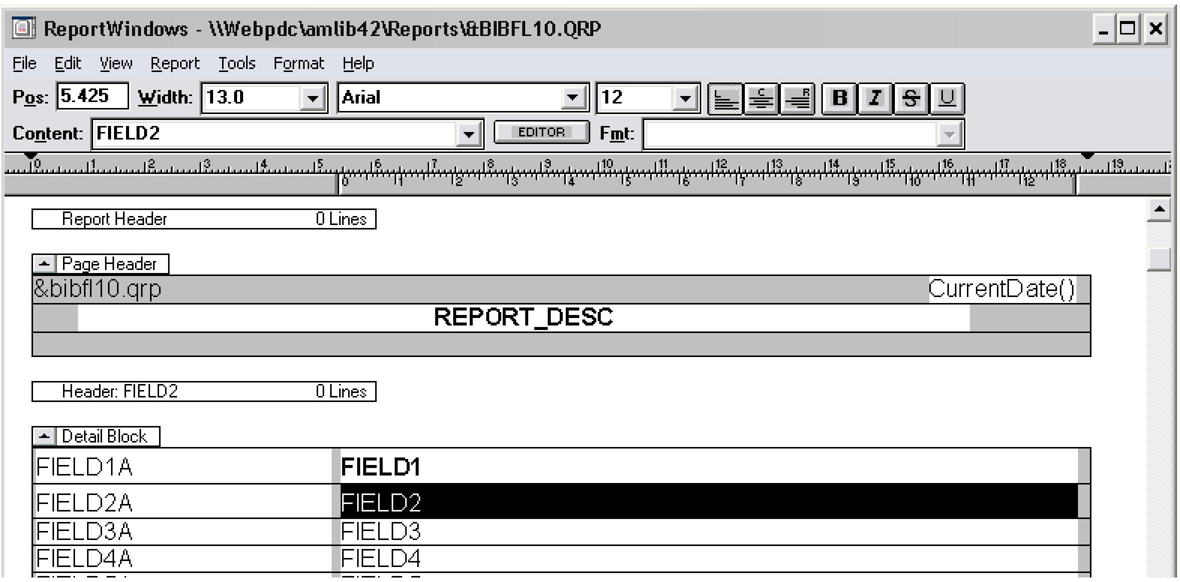
	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5
HEADING	Report Line Number	Tag Number	eg **+** or **blank** or **and sf in ('a', 'b')**	**blank** or **and cat_sf in ('a', 'b')**	Not used
EXAMPLE	**1**	**100**			
	2	**245**			
	3	**082**			
	4	**650**			
COMMENT	Can be any number between **1** and **20**	MARC Tag field number – for example: **245** (Title) Any Tag can be matched to ant Line Number	Specify which part of the MARC tag to send - see table below for more details	Specify which part of the MARC tag to send - see table below for more details	

The table below explains how the user can specify which parts of the MARC tag to send:

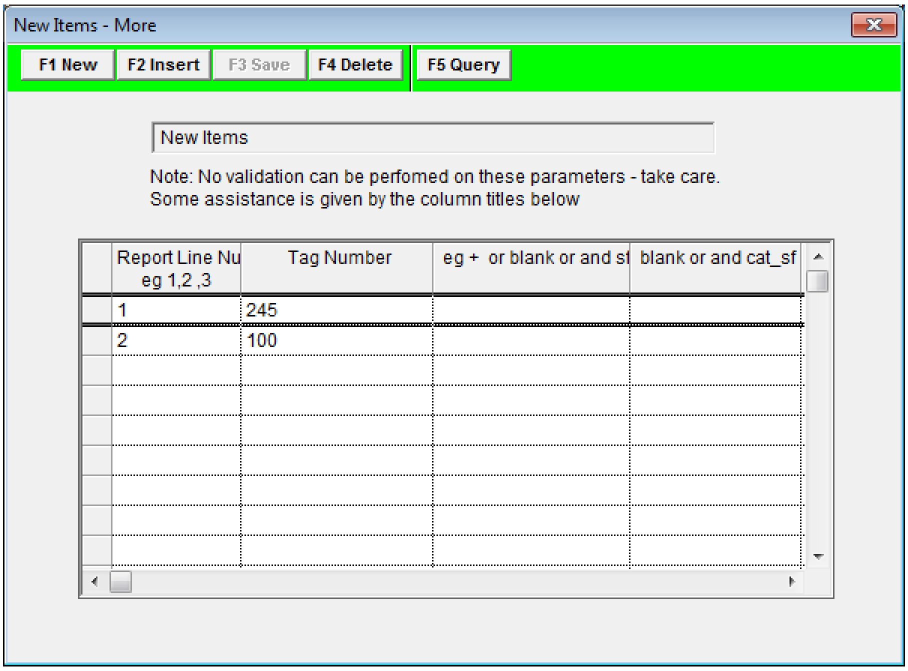
OPERATOR	DESCRIPTION	EXPLANATION
blank (Default)	The entire MARC tag is printed	If the column is left blank, then the entire MARC tag is printed
+	All data in the specified tag is printed no matter how many tags are included in the record	All Subject listings are printed, where there is only one or several or hundreds!
and sf in ('p', 'n')	Only the subfields specified to be printed within this **Authority** Tag	If 440 (Series) tag, only the Series name and number printed
and cat_sf in ('c')	Only the subfields specified to be printed within this **Non-Authority** Tag	If 260 (Publisher) tag, only the 'c' (Date) subfield printed (and not Place or Publisher)

Example 1 – Bibliography:

The template **&BIBFL10.QRP** is a Bibliography with up to 10 lines that can be defined. The template includes MARC Tag descriptors (include the 1A, 2A etc.):



1. Set the <u>More</u> window as follows – the Line numbers correspond to fields inserted on the template (in this example: **Title** and **Author**)
    a) Select the **F1 New** or **F2 Insert** button
    b) Type in field details – the columns are filled in as follows: '
        i. **Report Line Number** = **1** and **2**
        ii. **Tag Number** = MARC Tag field number – for example: **245** (Title) and **100** (Author)



&bibfl10.qrp 14/07/2004

New items

Title	**Compulsion.**
Personal Author	Ablow, Keith Russell.
Title	**In sunlight, in a beautiful garden.**
Personal Author	Cambor, Kathleen.
Title	**Utopia : a novel.**
Personal Author	Child, Lincoln.
Title	**The devil's redhead : a novel.**
Personal Author	Corbett, David.

Alternatively, the report can be set up to show all 10 lines with all occurrences of Multiple Tags - for example: if more than one 651 Subject occurs, show all headings. You are also able to define which subfields are displayed for Authorities and Non-Authorities – for example: only show the **Series Title** and **Number** (subfields **a** and **v** of Tag **440**, or only the **Date** in a Publisher (subfield **c**).

&bibfl10.qrp 14/07/2004

New items

Title	**Compulsion.**
Personal Author	Ablow, Keith Russell.
DDC Number	813.54
General Note	
Topical Subject Hdg	Forensic psychiatrists - Fiction. Fugitives from justice - Fiction. Teenage boys - Fiction. Twins - Fiction.
Geographic Subject Hdg	Nantucket Island (Mass.)
Genre/Form	Mystery fiction Psychological fiction.
Personal Name Subject	
Series Area (traced)	
Publication Details	2002.
Title	**In sunlight, in a beautiful garden.**
Personal Author	Cambor, Kathleen.
DDC Number	813.54
General Note	
Topical Subject Hdg	Capitalists and financiers - Fiction. City and town life - Fiction. Dam failures - Fiction.

The following DVD Covers report uses this methodology.

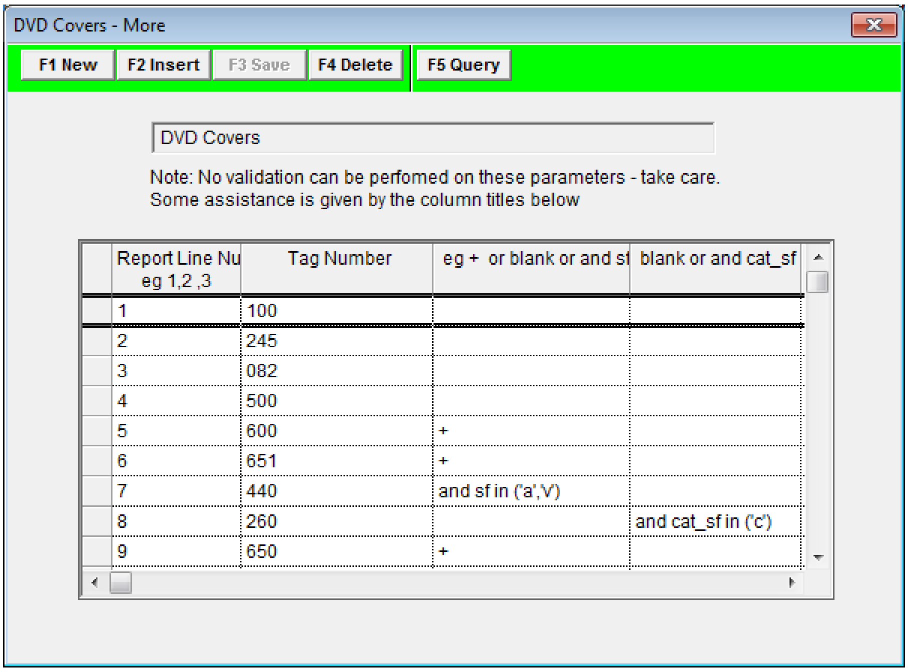
Example 2 – DVD Cover Report:

1. Click the **F10 More** button – the More screen will display
2. Set the More window as follows – the Line numbers correspond to fields inserted on the template
    a) Select the **F1 New** or **F2 Insert** button
    b) Type in field details – the columns are filled in as follows: '
        i. **Report Line Number** = can be any number between **1** and **20**

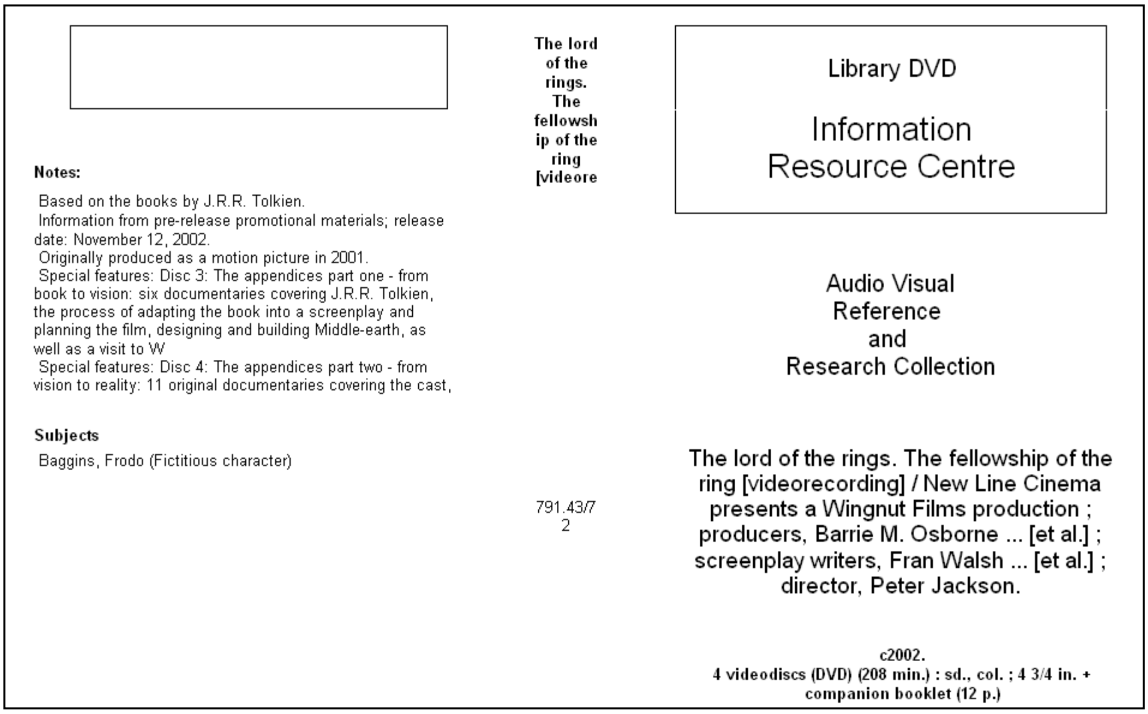
ii. **Tag Number** = MARC Tag field number – for example: **245** (Title)

iii. eg **+** or **blank** or **and sf in ('a', 'b')** =

iv. **blank** or **and cat_sf in ('a', 'b')** =



c) Click the **F3 Save** button when complete



Notes:

Based on the books by J.R.R. Tolkien.
Information from pre-release promotional materials; release date: November 12, 2002.
Originally produced as a motion picture in 2001.
Special features: Disc 3: The appendices part one - from book to vision: six documentaries covering J.R.R. Tolkien, the process of adapting the book into a screenplay and planning the film, designing and building Middle-earth, as well as a visit to W
Special features: Disc 4: The appendices part two - from vision to reality: 11 original documentaries covering the cast,

Subjects

Baggins, Frodo (Fictitious character)

The lord of the rings. The fellowsh ip of the ring [videore

791.43/7 2

Library DVD

Information Resource Centre

Audio Visual Reference and Research Collection

The lord of the rings. The fellowship of the ring [videorecording] / New Line Cinema presents a Wingnut Films production ; producers, Barrie M. Osborne ... [et al.] ; screenplay writers, Fran Walsh ... [et al.] ; director, Peter Jackson.

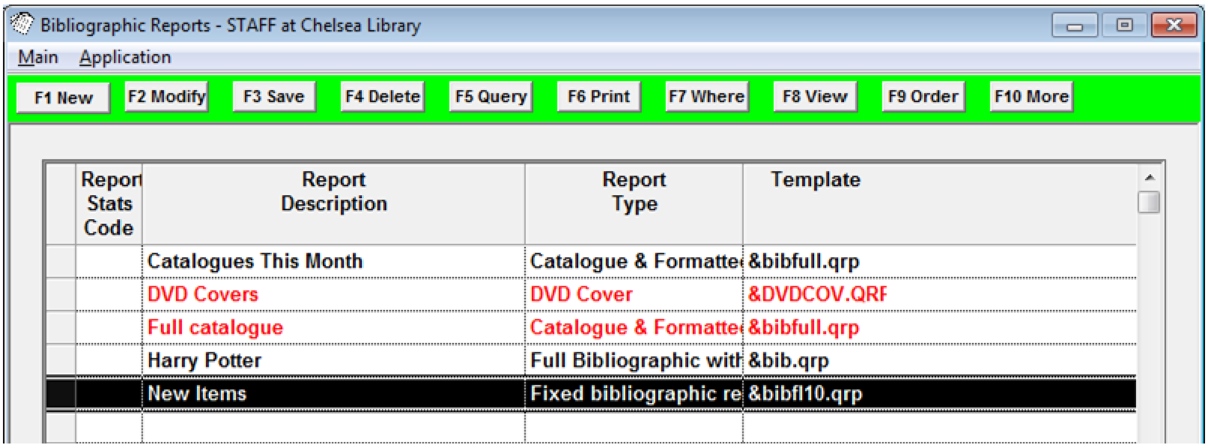
c2002.
4 videodiscs (DVD) (208 min.) : sd., col. ; 4 3/4 in. + companion booklet (12 p.)

Saved Files

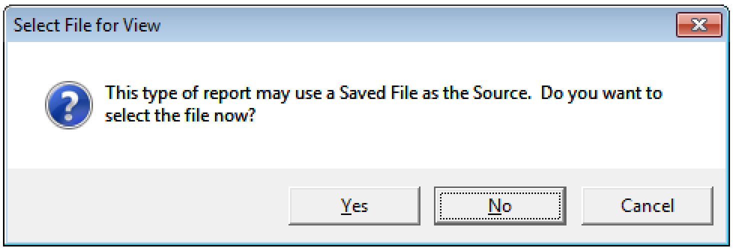
It is possible to use a Saved File for the Report – for example: the DVD Covers or New Items reports.

Please Note: If the report lacks an Auth Key set in the **F7 Where** statement, then the selection of a Saved File becomes mandatory.

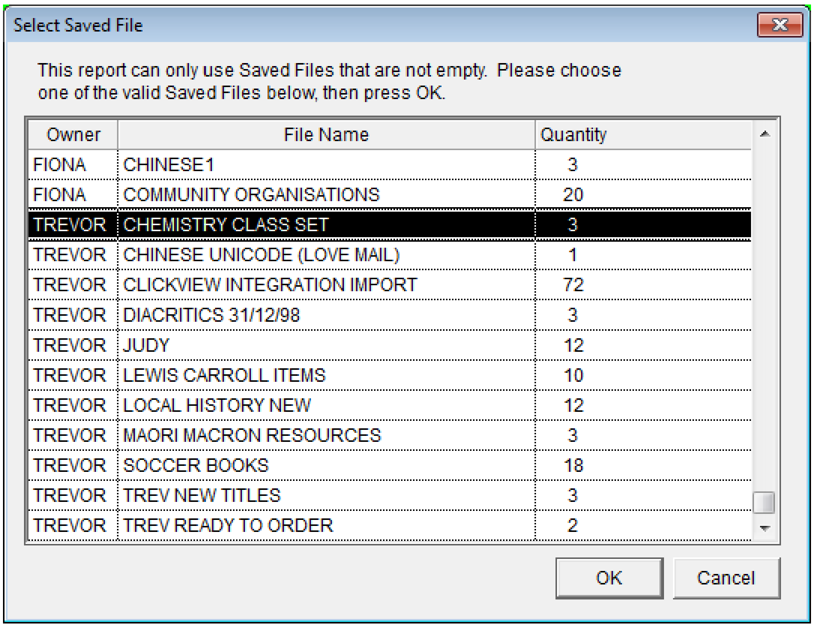
1. Go to **Main** > **Reports** > **RepBibliographic** – the Bibliographic Reports screen will display
2. Highlight the report



3. Click the **F8 View** button
4. If there is an Auth Key defined in the **F7 Where** statement, the following prompt will display: **This type of report may use a Saved Files as the Source. Do you want to select the file now?** – click the **Yes** button



5. A list of Saved Files will display:



Select Saved File

This report can only use Saved Files that are not empty. Please choose one of the valid Saved Files below, then press OK.

Owner	File Name	Quantity
FIONA	CHINESE1	3
FIONA	COMMUNITY ORGANISATIONS	20
TREVOR	CHEMISTRY CLASS SET	3
TREVOR	CHINESE UNICODE (LOVE MAIL)	1
TREVOR	CLICKVIEW INTEGRATION IMPORT	72
TREVOR	DIACRITICS 31/12/98	3
TREVOR	JUDY	12
TREVOR	LEWIS CARROLL ITEMS	10
TREVOR	LOCAL HISTORY NEW	12
TREVOR	MAORI MACRON RESOURCES	3
TREVOR	SOCCER BOOKS	18
TREVOR	TREV NEW TITLES	3
TREVOR	TREV READY TO ORDER	2

OK Cancel

6. Select the Saved File you would like to use and click the **OK** button – the report will display in the Report – View window:

New items

Sijie, Dai.

Balzac and the little Chinese seamstress.

843.92
Two boys are sent for re-education in Mao's China and discover instead the discreet charm of bourgeois literature and the tailor's attractive daughter.
China - History - Cultural Revolution, 1966-1976

Ablow, Keith Russell.

Compulsion.

813.54
Psychological thriller featuring forensic psychiatrist Frank Clevenger.
Forensic psychiatrists - Fiction.
Fugitives from justice - Fiction.
Teenage boys - Fiction.
Twins - Fiction.
Nantucket Island (Mass.)
Mystery fiction
Psychological fiction.

Campsie, Jane.

Energy.

613
Offers advice and practical hands-on solutions to help sustain energy levels through diet, exercise, meditation, breathing exercises and aromatherapy.
Health.
Physical fitness.
Vitality.

Howard, Audrey.

A flower in season.

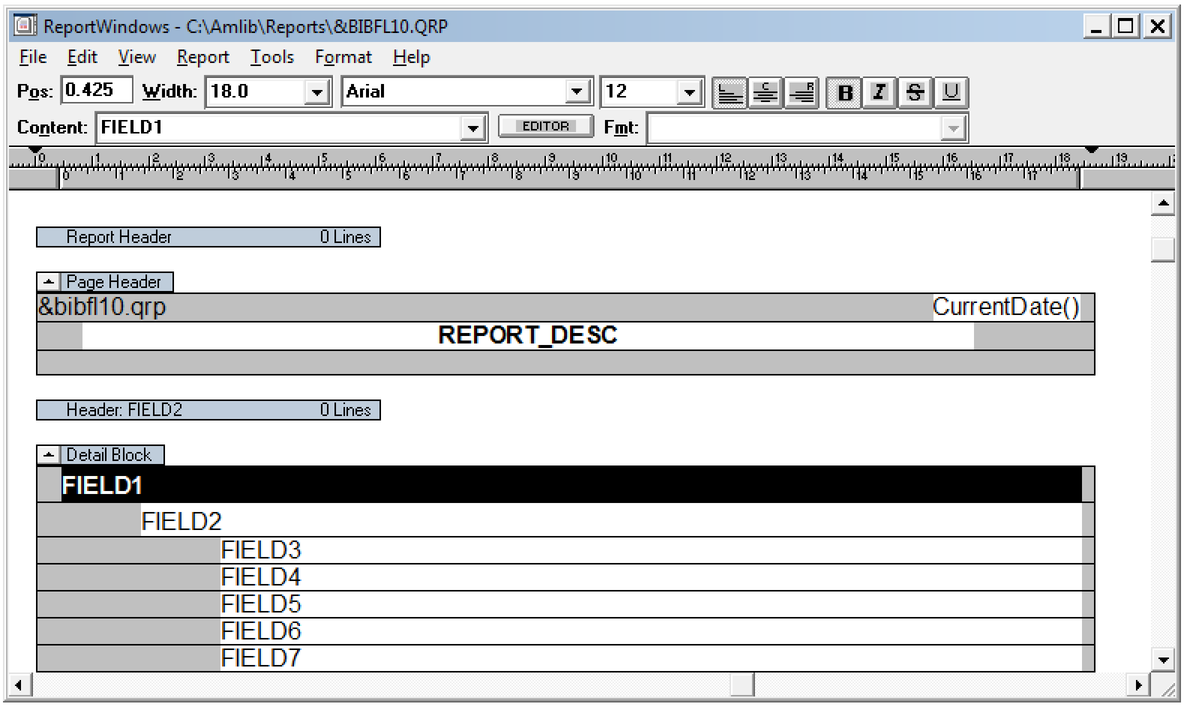
823.914
Country homes - England - Fiction.
Fathers and daughters - England - Fiction.
Lake District (England) - Social life and customs - 20th century
Domestic fiction.
Love stories.

Wilson, B. R. (Barry Robert), 1935-

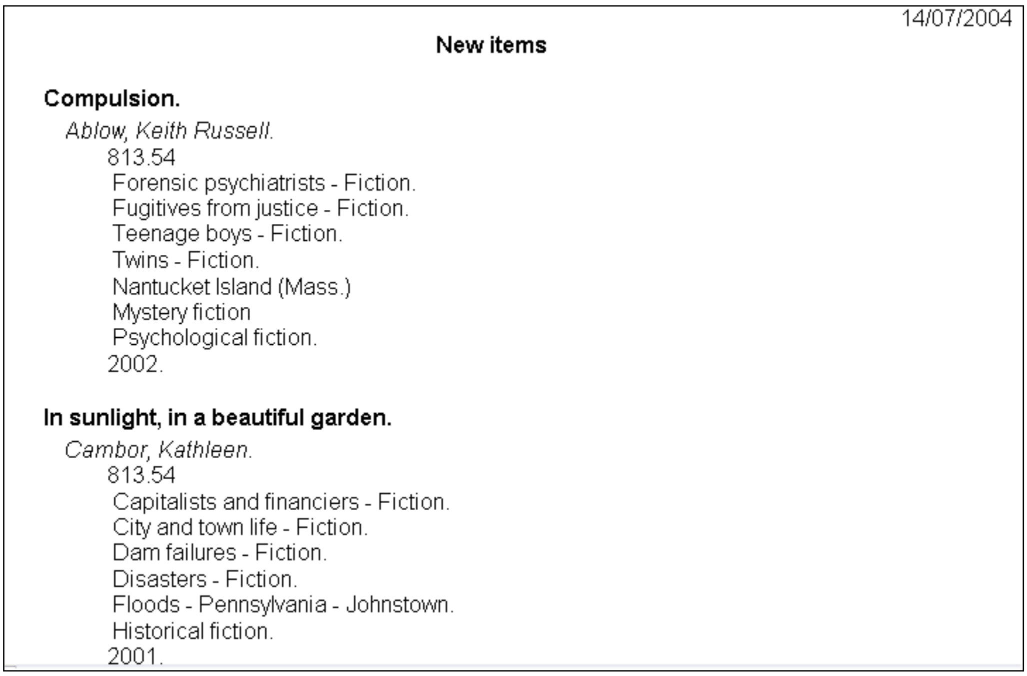
7. Review the report and if it looks okay, send it to print using the **Print** icon

Customising the Fixed Layout Templates

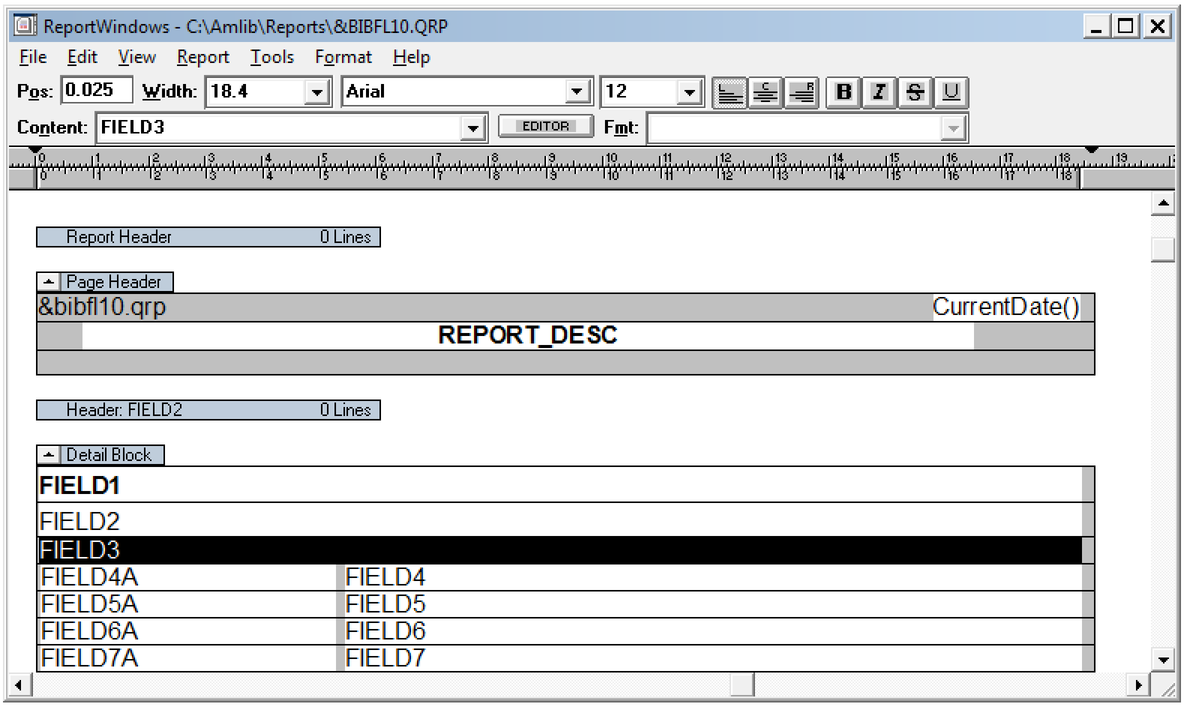
It is possible to alter the Fixed Layout report using the *RepWin* – for example: remove the Descriptors fields, format **Field2** to be *italics* etc. The customised report should then be given a new name to distinguish it from the original – for example: **EBIBFL10.QRP** for an Eldorado Library specialized Report based on the **&BIBFL10.QRP** template.

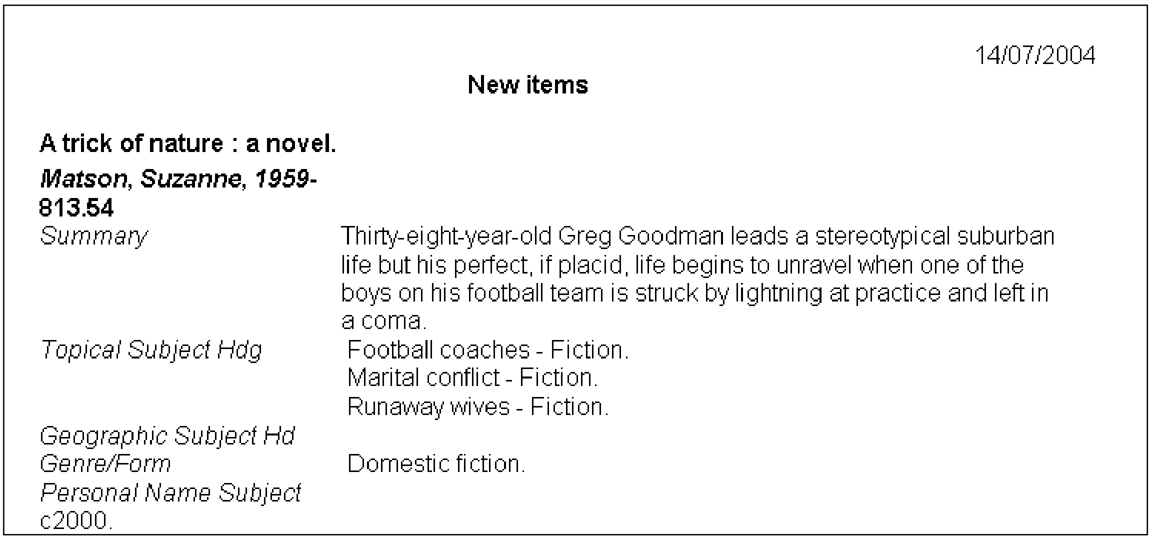


↓



Another alteration could be that the Labels are to be applied to Subjects only:




14/07/2004

New items

A trick of nature : a novel.

Matson, Suzanne, 1959-

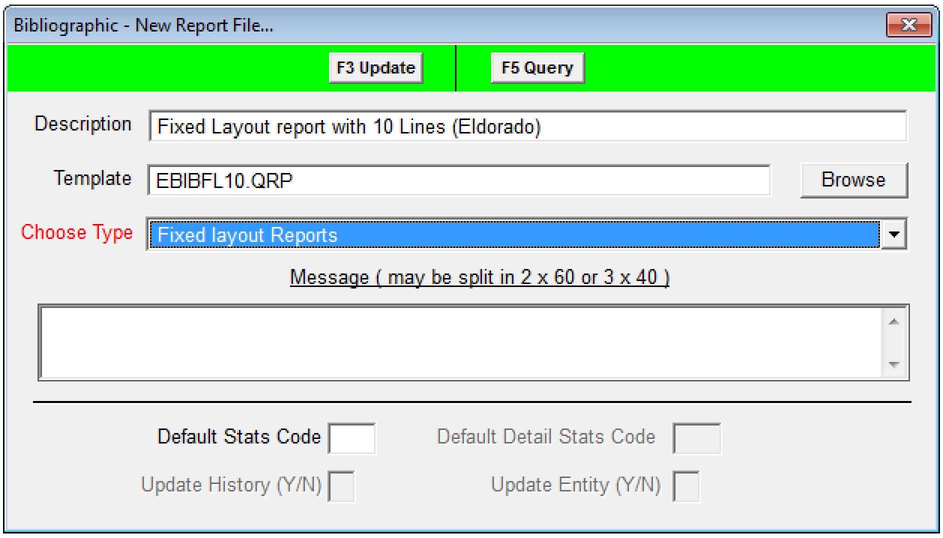
813.54

Summary	Thirty-eight-year-old Greg Goodman leads a stereotypical suburban life but his perfect, if placid, life begins to unravel when one of the boys on his football team is struck by lightning at practice and left in a coma.
Topical Subject Hdg	Football coaches - Fiction. Marital conflict - Fiction. Runaway wives - Fiction.
Geographic Subject Hd	
Genre/Form	Domestic fiction.
Personal Name Subject	

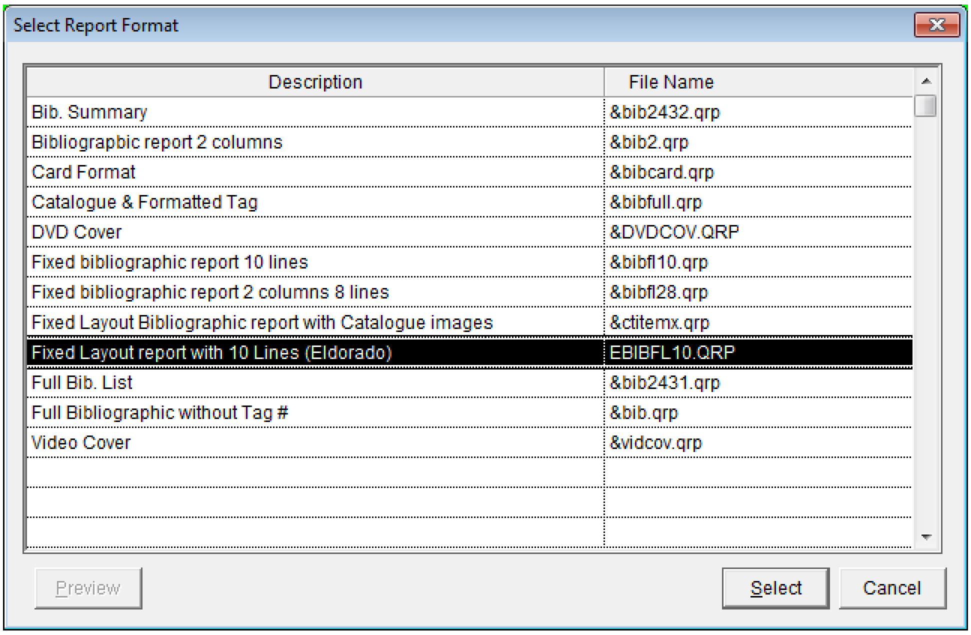
c2000.

HINT: A useful formatting tool in *RepWin* is to highlight Fields that need to be aligned by pressing the Shift Key and clicking on the multiple Fields and the selecting **Format** > **Align Left Sides** from the menu.

Please Note: When loading the customised template via *RepAddNew* ensure that the Choose Type = **Fixed layout Reports**.



This Report will then be available in RepBibliographic:



CIRCULATION REPORTS - ADDING CHARGES USING F10 MORE

The **F10 More** button provides extra parameters to allow you to apply charges when running the reports. These charges will only apply if the **F6 Print** button is used and *RepStartSchedule* is started.

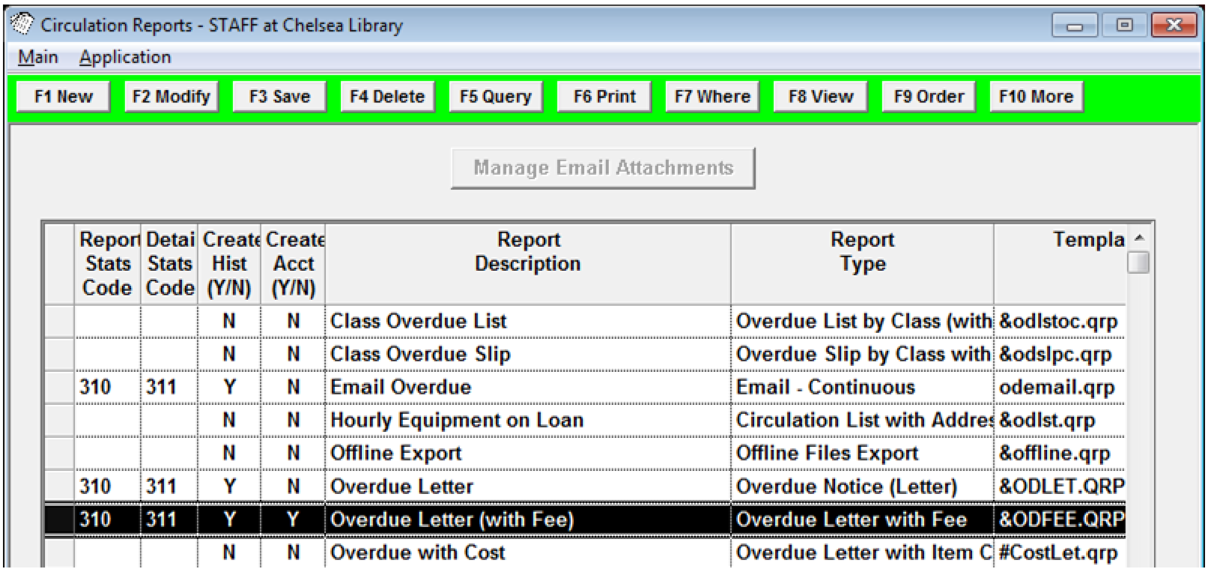
Please Note: User-defined charge types must be added to the Circulation Transaction Types table – see Appendix 1: Add the User-Defined Financial Record and Fees Type Names to the Circulation Transactions Types (RepCirculation and RepReservations Only) for more information.

	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5
HEADING	Report Line Number	Line 1 account history NAME	Line 1 overdue history NAME	Line 1 Financial record NAME	Line 1 Fees type name
EXAMPLE	**1**	**OVFINACC**	**OVDFINAL**	**OVDUEACC**	**OVDUEFEE**
COMMENT	Line 1 is used for History and Financial reporting purposes	If left blank, the system will put a Report Type of **ACCOUNT** in the Borrower History window if **Create Hist (Y/N) = Y** and **Create Acc (Y/N) = Y** and the report run via the *Scheduler*. It is possible to specify your own name – see example (max: 8 chars). Can use to specify 1st, 2nd, etc overdue – for example: **OVDUE1,OVDUE2**	If left blank, the system will put a Report Type of **OVERDUE** in the Borrower History window if **Create Hist (Y/N) = Y** and **Create Acc (Y/N) = N** and the report run via the *Scheduler*. It is possible to specify your own name – see example (max: 8 chars). Can use to specify 1st, 2nd, etc overdue – for example: **OVDUE1,OVDUE2**	If left blank, the system will put a Financial Type of **OVERDUE** in the Borrower Financial window indicating the (replacement) Cost for overdue items if **Create Acc (Y/N) = Y** and the report run via the *Scheduler*. It is possible to specify your own name – see example (max: 8 chars).	If left blank, the system will put a Financial Type of **FEE** in the Borrower Financial window for reports that have a **FORM_CHARGES** field in the report if **Create Acc (Y/N) = Y** and the report run via the *Scheduler*. It is possible to specify your own name – see example (max: 8 chars).
HEADING	Report Line Number	Line 2 Fee per Item $.c	Line 2 Fee per Notice $.c	Line 2 Fee Print Line	Line 2 not Used
EXAMPLE	**2**	**2.00**	**5.00**	**Includes fees of:**	<Leave blank>
COMMENT	Line 2 is used to add Fees to Reports	Enter amount to be charged for each overdue item [Optional] Amount will be added to the **FORM_ CHARGES** field in the Report	Enter amount to be charged per notice (in addition to any item fee) [Optional] Amount will be added to the **FORM_ CHARGES** field in the Report	Text will be added to the **USER_LINE1** field in the Report [Optional]	

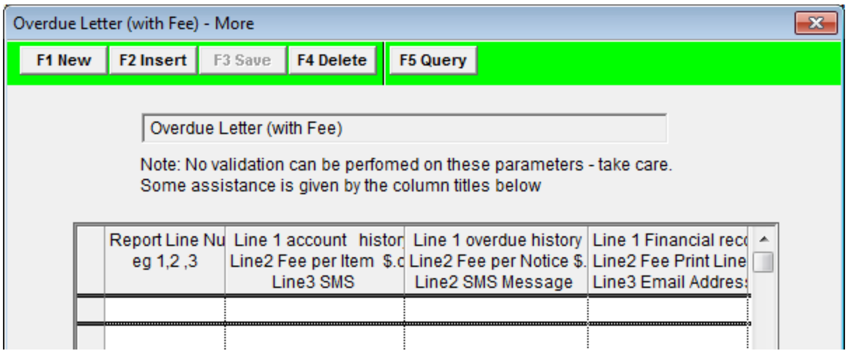
Create a Report

1. Launch the *Amlib* client

2. Go to **Main** > **Reports** > **RepCirculation** – the Circulation Reports screen will display:



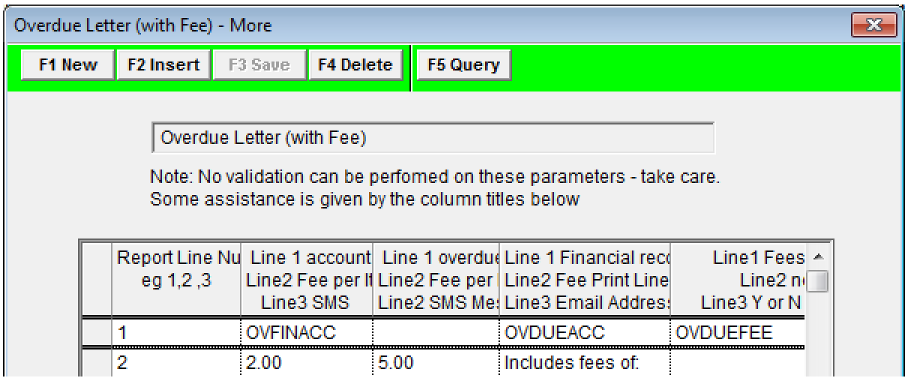
3. Ensure the Create Acct (Y/N) column = **Y**
4. Highlight the report to which you wish to add charges – for example: **Overdue Letter (with Fee)**
5. Click on the **F10 More** button – the More screen will display:



6. Click the **F1 New** or **F2 Insert** button
7. Click the **F10 More** button – the More screen will open
8. Click the **F1 New** or **F2 Insert** button
9. Enter the following parameters – for example:
   - Report Line Number = **1**
   - Line 1 account history NAME = **OVFINACC**
   - Line 1 Financial record NAME = **OVDUEACC**
   - Line 1 Fees type name = **OVDUEFEE**

It is also possible to apply charges at this stage on a per item/notice basis:

10. Click the **F1 New** or **F2 Insert** button
11. Enter the following parameters – for example:
    - Report Line Number = **2**
    - Line 2 Fee per Item = **2.00**
    - Line 2 Fee per Notice = **5.00**
    - Line 2 Fee Print Line = **Includes fees of:**
12. Click the **F3 Save** button when complete

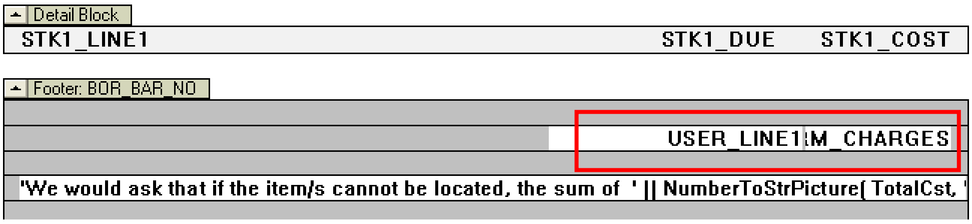


The above parameters will charge an overdue fee of **$2.00** per item + a **$5.00** per notice (admin) fee.

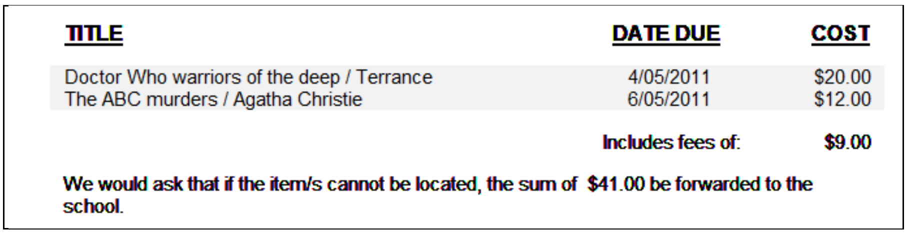
Customising the Template to Include Charges

Please Note: The report template must be altered to include the following fields: **FORM_CHARGES** and **USER_LINE1**.

- The new **&ODFEE.QRP** template includes **FORM_CHARGES** and **USER_LINE1**.

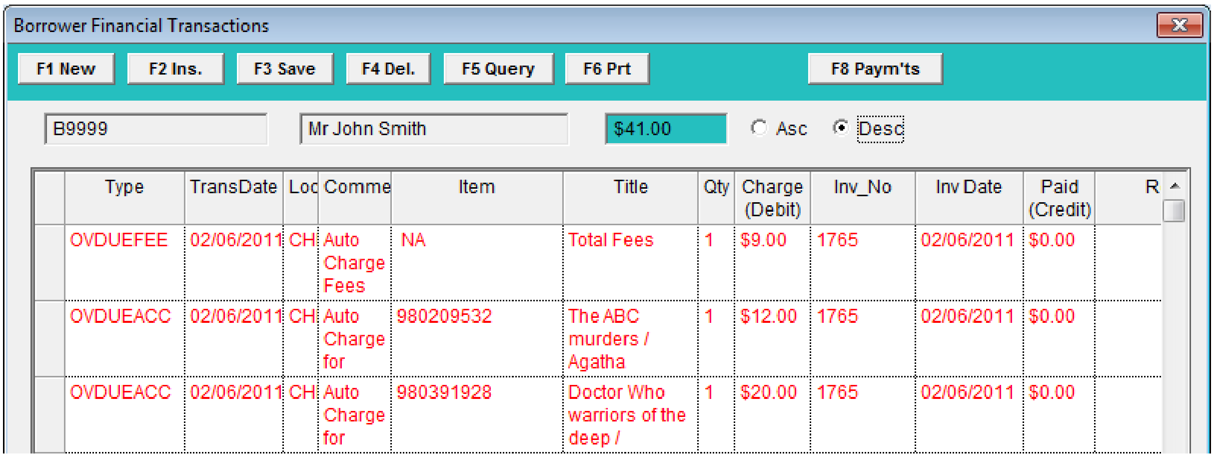


The **FORM_CHARGES** field can be added to the total charge [Field = **FORM_CHARGES**] or included as part of a **TotalCst**. You can also include the field **USER_LINE1** which will include the text you entered in the **F10 More** statement.

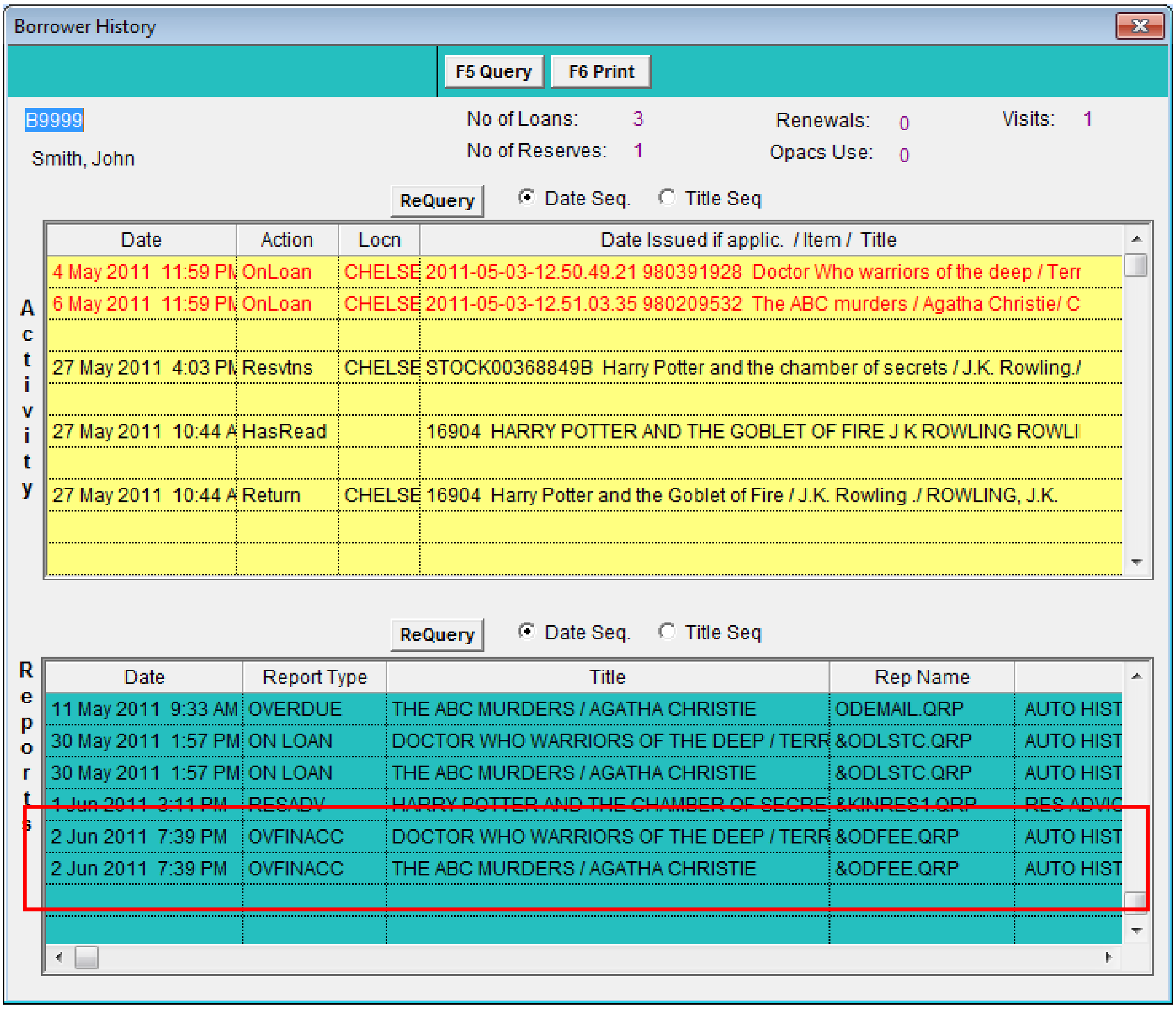


Borrower Record

After running the report with **F6 Print** and *RepStartSchedule*, a financial record will be written to the Borrower Financial Transactions screen using the parameters set up in **F10 More**:



If the report also has Create Hist (Y/N) = **Y** then a history record will also be written t o the Borrower History screen using the parameters set up in **F10 More**:



E-MAIL REPORTS

Several Reports can now be used via Email. See some examples at the end of this document.

Email Templates

Borrower Reports (RepBorrower)

- Send letter via Email: **&N1ADDEM.QRP**
- Send interest lists via Email: **&BORINT.QRP**

Circulation Reports (RepCirculation)

- Send reminders via Email: **&ODEMAIL.QRP**

ILLs Reports (RepILLS)

- ILL Email Reminder: **&ILLEREM.QRP**
- ILL Email Reminder – All Suppliers: **&ILLERMS.QRP**
- ILL Email Request: **&ILLEREQ.QRP**
- ILL Email Request – All Suppliers: **&ILLERQS.QRP**

Orders Reports (RepOrders)

- Email Order GST: **&OREGST.QRP**
- Email Order including Tax: **&OSEMAIL.QRP**
- Order Status Notice via Email: **&ORSIE.QRP**
- Order Returns Notice via Email: **&ORSIER.QRP**
- Cancellation Notice via Email: **&ORSIECL.QRP**
- Claims Notice via Email: **&ORSIECL.QRP**

Periodical Reports (RepPeriodicals)

- Claims Notice via Email: **&PICLE.QRP**

Reservation & Bookings Reports (RepReservation)

- Email notification of Reserve: **&RESEML.QRP**
- Email notification of Booking: **&BKGEML.QRP**

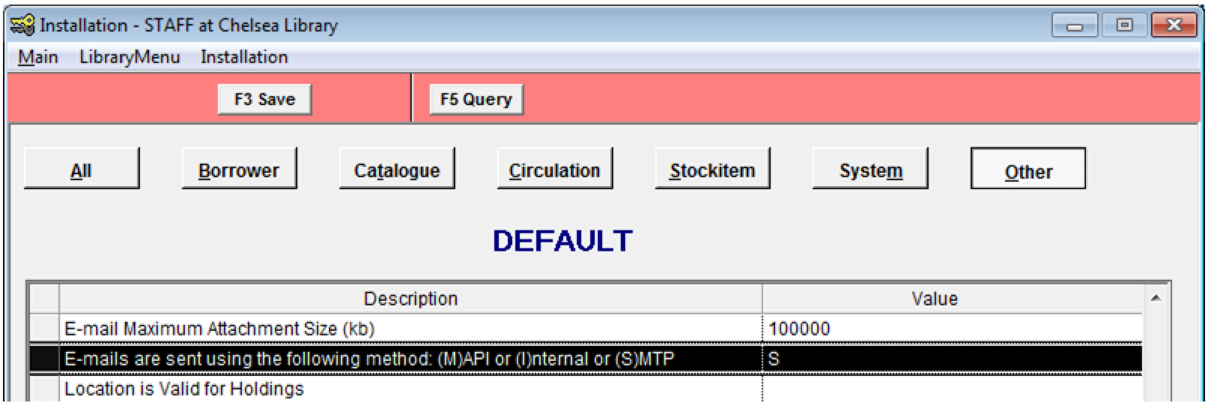
Setting Up

Supervisor Parameters

To begin, some settings need to be set in the Supervisor module (this need only be done once):

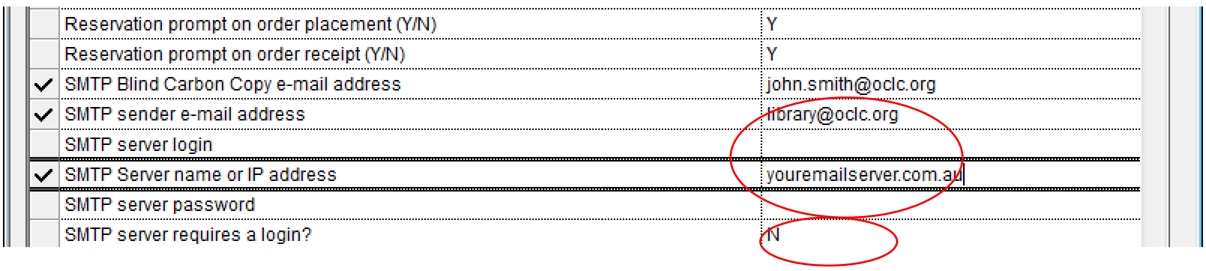
1. Launch the *Amlib* client
2. Go to **Main** > **Supervisor** > **Installation** – the Installation (DEFAULT)screen will display
3. Select the **Other** tab
4. Scroll down set the following: **E-mails are sent using the following method: (M)API or (I)nternal or (S)MTP**. Set to **S**, **I** or **M**

   Generally (**S**) SMTP is recommended, especially as it is simple and it has advantages over the others. It also means that the email client does not need to be open on the PC running the notices and allows greater flexibility with regard to setting up "from" and BCC/CC parameters.



Then the following parameters should also be set (a full table is included below):

- **SMTP Blind Carbon Copy e-mail address**: you can specify the BCC address to send a copy of all notices (so that you can verify that they have been sent)
- **SMTP sender e-mail address**: the email address to display on the notice sent to the borrower (For example: library@oclc.org, it can be the same as the BCC address)
- **SMTP Server name**: the address of the SMTP mail server being used. This might be a server address or an IP address



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

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

The complete set of parameters to consider:

Description	Explanation	Example
Emails are sent using the following methods (M)API, (I)nternal or SMTP	Generally (**S**) SMTP is recommended, especially if the organisation is not using a Microsoft Exchange Server. It also means that the email client does not need to be open on the PC running the notices AND can display the “from” name from one of the parameters below rather than the email address from the email client.	Set to **S**, **I** or **M**
SMTP Blind Copy e-mail address	**Optional**: If using the SMTP for emails. Enter only if copies of the email are to sent to a chosen email address – for example: Testing purposes	**library@amlib.com**
SMTP sender e-mail address	**Optional**: If using the SMTP for emails, enter the Address you wish to indicate as the sender	**enquiries@amlib.com.au**
SMTP server login	**Optional**: From your Systems Administrator if required	
SMTP Server name or IP address	If using the SMTP for emails, enter the **Server Name** or **IP Address** of the Server installed with the e-mail communication protocol, responsible for receiving and forwarding email messages	ServerName – for example: **server.amlib.com.au**
SMTP server password	**Optional**: From your systems administrator if required	
SMTP server requires a login?	If **Y**, supply a SMTP server logon and password If **N**, leave SMTP server logon and password blank	**Y/N**

The above tasks create **Sender** and **BCC** for **ALL** emails generated by the system. However, it is possible to set up separate SMTP parameters (Sender and CC) for individual locations, modules and reports.

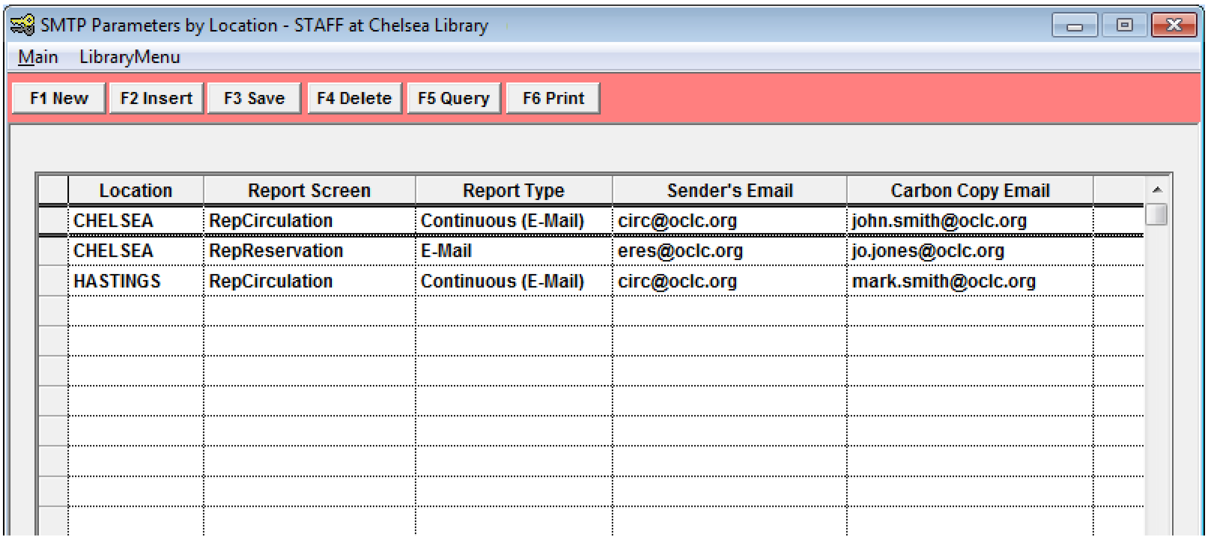
Setup Individual Email Systems by Location

1. In any Installation screen module, select **Installation** > **Choose Location** and choose a **Location**
2. Repeats steps 2-5 above. If you would like to use the DEFAULT settings, then the relevant fields for each location should be left **blank**
3. Once complete, you must exit and restart the *Amlib* client to allow the settings to take effect

Setup Individual Email Locations, Modules and Reports

We recommend leaving the email set-up for particular locations until after initial testing has been completed. Once the initial testing has been done, then:

1. In any Supervisor module, select **Library Menu** > **LocRepSMTP** – the SMTP Parameters by Location table will display
2. Select the **F1 New** or **F2 Insert** button
3. Using the drop-down boxes available in each column, select the Location, Report Screen, and Report Type
4. Then type in the individual Sender's Email and Carbon Copy Email addresses
5. Click the **F3 Save** button when complete
6. Exit and restart the *Amlib* client to allow the settings to take effect

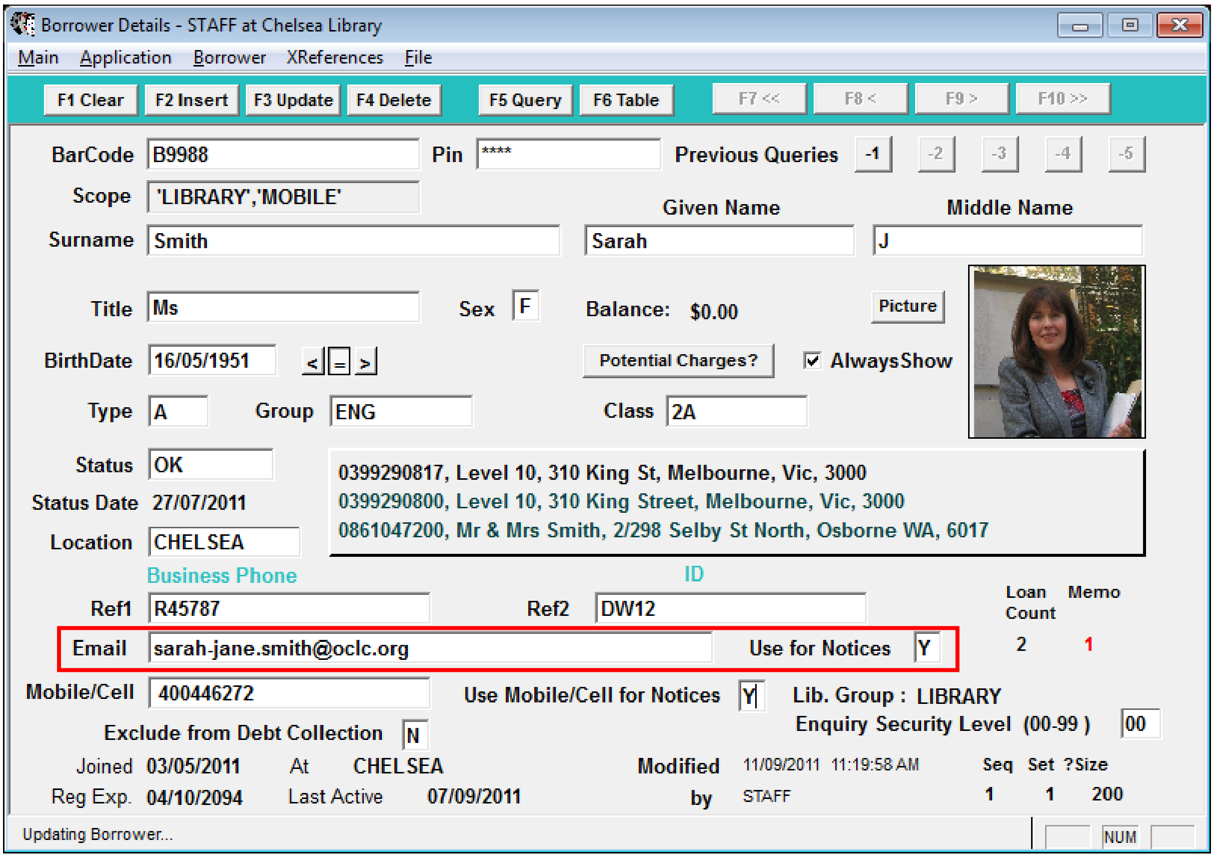


Location	Report Screen	Report Type	Sender's Email	Carbon Copy Email
CHELSEA	RepCirculation	Continuous (E-Mail)	circ@oclc.org	john.smith@oclc.org
CHELSEA	RepReservation	E-Mail	eres@oclc.org	jo.jones@oclc.org
HASTINGS	RepCirculation	Continuous (E-Mail)	circ@oclc.org	mark.smith@oclc.org

Please Note: It is not possible to alter a pre-existing entry in the SMTP Parameters by Location table – entries must be deleted (using **F4 Delete**) and then re-entered.

Borrower Settings

For borrowers to receive their overdue notices via email, the borrower record will need to have the following:



- Email address – for example:**sarah-jane.smith@oclc.org**
- Use for Notices = **Y** (for **Yes**)

Customising the Report

Edit the Template

The email report templates can be customised using *Report Writer* (**RepWin30.exe**) – a copy of which can be found in the **Amlib/Utility** folder on your *Amlib* server (see separate installation instructions). It is also possible for Amlib Support staff to modify an existing report if necessary.

Start off with an existing System Report (for example: **&ODEMAIL.QRP**) and adjust the wording as required – see separate Editing Text in Reports procedure. Be sure to save this customised report with a new name (without the **&** at the front).

- **Please Note:** Do not add logos and keep the layout simple for emails.

```
To:   TIM F CHAPTER
Borrower No:  +60011352302

             LIBRARY OVERDUE REMINDER NOTICE

The following items are overdue.  Please return them by 29/06/2000
or you will incur a fine.

Title                                   Call No          Date Due
-----                                   -------          --------
Dead man's walk : a novel.              F MCM           12/05/2000
Madeline at cooking school Madeline a   JK MAD          05/04/2000

To respond to the notice you may:
    * Return these items to any branch library
    * Phone and and renew unreserved items

Yours sincerely,

Library Manager.
```

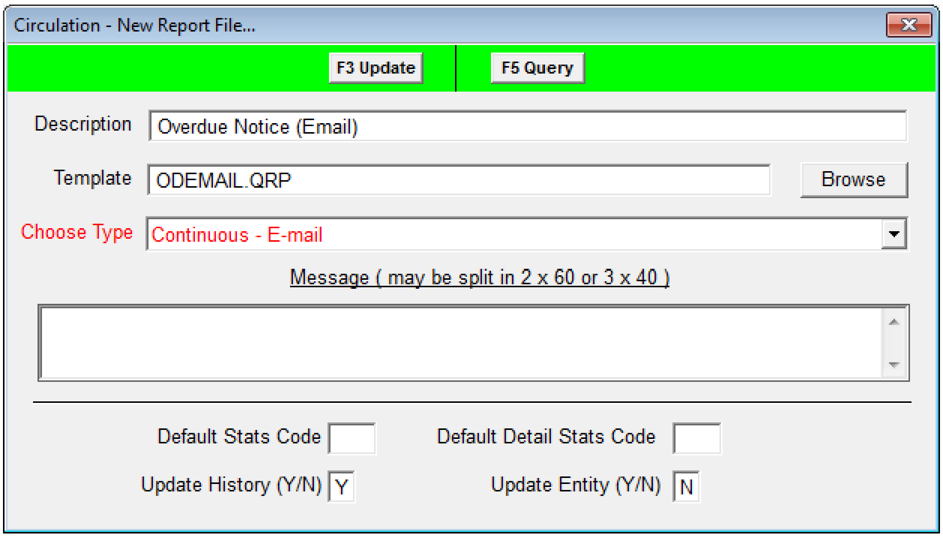
Save the Template

- Save the template into the **Amlib/Reports** folder on the *Amlib* server. This will make the template available for use to all users. Alternatively, you may save it into a local folder on your PC – but please be aware, that the template (once loaded) will only be available for use on that PC.
- Ensure that the template is saved with a name that clearly identifies it as a customised email template– for example: **BRODEMAIL.QRP**

Load the Template

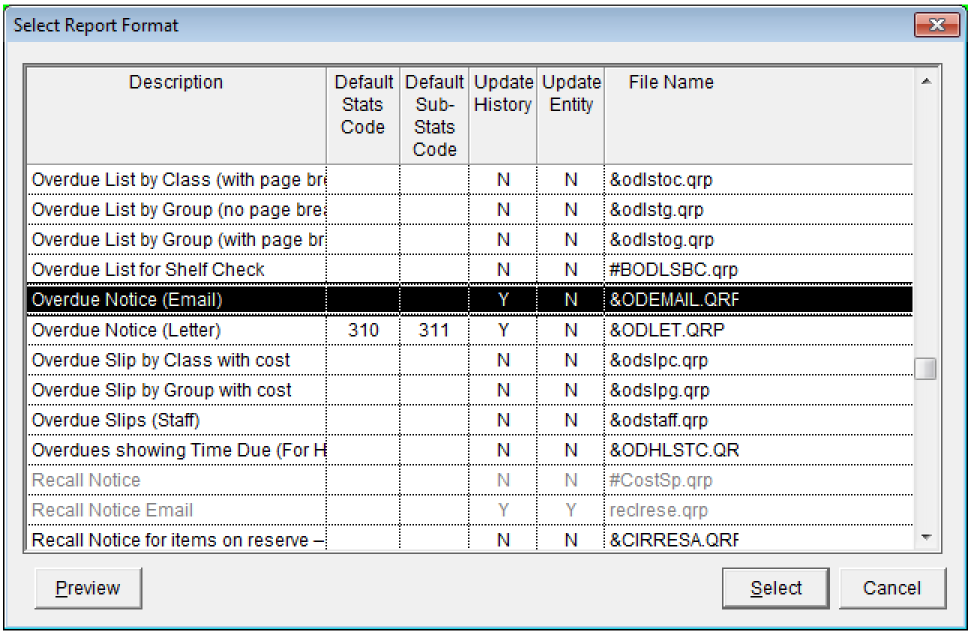
1. Go to **Main** > **Reports** > **RepAddNew** – the Report Files window will display
2. From the Report Entity drop-down, select the Report Screen (module) you would like to load a template for – for example: **Circulation**
3. Click the **F1 New** button – the New Report File... screen will display
4. Type in a Description – for example: **Overdue Notice (Email)**
5. Browse to the **Amlib/Reports** folder on your *Amlib* Server and locate the template to be loaded (if the template has been loaded onto your PC – then navigate to the local folder)
6. Click on the **Open** button
7. **Choose Type** – ensure you select the relevant email type – for example: **Continuous - E-mail**
8. You can leave Default Stats Code blank
9. Update History (Y/N) = **Y**
10. Update Entity (Y/N) = **N**
11. Click the **F3 Update** button
12. Close out of the Report Files screen

The template is now loaded and available for use in a Report.



Creating the Report

1. Go to a Reports screen – for example: **Main** > **Reports** > **RepCirculation**
2. Click the **F1 New** button – the Select Report Format screen will display:

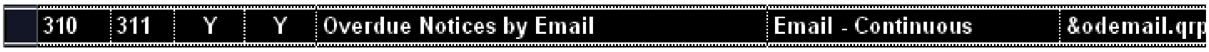


Select Report Format

Description	Default Stats Code	Default Sub-Stats Code	Update History	Update Entity	File Name
Overdue List by Class (with page br			N	N	&odlstoc.qrp
Overdue List by Group (no page bre			N	N	&odlstg.qrp
Overdue List by Group (with page br			N	N	&odlstog.qrp
Overdue List for Shelf Check			N	N	#BODLSBC.qrp
Overdue Notice (Email)			Y	N	&ODEMAIL.QRF
Overdue Notice (Letter)	310	311	Y	N	&ODLET.QRP
Overdue Slip by Class with cost			N	N	&odslpc.qrp
Overdue Slip by Group with cost			N	N	&odslpg.qrp
Overdue Slips (Staff)			N	N	&odstaff.qrp
Overdues showing Time Due (For H			N	N	&ODHLSTC.QR
Recall Notice			N	N	#CostSp.qrp
Recall Notice Email			Y	Y	reclrese.qrp
Recall Notice for items on reserve –			N	N	&CIRRESA.QRF

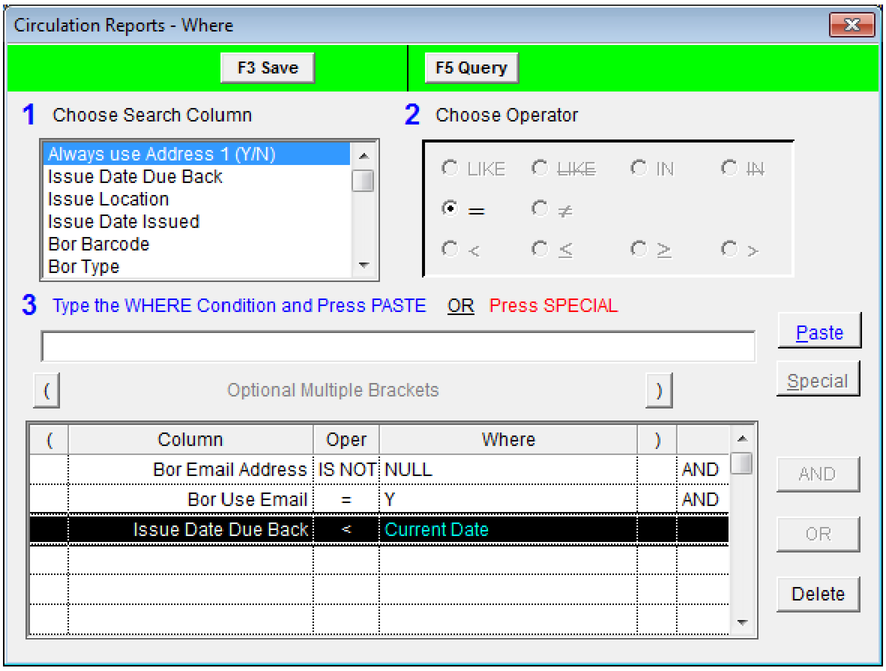
Preview Select Cancel

3. Highlight an email template (for example: Overdue Notice (Email) using the **&ODEMAIL.QRP** print template) and click the **Select** button
4. Type in a Report Description – for example: **Overdue Notices by Email**
5. If you would like the borrower record to retain a record of any notice sent, then ensure that Create Hist (Y/N) = **Y**
6. If there are replacement costs involved, ensure that the Create Acct (Y/N) = **Y**
7. Click the **F3 Save** button



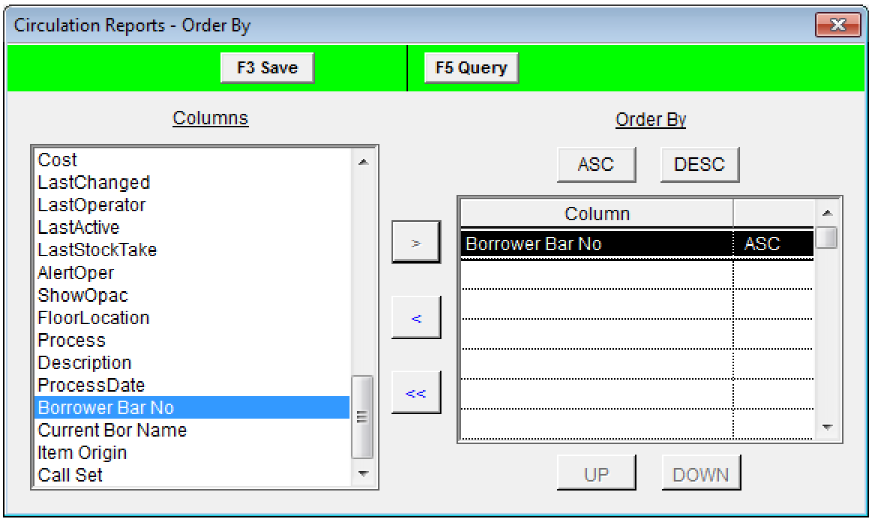
Where Statement

1. Select the report from the list and click on the **F7 Where** button
2. The statement **must** include the following settings:
   - **Bor Email Address IS NOT NULL** (Paste without placing a value in 3)
   - **Bor Use Email** = **Y**
   - Additional parameters can then be added
3. Click the **F3 Save** button



Order

1. Select the report from the list and click on the **F9 Order** button
2. Use the arrow keys to select fields to Order By – for example: **Borrower Bar No**
3. Click the **F3 Save** button when complete



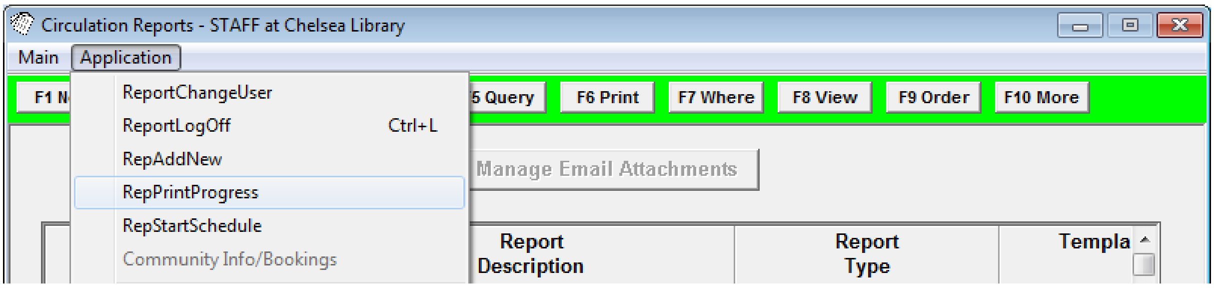
Printing the Emails

Using the *Scheduler* has two benefits over running reports via **F8 View**: It allows you to schedule regularly run reports so that staff do not have to do it manually each time, and it allows for further functions as part of the report such as updating Borrower/Stockitem history, creating financial accounts, changing records in the database and adding report information to your statistics. **Email reports MUST be run via the Scheduler.**

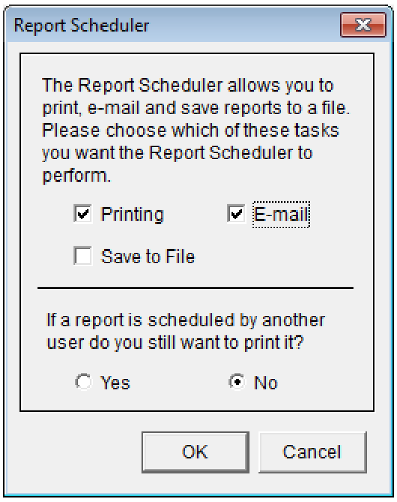
This section will take you through setting up a report to use *RepStartSchedule*.

Start the Scheduler

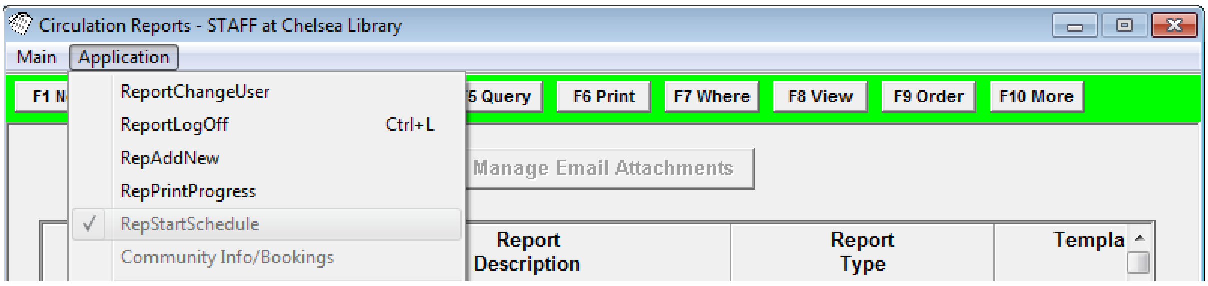
1. From the Report screen (**Main** > **Reports** > **RepCirculation** or **RepReservation**), select **Application** > **RepStartSchedule**



2. The Report Scheduler screen will display:



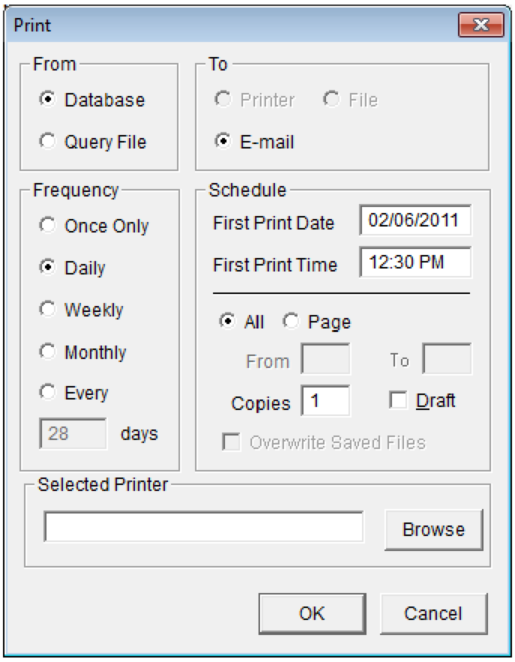
3. Select your printing options: Ensure **Email** is ticked
4. Also decide If a report is scheduled by another user do you still want to print it? = **Yes/No**
5. Then click the **OK** button
6. After selecting "**OK**", if you go back into the **Application** menu you will see that *RepStartSchedule* is now ***greyed*** out with a tick next to it – this indicates that the Scheduler is now running



Please Note: If you need to restart the scheduler at any point, you will need to log out of all Report screens (**Ctrl + L**) and start at the beginning of these instructions.

Scheduling the Report

1. With your report highlighted, click the **F6 Print** button – the Print box will display:



2. Select from the following options:
   a. From:
      - **Database** (to search the entire database)
   b. To:
      - **E-mail** (to email it to patrons – this option will only display if the report has been created from an appropriately loaded template)
   c. Frequency:
      - Once Only (if this is the only time you're going to print this report)
      - Daily (if you plan to send it every day)
      - Weekly (if this is a once a week item)
      - Monthly (if this is to be printed every calendar month)

- Every ___ days (if you want to set a specific schedule

d. Schedule:

- **First Print Date** (the day you want this report to begin its schedule)
- **First Print Time** (specifies the exact minutes the report will run)

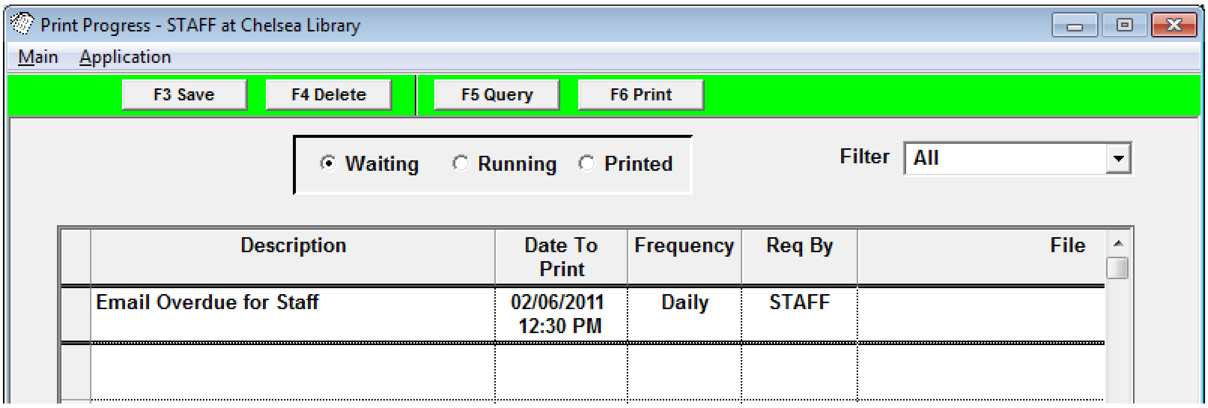
e. Selected Printer:

- You can specify any active printer on the network to print to – including virtual printer drivers such as a third party software that allows you to print to PDF (For example: **CutePDF Writer**)

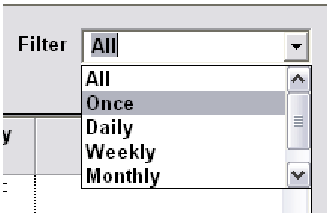
3. Once you have selected all of your settings, click the **OK** button

Check Print Progress

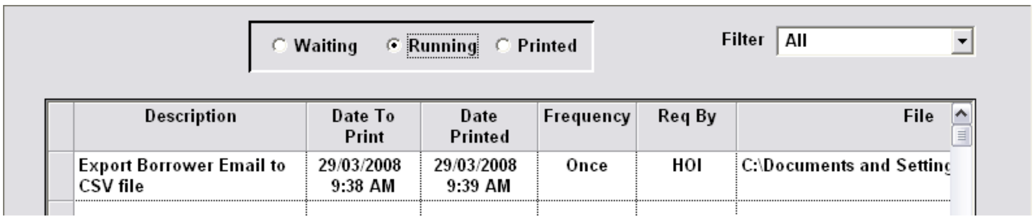
1. You can check the progress of your reports at any time by going into **Main** > **Reports** > **RepPrintProgress** – the Print Progress screen will display:



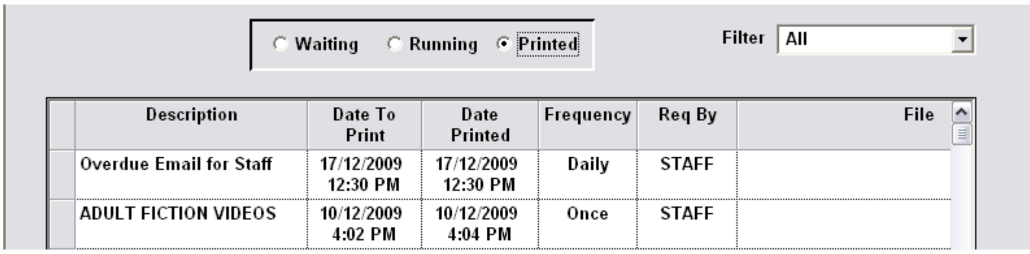
2. If your library uses the scheduler for a lot of reports, you can select a frequency type from the Filter drop down menu at the top:



3. You can also click through the three tab options at the top to see the ones that are **Waiting**, **Running**, or have already been **Printed**:



4. Your report will show up in the Printed tab when it is complete:



Email Address Validation Rules

When email reports are being sent a certain amount of validation is going on. Email addresses are rejected if illegal characters are found.

If the email address is invalid and if the barcode of the patron can be found by the process, the Borrower ID is written to a saved Borrower File, which can be checked later.

If the barcode of the patron cannot be found, no file can be created but an error message is written to the **amdberror.log** in the **Amlib** folder.

If the SMTP protocol is being used then any errors encountered will be logged. Neither MAPI nor the internal method support error reporting in an accessible way.

1. Must be at least 5 characters long. Shortest theoretical address is a@b.c
2. Must contain an "@"
3. Must have one or more characters before the "@"
4. Must contain a "."
5. No more than 4 characters after the last "."
6. No "_" after the "@"
7. Only one "@"
8. No invalid chars – the following ranges are invalid:

    - Less than ASCII 48 (except 45 and 46)
    - ASCII 57 to 65 (except 64)
    - ASCII 90 to ASCII 97 (except 95)
    - ASCII > 122

    Please Note: 45 = "-", 46 = ".", 64 = "@" and 95 = "_"

The formatting of the email is checked against these rules, but the address may it still be invalid.

Troubleshooting

Some users may experience some initial problems with SMTP emails not being sent. This can be the result of your anti-virus agent blocking programs that relay (mass) email or your mail server blocking relay (mass) emails.

- There is now a complete Setting-Up Email and Troubleshooting Guide

Examples

Borrower Subject interests report via email (&BORINEM.QRP)

Emails the items included for the Interests set in **Borrower** > **XReferences** > Subject **Interests**. The Borrower email address and Use for Email details need to be entered in the Borrower window. Where parameters can include a Borrower Type (for example: **T** for Teachers) and Received Date (for example: **> Current Date – 1 month**)

```
Interest by email                                         15/07/2004

To:       Judy Still
From:     <your library name>

The items listed below have recently been added to our collection.

Regards

Library Staff

 HEADING:-   Chocolate.

    Form:           BK
    Title:          A gourmet's book of chocolate / Lesley Mackley
                    & Carole Handslip.
    Author:         Mackley, Lesley.
    Shelf Ref:      641.3374 MAC
```

Letters (&1NADDEM.QRP)

It is possible to change the text of the letter and send it out to selected borrowers. It could be useful for advertising promotions, notifying staff, welcoming letter, confirming opening times etc.

1. To change the text of the letter click on the **Text for Letter** button
2. A dialogue box will display where the text of the note or letter can be typed
3. Select the **F3 Save** button when complete

- **Note:** The **F5 Query** button can be selected to return the screen to the display at the last save. Therefore any changes made after the last save will not be retained.

The template for this email report has to be set to use the Type of Name & Address x 1 across Email.

```
To:      Mr and Mrs C Cherve                             7/07/2004
From:    Library Staff

The Author George Pederson will be visiting our Library during
Bookweek. Please ensure you contact the Library by July 1st if you
are thinking of joining this session.
Kind regards
Gaye
```

Inter-Library Loans

It is possible to email inter-library loan reminders via email. The External Libraries table (select **Application** > **StockExternalLibs**) in the Stockitems module would need to be updated with the email addresses.

To: **Subiaco Public Library** **19/07/2004**
From: **EASTVILLE**

Attn: **Inter-Library-Loans Officer**

Will you please supply the following item(s) requested by our readers?

Thank you for your assistance.

B. Smith (Librarian)

Author / Cost	Title / Class	Bib / ISBN
SMITH, WILBUR	MONSOON F SMI	

Email Order with GST defined (&OSEGST.QRP)

A number of reports may be produced regarding order status. Email of Orders is now possible.

```
LIBRARY SERVICE - ELECTRONIC PURCHASE ORDER
Address:                     Telephone:

Order To:  Angus & Robertson                              Order No:    11
           Perth 6000                                     Order Date:  1/08/2002
E-mail:    subs@Angus&Robertson.com.au
Notes:

Ln   Title/Author (Description)          ISBN        Qty  Unit Cost     GST   Total Cost
     -------------------------           ----        ---  ---------   ------  ----------
1    Young World                                     1       $24.50    $2.45      $26.95
2    Young Animals set                               1      $904.55   $90.45     $995.00
                                                                              ===========
                                                                               $1,021.95
```

Email Reservations

- File Name = **&RESEML.QRP**
- Report Entity = **Reservations**
- Report Type = **- Email**
- Update Entity (Y/N) = **Y**

Reservation statuses assist in Reports. When an item with reservations on it is returned, the reservation for the first item in the queue changes to a status of **RETURN**.

Reservation reports can be run with the Update column set to Y, which when used in relation with the **F6 Print** button updates the status to **PRINTED**.

This ensures that the next batch of Reservation reports are only sent to those people where the item is newly **RETURN**ed. For those items that are on the Shelf when reserved, it would be wise to use the RESGET memos (set in **Supervisor** > **Locations** > **Borrower Barcode for Memos**) to alert staff to get them the reserved items from the Shelves and wand them through Returns. Alternatively, a pick list may also be run in the Reservations report screen.

```
To:  TIM F CHAPTER
Borrower No:  +60011352302                          07-09-00

              LIBRARY RESERVATION COLLECTION NOTICE

    The following item/s were reserved by you are being held for
    you at the Library.

  Beating the distance /                                Form:BK
  Chase, Diana.                          Please collect by: 14-Sep-2000
```

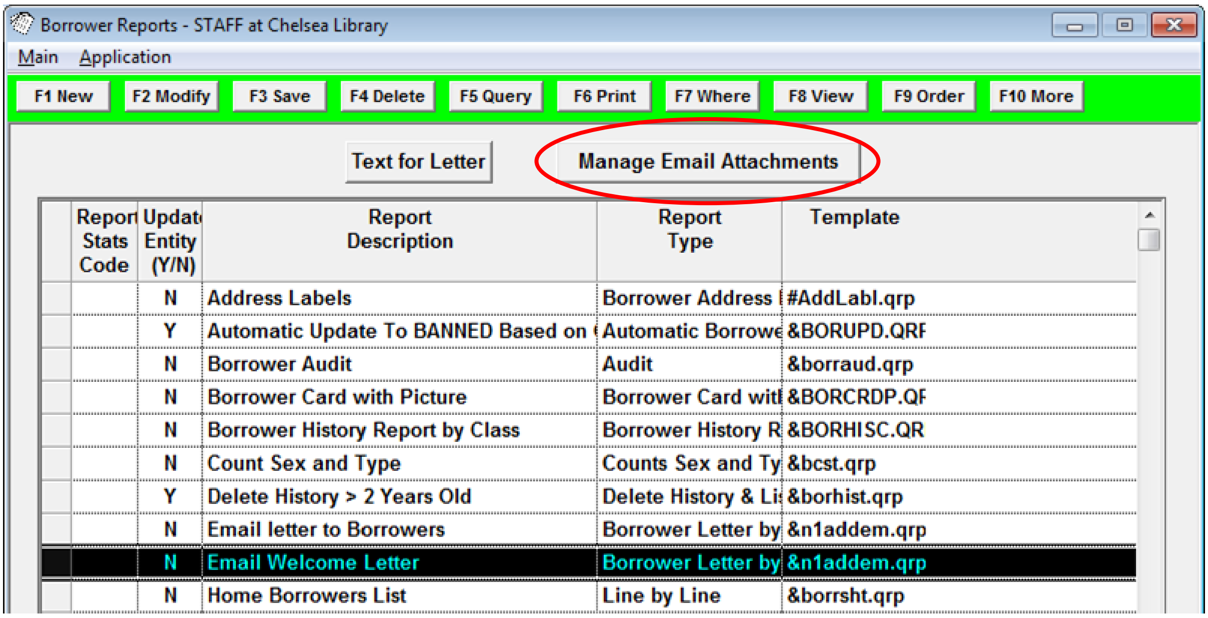
Damaged Item Notice (&STKMRR.QRP) and E-mail (&STKMRRE.QRP)

These most recent return reports are for sites who return items from the Borrower's records when they are damaged but still want to bill people for the costs of the damaged item. It will display the LAST borrower who had the item. If a site does not return the item when it is damaged (and keeps the item on loan), then Circulation reports can still be used.

```
To:   TIM F CHAPTER
Borrower No:   +60011352302

             LIBRARY OVERDUE REMINDER NOTICE

The following items are overdue.  Please return them by 29/06/2000
or you will incur a fine.

Title                                   Call No          Date Due
-----                                   -------          --------
Dead man's walk : a novel.              F MCM           12/05/2000
Madeline at cooking school Madeline a   JK MAD          05/04/2000

To respond to the notice you may:
    * Return these items to any branch library
    * Phone and and renew unreserved items

Yours sincerely,

Library Manager.
```

RUNNING REPORTS WITH E-MAIL ATTACHMENTS

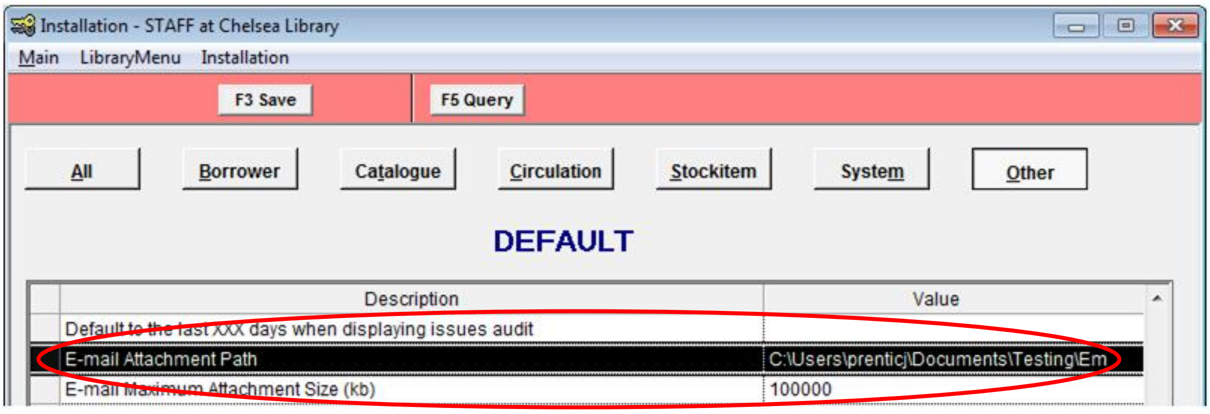
Reports with the option to send attachments via e-mail will have the **Manage Email Attachments** button enabled (button text is black).



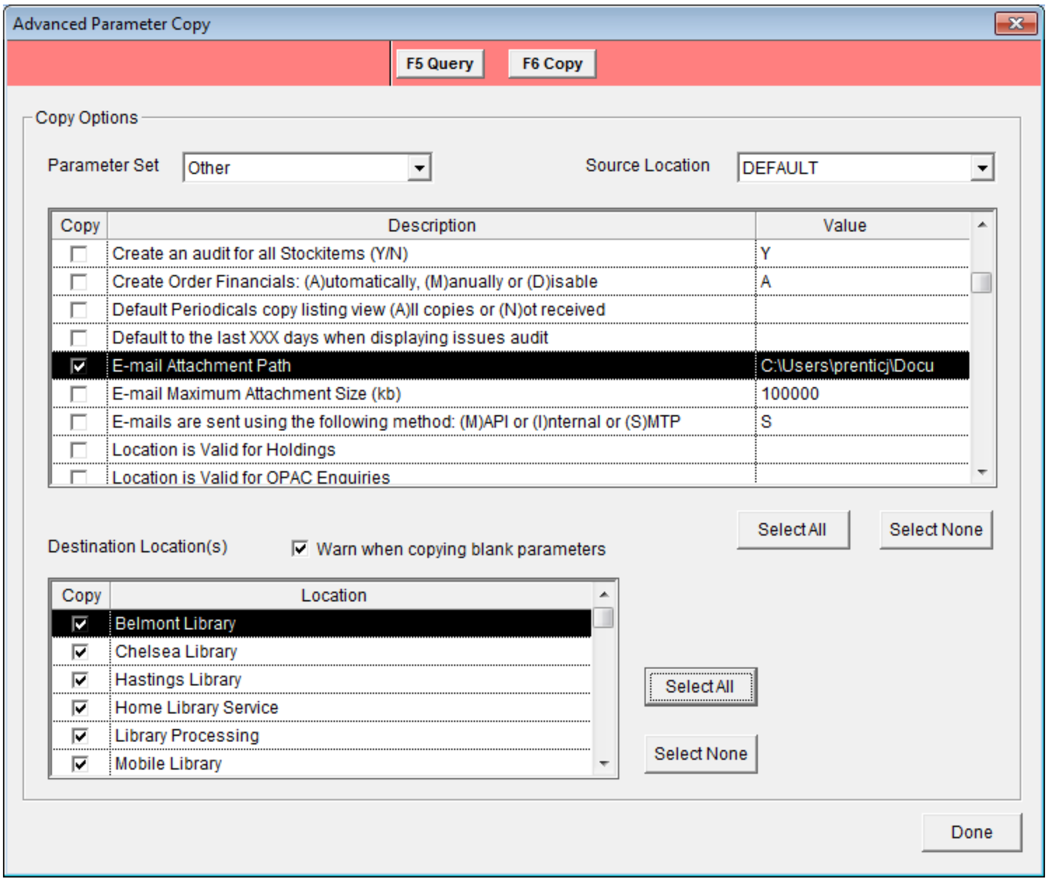
E-mail attachment parameters must first be set up in Supervisor settings. Once the correct template is selected, attachments such as MS Word documents can be sent with the e-mail messages.

Supervisor Settings

1. Launch the *Amlib* client
2. Go to **Main** > **Supervisor** > **Installation** – the Installation (DEFAULT) screen will display
3. Select the **Other** tab
4. Scroll down and enter the E-mail Attachment Path = file path to your e-mail attachments. ALL e-mail attachment files must be saved to this location.
5. Enter the E-mail Maximum Attachment Size = maximum size of attachments in Kb (1Mb = 1024 Kb).
6. Select the **F3 Save** button



7. Make sure to copy these settings to your other locations – select **Installation** > **Advanced Copy** – the Advanced Parameter Copy screen will display:



8. Select the following options:

    a. Tick the **E-mail Attachment Path** and **E-mail Maximum Attachment Size (kb)** parameters

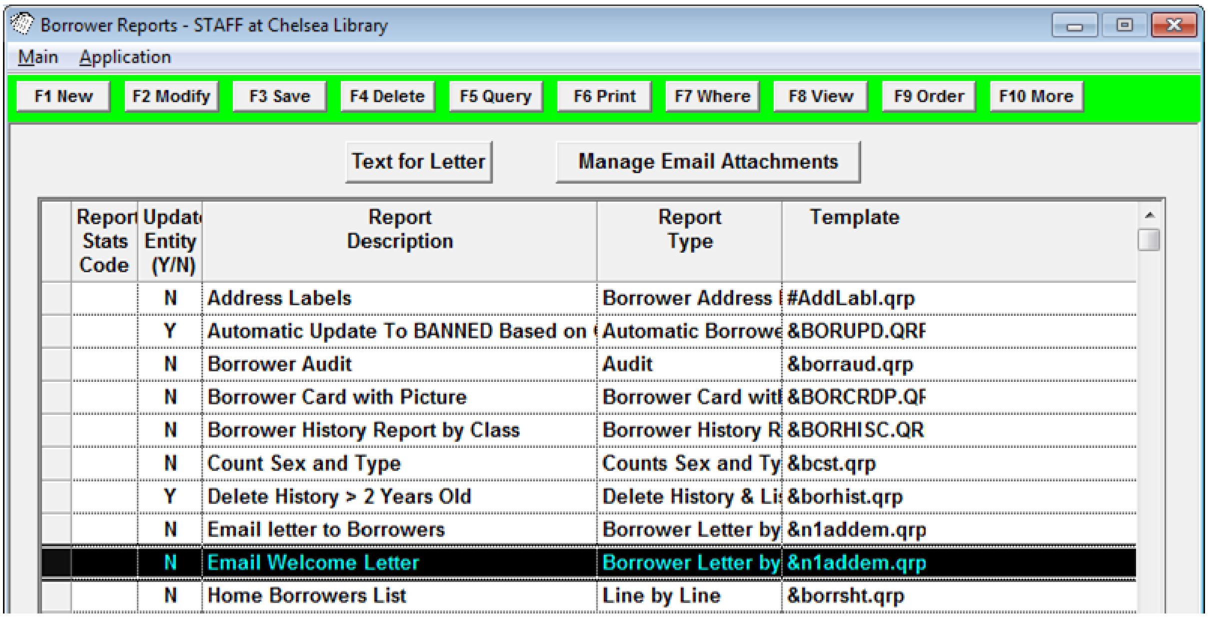
    b. Tick all the locations in the Destination Location(s) box

9. Select **F6 Copy**

10. Exit the *Amlib* client (**Ctrl-E** or **Ctrl-X**) and restart to ensure these settings are propagated to the rest of the system

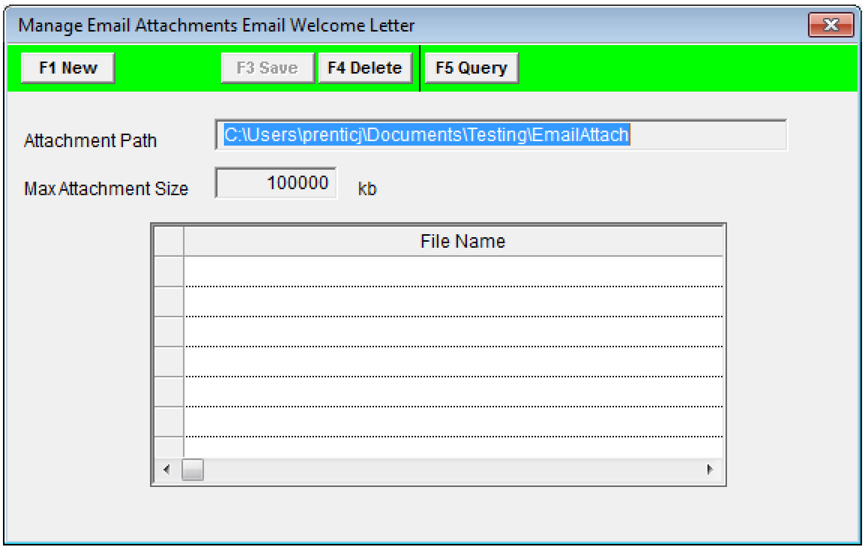
Create the Report

1. Create the report – for example **&N1ADDEM.QRP** (see separate individual procedures for more information about creating email reports)

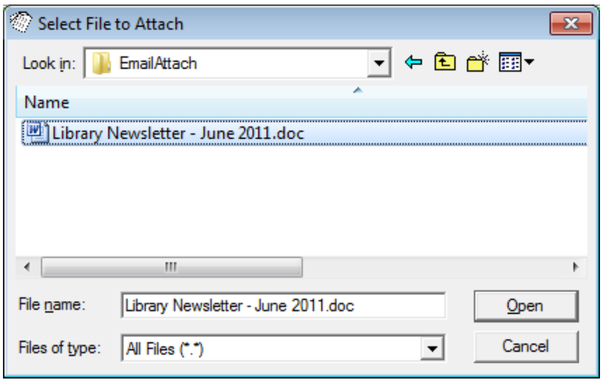


Adding the Attachment

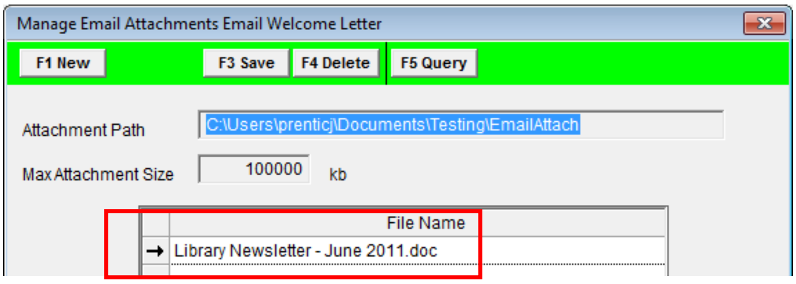
1. Highlight the report to which you would like to add an attachment
2. Select the **Manage Email Attachments** button – the Manage Email Attachments screen will display (the attachment path set in the *Supervisor* settings will be visible in the Attachment Path field):



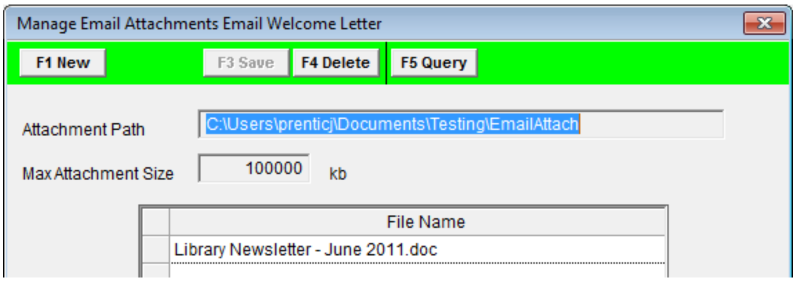
3. Click the **F1 New** button – the Select a File to Attach screen will display
4. **Browse** to the location of the attachment folder
5. Select the file and click the **Open** button



6. The document will appear in the File Name box (with an arrow next to it):



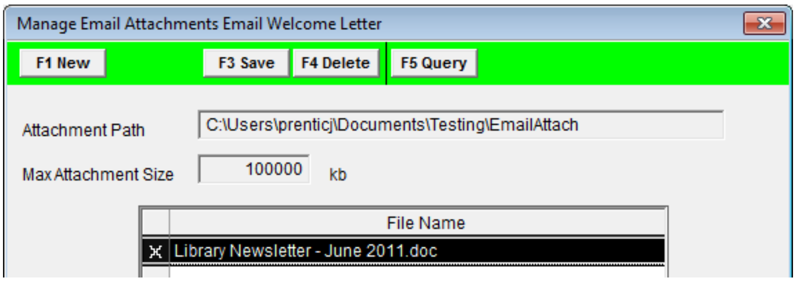
7. Select the **F3 Save** button (the arrow will disappear once saved)



8. To add further attachments, repeat 3 – 7 above

Please Note: The size restriction set previously in **Main** > **Supervisor** > **Installation** refers to the maximum size allowed for an attachment or the total size of ALL the attachments (if there are multiple attachments).

9. To delete attachments: highlight the attachment you wish to delete and click the **F4 Delete** button

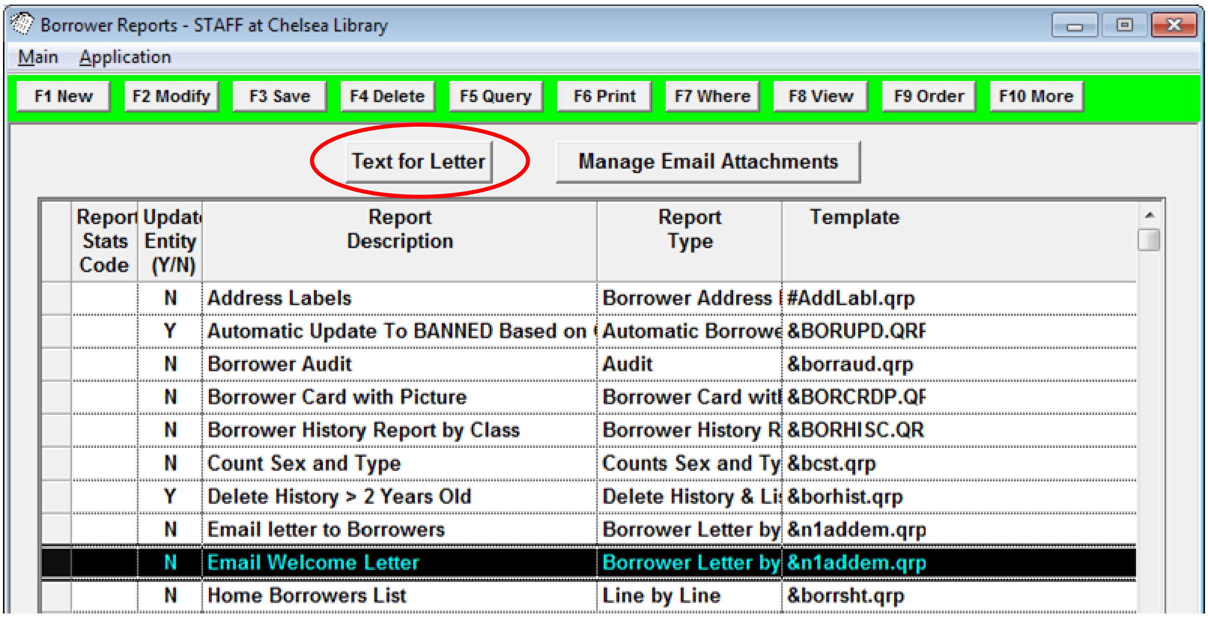


10. Once the list of attachments is complete, ensure that you click the **F3 Save** button to save your changes – close out of the screen by clicking the red cross in the corner

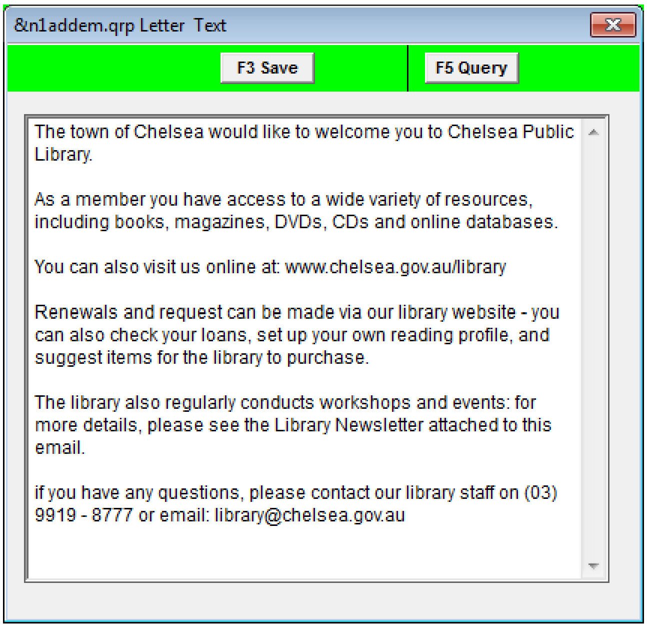
Email Text

If you would like some specified text to appear in the body of the e-mail you are sending, you can enter this in the Text for Letter area.

1. Highlight the report you are using, and select the **Text for Letter** button

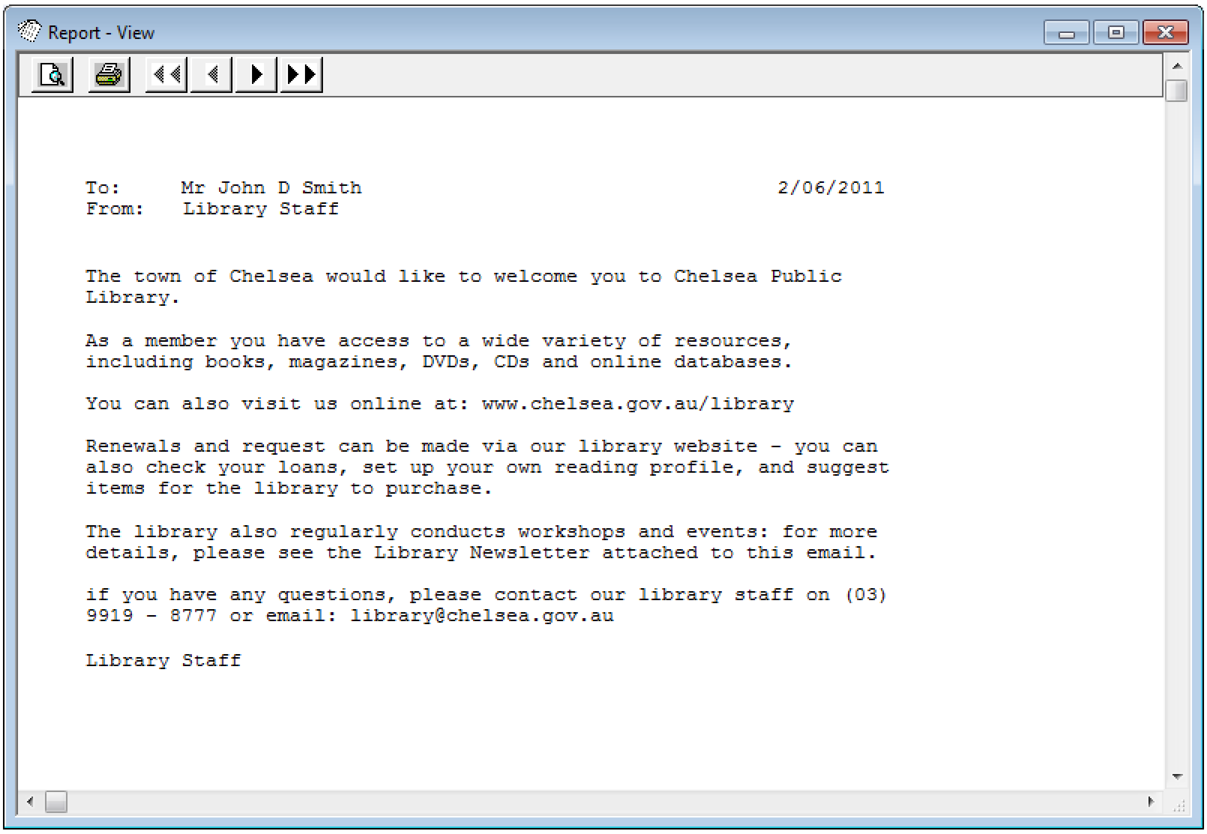


2. The Letter Text dialogue box will display:



3. Type (or copy and paste) in your text
4. Select the **F3 Save** button when complete – then close out of the screen by clicking on the red cross

Please Note: When sent, your chosen text will appear in the body of the message:



To: Mr John D Smith 2/06/2011
From: Library Staff

The town of Chelsea would like to welcome you to Chelsea Public Library.

As a member you have access to a wide variety of resources, including books, magazines, DVDs, CDs and online databases.

You can also visit us online at: www.chelsea.gov.au/library

Renewals and request can be made via our library website - you can also check your loans, set up your own reading profile, and suggest items for the library to purchase.

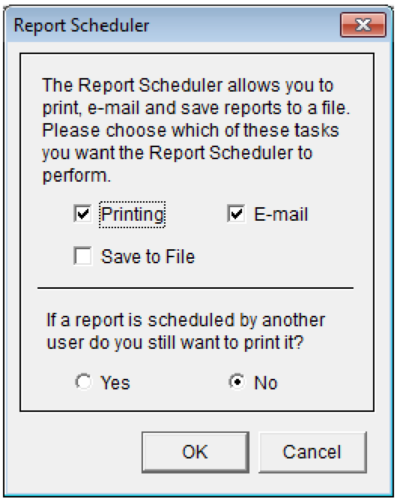
The library also regularly conducts workshops and events: for more details, please see the Library Newsletter attached to this email.

if you have any questions, please contact our library staff on (03) 9919 - 8777 or email: library@chelsea.gov.au

Library Staff

Start the Scheduler

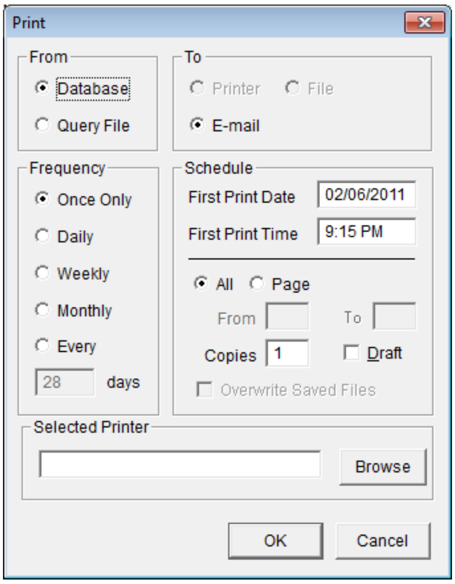
1. From the menu, select **Application** > **RepStartSchedule** – the Report Scheduler screen will display
2. Ensure that the E-mail box is **ticked**



3. Click on the **OK** button

Schedule the Report

1. Highlight the report you are using and select the **F6 Print** button – the Print screen will display:



2. Check/Change any Print settings
3. Click on the **OK** button
4. Check progress in **Application** > **RepPrintProgress**

SMS RESERVATIONS & OVERDUES NOTICES

Amlib utilizes the *Reports* module to produce exported text files for Reservation and Overdue notifications.

The SMS mobile phone messaging system works on a 'campaign' basis, where a text file is exported from *Amlib*. The file is then sent and imported to the SMS-messaging service supplied by a third party (*Talking Technologies*, *Telstra*, etc.). The information in the export file from *Amlib* is used for the content of the SMS message.

The field format requirements of the templates being used will differ between SMS messaging providers – generally the file is required to be in **.TXT** format.

Amlib employs two SMS messaging templates (which may need to be customised fit the specifications of a particular provider):

- **&RESSMS.QRP** Reservations Module
- **&ODSMS.QRP** Circulation Module

The report templates can be used to print a report in **.TXT** format using the Amlib Report Scheduler. The **.TXT** file may saved in a local directory (for example: **C:\SMS Messaging**) or a network directory (for example: **Q:\Library\SMS Messaging**).

File Transfer Methods

The most effective way to share files between the two systems is to set up a Windows File Share.

A user account with appropriate permissions to read, write and delete the transfer files will need to set-up; this account will be accessed by both systems.

See: http://compnetworking.about.com/od/windowsfilesharing/Windows_File_Sharing.htm for further details.

If this is not possible; the **.TXT** file may be emailed to the SMS messaging provider (see final section).

SMS Templates

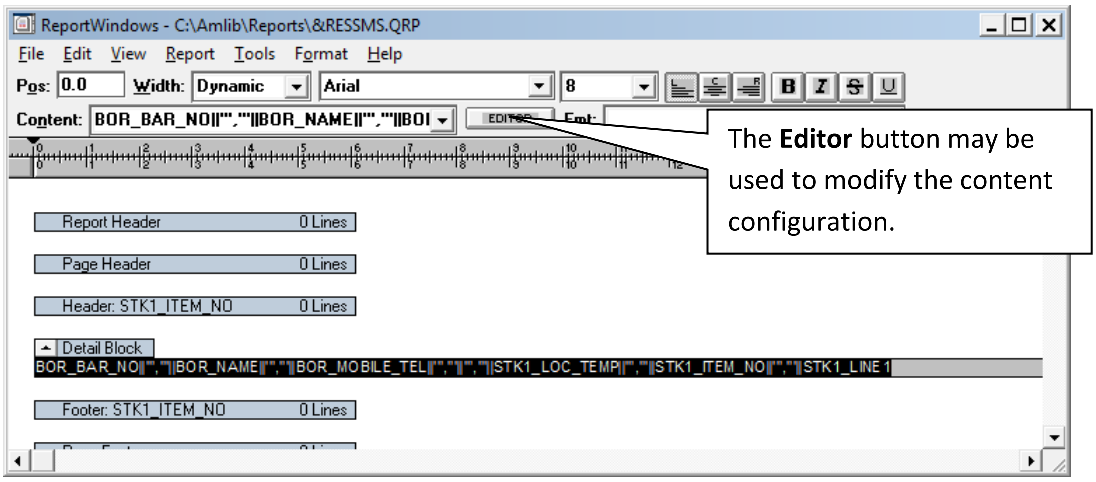
Both overdues and reservation SMS messaging employ the use of a dedicated template. In some circumstances, it may be necessary to edit these templates to adjust the content and sequencing of the fields in use to suit the specifications of the SMS messaging provider.

The templates can be found in the **Amlib/Reports** folder located on your Amlib server, and can be modified using RepWin30.exe (located in the **Amlib/Utility/Repwin** folder on your Amlib server).

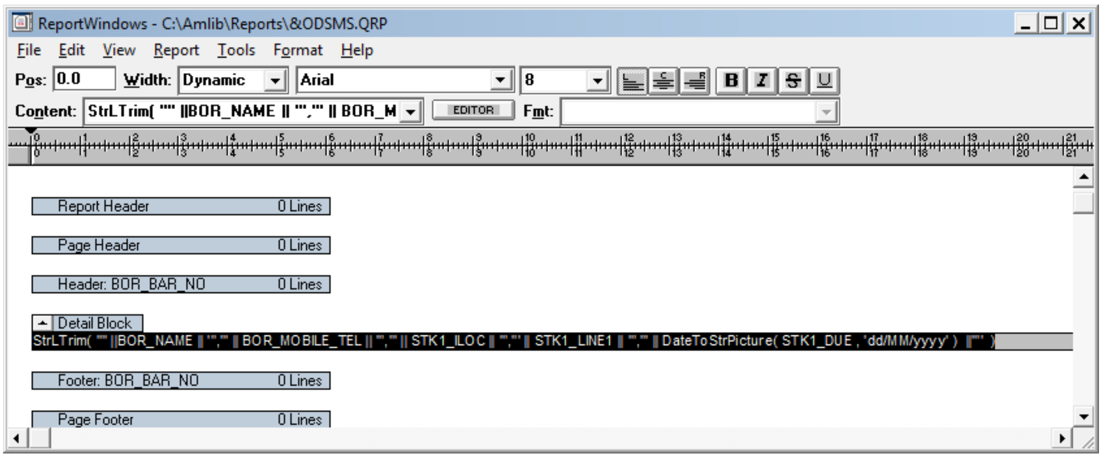
The simplest method for editing these templates, is to copy them into the **Amlib/Utility/Repwin** folder and then drag-and-drop the template to be edited on the RepWin30.exe program file – this will cause the template to automatically open in the editor.

1. Highlight the fields in the Detail Block and click on the **Editor** button to reconfigure the content and sequencing – being careful not to remove the delimination (usually ",") necessary for creating the required **.TXT** files.

Reservations: **&RESSMS.QRP**



Overdues: **&ODSMS.QRP**



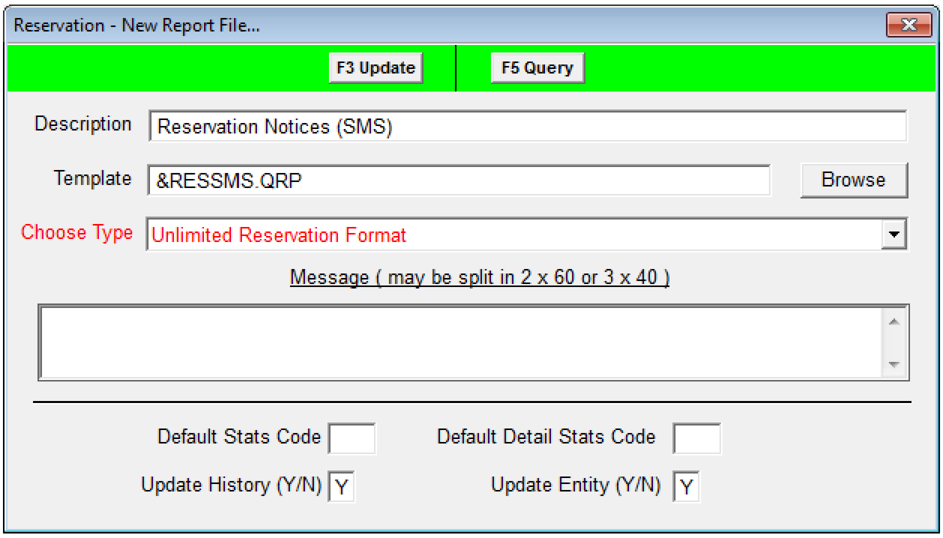
SMS Reservations

The template may be saved in **Amlib/Reports** folder on your *Amlib* server or on a local drive.

Load the Template

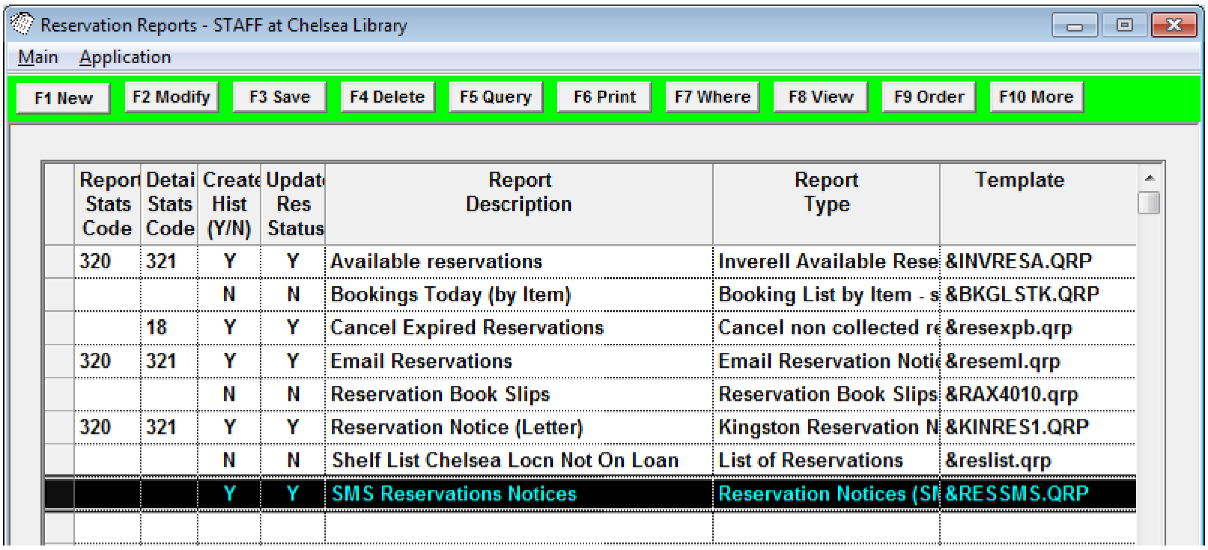
1. Launch the *Amlib* client
2. Go to **Main > Reports > RepAddNew** – the Report Files window will display
3. Select **Reservation** from the Report Entity dropdown
4. Click the **F1 New** button – the New Report File… screen will display
5. Description = **Reservation Notices (SMS)**
6. Browse to the **Amlib/Reports** folder on your Amlib Server and select the **&RESSMS.QRP** file (if the template has been loaded onto your PC – then navigate to the local folder)
7. Click the **Open** button
8. Choose Type = **Unlimited Reservation Format**
9. Update History = **Y**
10. Update Entity = **Y**
11. Click the **F3 Update** button
12. Close out of the Report Files window

The template is now loaded and available for use in a Report.



Create the 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 **Reservation Notices (SMS)** and click the **Select** button
4. Type in a Description – for example: **SMS Reservations Notices**
5. Click the **F3 Save** Button



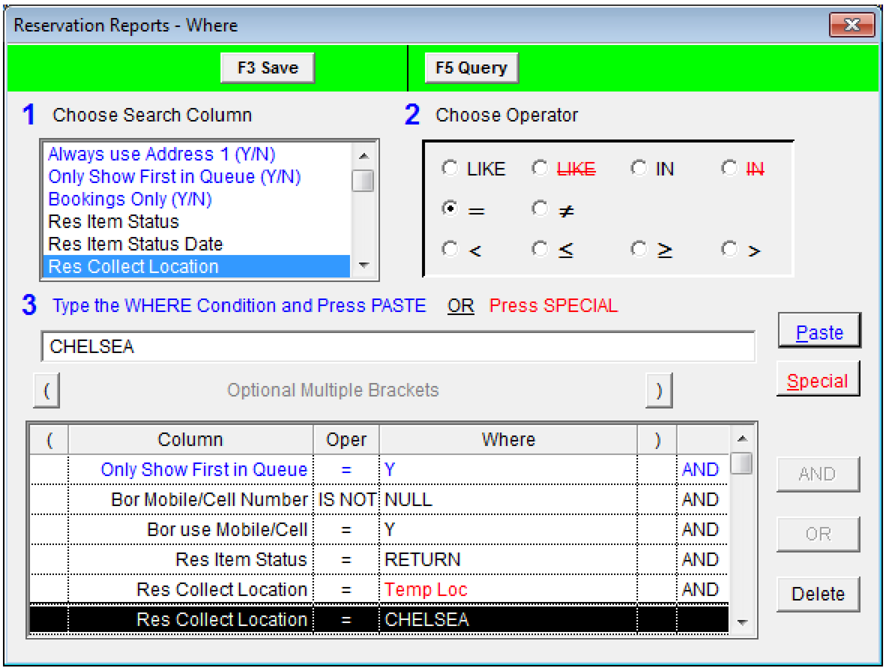
Repor Stats Code	Detai Stats Code	Create Hist (Y/N)	Updat Res Status	Report Description	Report Type	Template
320	321	Y	Y	Available reservations	Inverell Available Rese	&INVRESA.QRP
		N	N	Bookings Today (by Item)	Booking List by Item - s	&BKGLSTK.QRP
	18	Y	Y	Cancel Expired Reservations	Cancel non collected re	&resexpb.qrp
320	321	Y	Y	Email Reservations	Email Reservation Noti	&reseml.qrp
		N	N	Reservation Book Slips	Reservation Book Slips	&RAX4010.qrp
320	321	Y	Y	Reservation Notice (Letter)	Kingston Reservation N	&KINRES1.QRP
		N	N	Shelf List Chelsea Locn Not On Loan	List of Reservations	&reslist.qrp
		Y	Y	SMS Reservations Notices	Reservation Notices (SI	&RESSMS.QRP

Create/Modify the Where Statement

The 'Where Statement' for this report should be based on the normal reservation notification report. However, with this report an additional line should be added to the 'Where' to ensure that it only selects the borrowers who have nominated to receive notification via SMS. Generally, borrowers without a mobile phone number should be collected in a separate reservations print run that produces paper notices.

1. Highlight the SMS Reservation Notice and click the **F7 Where** button – the Reservation Reports – Where screen will open
2. Create the following Where conditions:
   - **Only Show First in Queue (Y/N) = Y** (otherwise ALL reserves on an item will show)
   - **Res Item Status = RETURN** – this status will change to **PRINTED** once this report is run, to prevent duplicate emails being sent.
   - **Bor Mobile/Cell Number IS NOT NULL** (Paste without placing a value in 3)
   - **Bor use Mobile/Cell (Y/N)** = **Y**
   - (Optional) **Res Collect Location = Temp Loc** [select using the **Special** button] – this ensures that the item is at the collection location)
   - (Optional) **Res Collect Location =** (enter your location code – for example: **CHELSEA**) – this will limit the notices sent to items for collection at the selected location

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

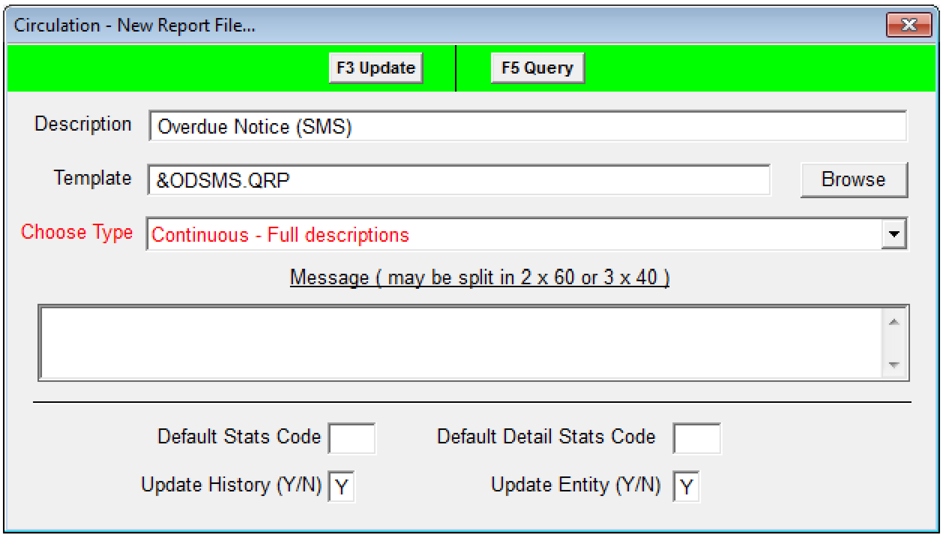


SMS Overdues

The template may be saved in **Amlib/Reports** folder on your *Amlib* server or on a local drive.

Load the Template

1. Launch the *Amlib* client
2. Go to **Main > Reports > RepAddNew** – the Report Files window will display
3. Select **Circulation** from the Report Entity dropdown
4. Click the **F1 New** button – the New Report File… screen will display:



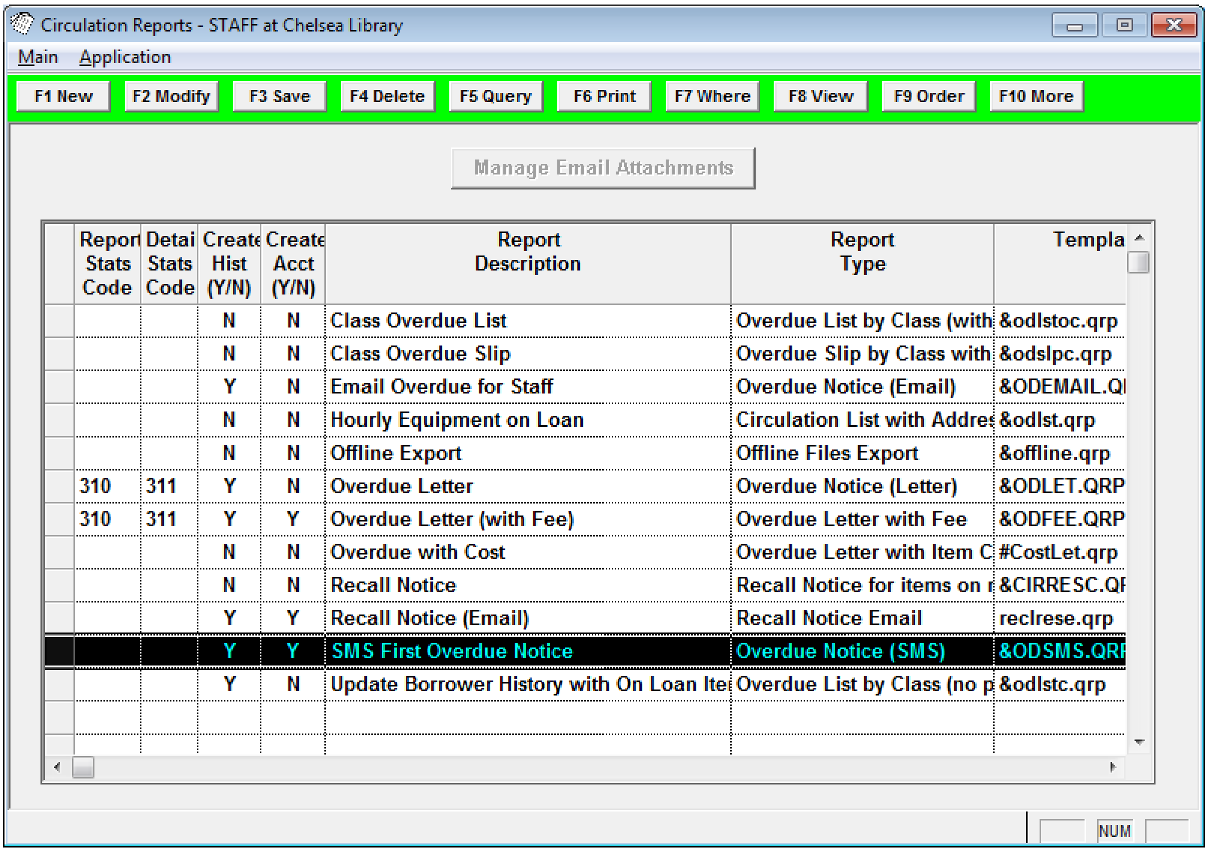
5. Type in a Description – for example: **Overdue Notice (SMS)**

6. Browse to the **Amlib/Reports** folder on your Amlib Server and select the **&ODSMS.QRP** file (if the template has been loaded onto your PC – then navigate to the local folder)
7. Click the **Open** button
8. Choose Type = **Continuous – Full descriptions**
9. Update History = **Y**
10. Update Entity = **N**
11. Click the **F3 Update** button
12. Close out of the Report Files window

The template is now loaded and available for use in a Report.

Create the Report

1. Go to **Main > Reports > RepCirculation** – the Circulation Reports screen will display
2. Click the **F1 New** button – the Select Report Format screen will display:



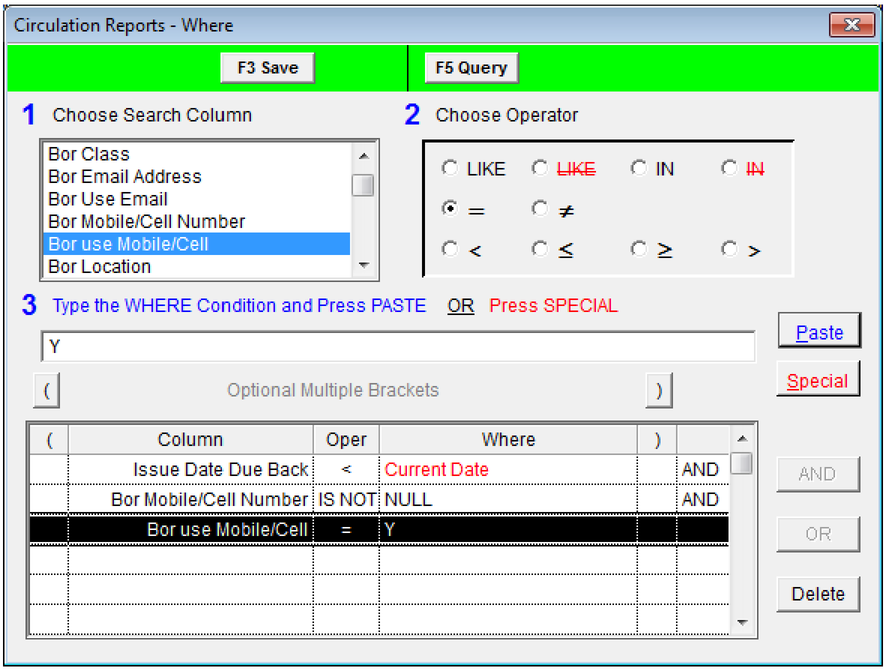
Repor Stats Code	Detai Stats Code	Create Hist (Y/N)	Create Acct (Y/N)	Report Description	Report Type	Templa
		N	N	Class Overdue List	Overdue List by Class (with	&odlstoc.qrp
		N	N	Class Overdue Slip	Overdue Slip by Class with	&odslpc.qrp
		Y	N	Email Overdue for Staff	Overdue Notice (Email)	&ODEMAIL.QI
		N	N	Hourly Equipment on Loan	Circulation List with Addres	&odlst.qrp
		N	N	Offline Export	Offline Files Export	&offline.qrp
310	311	Y	N	Overdue Letter	Overdue Notice (Letter)	&ODLET.QRP
310	311	Y	Y	Overdue Letter (with Fee)	Overdue Letter with Fee	&ODFEE.QRP
		N	N	Overdue with Cost	Overdue Letter with Item C	#CostLet.qrp
		N	N	Recall Notice	Recall Notice for items on r	&CIRRESC.QI
		Y	Y	Recall Notice (Email)	Recall Notice Email	reclrese.qrp
		Y	Y	SMS First Overdue Notice	Overdue Notice (SMS)	&ODSMS.QRI
		Y	N	Update Borrower History with On Loan Ite	Overdue List by Class (no p	&odlstc.qrp

3. Type in a Description – for example: **SMS First Overdue Notice**
4. Click the **F3 Save** button

Create/Modify the Where Statement

The 'Where Statement' for this report should be based on the normal reservation notification report. However, with this report an additional line should be added to the 'Where' to ensure that it only selects the borrowers who have nominated to receive notification via SMS. Generally, borrowers without a mobile phone number should be collected in a separate reservations print run that produces paper notices.

1. Highlight the SMS Overdue Notice and click the **F7 Where** button – the Circulation Reports – Where screen will display:



2. Create the following Where conditions:
    - **Issue Date Due Back <= Current Date** [alter as required]
    - **Bor use Mobile/Cell = Y**
    - **Bor Mobile/Cell Number IS NOT NULL** (Paste without placing a value in 3)
    - **Bor Location =** <specify location code> [optional]
3. Click **F3 Save** button

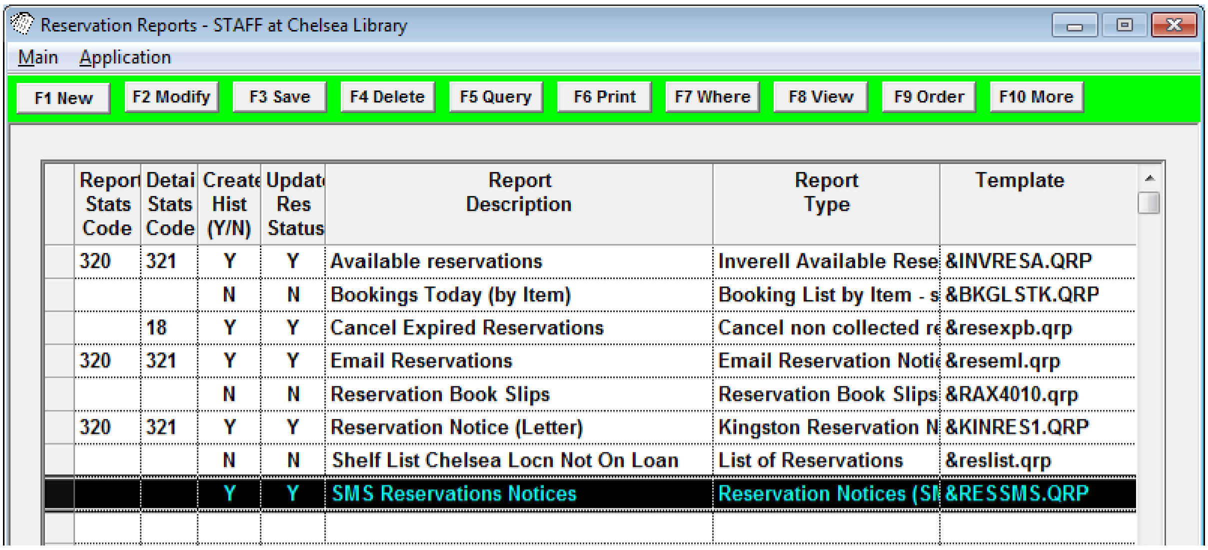
Running the SMS Reports File (Reservations/Overdues): File Sharing

If using the Windows File Sharing method to supply the required **.TXT** file to your SMS-messaging service, then the report will need to be scheduled to run to save the file to the specified directory.

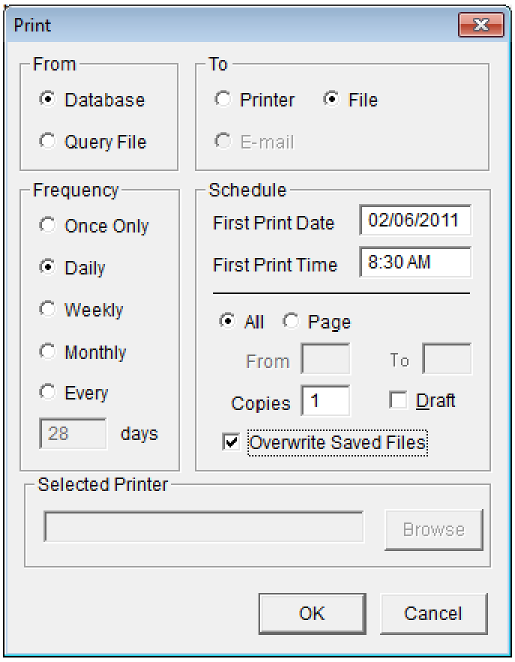
Reports can be scheduled to run once Daily, several times Daily, or several times Weekly.

Scheduling the Report

1. Go to **Main > Reports > RepReservation** or **RepCirculation** – the Reservation or Circulation Reports screen will display:



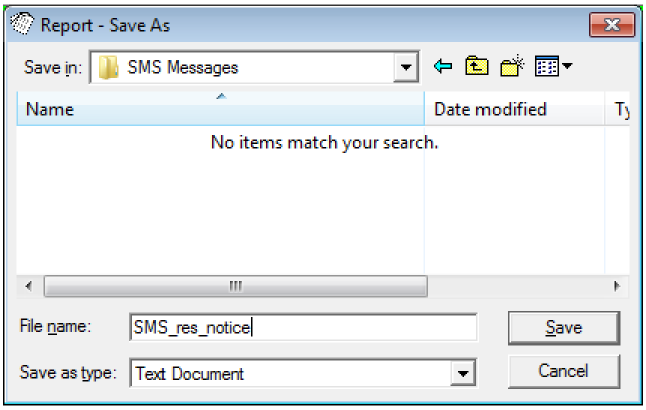
2. Select the **SMS Reservations Notice** or **SMS Overdues Notice** report
3. Click the **F6 Print** button – the Print screen will display:



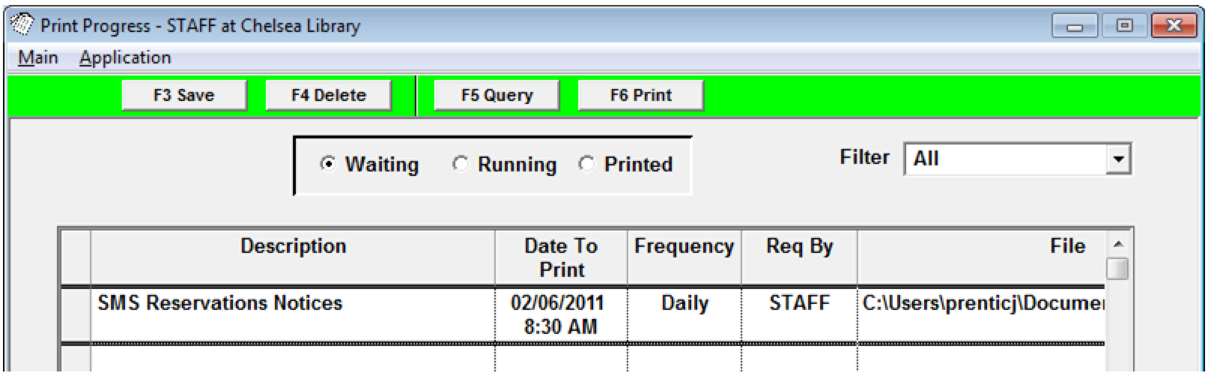
4. Set the conditions as follows:

- From = **Database**
- To = **File**
- Frequency = **Daily** or **Weekly** (if the report is to be run only on certain days a week, select **Weekly** and nominate the day via the First Print Date)
- First Print Date = <set date for first scheduled occurrence – for example: **30/08/2010**>
- First Print Time = <set time for first scheduled occurrence – for example: **8:30 AM**>
- Overwrite Saved Files = **ticked** [the same file is then used to generate the notices]
- Click the **OK** button when complete

5. Save the file in **.TXT** format (Save as type: **Text Document**) in the drive location to be used for file transfers (usually Windows File Sharing) – for example: **C:\SMS Message**, using the following file name: **SMS_res_notice** or **SMS_over-notice**

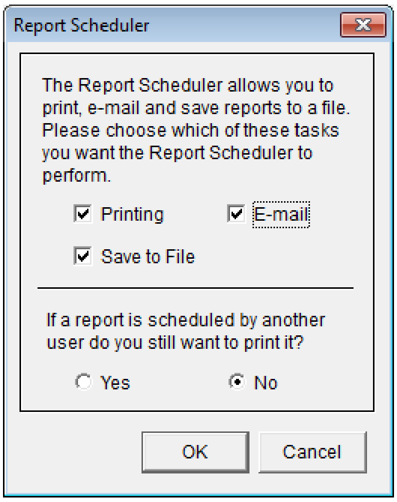


6. If you would like to print a report several times **Daily** or **Weekly**, repeat steps 3 – 5 with altered First Print Dates and Times)
7. Check **Application > RepPrintProgress** to ensure all reports are scheduled correctly (see example of screen below)



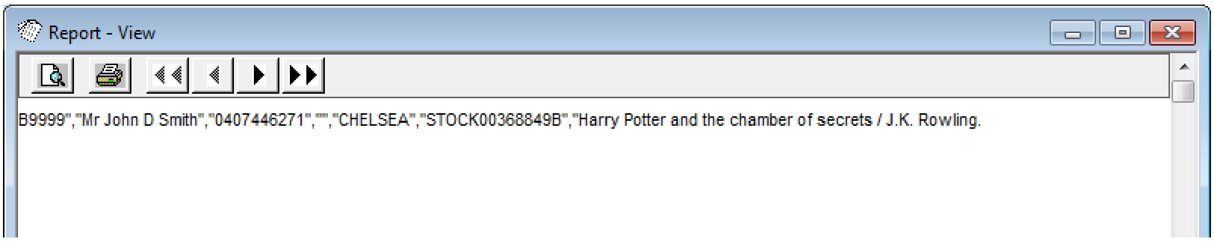
Start the Scheduler

1. Go to **Main** > **Reports** > **RepReservation** or **RepCirculation** – the Reservation or Circulation Reports screen will display
2. From the menu, select **Application** > **RepStartSchedule –** the Report Scheduler screen will display:



3. You must check *both* the **Save to File** and **E- mail** options
4. Click on the **OK** button
5. When the scheduled report run is complete the following text file will be available to be transferred to the SMS-Messaging provider for further processing

Please Note: Please ensure that the Scheduler is started **PRIOR** to the printing time – otherwise the report **WILL NOT PRINT**!



Running the SMS Reports File (Reservations/Overdues): Emailing

If you are required to supply the SMS-messaging service with your SMS report via email, the email can be sent from directly within the system as an attachment.

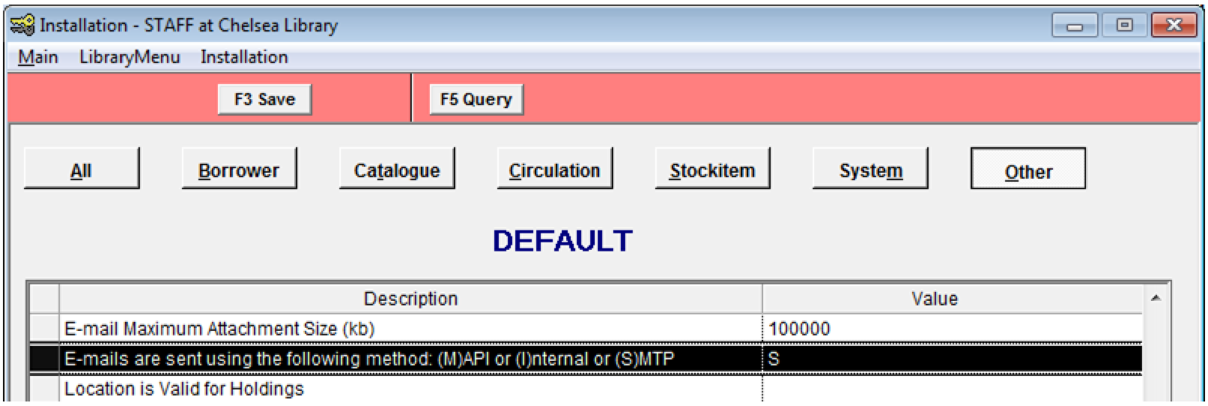
The process is similar to that in the previous section, however, the email specifications for the SMS-messaging service must also be provided.

Supervisor Parameters

To begin, some settings need to be set in the Supervisor module (this need only be done once):

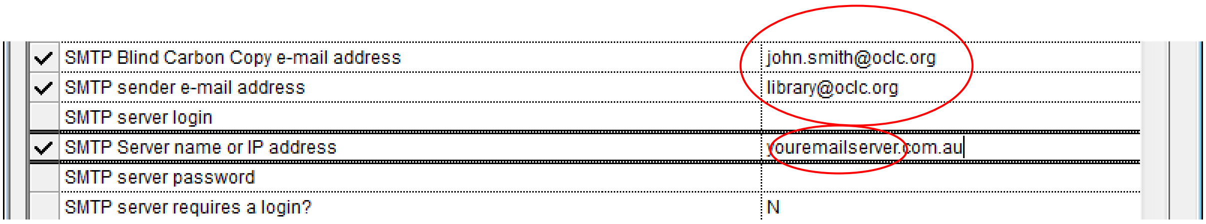
1. Launch the *Amlib* client
2. Go to **Main** > **Supervisor** > **Installation** – the Installation (DEFAULT)screen will display
3. Select the **Other** tab
4. Scroll down set the following: **E-mails are sent using the following method: (M)API or (I)nternal or (S)MTP**. Set to **S**, **I** or **M**

   Generally (**S**) SMTP is recommended, especially as it is simple and it has advantages over the others. It also means that the email client does not need to be open on the PC running the notices and allows greater flexibility with regard to setting up "from" and BCC/CC parameters.



Then the following parameters should also be set (a full table is included below):

- **SMTP Blind Carbon Copy e-mail address**: you can specify the BCC address to send a copy of all notices (so that you can verify that they have been sent)
- **SMTP sender e-mail address**: the email address to display on the notice sent to the borrower (For example: library@oclc.org, it can be the same as the BCC address)
- **SMTP Server name**: the address of the SMTP mail server being used. This might be a server address or an IP address



5. Click the **F3 Save** button when complete
6. Exit and restart the *Amlib* client to allow the settings to take effect

The complete set of parameters to consider:

Description	Explanation	Example
Emails are sent using the following methods (M)API, (I)nternal or SMTP	Generally (**S**) SMTP is recommended, especially if the organisation is not using a Microsoft Exchange Server. It also means that the email client does not need to be open on the PC running the notices AND can display the "from" name from one of the parameters below rather than the email address from the email client.	Set to **S**, **I** or **M**
SMTP Blind Copy e-mail address	**Optional**: If using the SMTP for emails. Enter only if copies of the email are to sent to a chosen email address – for example: Testing purposes	**library@amlib.com**
SMTP sender e-mail address	**Optional**: If using the SMTP for emails, enter the Address you wish to indicate as the sender	**enquiries@amlib.com.au**
SMTP server login	**Optional**: From your Systems Administrator if required	
SMTP Server name or IP address	If using the SMTP for emails, enter the **Server Name** or **IP Address** of the Server installed with the e-mail communication protocol, responsible for receiving and forwarding email messages	ServerName – for example: **server.amlib.com.au**
SMTP server password	**Optional**: From your systems administrator if required	
SMTP server requires a login?	If **Y**, supply a SMTP server logon and password If **N**, leave SMTP server logon and password blank	**Y/N**

The above tasks create **Sender** and **BCC** for **ALL** emails generated by the system. However, it is possible to set up separate SMTP parameters (Sender and CC) for individual locations, modules and reports.

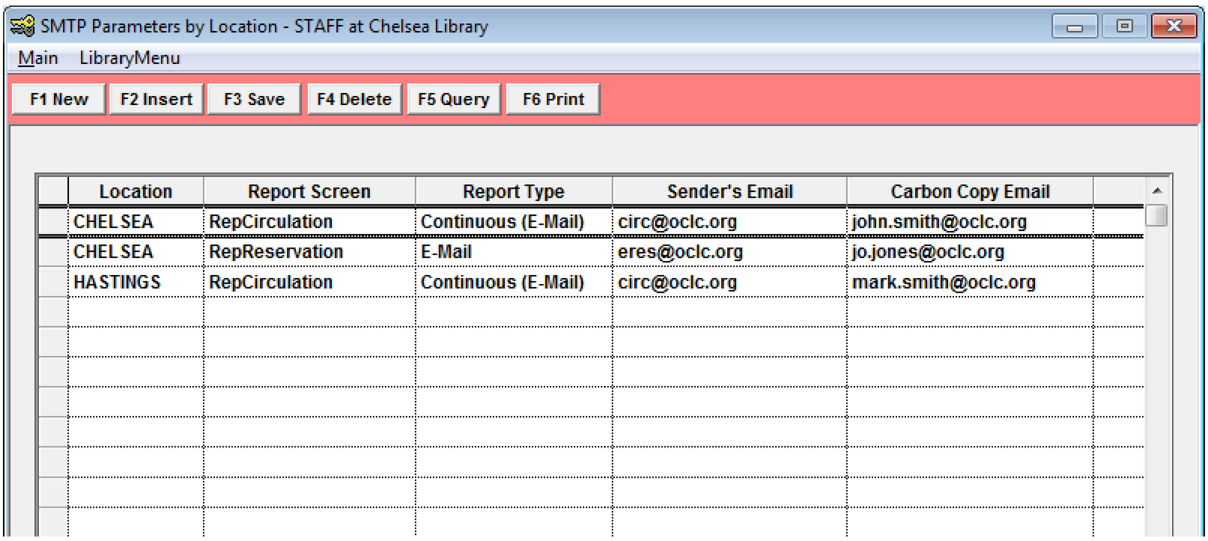
Setup Individual Email Systems by Location

1. In any Installation screen module, select **Installation** > **Choose Location** and choose a **Location**
2. Repeats steps 2-5 above. If you would like to use the DEFAULT settings, then the relevant fields for each location should be left **blank**
3. Once complete, you must exit and restart the *Amlib* client to allow the settings to take effect

Setup Individual Email Locations, Modules and Reports

We recommend leaving the email set-up for particular locations until after initial testing has been completed. Once the initial testing has been done, then:

1. In any Supervisor module, select **Library Menu** > **LocRepSMTP** – the SMTP Parameters by Location table will display
2. Select the **F1 New** or **F2 Insert** button
3. Using the drop-down boxes available in each column, select the Location, Report Screen, and Report Type
4. Then type in the individual Sender's Email and Carbon Copy Email addresses
5. Click the **F3 Save** button when complete
6. Exit and restart the *Amlib* client to allow the settings to take effect



Location	Report Screen	Report Type	Sender's Email	Carbon Copy Email
CHELSEA	RepCirculation	Continuous (E-Mail)	circ@oclc.org	john.smith@oclc.org
CHELSEA	RepReservation	E-Mail	eres@oclc.org	jo.jones@oclc.org
HASTINGS	RepCirculation	Continuous (E-Mail)	circ@oclc.org	mark.smith@oclc.org

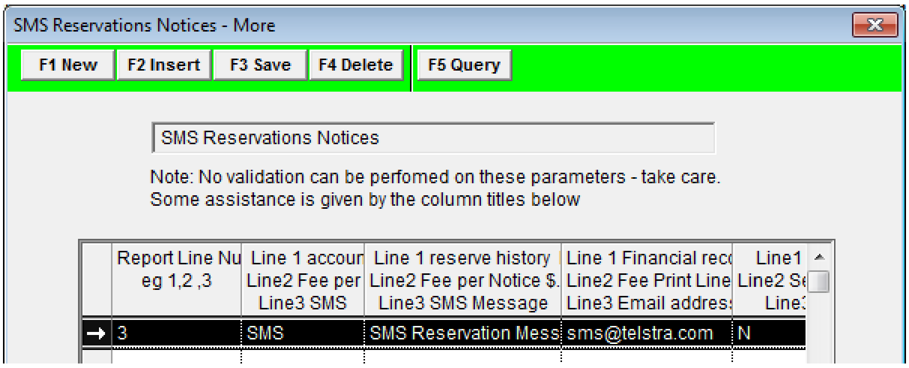
Please Note: It is not possible to alter a pre-existing entry in the SMTP Parameters by Location table – entries must be deleted (using **F4 Delete**) and then re-entered.

Set Up SMS-Messaging Service Parameters

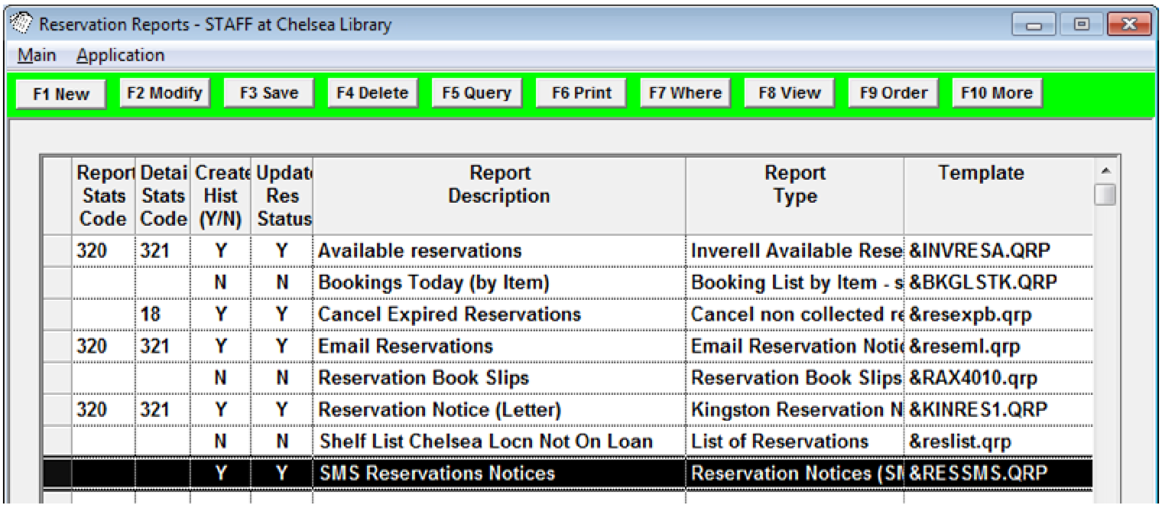
1. Go to **Main > Reports > RepReservation** or **RepCirculation** – the Reservation or Circulation Reports screen will display
2. Select the **SMS Reservations Notice** or **SMS Overdues Notice**
3. Click the **F10 More** button – the More screen will open
4. Click the **F1 New** button
5. Enter the following parameters:

COLUMN	HEADER	COMMENT
1	Report Line Number	Always **3**
2	SMS	Always **SMS**
3	SMS Message	Message body – becomes the message in the email (50 chars)
4	Email Address	The email address of the SMS-messaging service (50 chars)
5	Delete File	After Sending - **Y** or **N**

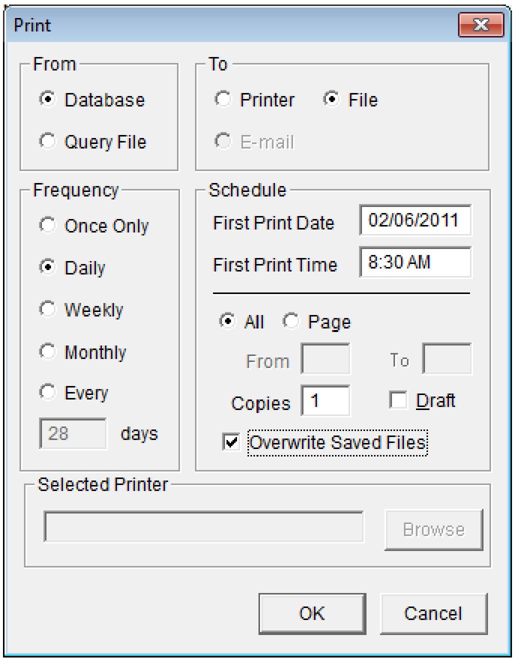
Note: Since Lines 1 and 2 are already used for other reporting purposes, the email function uses **Line 3**.



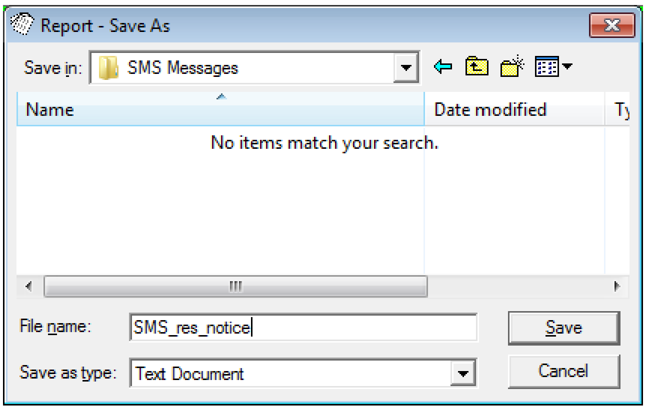
6. Click the **F3 Save** button when complete



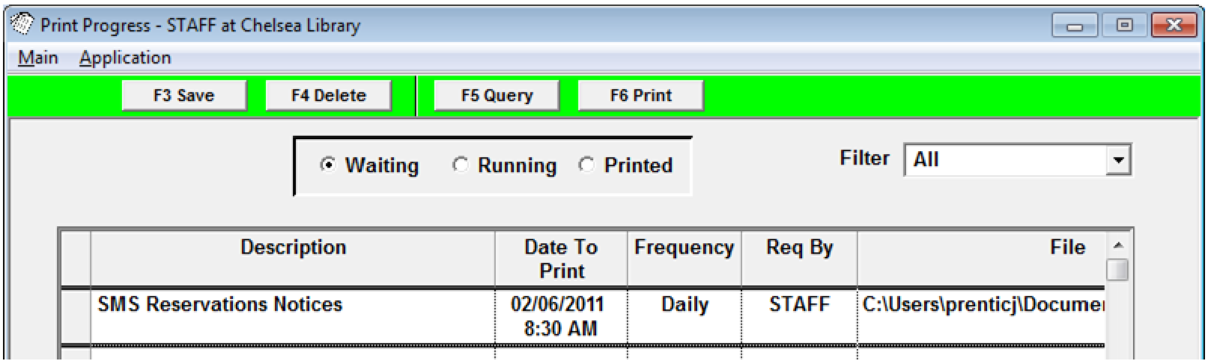
7. Highlight the report and click on the **F6 Print** button – the Print screen will display:



8. Set the conditions as follows:
   - From = **Database**
   - To = **File**
   - Frequency = **Daily** or **Weekly** (if the report is to be run only on certain days a week, select **Weekly** and nominate the day via the First Print Date)
   - First Print Date = <set date for first scheduled occurrence – for example: **30/08/2010**>
   - First Print Time = <set time for first scheduled occurrence – for example: **8:30 AM**>
   - Overwrite Saved Files = **ticked** [the same file is then used to generate the notices]
   - Click the **OK** button
9. Save as type: **Text Document** to a specified drive location – for example: **C:\SMS Message**, using the following file name: **SMS_res_notice** or **SMS_rver-notice**. (A copy of the file will be saved here, unless the Column 5 was set to **Delete the File** at Step 5 above.

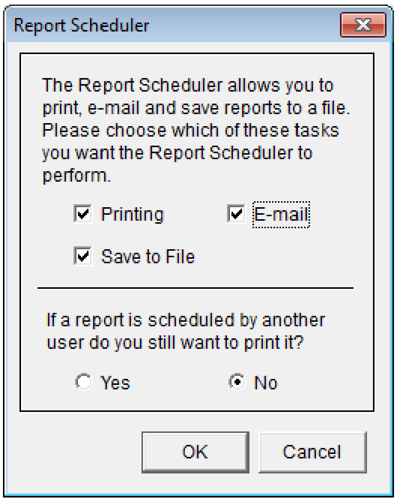


10. If you would like to print a report several times **Daily** or **Weekly**, repeat steps 3 – 5 with altered First Print Dates and Times)
11. Check **Application > RepPrintProgress** to ensure all reports are scheduled correctly (see example of screen below)



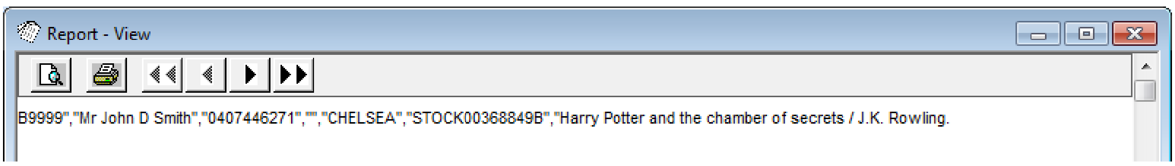
<u>Start the Scheduler</u>

1. Go to **Main** > **Reports** > **RepReservation** or **RepCirculation** – the <u>Reservation</u> or <u>Circulation Reports screen</u> will display
2. From the menu, select **Application** > **RepStartSchedule –** the <u>Report Scheduler</u> screen will display:



3. You must check *both* the **Save to File** and **E- mail** options
4. Click on the **OK** button
5. When the scheduled report run is complete the following text file will be available to be transferred to the SMS-Messaging provider for further processing

Please Note: Please ensure that the Scheduler is started **PRIOR** to the printing time – otherwise the report **WILL NOT PRINT**!



AUDITS AND AUDIT REPORTS

The audit reports list stockitems/authorities/borrowers that have been deleted, inserted (added) or updated (modified/changed) within a specified time period.

In addition to the audits, there are a number of Statistics Reports Audits that look at Operator logons and alterations, as well as searches performed in each module.

Supervisor Settings: Setting Up Audits

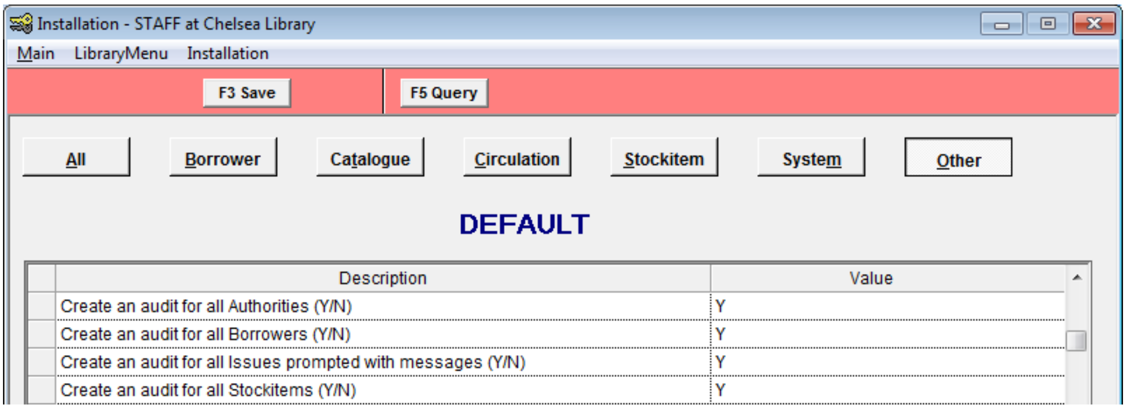
The Audit must be switched on first, before the data can be collected. To check this:

1. Launch the *Amlib* client
2. Go to **Main** > **Supervisor** > **Installation** > **Other** tab
3. There are several types of audit:

    - Create an audit for all Authorities (Y/N)
    - Create an audit for all Borrowers (Y/N)
    - Create an audit for all issues prompted with messages (Y/N)
    - Create an audit for all Stockitems (Y/N)

4. If you would like to keep audit details, ensure that these are set to **Y** (particularly the last)
5. Make sure you also check your settings by individual Location:
    a. Select **Installation** > **Choose Location**
    b. Select location and click on the **OK** button
    c. Select the **Other** tab

Please Note: Any record/s that were deleted, inserted or updated prior to the audit being switched on will not be recorded.



Issues Audit

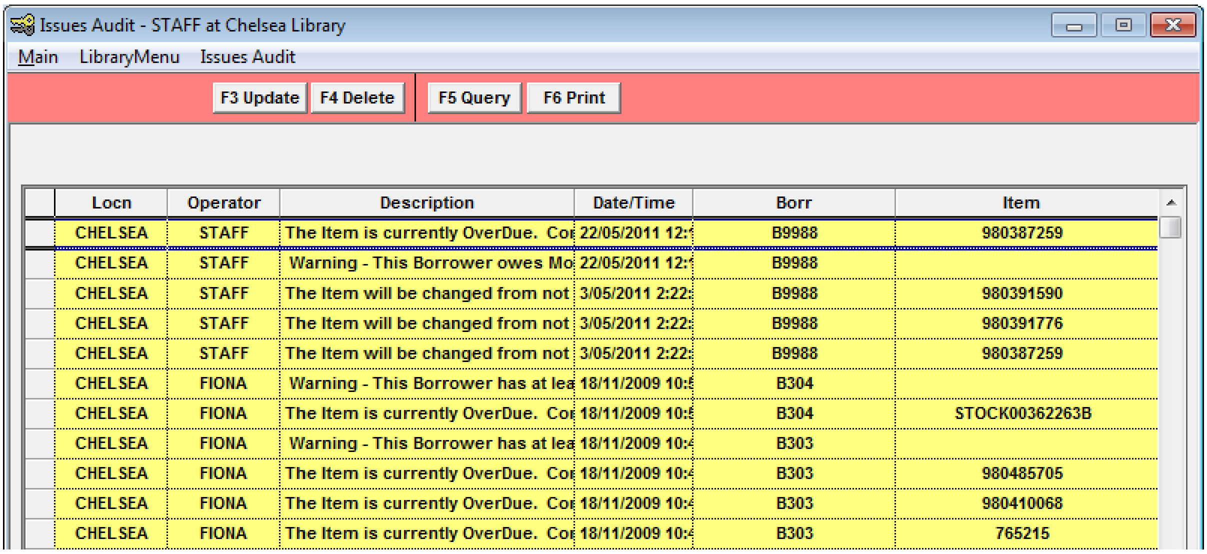
Issues Audit records all messages that are displayed in issues. If you do not use this particular function, make sure the audit is switched off (see Supervisor Settings above):

- **Create an audit for all issues prompted with messages (Y/N)** = **N**

As the logs fill up quickly and must be regularly maintained (old entries deleted daily or weekly).

To access the Issues Audit:

1. Open the Supervisor module
2. Select **LibraryMenu** > **IssuesAudit** – the Issue Audit table will display
3. Select the **F6 Print** button to print up the list



Locn	Operator	Description	Date/Time	Borr	Item
CHELSEA	STAFF	The Item is currently OverDue. Co	22/05/2011 12:	B9988	980387259
CHELSEA	STAFF	Warning - This Borrower owes Mo	22/05/2011 12:	B9988	
CHELSEA	STAFF	The Item will be changed from not	3/05/2011 2:22	B9988	980391590
CHELSEA	STAFF	The Item will be changed from not	3/05/2011 2:22	B9988	980391776
CHELSEA	STAFF	The Item will be changed from not	3/05/2011 2:22	B9988	980387259
CHELSEA	FIONA	Warning - This Borrower has at lea	18/11/2009 10:	B304	
CHELSEA	FIONA	The Item is currently OverDue. Co	18/11/2009 10:	B304	STOCK00362263B
CHELSEA	FIONA	Warning - This Borrower has at lea	18/11/2009 10:	B303	
CHELSEA	FIONA	The Item is currently OverDue. Co	18/11/2009 10:	B303	980485705
CHELSEA	FIONA	The Item is currently OverDue. Co	18/11/2009 10:	B303	980410068
CHELSEA	FIONA	The Item is currently OverDue. Co	18/11/2009 10:	B303	765215

To delete entries from the table:

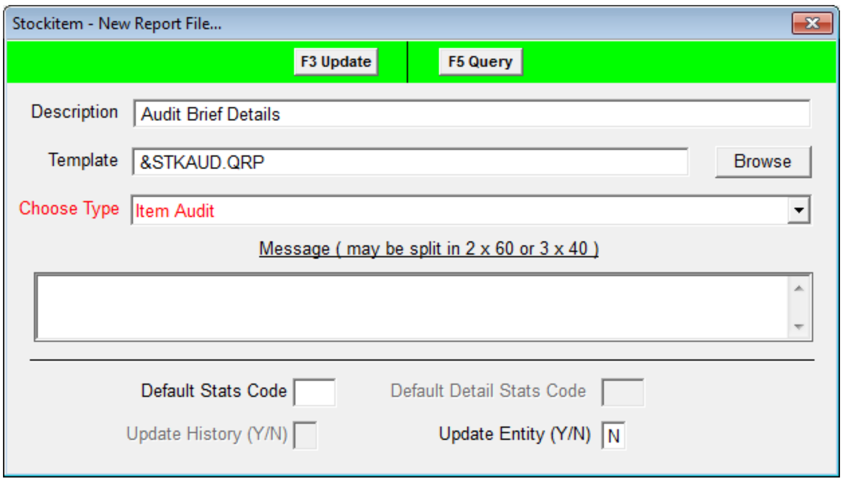
1. Open the Supervisor module
2. Select **LibraryMenu** > **IssuesAudit** – the Issue Audit table will display
3. **Highlight** the entries in the list to be deleted
4. Click the **F4 Delete** button – this will mark the entries for deletion
5. Click the **F3 Update** button to delete the marked entries

Load the Template

Some audit report templates may need to be loaded before they can then be used in a report. You can also use this method to double-check the Choose Type of an already loaded template.

1. Go to **Main** > **Reports** > **RepAddNew** – the Report Files window will display
2. Select the appropriate Report Entity: either **Authority**, **Borrower**, **Statistics** or **Stockitem** – in the example below: Report Entity = **Stockitem**
3. Click the **F1 New** button – the New Report File pane will open
4. Type in a Description – for example: **Audit Full Details**
5. Click on the **Browse** button to view the **Amlib/Reports** folder on your *Amlib* Server and locate the template to be loaded – be sure to change the Files of type: drop-down to **System Report Templates (*.qrp)**
6. **Select** the template to be loaded and click on the **Open** button
7. Change the Choose Type to select an **Audit** type:
    a. Authority: **Authority Audits**
    b. Borrower: **Audit Report**
    c. Stockitem: **Item Audit**
    d. Statistics: **Access Audit**, **Logon Audit** or **Search Audit**
8. You can leave Default Stats Code blank
9. Update Entity (Y/N) = **N**
10. Click on the **F3 Update** button
11. Close out of the Report Files window

The template is now loaded and available for use in a Report.



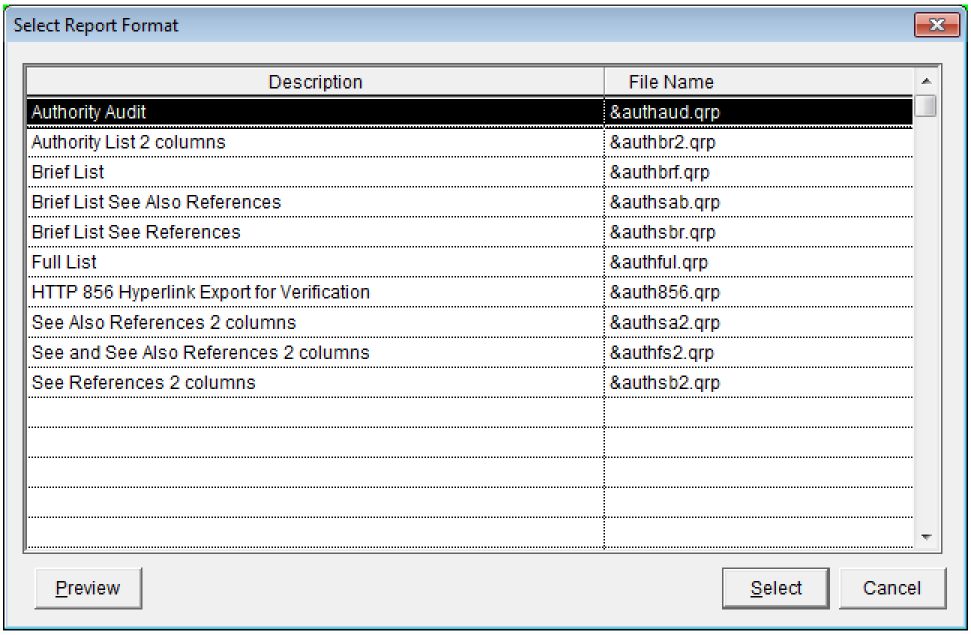
Authority Audit Reports

- Reports can be set up in **Main** > **Reports** > **RepAuthority**

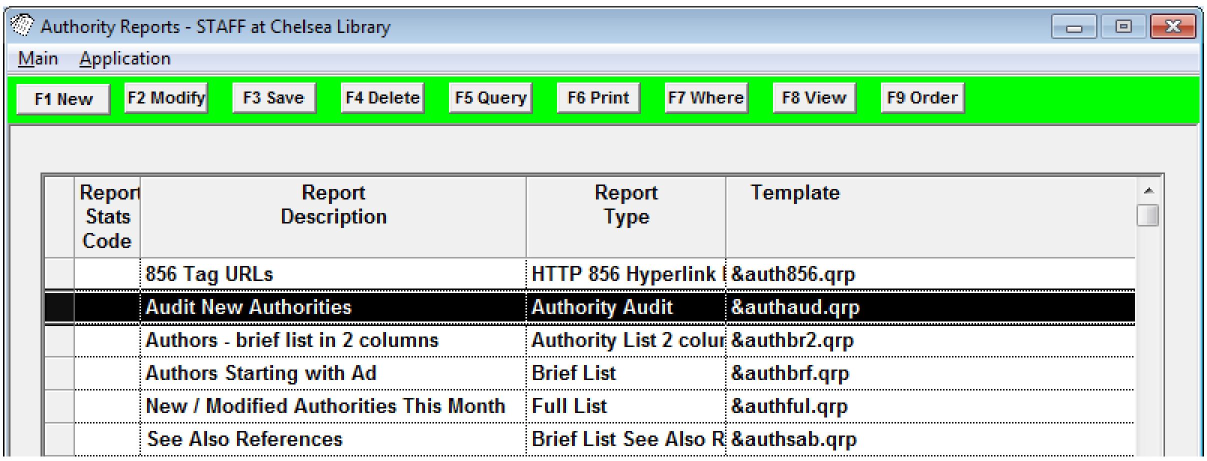
There is only one type of audit report available:

1. Audit report: **&AUTHAUD.QRP**

1. Go to **Main** > **Reports** > **RepAuthority** – the Authority Reports screen will display
2. Click the **F1 New** button – the Select Report Format screen will display
3. Highlight the **&AUTHAUD.QRP** template and click the **Select** button



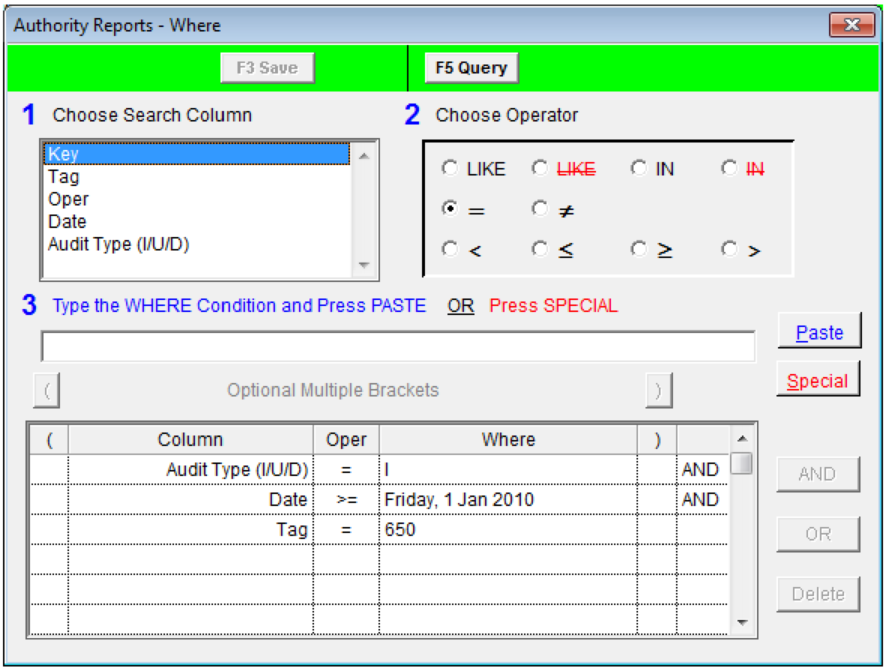
4. Type a Report Description – for example: **Audit New Authorities**
5. Click the **F3 Save** button



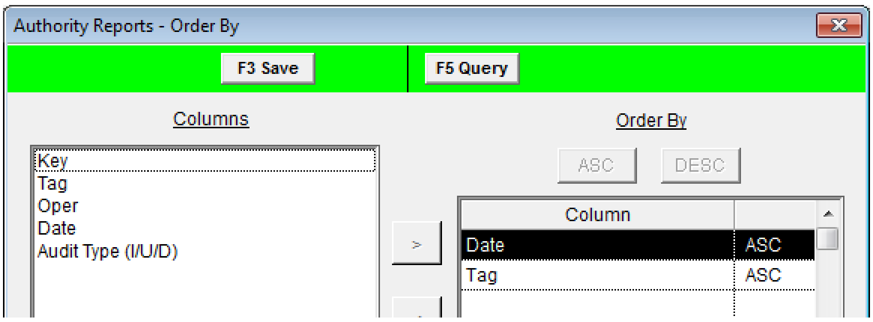
6. Highlight the Audit report and click the **F7 Where** button – the Authority Reports – Where screen will display
7. Enter your Where parameters – there are three audit types:

2. **D**: Deleted
3. **I**: Inserted
4. **U**: Updated

The Where parameters will depend on what you are after. Typically you would set the **Date** and **Audit Type (I/U/D)**. You may also include tag numbers or span of numbers (for example: **> 600** AND **< 700**).



8. Click the **F3 Save** button when complete
9. (Optional) Click the **F9 Order** button – you can then set the order for the report to print in. You can sort by **Date** and **Tag** (or vice versa if you're looking for a particular tag). Click the **F3 Save** button when complete.



10. Click the **F8 View** button to view the report
11. Select the **print** icon to print the report

&authaud.qrp AUTHORITY AUDIT REPORT 17/11/2010

Audit New Authorities

Tag	Indicators	Authority / *Database Key*	Operator	Date/Time	Audit
650		**Being Rich - Lifestyle** *BEING RICH LIFESTYLE*	JOHN PR	Apr 8, 2010 12:04 PM	I
650		**Rummy** *RUMMY*	JOHN PR	Apr 19, 2010 5:05 PM	I
650		**Jax** *JAX*	JOHN PR	Apr 19, 2010 5:06 PM	I
650		**Olympic Games** *OLYMPIC GAMES*	JOHNPR	Jul 7, 2010 5:56 PM	I
650		**Science fiction - - television** *SCIENCE FICTION TELEVISION*	JOHNPR	Oct 19, 2010 9:37 PM	I

Borrower Audit Reports

- Reports can be set up in **Main** > **Reports** > **RepBorrower**

There is only one type of audit report available:

5. Audit: **&BORRAUD.QRP**

1. Go to **Main** > **Reports** > **RepBorrower** – the Borrower Reports screen will display
2. Click the **F1 New** button – the Select Report Format screen will display
3. Highlight the **&BORRAUD.QRP** template and click the **Select** button

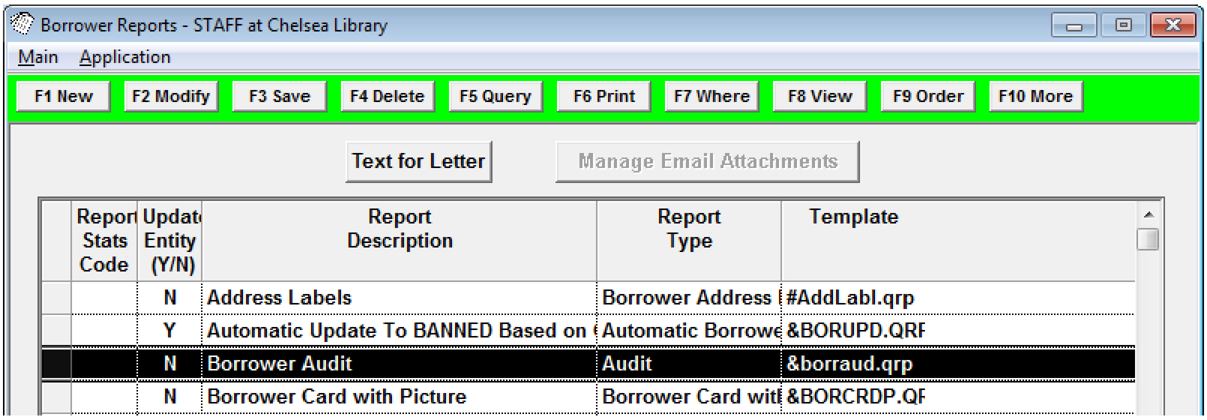
Select Report Format

Description	Update Entity	File Name
Account History Count >= 3	N	&borh3n.qrp
Account History Count >= 6	N	&borh6n.qrp
Audit	N	&borraud.qrp
Automatic Borrower Update	N	&BORUPD.QRF
Bor List with Barcodes	N	&barcode.qrp
Borrower Address Labels	N	#AddLabl.qrp
Borrower Card	N	&borcard.qrp
Borrower Card with picture	N	&BORCRDP.QF
Borrower Circulation Automatic Update	Y	&BORCUPD.QF
Borrower count by Location, Type & Gender	N	&bctg.qrp
Borrower count by Location, Type & Suburb	N	&bct.qrp
Borrower count by Type/Location, Gender/Type & Class/Type	N	&Bctsch.qrp
Borrower Financial Report	N	&borfin.qrp
Borrower History Report (Class Order)	N	&BORHISC.QRI

Preview Select Cancel

4. Type a Report Description – for example: **Borrower Audit**

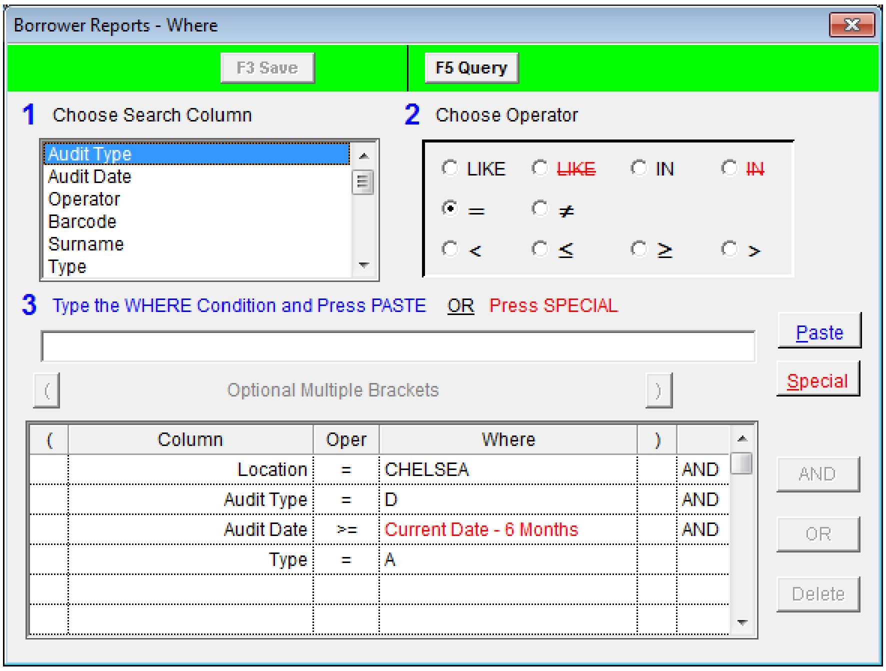
5. Click the **F3 Save** button



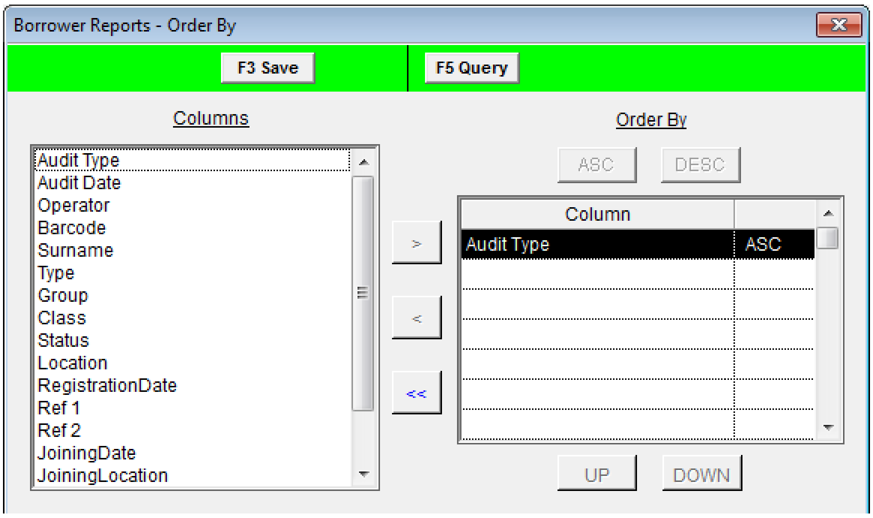
6. Highlight the Audit report and click the **F7 Where** button – the Borrower Reports – Where screen will display
7. Enter your Where parameters – there are three audit types:

    6. **D**: Deleted
    7. **I**: Inserted
    8. **U**: Updated

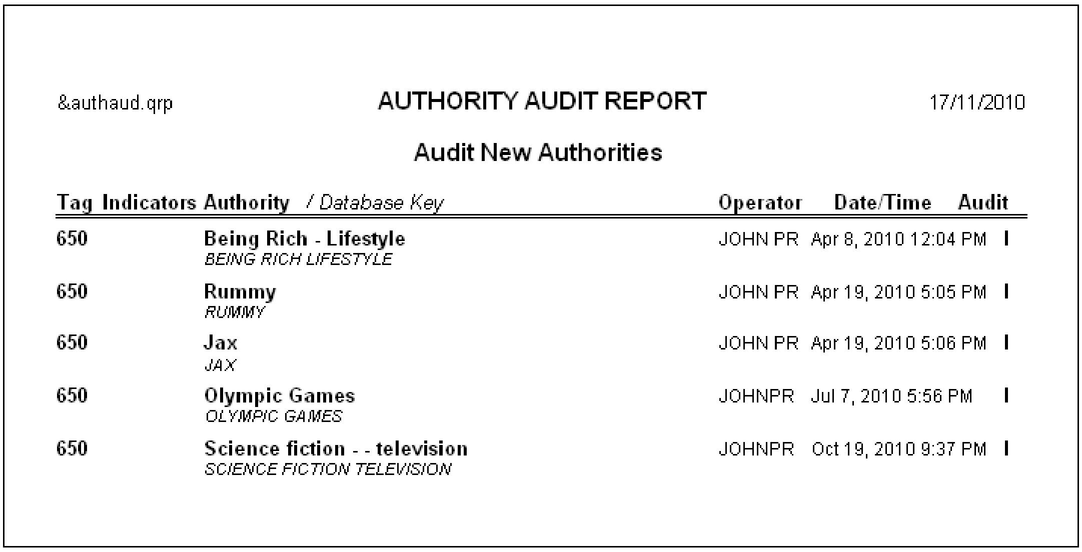
    The Where parameters will depend on what you are after. Typically you would set the **Audit Date** and **Audit Type (I/U/D)**. You may also want to limit by **Location**, Borrower **Type**, etc.



8. Click the **F3 Save** button when complete
9. (Optional) Click the **F9 Order** button – you can then set the order for the report to print in. You can sort by **Audit Date** and **Barcode** (or vice versa if you're looking for a particular patron). Click the **F3 Save** button when complete.



10. Click the **F8 View** button to view the report
11. Select the **print** icon to print the report



&authaud.qrp AUTHORITY AUDIT REPORT 17/11/2010

Audit New Authorities

Tag	Indicators	Authority / *Database Key*	Operator	Date/Time	Audit
650		**Being Rich - Lifestyle** *BEING RICH LIFESTYLE*	JOHN PR	Apr 8, 2010 12:04 PM	I
650		**Rummy** *RUMMY*	JOHN PR	Apr 19, 2010 5:05 PM	I
650		**Jax** *JAX*	JOHN PR	Apr 19, 2010 5:06 PM	I
650		**Olympic Games** *OLYMPIC GAMES*	JOHNPR	Jul 7, 2010 5:56 PM	I
650		**Science fiction - - television** *SCIENCE FICTION TELEVISION*	JOHNPR	Oct 19, 2010 9:37 PM	I

Statistics Audit Reports

- Reports can be set up in **Main** > **Reports** > **RepStatistics**

There are three types of audit reports available:

1. Access Audit: **&SAAUDIT.QRP**

This report displays access to the *Authority* and *Catalogue* modules by Operator showing alterations made.

7/09/2006

Audit for catalogue

Date	Operator	Module	Location	Oper Sec.	Object Sec.
24-Jul-2006 1:38:02 PM	STAFF	AUTHORITY	EAS	93	0
Detail	Authors - Services for - Western Australia - Handbooks, manuals, etc.				
17-Aug-2006 10:23:47 AM	STAFF	AUTHORITY	EAS	93	50
Detail	000025084723				
22-Aug-2006 11:49:45 AM	STAFF	AUTHORITY	EAS	93	0
Detail	Attachments re: / Bali.				
22-Aug-2006 11:49:48 AM	STAFF	AUTHORITY	EAS	93	0
Detail	Viewed Attachments re: / Bali.Rice paddies				

2. Logon Audit: **&SLAUDIT.QRP**

This report displays the date and time Operators logged onto the *Authority* and *Catalogue* modules:

7/09/2006

Access to Authority, Catalogue

Date	Operator	Module	Location	IP_Address
01-Sep-2006 1:05:52 PM	STAFF	AUTHORITY	LIB	
01-Sep-2006 1:06:10 PM	STAFF	AUTHORITY	LIB	
01-Sep-2006 2:13:19 PM	STAFF	CATALOGUE	LIB	
01-Sep-2006 2:39:07 PM	STAFF	AUTHORITY	LIB	
01-Sep-2006 3:10:06 PM	STAFF	CATANET	LIB	10.0.0.47

3. Search Audit: **&SAUDIT.QRP**

This report displays Search terms used with the *Authority* and *Catalogue* modules and the type of search done:

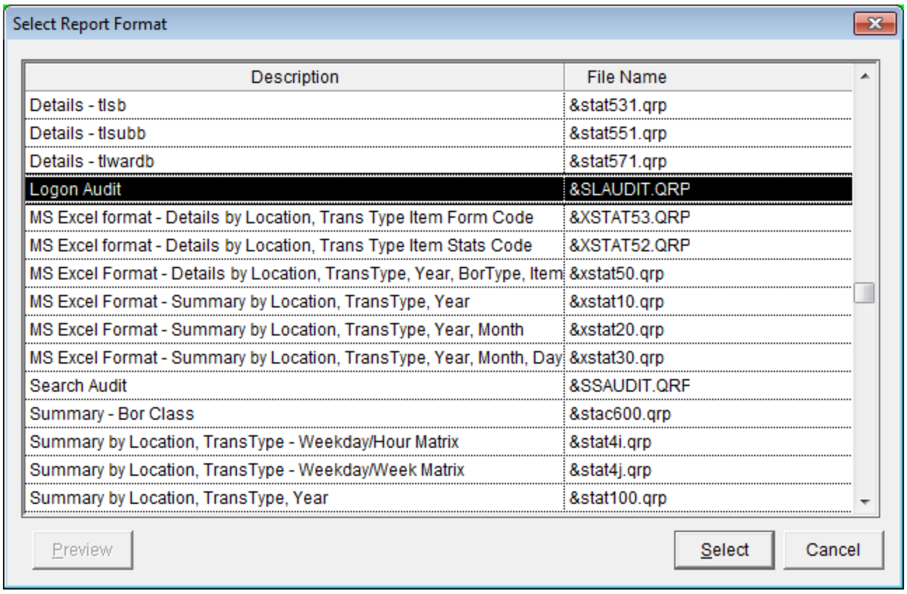
7/09/2006

Searches - Authority, Catalogue

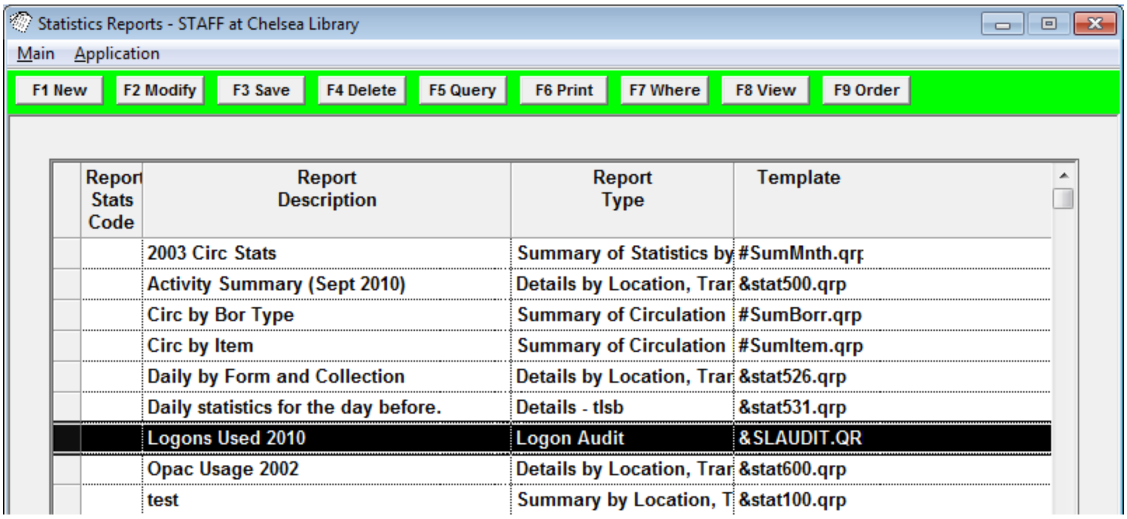
Date	Operator	Module	Location	Oper Sec.	Type
10-Aug-2006 10:18:59 AM	STAFF	CATANET	LIB	100	Catalogue Ref Number
Term	13107				
11-Aug-2006 4:04:05 PM	STAFF	CATANET	LIB	100	BR: Title
Term	sky				
11-Aug-2006 4:04:48 PM	STAFF	CATANET	LIB	100	BR: I.S.B.N.
Term	0037-6604				
11-Aug-2006 4:04:56 PM	STAFF	CATANET	LIB	100	BR: Any Authority
Term	0037-6604				

Creating a Statistics Audit Report

1. Go to **Main** > **Reports** > **RepStatistics** – the Statistics Reports screen will display
2. Click the **F1 New** button the Select Report Format screen will display:



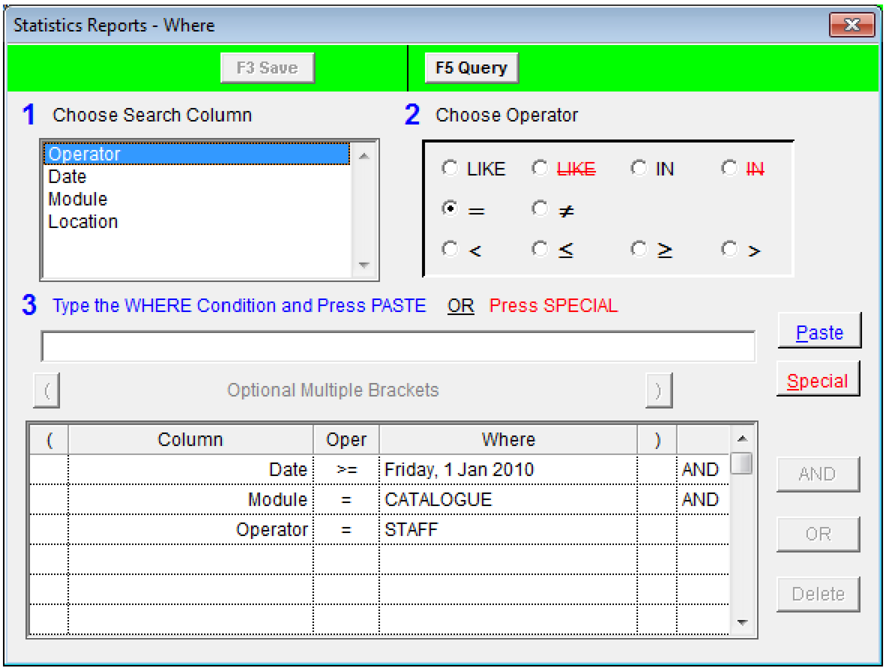
3. Highlight an audit **template** (Access, Logon or Search) and click the **Select** button
4. Type a Report Description – for example: **Logons Used 2010**
5. Click the **F3 Save** button



6. Highlight the Audit report and click **F7 Where** – the Statistics Reports – Where screen will display
7. Enter your Where parameters – there are two module types:

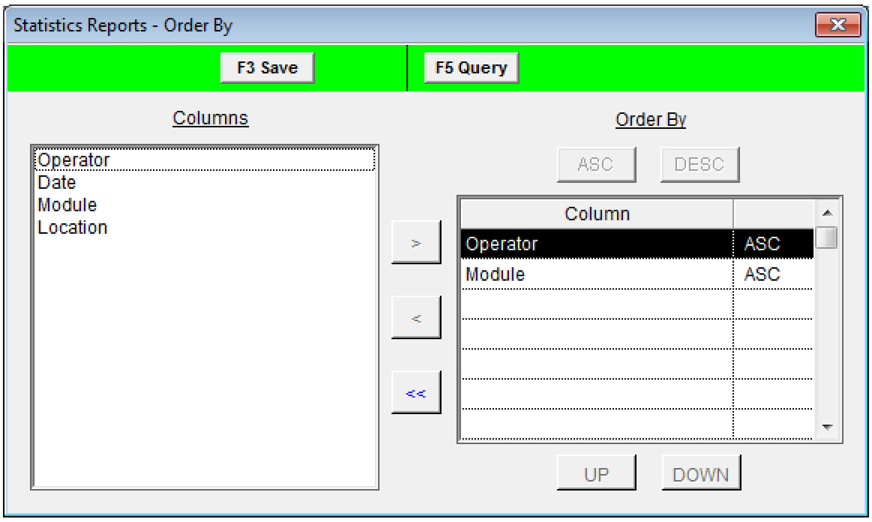
   - AUTHORITY
   - CATALOGUE

The Where parameters will depend on what you are after. Typically you would set the **Date** and **Module** parameters, and perhaps **Location** (Operator Logon Location).



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

9. (Optional) Click the **F9 Order** button – you can then set the order for the report to print in. You can sort by **Operator** and **Module** (or vice versa if you're looking for a particular item). Click the **F3 Save** button when complete.



10. Click the **F8 View** button to view the report

11. Select the **print** icon to print the report

Stockitem Audit Reports

- Reports can be set up in **Main** > **Reports** > **RepStockitem**

There are three types of audit reports available:

1. Audit Brief Details: **&SADBR.QRP**

This report displays a small amount of information for each item:

&sadbr.qrp

Audit - 2002

18/09/2008

The bird of happiness.		Call No. F STE	Cat No.: 5153	Accn Date:	Cost:
Barcode: 317005603212	Author: Stewart, Sally.		Audit Date: 15/01/2002	Times Borrowed: 0	
Bird designs stained glass pattern book / Carolyn Relei		Call No. Q748.5 REL	Cat No.: 2905	Accn Date:	Cost:
Barcode: 364218956232	Author: Relei, Carolyn.		Audit Date: 15/01/2002	Times Borrowed: 0	
It seems just yesterday...[picture] : wander through We		Call No. 919.41 IT	Cat No.: 9913	Accn Date:	Cost: $12.50
Barcode: +60011352329	Author:		Audit Date: 24/01/2002	Times Borrowed: 0	

2. Audit Medium Details: **&SADDET.QRP**

This report includes some additional fields: location, publisher, form and stats codes:

&auddet.qrp

Audit Medium Details - Audit - 2002

18/09/2008

The bird of happiness.

Barcode: 317005603212	Location: EAS	Audit Type: I	Accession Date:
Cat No.: 5153	Call No. F STE	Audit Date: 15/01/2002	Last Active:
Author: Stewart, Sally.		Form: BK	Times Borrowed: 0.00
Publisher:		Stats: AF	Cost:

Bird designs stained glass pattern book / Carolyn Relei.

Barcode: 364218956232	Location: EAS	Audit Type: I	Accession Date:
Cat No.: 2905	Call No. Q748.5 REL	Audit Date: 15/01/2002	Last Active:
Author: Relei, Carolyn.		Form: BK	Times Borrowed: 0.00
Publisher: 60 p. : chiefly ill. ; 28 cm.		Stats: ANF	Cost:

3. Audit Full Details: **&STKAUD.QRP**

This report displays many additional fields for each item:

&stkaud.qrp

Audit - 2002 **18/09/2008**

Operator: STAFF

Audit Type: I **Date and Time:** 15/01/2002

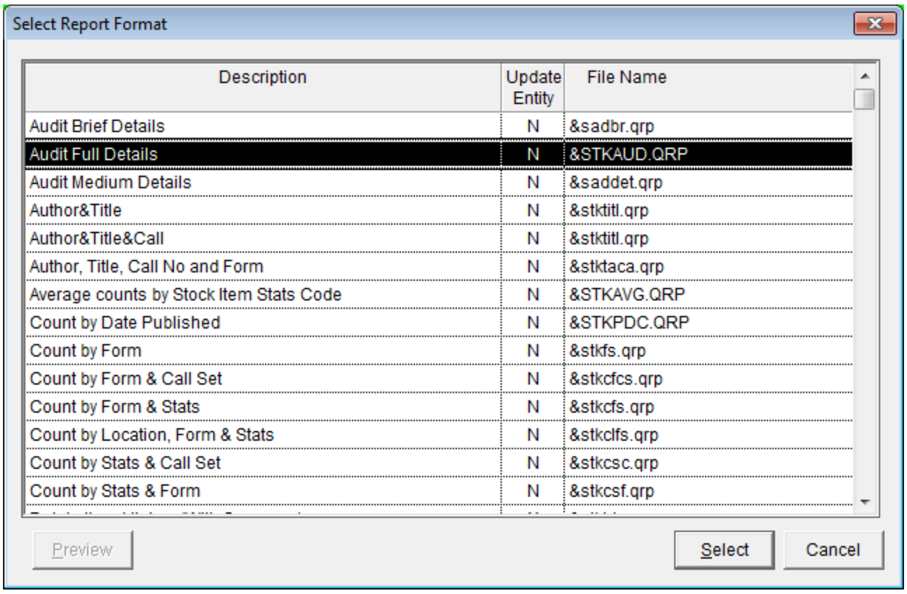
Item Number: 317005603212 **Cat Ref Number:** 5153 **Unique Number:** 10418
The bird of happiness.
Stewart, Sally.

Vol: **Ed:** 1991
Sts Code: AF **Form:** BK
F STE **Call Set :**
Description: **Convert Val:**

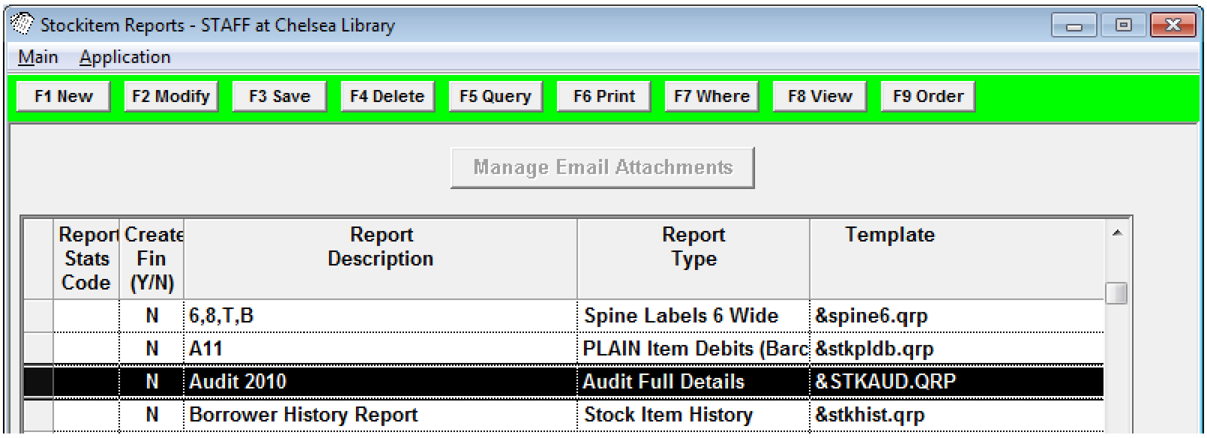
Location **Perm:** EAS	**Temp:** EAS	**Floor:**		**Source:**
For Loan: Y	**Loan Type:**	**Process:**		**Process Date:**
On Order: N	**Received:** 15/01/2002	**Accessioned:**		**Current Cost:**
On Loan: N	**Borrower:**			**Barcode:**
Due Date:	**Times Borrowed:** 0			**Last Active:**
Reserves: 0	**Times Reserved:** 0	**Times Renewed:** 0	**for this issue**	
Stock Take:				**Last Stock Take:**
Date Issued:	**Issue Location:**			**Issue Type:**

Creating a Stockitem Audit Report

1. Go to **Main** > **Reports** > **RepStockitem** – the Stockitem Reports screen will display
2. Click the **F1 New** button – the Select Report Format screen will display:



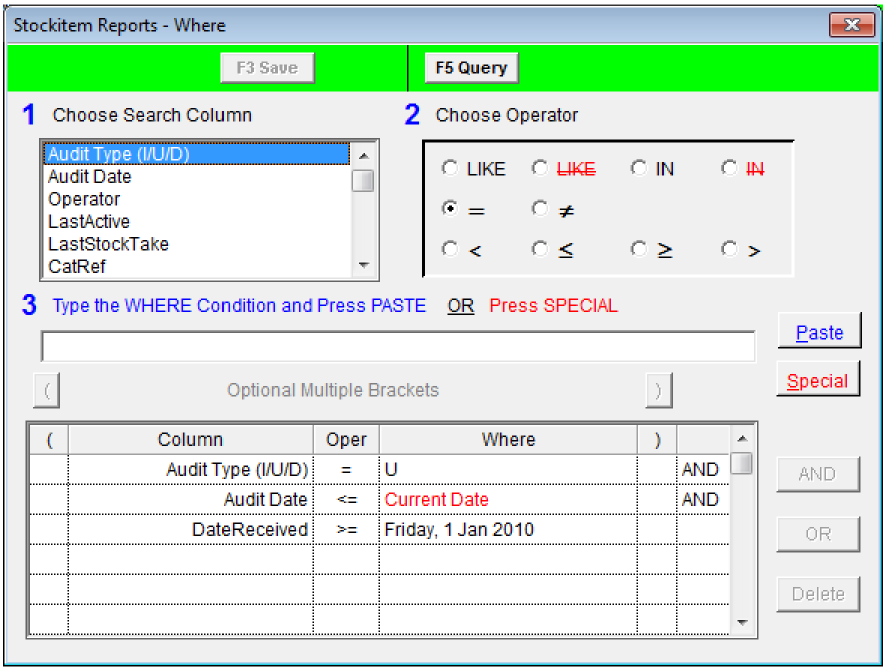
3. Highlight an audit **template** (brief, medium or full details) and click the **Select** button
4. Type a Report Description – for example: **Audit 2010**
5. Click the **F3 Save** button



6. Highlight the Audit report and click the **F7 Where** button – the Stockitem Reports – Where pane will open
7. Enter your Where parameters – there are three audit types:

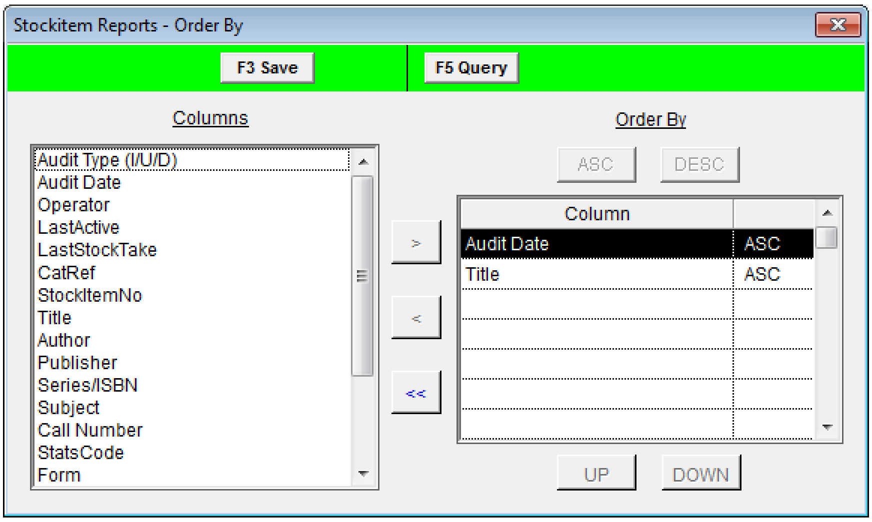
   - **D**: Deleted
   - **I**: Inserted
   - **U**: Updated

   The Where parameters will depend on what you are after. Typically you would set the **Audit Date** and **Audit Type (I/U/D)** parameters, and perhaps **PermLoc** (Permanent Location).



8. Select the **F3 Save** button when complete

9. (Optional) Click the **F9 Order** button – you can then set the order for the report to print in. You can sort by **Audit Date** and **Title** (or vice versa if you're looking for a particular item). Click the **F3 Save** button when complete.



10. Click **F8 View** to view the report

11. Select the **print** icon to print the report

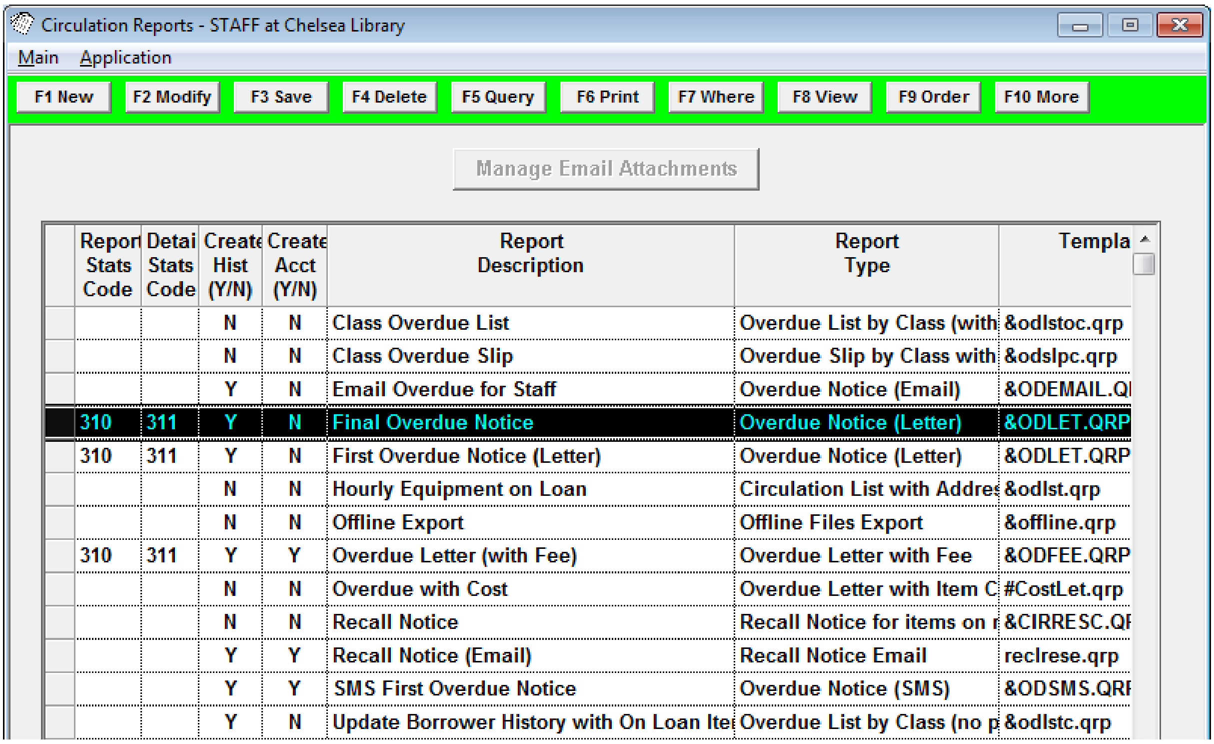
ACCOUNTS AND UPDATE REPORTS

Financial accounts can be added to borrower records via Reports. In order for this to work, you need to have the Create Acct column set to "**Y**" and you need to run your reports through **F6 Print** and *RepStartSchedule*.

Schools can use this to create a Final Account Due for departing students (where items on loan have not been returned and/or lost).

Create the Report

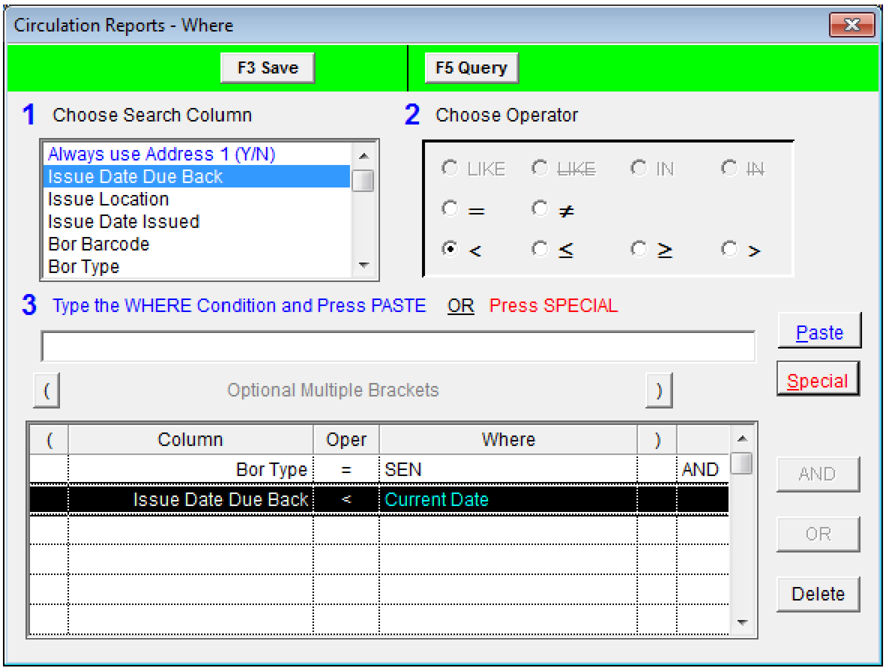
1. Launch the *Amlib* client
2. Go to **Main** > **Reports** > **RepCirculation** – the Circulation Reports window will display
3. Click the **F1 New** button – the Select Report Format screen will display
4. Highlight an appropriate Report (you may have a standard letter/email template you wish to use, or a modified overdue letter/email template added to the reports module) and click the **Select** button
5. Type in a Report Description – for example: **Final Overdue Account**
6. Ensure the Create Hist (Y/N) column = **Y** (for **Yes**)
7. Ensure the Create Acct (Y/N) column = **Y** (for **Yes**)
8. Click the **F3 Save** button to save the Report



Repor Stats Code	Detai Stats Code	Create Hist (Y/N)	Create Acct (Y/N)	Report Description	Report Type	Templa
		N	N	Class Overdue List	Overdue List by Class (with	&odlstoc.qrp
		N	N	Class Overdue Slip	Overdue Slip by Class with	&odslpc.qrp
		Y	N	Email Overdue for Staff	Overdue Notice (Email)	&ODEMAIL.QI
310	311	Y	N	Final Overdue Notice	Overdue Notice (Letter)	&ODLET.QRP
310	311	Y	N	First Overdue Notice (Letter)	Overdue Notice (Letter)	&ODLET.QRP
		N	N	Hourly Equipment on Loan	Circulation List with Addres	&odlst.qrp
		N	N	Offline Export	Offline Files Export	&offline.qrp
310	311	Y	Y	Overdue Letter (with Fee)	Overdue Letter with Fee	&ODFEE.QRP
		N	N	Overdue with Cost	Overdue Letter with Item C	#CostLet.qrp
		N	N	Recall Notice	Recall Notice for items on r	&CIRRESC.QI
		Y	Y	Recall Notice (Email)	Recall Notice Email	reclrese.qrp
		Y	Y	SMS First Overdue Notice	Overdue Notice (SMS)	&ODSMS.QRI
		Y	N	Update Borrower History with On Loan Ite	Overdue List by Class (no p	&odlstc.qrp

Where Statement

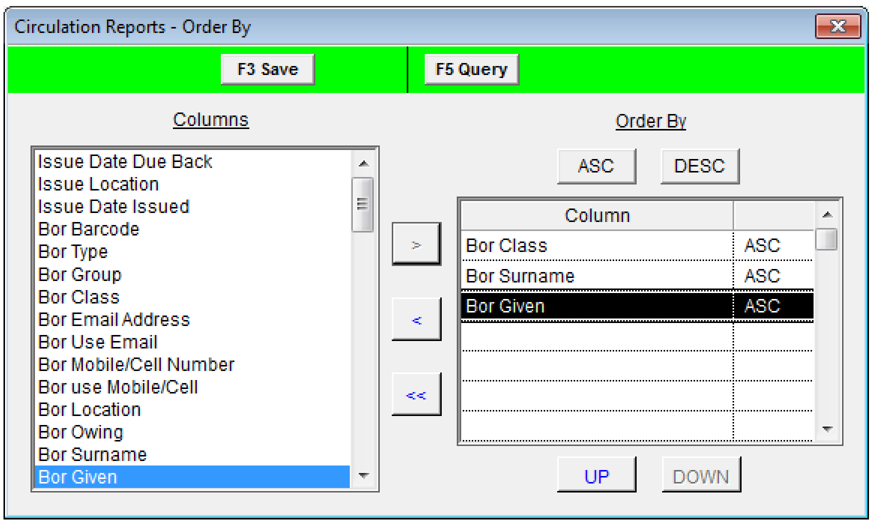
1. Click the **F7 Where** button – the Circulation Reports – Where screen will display:



2. Enter an appropriate Where Statement – for example:
    a. **BorType = SEN** (for Seniors)
    b. **Issue Date Due Back < Current Date** (select via the **Special** button)
3. Click the **F3 Save** button when complete

Order By

1. Click the **F9 Order** button – the Circulation Reports - Order By screen will display:



2. Set an appropriate order using the arrow keys to move fields from the Columns table in to the Order By table – for example:
    a. **Bor Class**
    b. **Bor Surname**
    c. **Bor Given**
3. Click the **F3 Save** button when complete

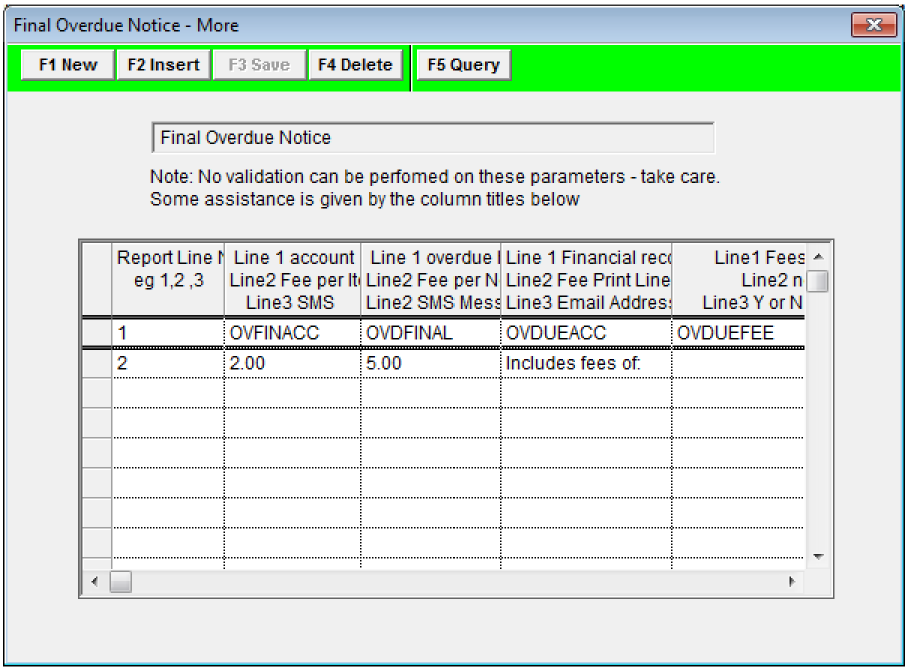
F10 More

Please Note: User-defined charge types must be added to the Circulation Transaction Types table – see Appendix 1: Add the User-Defined Financial Record and Fees Type Names to the Circulation Transactions Types (RepCirculation and RepReservations Only) for more information.

	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5
HEADING	Report Line Number	Line 1 account history NAME	Line 1 overdue history NAME	Line 1 Financial record NAME	Line 1 Fees type name
EXAMPLE	**1**	**OVFINACC**	**OVDFINAL**	**OVDUEACC**	**OVDUEFEE**
COMMENT	Line 1 is used for History and Financial reporting purposes	If left blank, the system will put a Report Type of **ACCOUNT** in the Borrower History window if **Create Hist (Y/N) = Y** and **Create Acc (Y/N) = Y** and the report run via the *Scheduler*. It is possible to specify your own name – see example (max: 8 chars). Can use to specify 1st, 2nd, etc overdue – for example: **OVDUE1**,**OVDUE2**	If left blank, the system will put a Report Type of **OVERDUE** in the Borrower History window if **Create Hist (Y/N) = Y** and **Create Acc (Y/N) = N** and the report run via the *Scheduler*. It is possible to specify your own name – see example (max: 8 chars). Can use to specify 1st, 2nd, etc overdue – for example: **OVDUE1**,**OVDUE2**	If left blank, the system will put a Financial Type of **OVERDUE** in the Borrower Financial window indicating the (replacement) Cost for overdue items if **Create Acc (Y/N) = Y** and the report run via the *Scheduler*. It is possible to specify your own name – see example (max: 8 chars).	If left blank, the system will put a Financial Type of **FEE** in the Borrower Financial window for reports that have a **FORM_CHARGES** field in the report (see example 2) if **Create Acc (Y/N) = Y** and the report run via the *Scheduler*. It is possible to specify your own name – see example (max: 8 chars).

HEADING	Report Line Number	Line 2 Fee per Item $.c	Line 2 Fee per Notice $.c	Line 2 Fee Print Line	Line 2 not Used
EXAMPLE	**2**	**2.00**	**5.00**	**Includes fees of:**	<Leave blank>
COMMENT	Line 2 is used to add Fees to Reports	Enter amount to be charged for each overdue item [Optional] Amount will be added to the **FORM_ CHARGES** field in the Report	Enter amount to be charged per notice (in addition to any item fee) [Optional] Amount will be added to the **FORM_ CHARGES** field in the Report	Text will be added to the **USER_LINE1** field in the Report [Optional]	

1. Click the **F10 More** button – the More screen will display:



2. Click the **F1 New** or **F2 Insert** button
3. Enter the following parameters:
   a. Report Line Number = **1**
   b. Line 1 account History NAME = **OVFINACC**
   c. Line 1 overdue History NAME = **OVDFINAL**
   d. Line 1 Financial record NAME = **OVDUEACC**
   e. Line 1 Fees type name = **OVDUEFEE** (applicable only if Charges apply –see below)

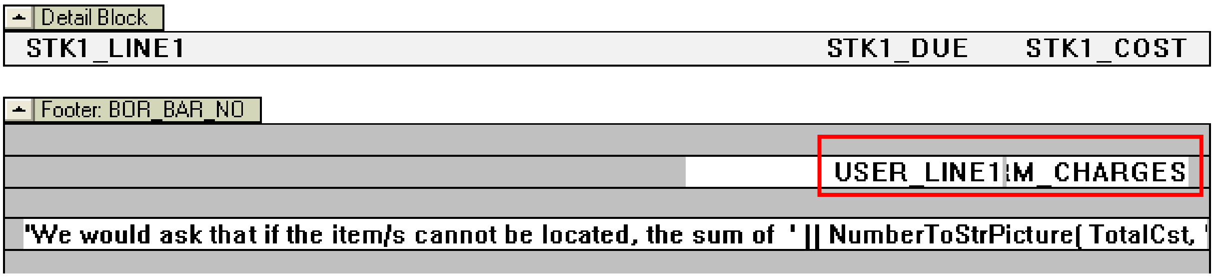
It is also possible to apply charges at this stage on a per item/notice basis:

4. Click the **F1 New** or **F2 Insert** button
5. Enter the following parameters:
    a. Report Line Number = **2**
    b. Line 2 Fee per Item = **2.00**
    c. Line 2 Fee per Notice = **5.00**
    d. Line 2 Fee Print Line = **Includes fees of:**
6. Click the **F3 Save** button when complete

Edit the Template to Include Charges

Please Note: The report template must be altered to include the following fields: **FORM_CHARGES** *and* **USER_LINE1**.

- The new **&ODFEE.QRP** template includes **FORM_CHARGES** and **USER_LINE1**.



The **FORM_CHARGES** field can be added to the total charge [Field = **FORM_CHARGES**] or included as part of a **TotalCst**. You can also include the field **USER_LINE1** which will include the text you entered in the **F10 More** statement.

Print Report (via Scheduler)

If you only want to print a report then the quickest method is to use **F8 View** and print from the Report – View window.

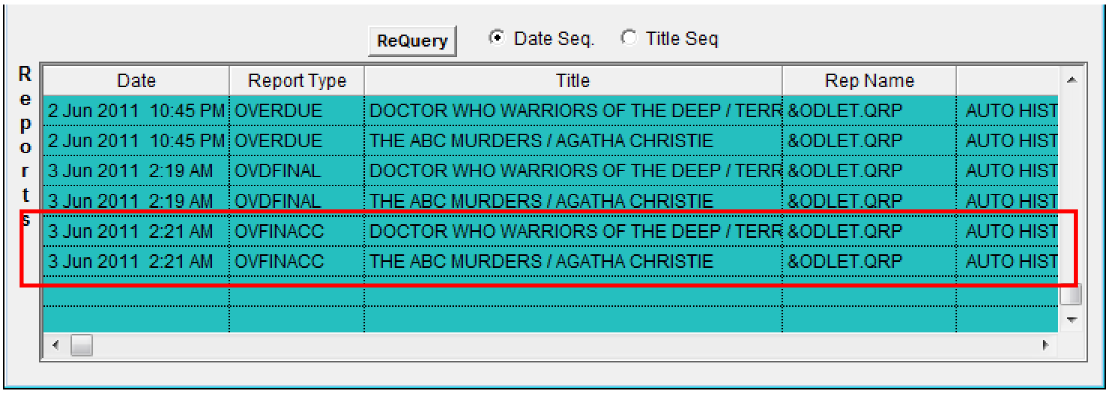
Using the *Scheduler* (via the **F6 Print** button) has several benefits over running reports via the **F8 View** button: It allows you to schedule regularly run reports so that staff do not have to do it manually each time, and it allows for further functions as part of the report such as updating Borrower/Stockitem history, updating the Reservation Status and adding report information to your statistics. **This report MUST be run via the Scheduler.**

Borrower

Once the report is printed each Patron will have an entry in the Borrower Financial Transactions window that will show the cost of the item:

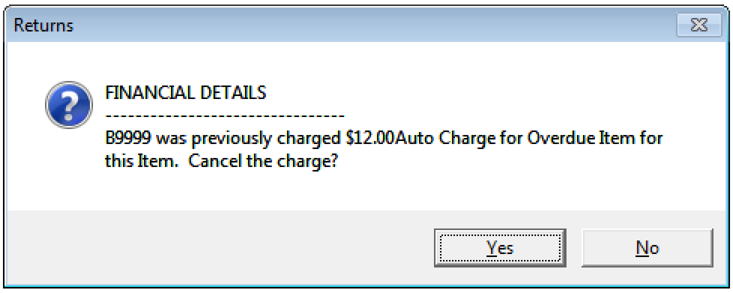
Type	TransDate	Locn	Comme	Item	Title	Qty	Charge (Debit)	Inv_No	Inv Date	Paid (Credit)
OVDUEFEE	03/06/2011	CHELSE	Auto Charge Fees	NA	Total Fees	1	$9.00	1766	03/06/2011	$0.00
OVDUEACC	03/06/2011	CHELSE	Auto Charge for	980391928	Doctor Who warriors	1	$20.00	1766	03/06/2011	$0.00
OVDUEACC	03/06/2011	CHELSE	Auto Charge for	980209532	The ABC murders / Agatha	1	$12.00	1766	03/06/2011	$0.00

Each Patron will also have an entry listed in the Borrower History window that will show that the report was run off:



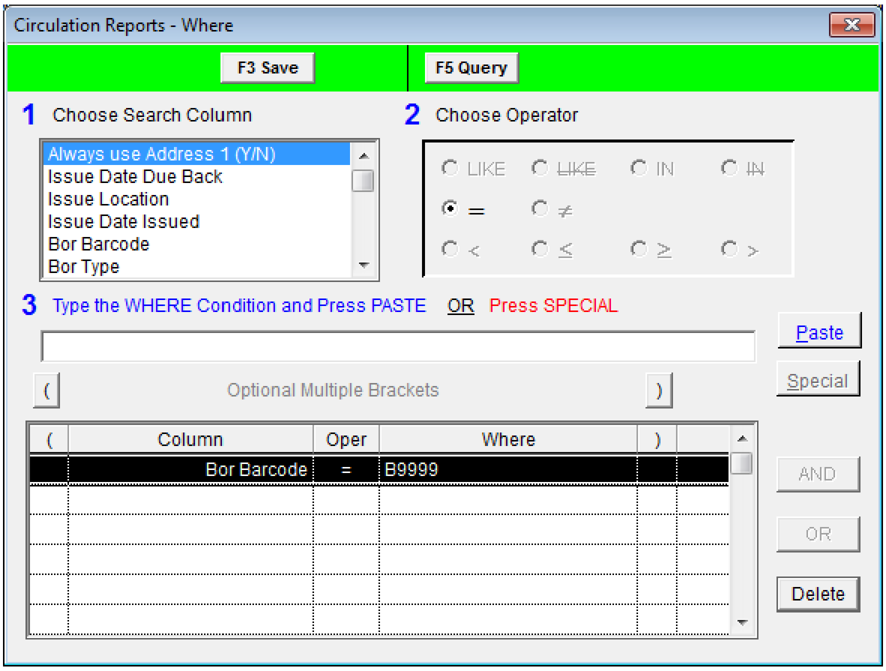
Date	Report Type	Title	Rep Name	
2 Jun 2011 10:45 PM	OVERDUE	DOCTOR WHO WARRIORS OF THE DEEP / TERR	&ODLET.QRP	AUTO HIST
2 Jun 2011 10:45 PM	OVERDUE	THE ABC MURDERS / AGATHA CHRISTIE	&ODLET.QRP	AUTO HIST
3 Jun 2011 2:19 AM	OVDFINAL	DOCTOR WHO WARRIORS OF THE DEEP / TERR	&ODLET.QRP	AUTO HIST
3 Jun 2011 2:19 AM	OVDFINAL	THE ABC MURDERS / AGATHA CHRISTIE	&ODLET.QRP	AUTO HIST
3 Jun 2011 2:21 AM	OVFINACC	DOCTOR WHO WARRIORS OF THE DEEP / TERR	&ODLET.QRP	AUTO HIST
3 Jun 2011 2:21 AM	OVFINACC	THE ABC MURDERS / AGATHA CHRISTIE	&ODLET.QRP	AUTO HIST

A prompt will display with the following message if the item is returned: **FINANCIAL DETAILS – XXXX was previously charged $XX.XX Auto Charge for Overdue Item for this Item. Cancel the charge?**



Single Account

Creating an invoice against a single account can be done via the Where statement in the report.



Email Reports

If you're planning to use email notices for those with email at your library, you need to ensure that patrons receiving notices by email aren't also getting hardcopies, and that those who do not have email addresses are still receiving hardcopies.

To do this you need to adjust the Where statement of your hardcopy notice report to include: **Bor Use Email = N**. For the reports you are setting up to be sent by email you need to use: **Bor Use Email = Y.**

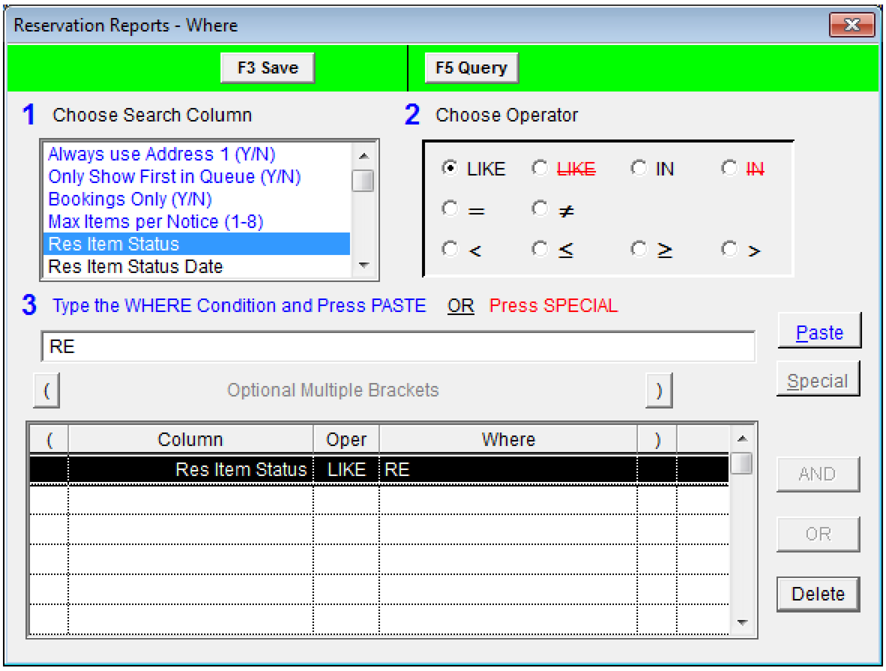
Status Updates

There are other reports that can affect changes in *Amlib*. For all of these to work, you must have the Update column in the report screen set to "**Y**" and they must all be run through **F6 Print** and *RepStartSchedule*.

Reservation Statuses

When an item is placed on reserve, a **Reservation Status** is placed against that item. The status is important as the reports use this status as a determinant for what to print and what not to.

STATUS	EXPLANATION
ISSUE	Item was on loan when reserved (reserve placed via *Amlib* client)
ON LOAN	Item was on loan when reserved (reserve placed via *Opacs*)
SHELF	Item was on shelf (available) when reserved
RETURN	Item has been returned AFTER reservation placed
TRANSFER	Item was on transfer when reserved
ORDER	Item was on order when reserved
READY	Reservation on item has been CANCELLED through an expiry report and is now ready for the next reader
PRINTED	Item was included in a *scheduled* Reservation report with Update Res Status = **Y**



AUTOMATIC BORROWER AND CIRCULATION UPDATES

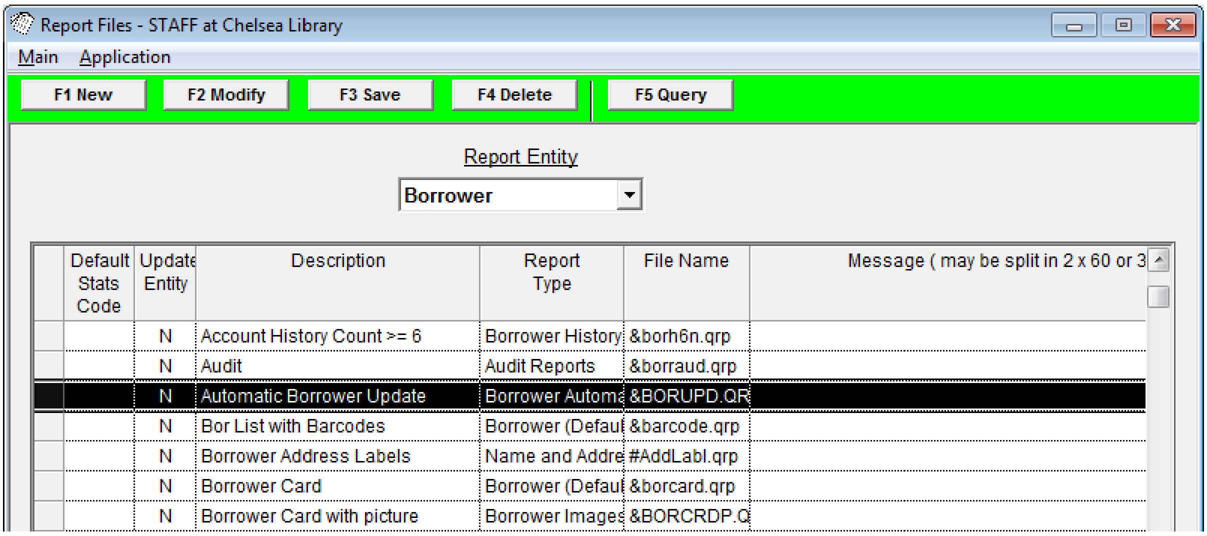
Borrower Update Reports

Borrower update reports can now be run to change borrower **status**, add **memos** and delete the **address 3** field (for those borrowers that are changing to adult status).

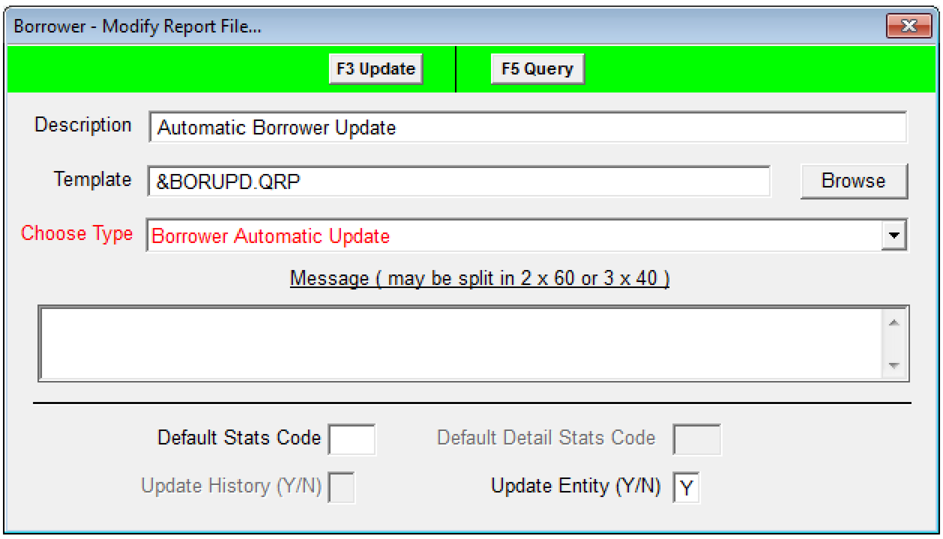
In the following example, we are changing the Borrower Type of Young Adult members to an **Adult** Type and deleting the Guardian Address.

Template

1. Launch the *Amlib* client
2. Go to **Main** > **Reports** > **RepAddNew** – the Report Files screen will display:



3. Locate and highlight the **&BORUPD.QRP** template
4. Click the **F2 Modify** button – the Borrower - Modify Report File... screen will display:



5. Check the following settings:

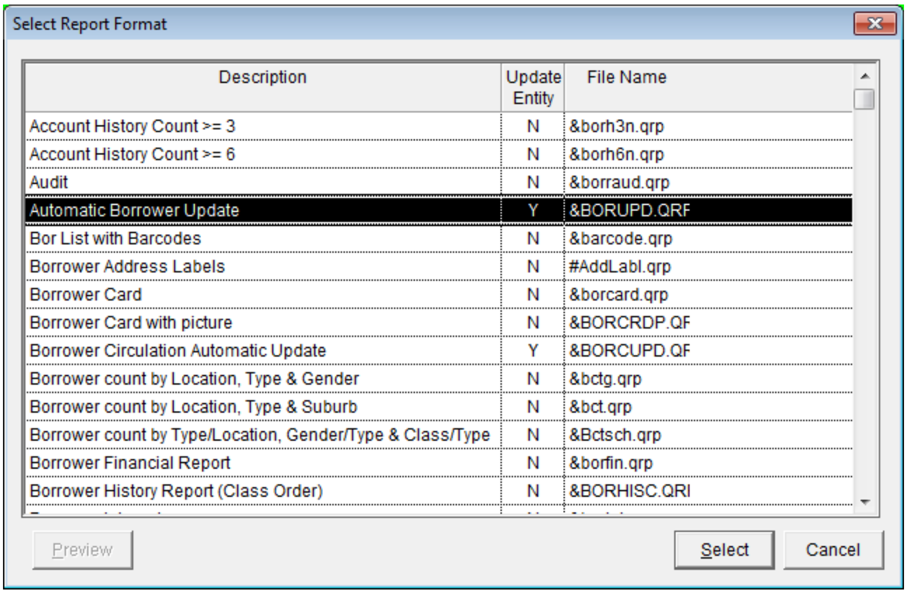
a. Choose Type = **Borrower Automatic Update**

b. Update Entity (Y/N) = **Y**

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

Create the Report

1. Go to **Main** > **Reports** > **RepBorrower** – the Borrower Reports screen will display
2. Click the **F1 New** button – the Select Report Format list will display:

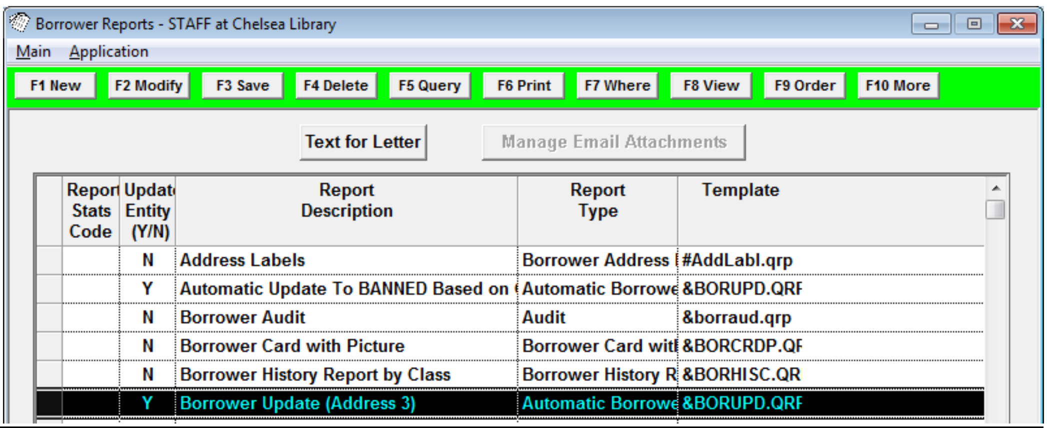


Select Report Format

Description	Update Entity	File Name
Account History Count >= 3	N	&borh3n.qrp
Account History Count >= 6	N	&borh6n.qrp
Audit	N	&borraud.qrp
Automatic Borrower Update	Y	&BORUPD.QRF
Bor List with Barcodes	N	&barcode.qrp
Borrower Address Labels	N	#AddLabl.qrp
Borrower Card	N	&borcard.qrp
Borrower Card with picture	N	&BORCRDP.QF
Borrower Circulation Automatic Update	Y	&BORCUPD.QF
Borrower count by Location, Type & Gender	N	&bctg.qrp
Borrower count by Location, Type & Suburb	N	&bct.qrp
Borrower count by Type/Location, Gender/Type & Class/Type	N	&Bctsch.qrp
Borrower Financial Report	N	&borfin.qrp
Borrower History Report (Class Order)	N	&BORHISC.QRI

Preview　Select　Cancel

3. Highlight the **&BORUPD.QRP** template and click the **Select** button
4. A new report will be added to the list of reports
5. Type in a Description – for example: **Update Borrower Address 3**
6. The Update Entity (Y/N) column setting must be set to **Y**
7. Click the **F3 Save** button when complete



Borrower Reports - STAFF at Chelsea Library

Main　Application

F1 New　F2 Modify　F3 Save　F4 Delete　F5 Query　F6 Print　F7 Where　F8 View　F9 Order　F10 More

Text for Letter　Manage Email Attachments

Report Stats Code	Update Entity (Y/N)	Report Description	Report Type	Template
	N	Address Labels	Borrower Address	#AddLabl.qrp
	Y	Automatic Update To BANNED Based on	Automatic Borrowe	&BORUPD.QRF
	N	Borrower Audit	Audit	&borraud.qrp
	N	Borrower Card with Picture	Borrower Card witl	&BORCRDP.QF
	N	Borrower History Report by Class	Borrower History R	&BORHISC.QR
	Y	Borrower Update (Address 3)	Automatic Borrowe	&BORUPD.QRF

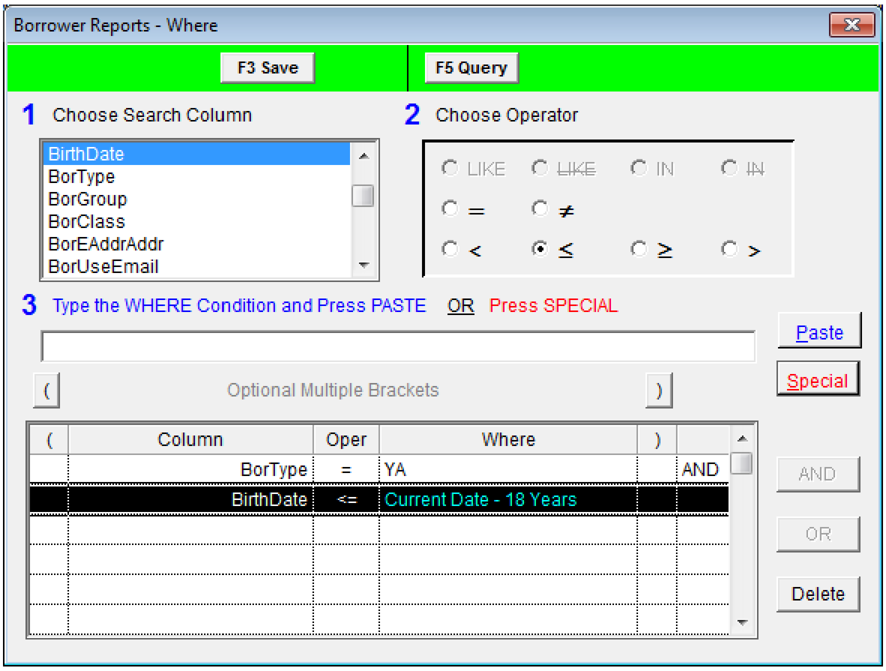
Set Where Parameters

Your where parameters can be set according to the changes you need to make to your database, and which group(s) of people these changes apply to.

The Where statement here selects those borrowers with a **YA** borrower type who are now over **18**.

If you are unsure of how to set your where parameters for the update you wish to carry out, please contact Amlib support.

1. Highlight the Report
2. Click the **F7 Where** button – the Borrower Reports – Where screen will display:



3. Enter the following details:
    a. **BorType** – for example: **BorType = YA**
    b. **BirthDate** – for example: **BirthDate <= Current Date – 18 Years** (use the **Special** button to insert Current Date – **216** months)
4. Click the **F3 Save** button when complete (the Where screen will close)

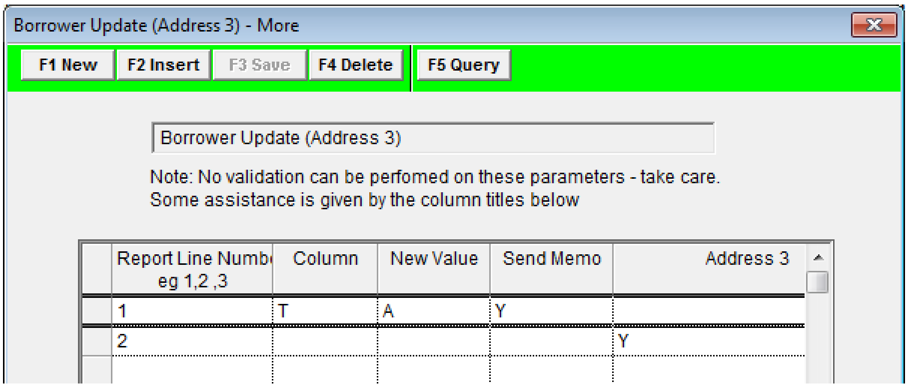
Update Parameters (F10 More)

The **F10 More** button is used to set up the new values and whether a Memo is to be sent.

A report employing **F10 More** parameters must be run via the *Scheduler*.

	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5
HEADING	Report Line Number	Column	New Value	Send Memo	Address 3
EXAMPLE	**1**	**T**	**A**	**Y**	**<leave blank>**
	2	**<leave blank>**	**<leave blank>**	**<leave blank>**	**Y**
COMMENT	Line 1 is used for updates Line 2 is used to delete Borrower Address 3	Borrower field – can be Borrower Types (**T**), Classes (**C**) Groups (**G**) or Status (**S**)	The new value – must be a valid code for the selected column	If **Y**, create the memo in **Text for Letter**, found at the top of the Borrower Reports screen	If **Y**, can be used to delete Address 3 (Guardian Address) from Borrower record

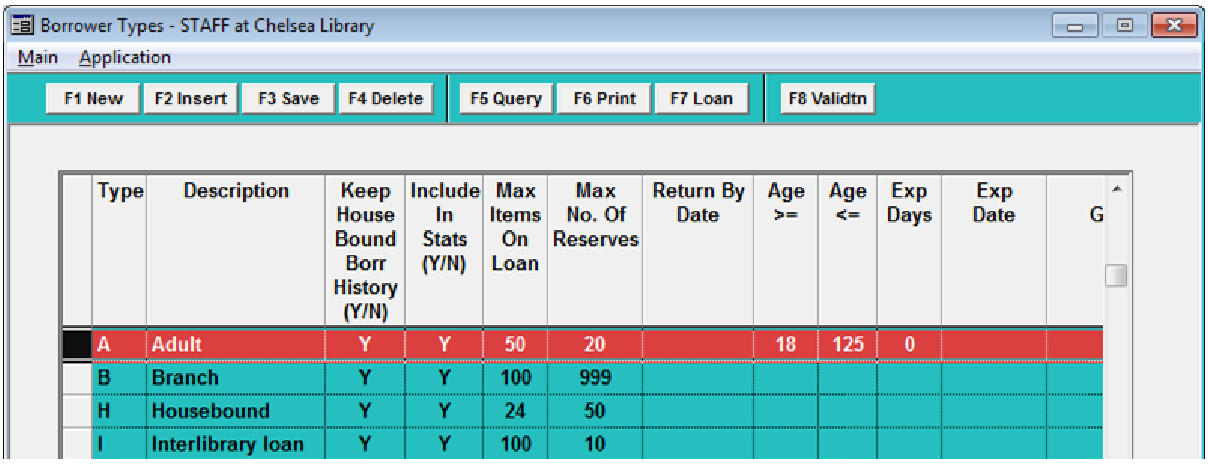
1. **Highlight** the report
2. Click the **F10 More** button – the More screen will display
3. Click the **F1 New** or **F2 Insert** button
4. Enter the following Line 1 parameters (see Notes below):
    a. Report Line Number = **1**
    b. Column = **T**
    c. New Value = **A** (for **Adult**)
    d. Send Memo = **Y** (optional)
5. Click the **F3 Save** button when complete
6. Enter the following Line 2 parameters (see Notes below):
    a. Address 3 = **Y** (this will delete the Borrower's Guardian Address)
7. Click the **F3 Save** button when complete



Notes

Updates: The new value is the new Borrower Type (or Borrower Status, Borrower Class or Borrower Group) that you wish to change the Borrowers to.

In the example given above, the Borrower Type would be changed to **Adult**, or **A**. The value entered in this column will depend on your Borrower Type settings. If you unsure, check your settings before proceeding: Go to **Main** > **Borrower** > **BorrowerTypes**:



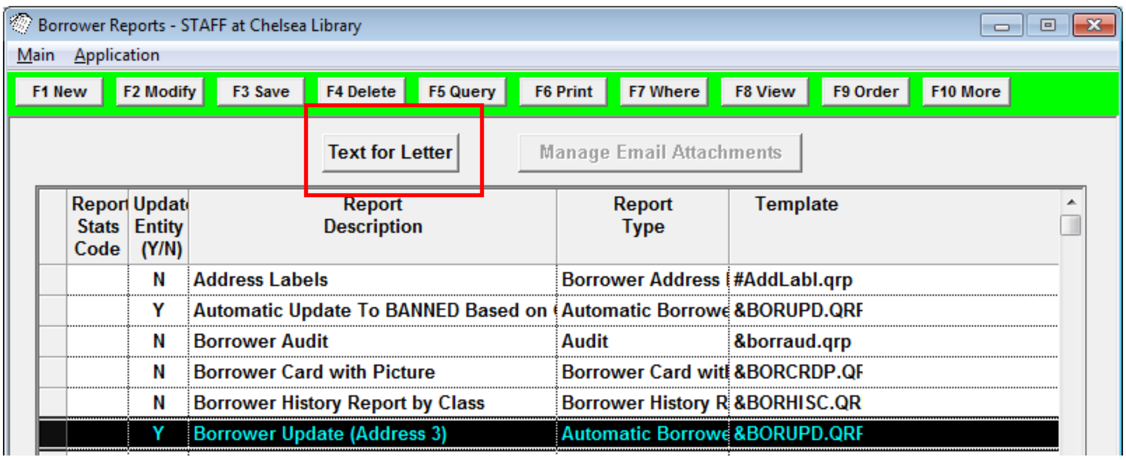
Send Memo: If you wish to add a memo to each borrower record that is changed, type a **Y** in the Send Memo column. Otherwise, type **N** in the Send Memo column.

Delete Guardian Address: Type a Y in the Address 3 column if you wish to have the guardian address deleted (for example in the case where YA members are changed to A members, for these records you may prefer to have the guardian address deleted as this is no longer required).

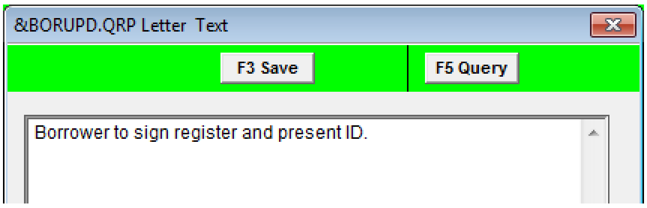
Memos

If you have placed a **Y** in the Send Memo column, then the Memo text must then be set up.

1. **Highlight** the report



2. Click the **Text for Letter** button – the Letter Text screen will display:

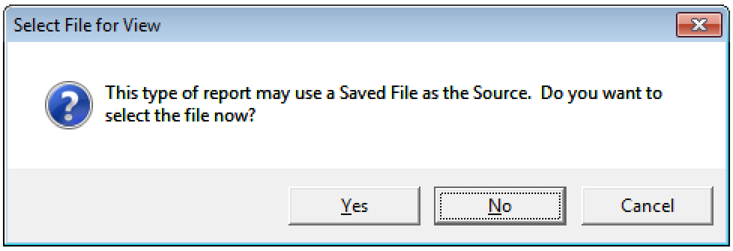


3. Type in the text that you would like to see in the Borrower Memo – for example: **Borrower to sign register and present ID.**
4. Click the **F3 Save** button when complete
5. Click on the **[X]** to close the screen

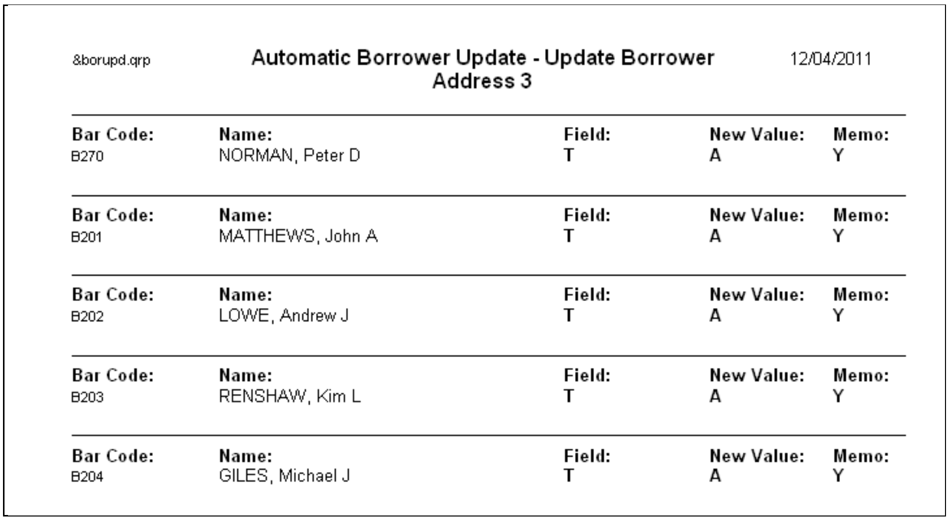
View Report

Once the report is set up, you can then preview the report as follows:

1. Highlight the report and click the **F8 View** button – a prompt with the following message will display: **This type of report may use a Saved File as the Source. Do you want to select the file now?**



2. Click the **No** button to run this report against all borrowers
3. The report will open in the Report – View window:



&borupd.qrp — Automatic Borrower Update - Update Borrower Address 3 — 12/04/2011

Bar Code:	Name:	Field:	New Value:	Memo:
B270	NORMAN, Peter D	T	A	Y
B201	MATTHEWS, John A	T	A	Y
B202	LOWE, Andrew J	T	A	Y
B203	RENSHAW, Kim L	T	A	Y
B204	GILES, Michael J	T	A	Y

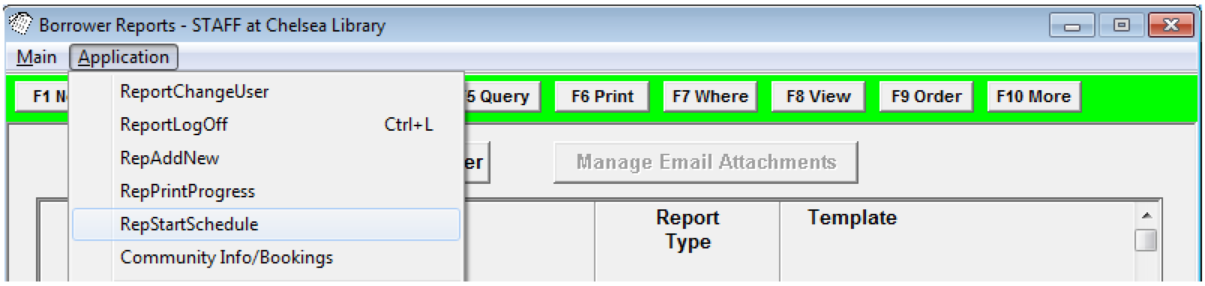
4. If you wish to print a hardcopy, click on the **print** icon

Print Report (via Scheduler)

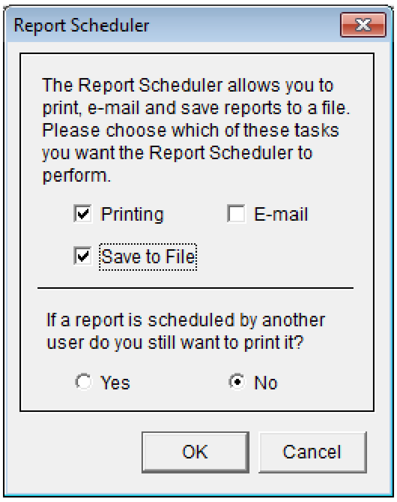
Borrower Update reports MUST be run via the *Scheduler*.

Start the Scheduler

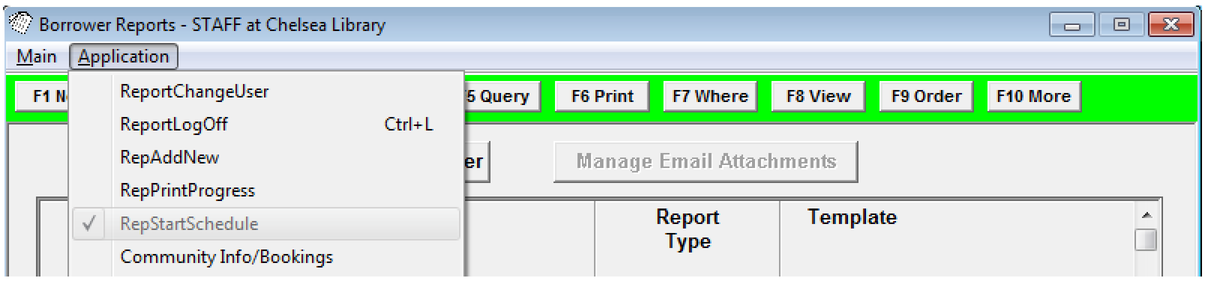
1. From the Reports screen, select **Application** > **RepStartSchedule**



2. The Report Scheduler screen will display
3. Select your printing options: ensure **Save to File** is ticked (you can tick all three if you intend on printing up multiple reports using multiple formats during a session)



4. Then click the **OK** button
5. After clicking **OK**, if you go back into the **Application** menu you will see that *RepStartSchedule* is now greyed out with a tick next to it – this indicates that the *Scheduler* is now running



Scheduling the Report

1. With your report highlighted, select the **F6 Print** button – the Print dialogue box will display
2. Select from the following options:
   a. From:

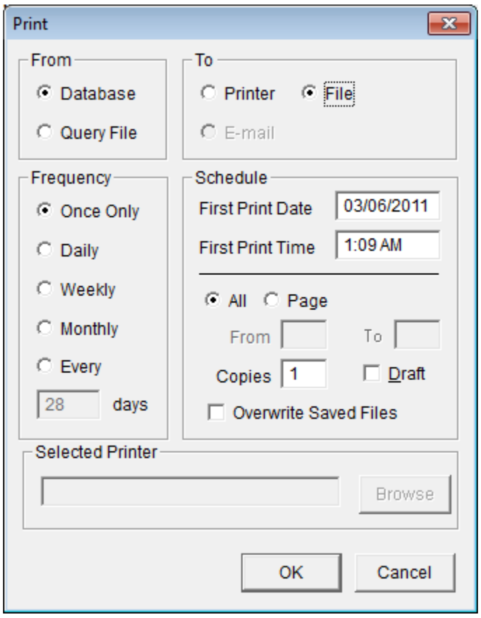
- **Database** (to search the entire database)

b. To:

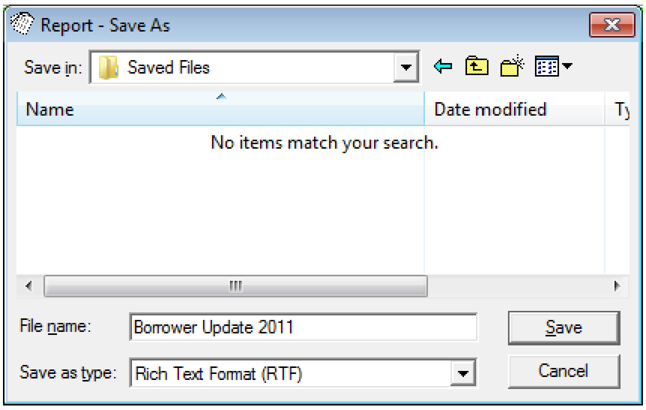
- **File** (to save a report as a file)

c. Frequency:

- **Once Only**



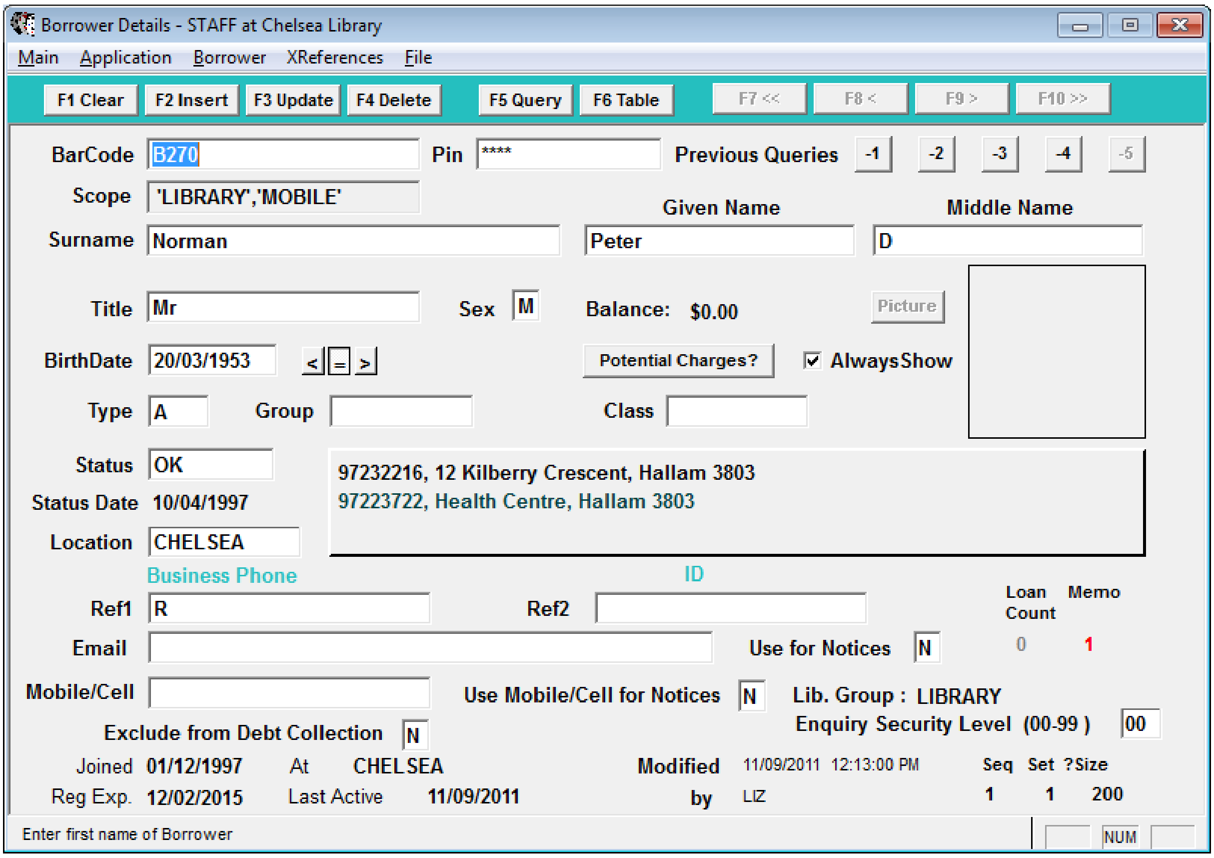
3. Once you have selected all of your settings, click the **OK** button – the Report – Save As screen will display:



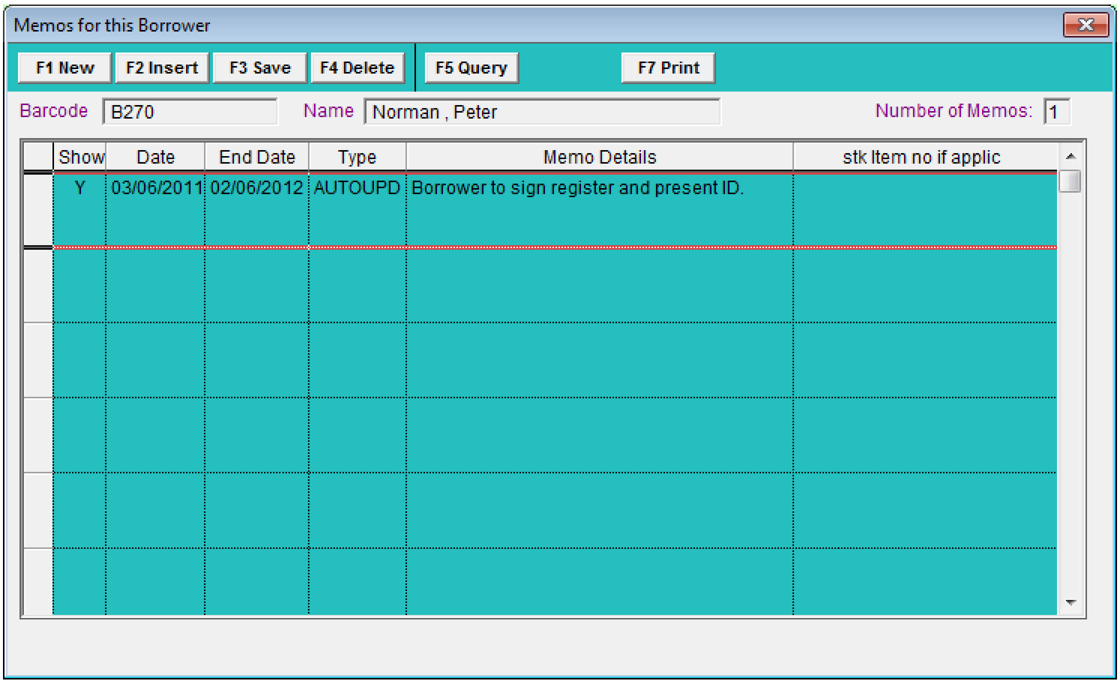
4. Select a Save in: location and type in a File name:
5. Click the **Save** button when complete

The report will then "print".

Updated Borrower Record:



Memo that appears in Circulation:



Running Borrower Circulation Update Reports

The Borrower Circulation Automatic Update (**&BORCUPD.QRP**) template was created for the purpose of automatically changing the status of borrowers based on the inclusion of due date parameters in the Where statement of the report. The application of this would be to change borrowers with overdues past a certain due date to a SUSPENDED status.

To set up the process correctly, the following reports would need to be scheduled in this order:

1. Borrower Automatic Update (**&BORUPD.QRP**) to set all borrowers with suspended status to a status of **OK**.
2. Borrower Circulation Automatic Update (**&BORCUPD.QRP**) to set all borrowers with the given due date parameters to a status of suspended.

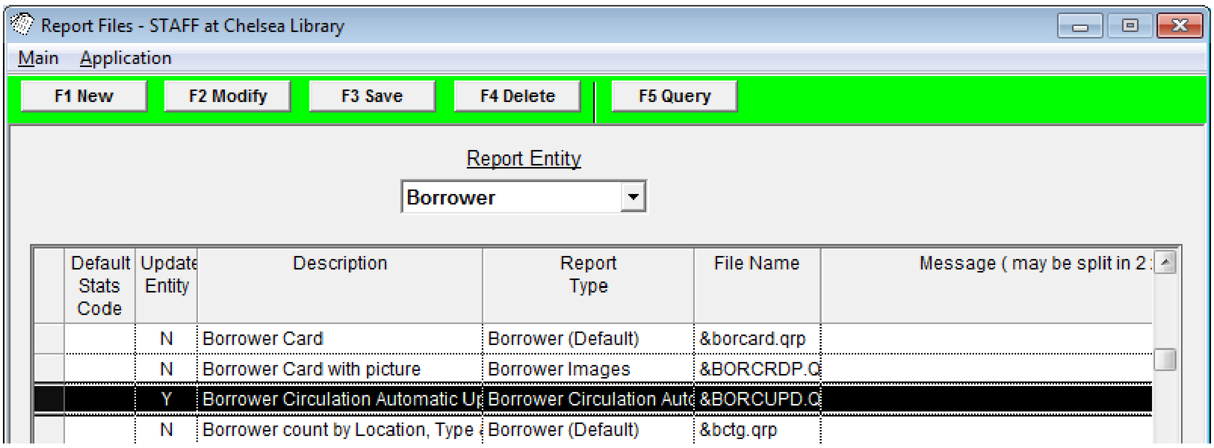
In the event that any borrowers with suspended status return or pay for all their overdues, the scheduling of the reports in this way ensures that those borrowers will be re-instated to a status of **OK**. The running of the Borrower Circulation Automatic Update then re-calculates which borrowers still fit the criteria for suspension, so that these borrowers still have their SUSPENDED status.

When the Borrower Circulation Automatic Update report is run, a borrower file is also created which contains all the records for borrowers that have had their status changed.

Setting up the Reports

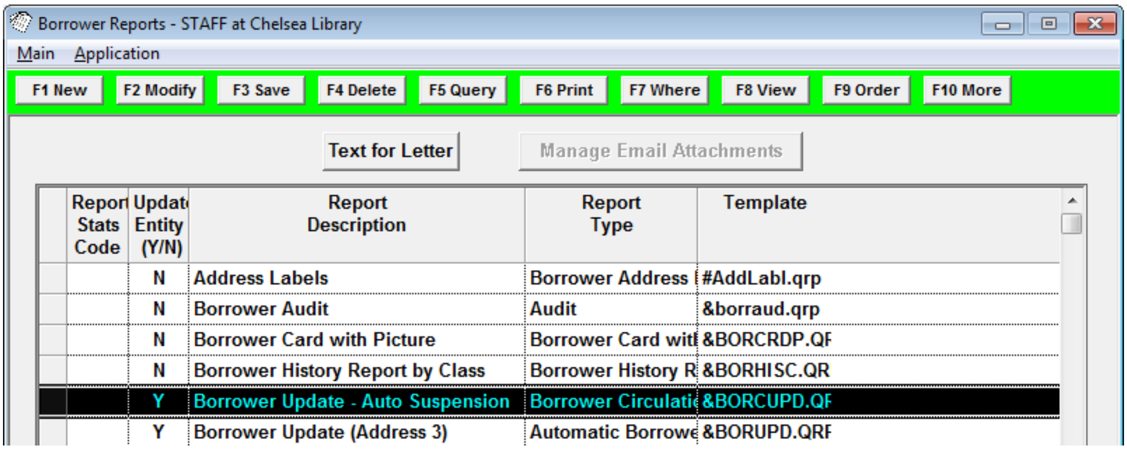
Create the Borrower Circulation Automatic Update Report

1. Launch the *Amlib* client
2. Ensure that the borrower circulation update template is correctly set in **Main** > **Reports** > **RepAddNew** – Entity = **Borrower**:
   - Report Type = **Borrower Circulation Automatic Update**
   - File Name = **&BORCUPD.QRP** (not to be confused with **&BORUPD.QRP**)

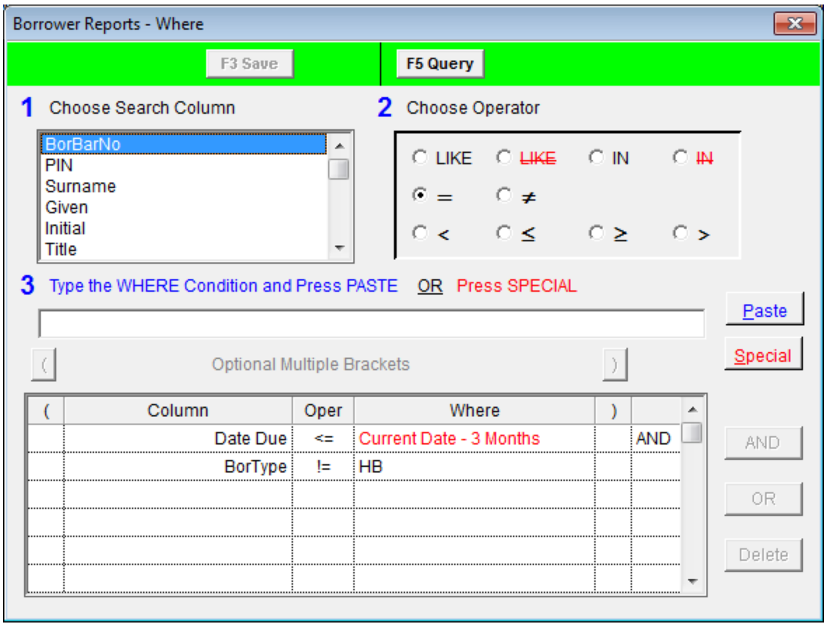


3. Go to **Main** > **Reports** > **RepBorrower** – the Borrower Reports screen will display
4. Click the **F1 New** button – the Select Report Format screen will display

5. Highlight the Borrower Circulation Automatic Update (**&BORCUPD.QRP**) and click the **Select** button
6. Type in a Description – for example: **Borrower Update – Auto Suspension**
7. Ensure the Update Entity (Y/N) column = **Y**
8. Click the **F3 Save** button when complete



9. Highlight the report and click the **F7 Where** button – the Borrower Reports – Where screen will display
10. Set the due date parameter based on your criteria for suspension of borrowers. You may also choose to include parameters if you wish to exclude certain borrowers (for example: **housebound** borrower type or specific location)
11. Click the **F3 Update** button when complete

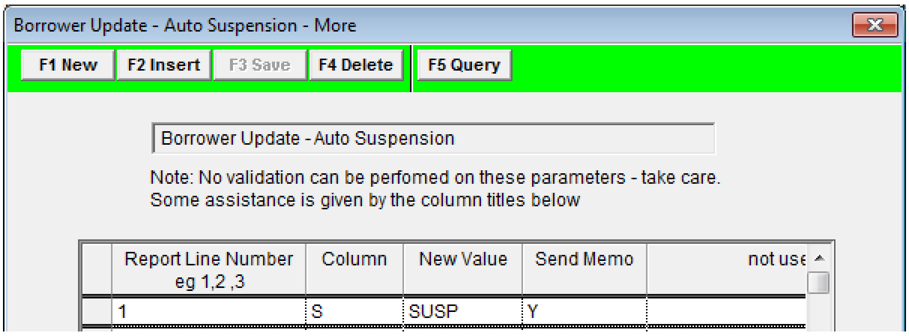


F10 More

1. Click the **F10 More** button – the More screen will display
2. Click the **F1 New** or **F2 Insert** button

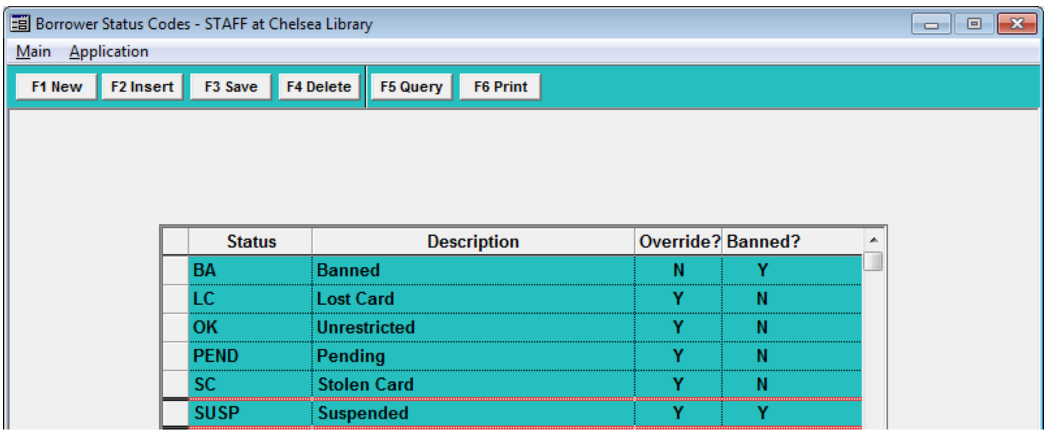
3. Enter the following parameters:

- Report Line Number = **1**
- Column = **S** (for **Status**)
- New Value = **SUSP** (for **Suspended**)
- Send Memo = **Y**



	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5
HEADING	Report Line Number	Column	New Value	Send Memo	not used
EXAMPLE	**1**	**S**	**SUSP**	**Y**	**<leave blank>**
COMMENT	Line 1 is used for updates	Borrower field – can be Borrower Types (**T**), Classes (**C**) Groups (**G**) or Status (**S**)	The new value – must be a valid code for the selected column	If **Y**, create the memo in **Text for Letter**, found at the top of the Borrower Reports screen	

The column is set to **S** in order to change the Status. The new value is the status you are changing your borrowers to – this will depend on the settings you have in **Main** > **Borrowers** > **Borrower – Application** > **Borrower Status**:



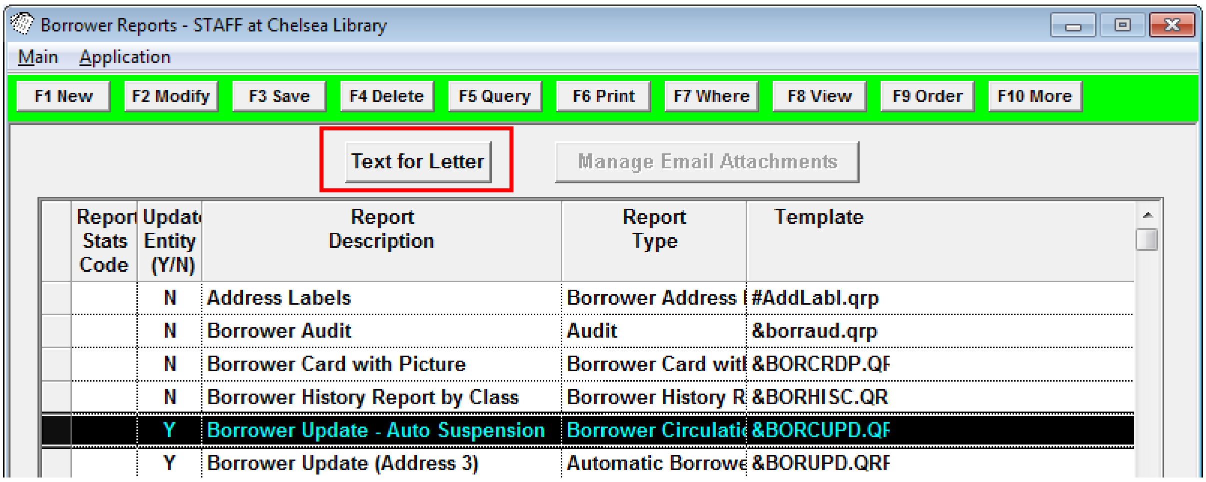
The Send Memo can be set to either **Y** or **N**. If set to **Y**, the memo will be attached to each borrower's record as a borrower memo.

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

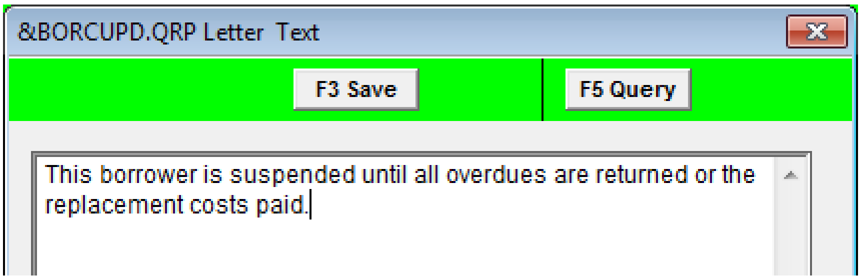
Memo

If you set the Send Memo column to be **Y** in the **F10 More** screen you will need to fill in the content of your memo.

1. Highlight your report and click the **Text for Letter** button – the Letter Text screen will display

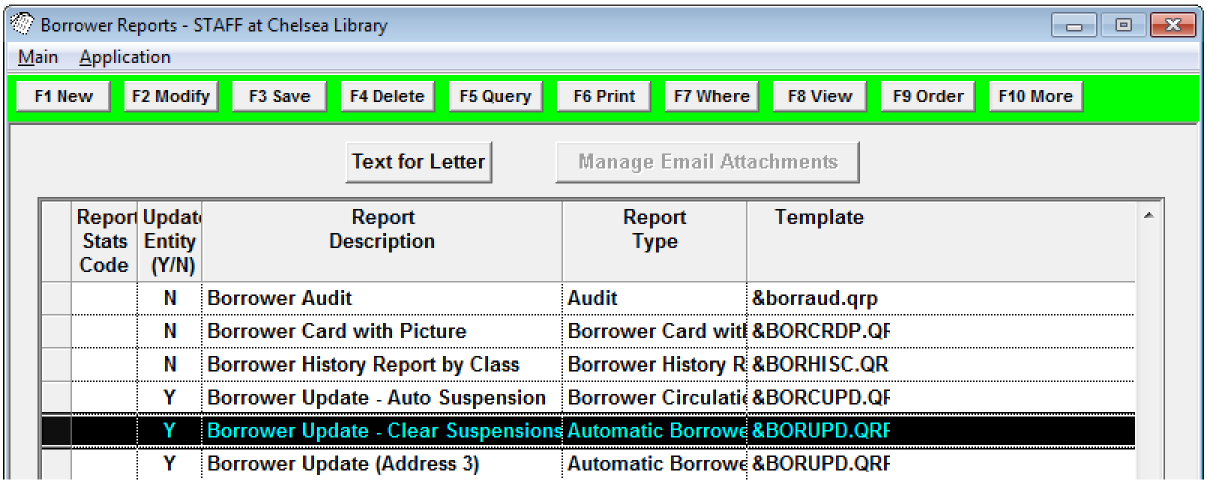


2. Enter the memo text
3. Click the **F3 Save** button when complete and click on the red **[X]** to close the window

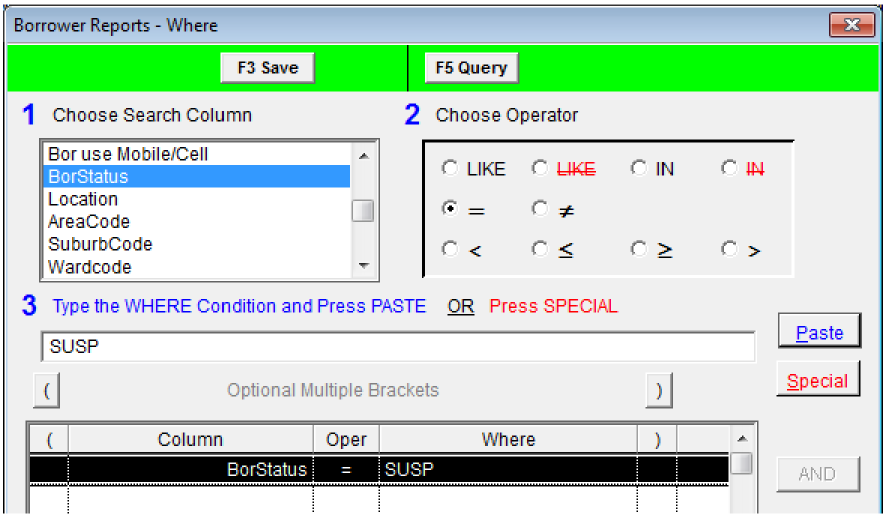


Create the Borrower Automatic Update Report

1. Click the **F1 New** button – the Select Report Format screen will display
2. Highlight the Borrower Automatic Update (**&BORUPD.QRP**) and click the **Select** button
3. Type in a Description – for example: **Borrower Update – Clear Suspensions**
4. Ensure the Update Entity (Y/N) column = **Y**
5. Click the **F3 Save** button when complete

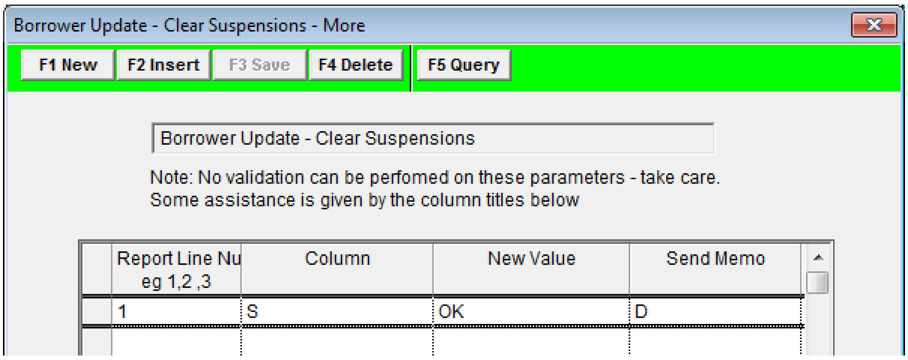


6. Highlight the report and click the **F7 Where** button – the Borrower Reports – Where screen will display
7. Enter the Borrower Status to be checked (and cleared) – for example: BorStatus = **SUSP**
8. Click the **F3 Update** button when complete



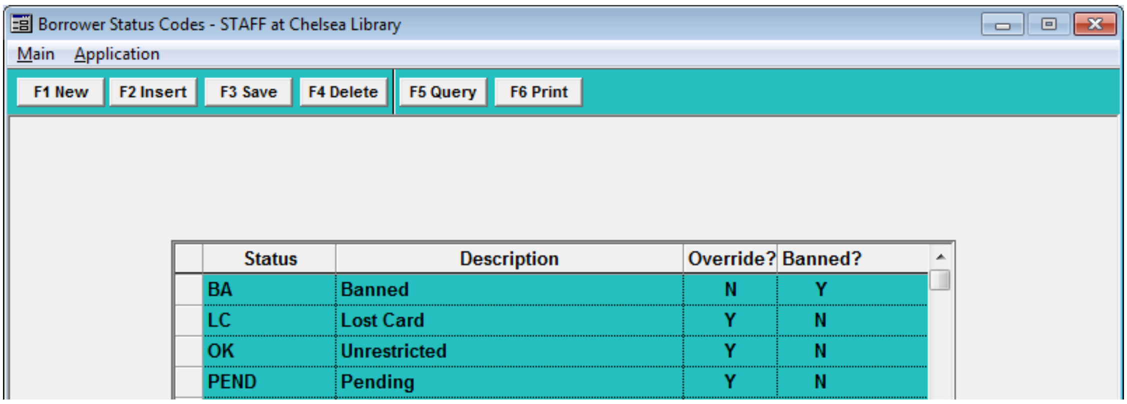
F10 More

1. Click the **F10 More** button – the More screen will display
2. Click the **F1 New** or **F2 Insert** button
3. Enter the following parameters:
    - Report Line Number = **1**
    - Column = **S** (for **Status**)
    - New Value = **OK** (for **Unrestricted**)
    - Send Memo = **D** (this will delete the memo if it no longer applies)
    - Address 3 = **<leave blank>**



	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5
HEADING	Report Line Number	Column	New Value	Send Memo	Address 3
EXAMPLE	**1**	**S**	**OK**	**D**	**<leave blank>**
COMMENT	Line 1 is used for updates	Borrower field – can be Borrower Types (**T**), Classes (**C**) Groups (**G**) or Status (**S**)	The new value – must be a valid code for the selected column	If **D**, will delete if it no longer applies – otherwise set to N to leave in place	

The Column is set to **S** in order to change the Status. The new value is the normal **OK** status you would have your borrowers default to – this will depend on the settings you have in **Main** > **Borrowers** > **Borrower** – **Application** > **Borrower Status**:



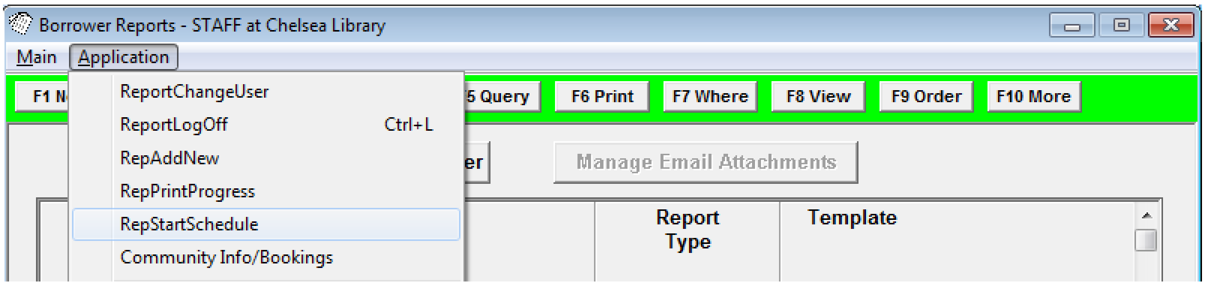
4. Click the **F3 Save** button when complete

Print Report (via Scheduler)

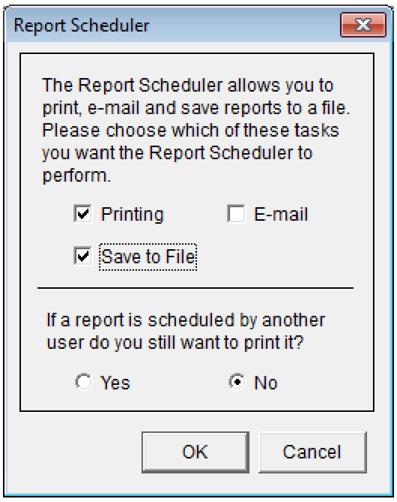
Borrower Update reports MUST be run via the *Scheduler*.

Start the Scheduler

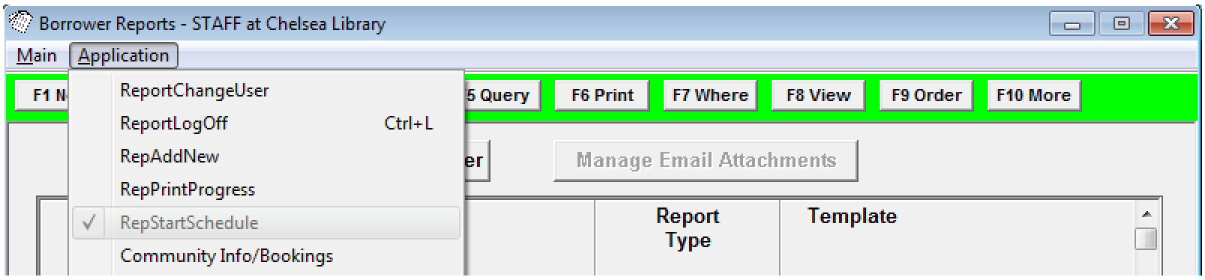
1. From the Reports screen, select **Application** > **RepStartSchedule**



2. The Report Scheduler screen will display
3. Select your printing options: ensure **Save to File** is ticked (you can tick all three if you intend on printing up multiple reports using multiple formats during a session)



4. Then click the **OK** button
5. After clicking **OK**, if you go back into the **Application** menu you will see that *RepStartSchedule* is now greyed out with a tick next to it – this indicates that the *Scheduler* is now running



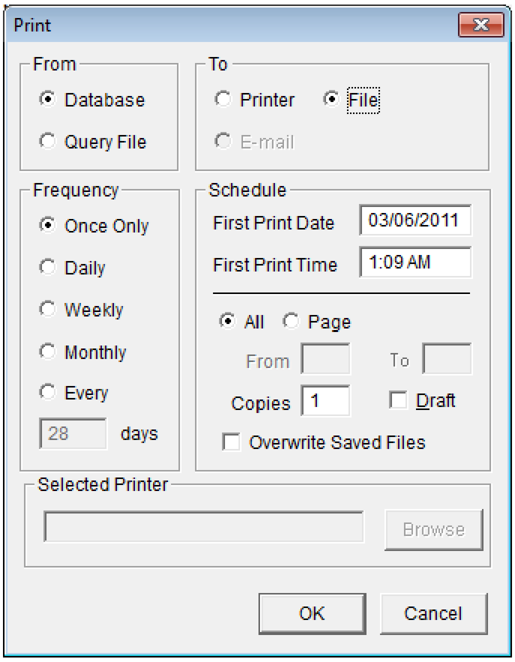
Scheduling the Report

IMPORTANT! In order to ensure that only those borrowers with outstanding items are/remain suspended, the reports MUST be run in the following order:

1. Borrower Automatic Update (**&BORUPD.QRP**) to set all borrowers with **SUSPENDED** status to back to **OK**.
2. Borrower Automatic Circulation Update (**&BORCUPD.QRP**) to set all borrowers with the given due date parameters to a status of SUSPENDED.

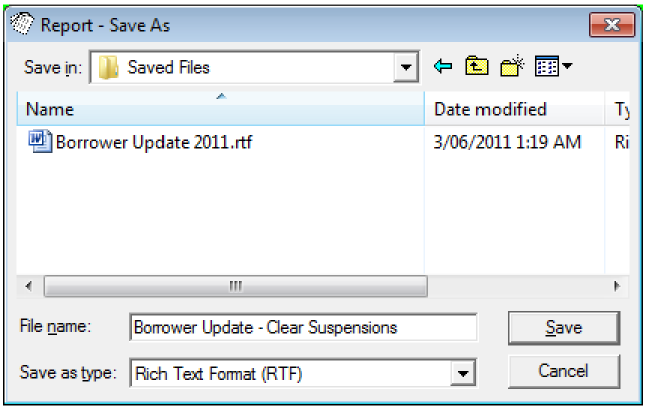
The reports can be run manually run or scheduled to run daily/weekly (as long as they are run in the correct order).

1. With your report highlighted, select the **F6 Print** button – the Print dialogue box will display
2. Select from the following options:
   a. From:
      - **Database** (to search the entire database)
   b. To:
      - **File** (to save a report as a file)
   c. Frequency:
      - Any frequency can be used: **Once Only**, **Daily**, **Weekly** or **Monthly**
   d. Schedule:
      - **First Print Date** (defaults to current date)
      - **First Print Time** (defaults to current time)



IMPORTANT! In order to ensure that only those borrowers with outstanding items are/remain suspended, the reports MUST be run in the correct order!

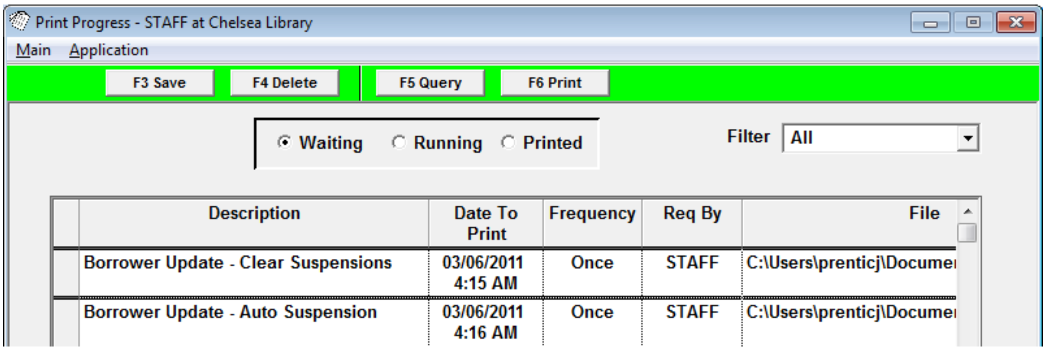
3. Once you have selected all of your settings, click the **OK** button – the Report – Save As screen will display:



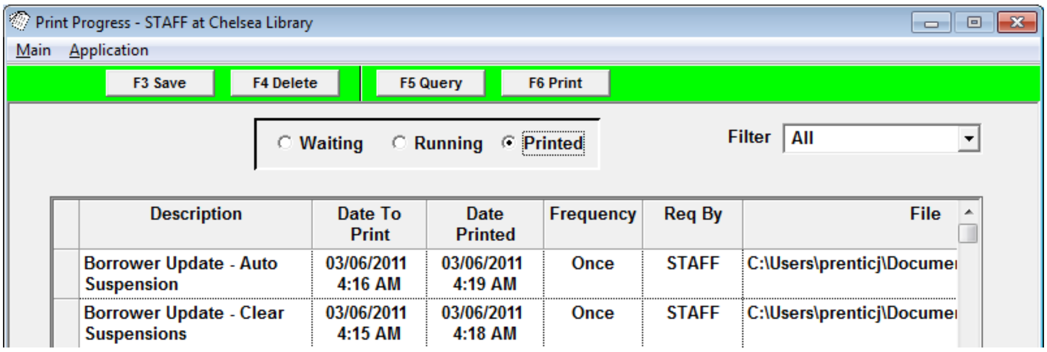
4. Select a Save in: location and type in a File name: - for example: **Borrower Update- Clear Suspensions** or **Borrower Update – Set Suspensions**
5. Click the **Save** button when complete

Check Print Progress

1. You can check the progress of your reports at any time by going into **Main** > **Reports** > **RepPrintProgress**



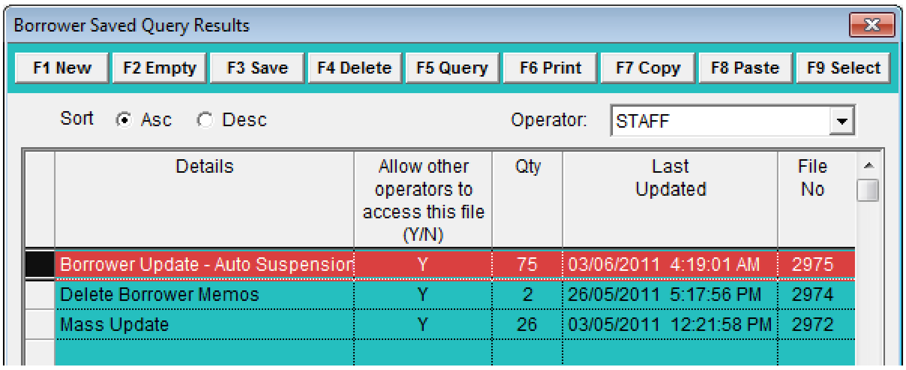
2. You can also click through the three tab options at the top to see the ones that are **Waiting**, **Running**, or have already been **Printed**
3. Your report will show up in **Printed** when it is complete



Check the Suspended Borrowers

If required, borrowers that have been suspended with the Borrower Circulation Automatic Update report can be checked from a borrower file.

1. Launch the *Amlib* Client
2. Got to **Main** > **Borrowers** > **Borrower** – the Borrower Details screen will display
3. From the menu, select **File** > **DisplayFile** – the Borrower Saved Query Results screen will display:

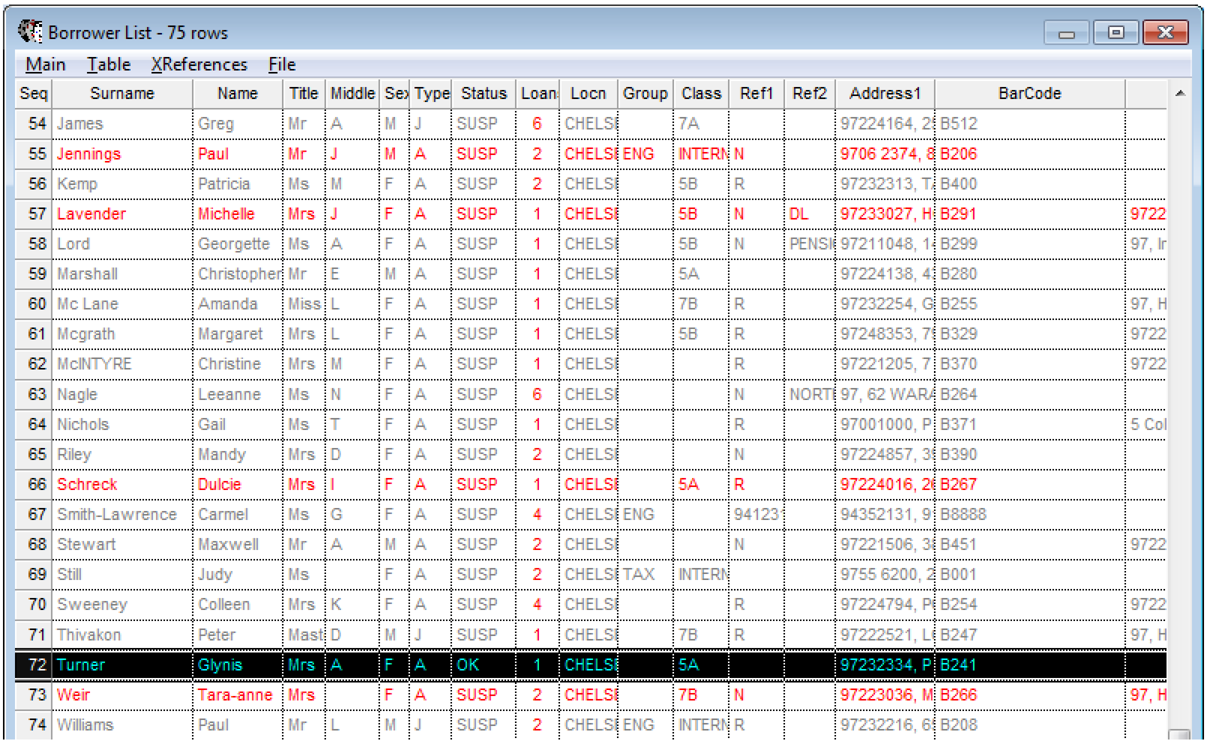

Borrower Saved Query Results

F1 New | F2 Empty | F3 Save | F4 Delete | F5 Query | F6 Print | F7 Copy | F8 Paste | F9 Select

Sort ● Asc ○ Desc Operator: STAFF

Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
Borrower Update - Auto Suspension	Y	75	03/06/2011 4:19:01 AM	2975
Delete Borrower Memos	Y	2	26/05/2011 5:17:56 PM	2974
Mass Update	Y	26	03/05/2011 12:21:58 PM	2972

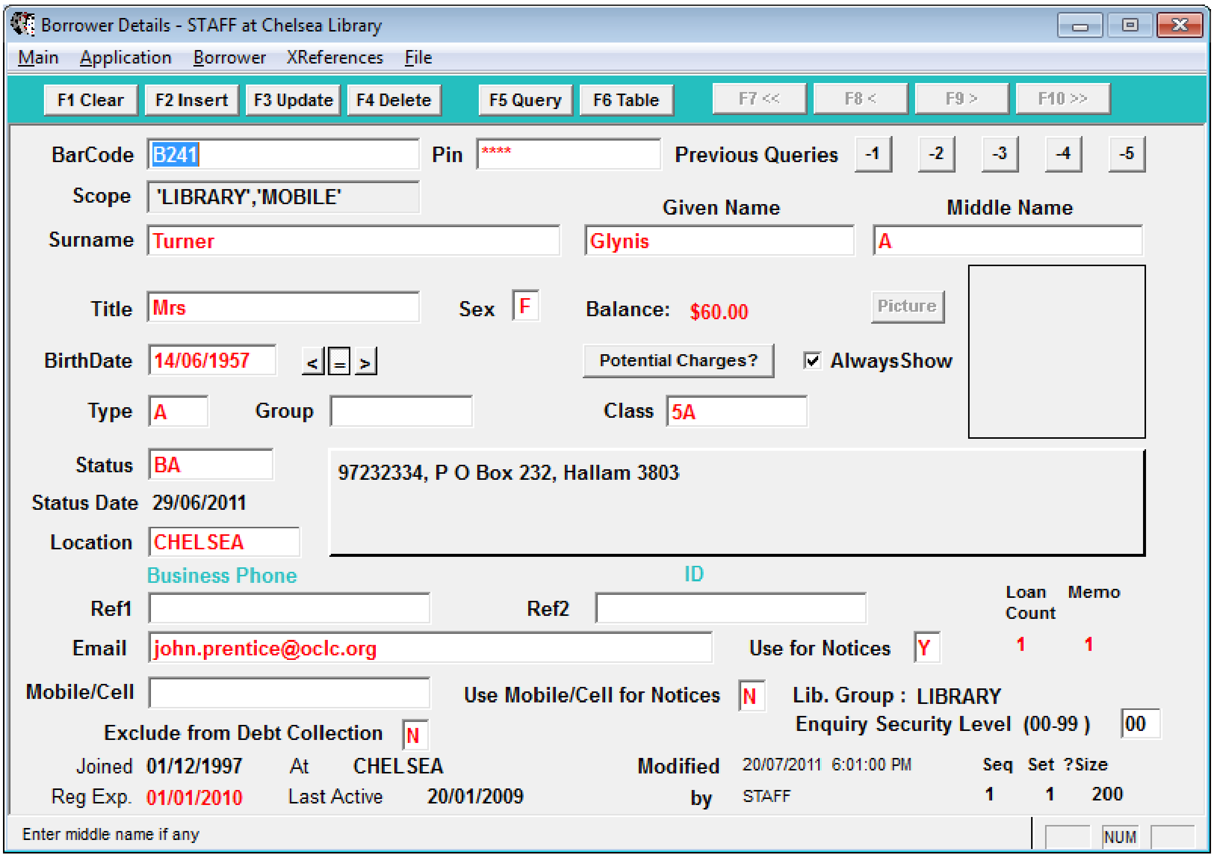
4. Borrower Circulation Automatic Update will be listed under the report name – for example: **Borrower Update – Auto Suspension**
5. Highlight the saved file and click the **F9 Select** button to see a Borrower List of the borrowers who have been suspended:

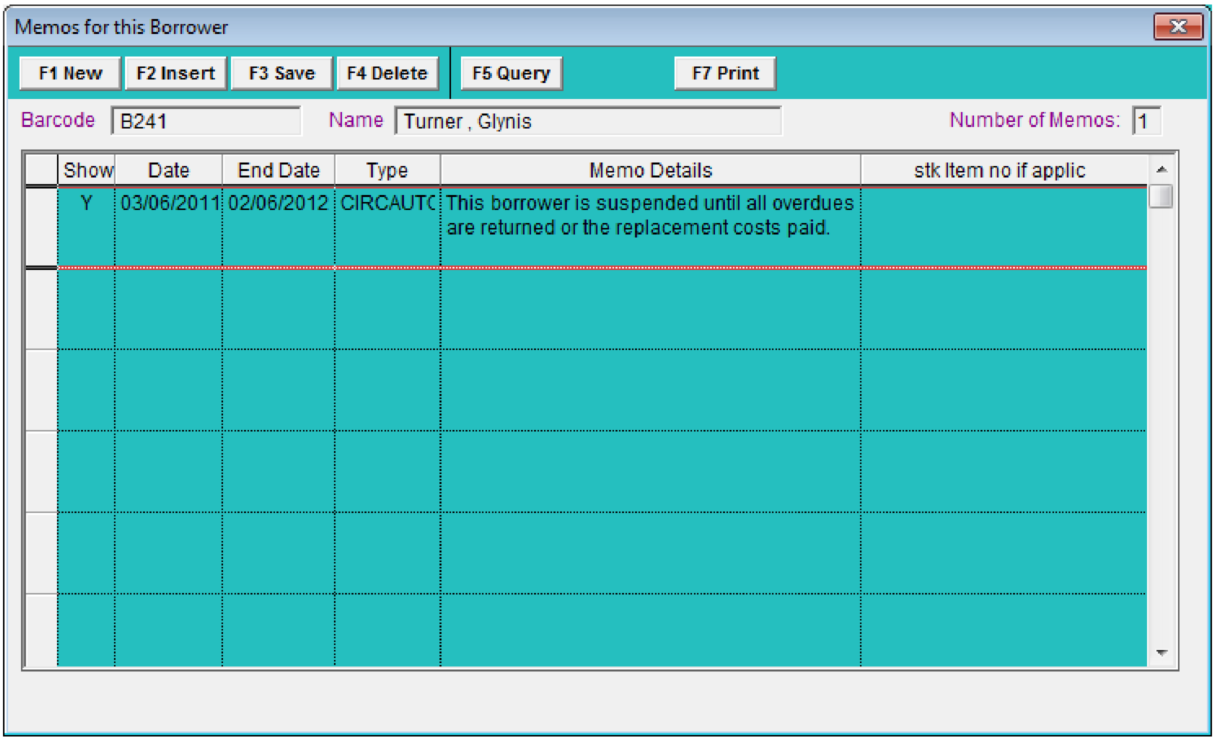

Borrower List - 75 rows

Main Table XReferences File

Seq	Surname	Name	Title	Middle	Sex	Type	Status	Loan	Locn	Group	Class	Ref1	Ref2	Address1	BarCode	
54	James	Greg	Mr	A	M	J	SUSP	6	CHELS		7A			97224164, 2	B512	
55	Jennings	Paul	Mr	J	M	A	SUSP	2	CHELS	ENG	INTERN	N		9706 2374, 8	B206	
56	Kemp	Patricia	Ms	M	F	A	SUSP	2	CHELS		5B	R		97232313, T	B400	
57	Lavender	Michelle	Mrs	J	F	A	SUSP	1	CHELS		5B	N	DL	97233027, H	B291	9722
58	Lord	Georgette	Ms	A	F	A	SUSP	1	CHELS		5B	N	PENSI	97211048, 1	B299	97, Ir
59	Marshall	Christopher	Mr	E	M	A	SUSP	1	CHELS		5A			97224138, 4	B280	
60	Mc Lane	Amanda	Miss	L	F	A	SUSP	1	CHELS		7B	R		97232254, G	B255	97, H
61	Mcgrath	Margaret	Mrs	L	F	A	SUSP	1	CHELS		5B	R		97248353, 7	B329	9722
62	McINTYRE	Christine	Mrs	M	F	A	SUSP	1	CHELS			R		97221205, 7	B370	9722
63	Nagle	Leeanne	Ms	N	F	A	SUSP	6	CHELS			N	NORT	97, 62 WAR	B264	
64	Nichols	Gail	Ms	T	F	A	SUSP	1	CHELS			R		97001000, P	B371	5 Col
65	Riley	Mandy	Mrs	D	F	A	SUSP	2	CHELS			N		97224857, 3	B390	
66	Schreck	Dulcie	Mrs	I	F	A	SUSP	1	CHELS		5A	R		97224016, 2	B267	
67	Smith-Lawrence	Carmel	Ms	G	F	A	SUSP	4	CHELS	ENG		94123		94352131, 9	B8888	
68	Stewart	Maxwell	Mr	A	M	A	SUSP	2	CHELS			N		97221506, 3	B451	9722
69	Still	Judy	Ms		F	A	SUSP	2	CHELS	TAX	INTERN			9755 6200, 2	B001	
70	Sweeney	Colleen	Mrs	K	F	A	SUSP	4	CHELS			R		97224794, P	B254	9722
71	Thivakon	Peter	Mast	D	M	J	SUSP	1	CHELS		7B	R		97222521, L	B247	97, H
72	Turner	Glynis	Mrs	A	F	A	OK	1	CHELS		5A			97232334, P	B241	
73	Weir	Tara-anne	Mrs		F	A	SUSP	2	CHELS		7B	N		97223036, M	B266	97, H
74	Williams	Paul	Mr	L	M	J	SUSP	2	CHELS	ENG	INTERN	R		97232216, 6	B208	

6. Double-click on a name to bring up the Borrower Details:





SAVING A REPORT TO FILE

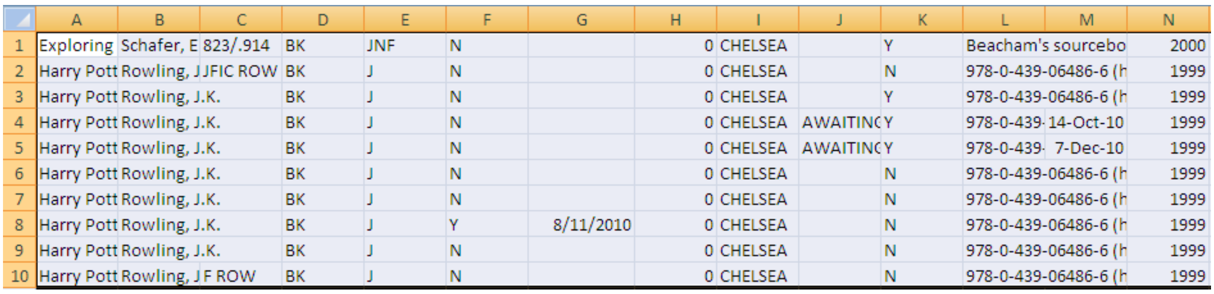
You can save your reports to a file, for email or formatting, or just to keep it in an electronic format rather than paper. The two ways of doing this are by Table or Report.

Table

1. Access a module and perform a search – the results will display in a List
2. **Highlight** the items you would like to save to file
3. Type **Ctrl-C** to copy them
4. Open up *MS Excel* or *Word*
5. Type **Ctrl-P** to paste the selection into a table or page

After getting a table of results in one of the modules, you can highlight them all to select them and do Ctrl + Insert to copy them. Then you can paste the items into Excel or Word.

Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Ec
1	Exploring Harry Potter / by Eliz	Schafer, Elizabeth I	823/.914	BK	JNF	N		0	CHELS		Y	Beacham's sc		20
2	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	ANF	Y	21/03/2	1	CHELS		N	978-0-7475-3		19
3	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	Y	10/08/2	2	BELM		N	978-0-7475-3		19
4	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	N		1	CHELS		N	978-0-7475-3		19
5	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	N		0	CHELS		N	978-0-7475-3		19
6	Harry Potter and the Deathly H	Rowling, J.K.	ROW	BK	J	N		0	CHELS		Y			
7	Harry Potter and the Deathly H	Rowling, J.K.	ROW	BK	J	N		0	HAST		Y			
8	Harry Potter and the Goblet of	Rowling, J.K.	F ROW	BK	AF	N		0	CHELS		N			19
9	Harry Potter and the Goblet of	Rowling, J.K.	F ROW	BK	J	N		0	CHELS		N			19
10	Harry Potter and the half-bloo	Rowling, J.K.	F ROW	BK	AF	N		3	BELM		N	Harry Potterv		20
11	Harry Potter and the half-bloo	Rowling, J.K.	F ROW	BK	AF	N		3	CHELS		N	Harry Potterv		20
12	Harry Potter and the Order of	Rowling, J.K.	F ROW	BK	J	N		4	CHELS		Y	978-0-439-35		20
13	Harry Potter and the Order of	Rowling, J.K.	F ROW	BK	J	N		4	CHELS		Y	978-0-439-35		20
14	Harry Potter and the Order of	Rowling, J.K.	F ROW	BK	J	N		4	CHELS		Y	978-0-439-35		20
15	Harry Potter and the philosoph	Rowling, J.K.	F ROW	BK	J	N		5	HAST		N	978-0-7475-3		19



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Exploring	Schafer, E	823/.914	BK	JNF	N		0	CHELSEA		Y	Beacham's sourcebo		2000
2	Harry Pott	Rowling, J	JFIC ROW	BK	J	N		0	CHELSEA		N	978-0-439-06486-6 (h		1999
3	Harry Pott	Rowling, J.K.		BK	J	N		0	CHELSEA		Y	978-0-439-06486-6 (h		1999
4	Harry Pott	Rowling, J.K.		BK	J	N		0	CHELSEA	AWAITINC	Y	978-0-439-	14-Oct-10	1999
5	Harry Pott	Rowling, J.K.		BK	J	N		0	CHELSEA	AWAITINC	Y	978-0-439-	7-Dec-10	1999
6	Harry Pott	Rowling, J.K.		BK	J	N		0	CHELSEA		N	978-0-439-06486-6 (h		1999
7	Harry Pott	Rowling, J.K.		BK	J	N		0	CHELSEA		N	978-0-439-06486-6 (h		1999
8	Harry Pott	Rowling, J.K.		BK	J	Y	8/11/2010	0	CHELSEA		N	978-0-439-06486-6 (h		1999
9	Harry Pott	Rowling, J.K.		BK	J	N		0	CHELSEA		N	978-0-439-06486-6 (h		1999
10	Harry Pott	Rowling, J	F ROW	BK	J	N		0	CHELSEA		N	978-0-439-06486-6 (h		1999

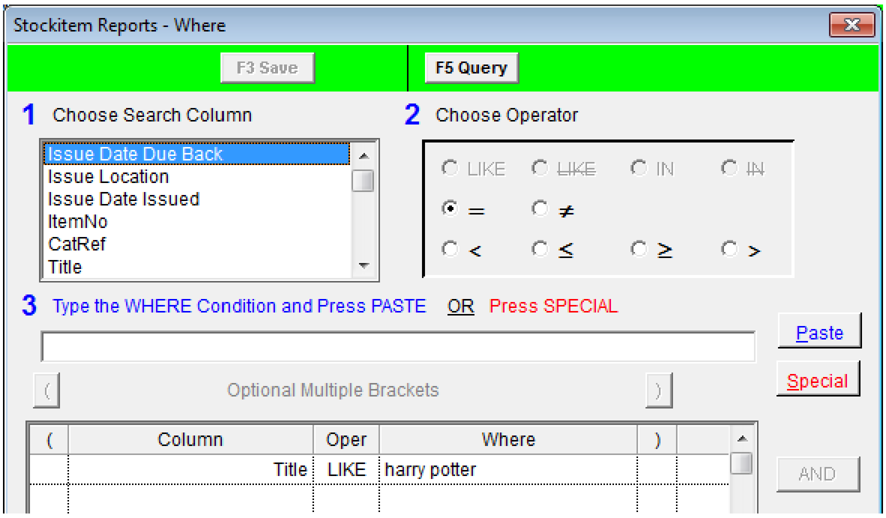
This method works best if you don't have a large number of results.

Report

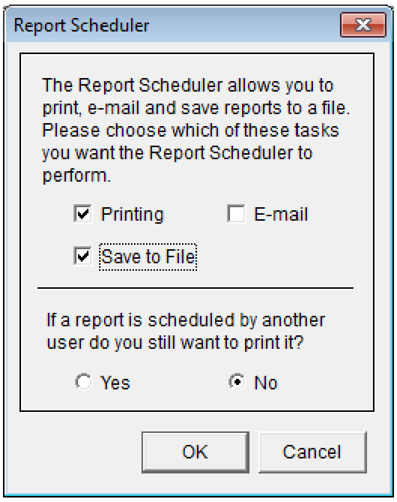
There are several *Excel* report templates available which can be used to save to a file.

In this example, we are going to use the **&XSTKCSV.QRP** template in the **Reports** > **RepStockitem** module:

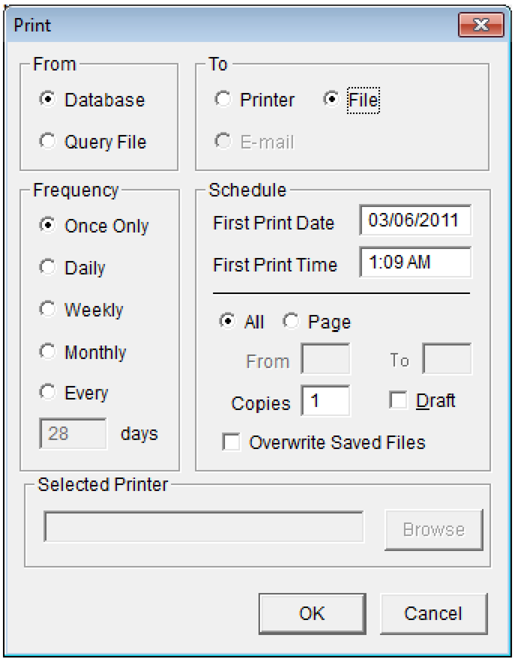
1. Go to **Main** > **Reports** > **RepStockitem** – the Stockitem Reports screen will display
2. Click the **F1 New** button – the Select Report Format screen will display
3. Highlight the **&XSTKCSV.QRP** template and click the **Select** button
4. Type in an appropriate Description and click the **F3 Save** button
5. Enter an appropriate **F7 Where** search – for example: **Title LIKE Harry Potter**



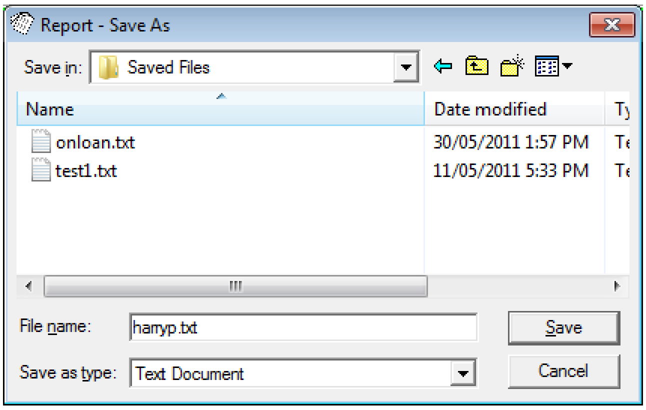
6. Order the Report – for example: **Title | ASC**
7. Select **Application** > **RepStartSchedule** – the Report Scheduler screen will display
8. Ensure that **Save to File** is ticked and click the **OK** button



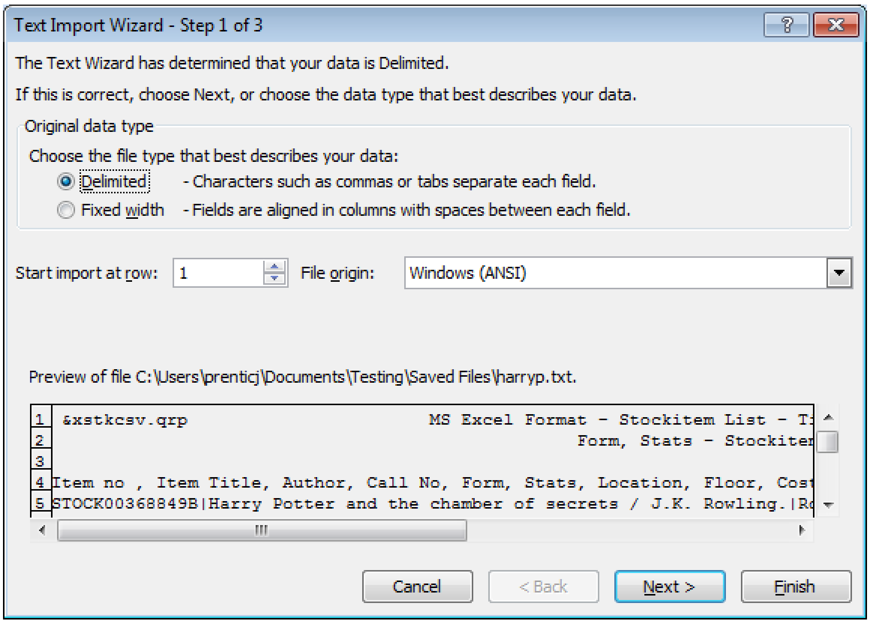
9. Click the **F6 Print** button – change the To: option to **File** and click the **OK** button



10. A Report – Save As dialogue box will display:
    a. To save it for a Word document, leave the Save as type: as **Rich Text Format (RTF)**
    b. To be able to open it in Excel, change the Save as type: to **Text Document**



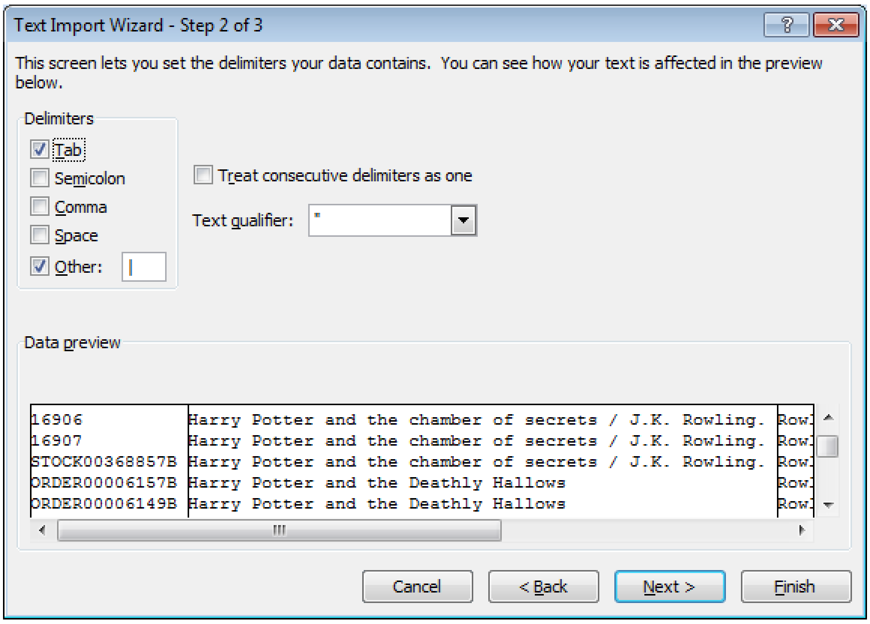
11. You can check the progress of your report in *Reports > RepPrintProgress*
12. If you've saved the report to open in *Excel* (Text Document) then you will need to follow these steps so it is displayed correctly:
    a. Open *Microsoft Excel*
    b. Use **File** > **Open** to open the text file you've saved – ensure that the Files of type: = **All Files (*.*)**
    c. The Text Import Wizard will display:



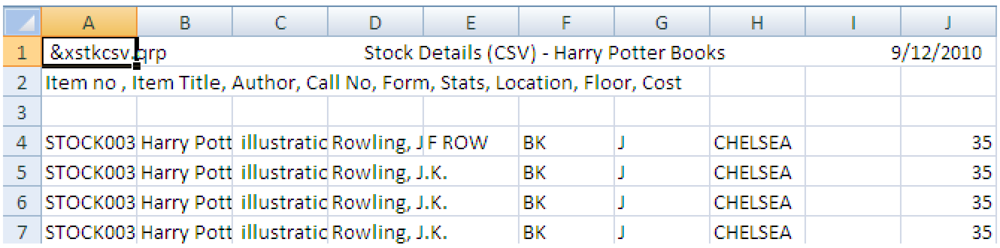
d. Excel will recognise your file as **Delimited**, so click the **Next** button

e. Delimiters: select **Semicolon** and add a pipe **|** in the **Other** box

f. Click the **Next** button and then the **Finish** button



13. Your data will be transferred into the *Excel* sheet and you can now use the formatting tools to customise it:



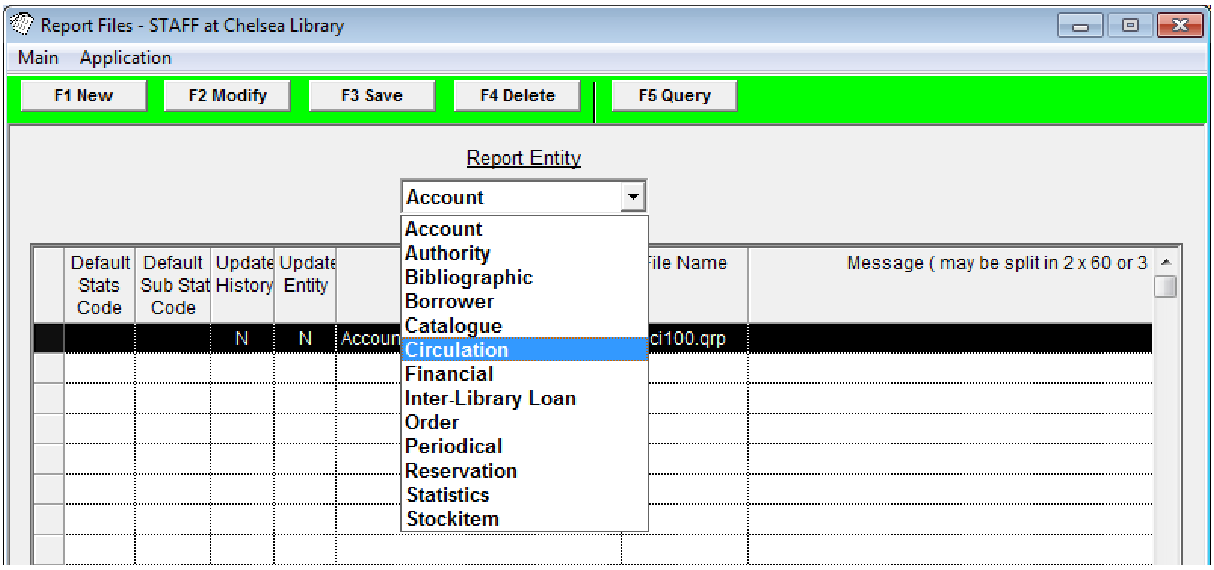
	A	B	C	D	E	F	G	H	I	J
1	&xstkcsv.qrp				Stock Details (CSV) - Harry Potter Books					9/12/2010
2	Item no , Item Title, Author, Call No, Form, Stats, Location, Floor, Cost									
3										
4	STOCK003	Harry Pott	illustratic	Rowling, J	F ROW	BK	J	CHELSEA		35
5	STOCK003	Harry Pott	illustratic	Rowling, J.K.		BK	J	CHELSEA		35
6	STOCK003	Harry Pott	illustratic	Rowling, J.K.		BK	J	CHELSEA		35
7	STOCK003	Harry Pott	illustratic	Rowling, J.K.		BK	J	CHELSEA		35

LOADING TEMPLATES

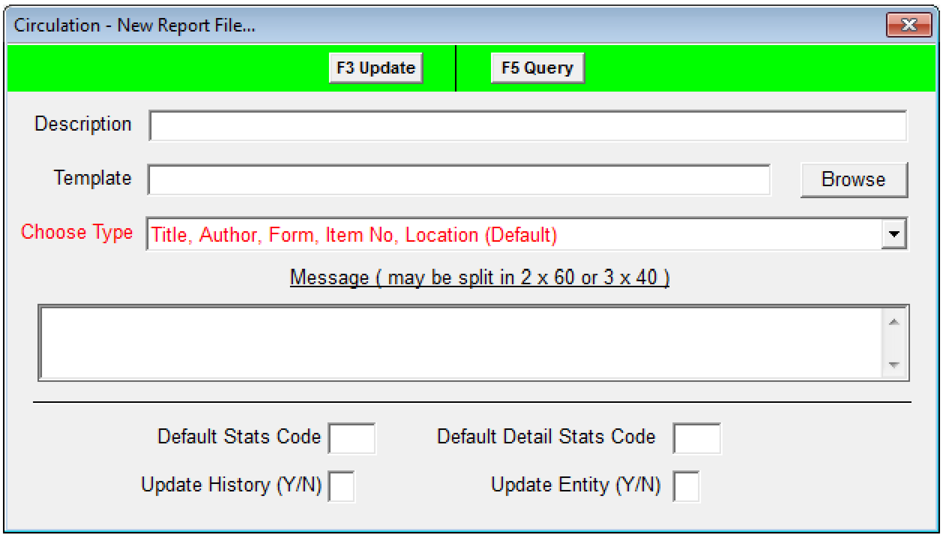
Your new/customised template needs to be saved somewhere that can be accessed by every workstation, such as the **Amlib/Reports** folder on your *Amlib* server.

To add them into the *Amlib* client:

1. Launch the *Amlib* client
2. Go to **Main** > **Reports** > **RepAddNew** – the Report Files window will open
3. From the Report Entity drop-down, select the appropriate module for your report – for example: **Circulation**

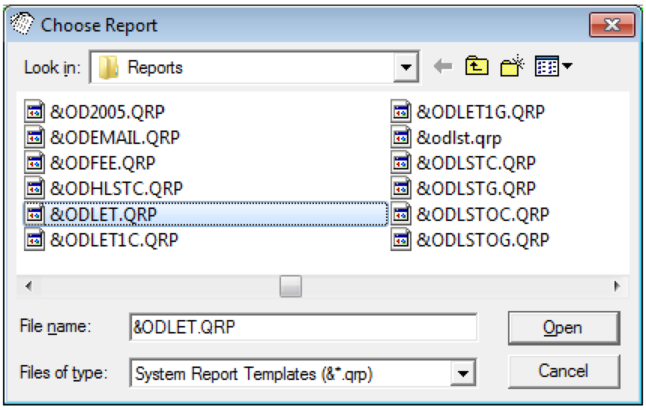


4. Click the **F1 New** button – the New Report File… window will display



5. Type in an appropriate Description – for example: **Overdue Notice (Letter)**

6. Template – click on the **Browse** button – the Choose Report window will display:



7. Navigate to the **Amlib/Reports** folder on your *Amlib* Server (if the template has been loaded onto your PC – then navigate to the local folder)

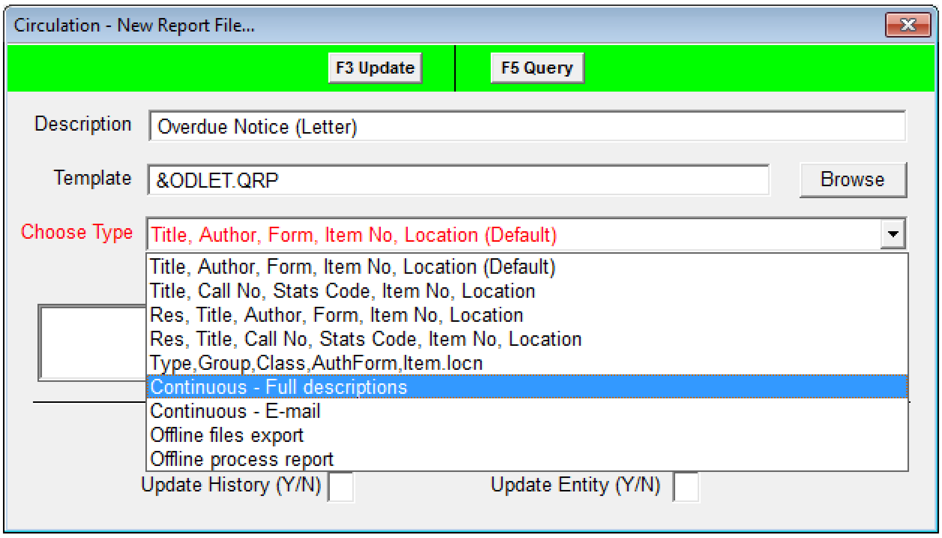
8. Files of type:

   - Select **Custom Report Templates (*.QRP)** for customised templates
   - Select **System Report Templates (*.QRP)** for all standard system templates

9. Locate the template to be loaded and highlight it

10. Click the **Open** button – the template will be selected the Choose Report window will close

11. Choose Type – it is *essential* that the appropriate type be chosen that this will inform how your template operates and the information that is sent to it – in this example: **Continuous - Full descriptions** has been selected

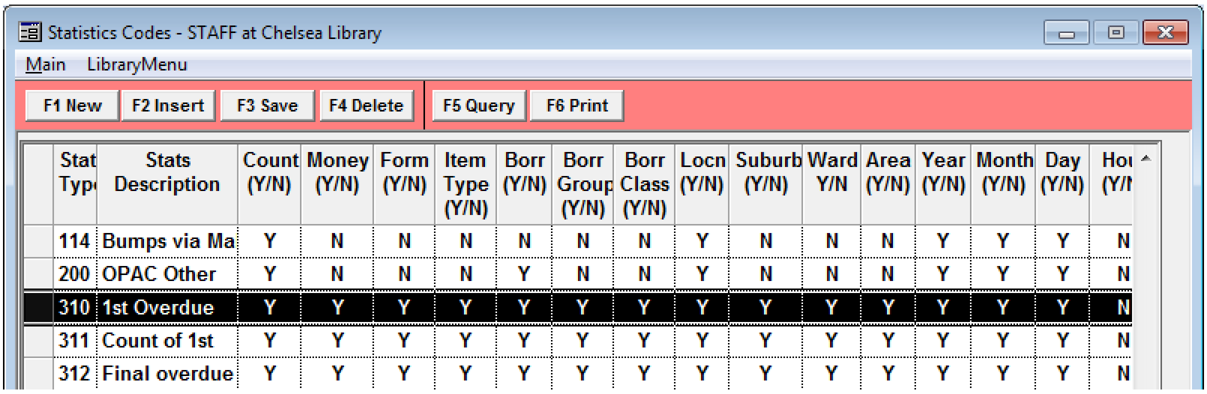


12. Message – leave blank

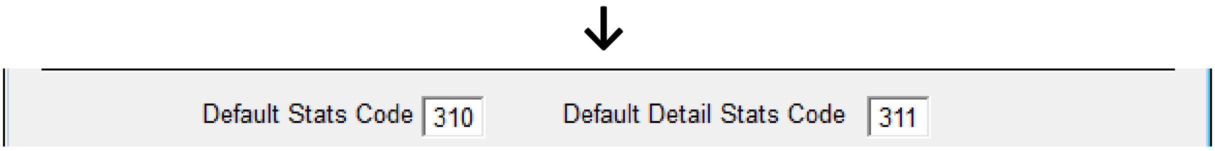
13. Default Stats Code – it is possible to collect statistics on the number of times that this report is run by adding an entry into the Statistics Codes table (**Main** > **Supervisor** > **StatsParams**) and then adding the **Stat Type** into the Default Stats Code box

14. Default Detail Stats Code – it is possible to collect statistics on the number of individual notices that a particular report generates by adding an entry into the Statistics Codes table

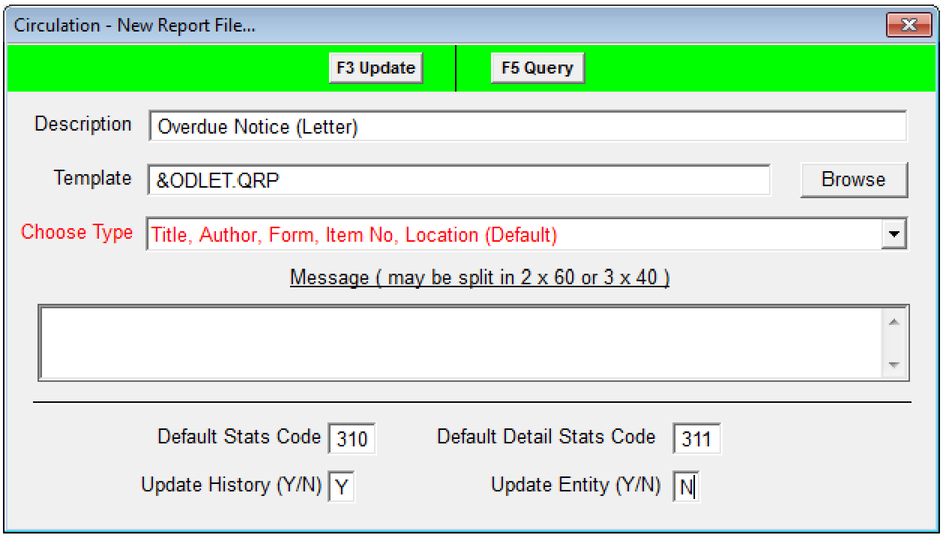
(**Main** > **Supervisor** > **StatsParams**) and then adding the **Stat Type** into the Default Detail Stats Code box (not available for all modules)



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)	Hou (Y/N
114	Bumps via Ma	Y	N	N	N	N	N	N	Y	N	N	N	Y	Y	Y	N
200	OPAC Other	Y	N	N	N	Y	N	N	Y	N	N	N	Y	Y	Y	N
310	1st Overdue	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N
311	Count of 1st	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N
312	Final overdue	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	N



15. Update History (Y/N) – it is possible to retain a record of the report having been generated – for example: the above **Overdue Letter** report can add a record of the overdue being printed to the Borrower History of affected patrons
16. Update Entity (Y/N) – this field can be used to update the status or alter a parameter of a record – for example: an account may be generated for an overdue circulation report



17. Click the **F3 Update** button
18. Close out of the Report Files window

The template is now loaded and available for use in a Report.

SCHEDULING REPORTS

Print Report (via Scheduler)

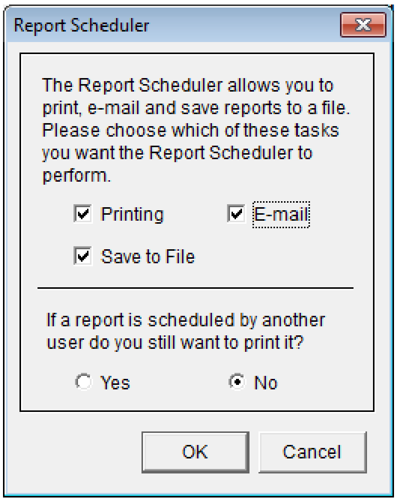
If you only want to print a report then the quickest method is to use the **F8 View** button and print from the Report – View window.

Using the *Scheduler* (via the **F6 Print** button) has several benefits over running reports via the **F8 View** button: It allows you to schedule regularly run reports so that staff do not have to do it manually each time, and it allows for further functions as part of the report such as updating Borrower/Stockitem history, updating the Reservation Status and adding report information to your statistics. **Email and SMS reports MUST be run via the Scheduler.**

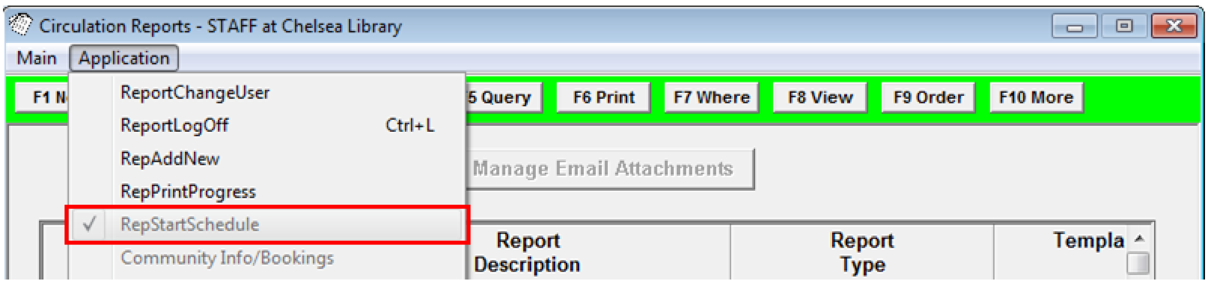
This guide will take you through setting up a report to use *RepStartSchedule*.

Start the Scheduler

1. From any Reports screen, select **Application** > **RepStartSchedule** – the Report Scheduler screen will display:



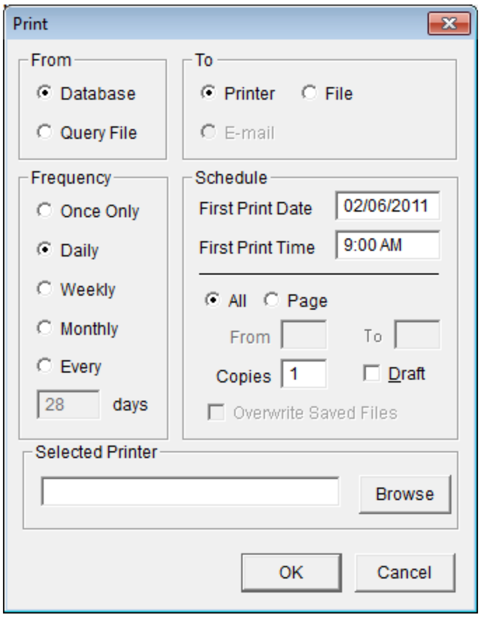
2. Select your printing options: ensure **Printing**, **E-mail** and/or **Save to File** is ticked (you can tick all three if you intend on printing up multiple reports using multiple formats during a session)
3. Also decide If a report is scheduled by another user do you still want to print it? = **Yes**/**No**
4. Then click the **OK** button
5. After clicking **OK**, if you go back into the **Application** menu you will see that *RepStartSchedule* is now ***greyed*** out with a tick next to it – this indicates that the *Scheduler* is now running:



Please Note: If you need to restart the scheduler at any point, you will need to log out of all Report screens (**Ctrl + L**) and start at the beginning of these instructions.

Scheduling the Report

1. With your report highlighted, select the **F6 Print** button – the Print dialogue box will display:



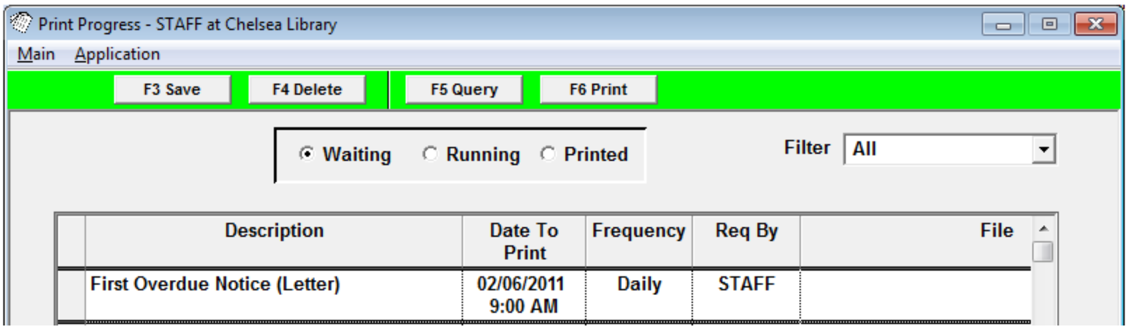
2. Select from the following options:
   a. From:
      - **Database** (to search the entire database)
   b. To:
      - **Printer** (to generate print reports)
      - **E-mail** (to generate email reports – this option will only be available to reports that have been created from an appropriately loaded template)
      - **File** (to save a report as a file)
   c. Frequency:
      - **Once Only** (if this is the only time you're going to print this report)
      - **Daily** (if you plan to send it every day)
      - **Weekly** (if this is a once a week item)
      - **Monthly** (if this is to be printed every calendar month)
      - **Every ___ days** (if you want to set a specific schedule
   d. Schedule:
      - **First Print Date** (the day you want this report to begin its schedule)
      - **First Print Time** (specifies the exact minutes the report will run)
   e. Selected Printer:

- You can specify any active printer on the network to print to – including virtual printer drivers such as a third party software that allows you to print to PDF (For example: **CutePDF Writer**)

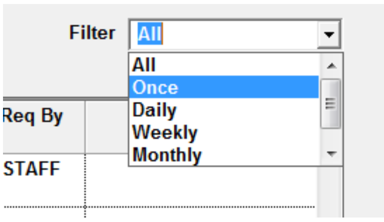
3. Once you have selected all of your settings, click the **OK** button

<u>Check Print Progress</u>

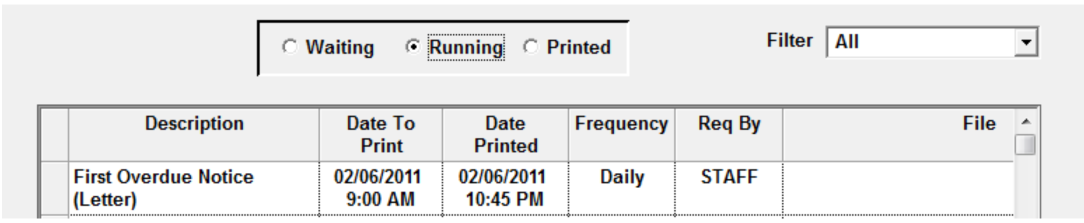
1. You can check the progress of your reports at any time by going into **Main** > **Reports** > **RepPrintProgress** – the <u>Print Progress</u> screen will display:



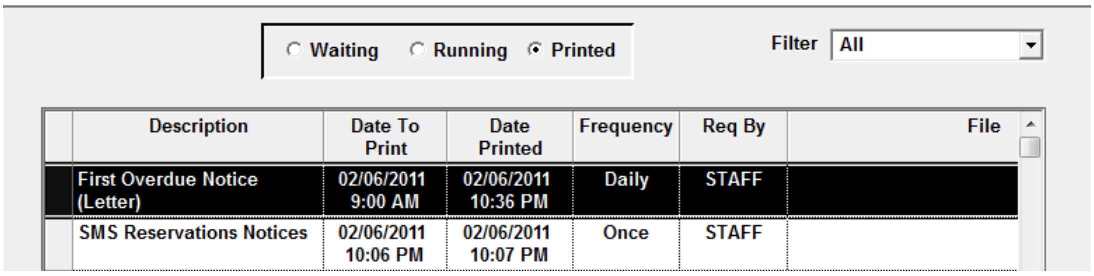
7. If your library uses the scheduler for a lot of reports, you can select a frequency type from the <u>Filter</u> drop-down menu at the top:



8. You can also click through the three tab options at the top to see the ones that are **Waiting**, **Running**, or have already been **Printed**:



9. Your report will show up in <u>Printed</u> tab when it is complete:



LAUNCH REPORTS UNATTENDED

The Report module has been modified so that it can be started from a command line to run all currently scheduled reports and then exit.

Several sites have requested that we build a report Service to run unattended on a server. Currently there are no plans to do this. This enhancement will make it possible for sites to schedule the report exe to start up, print scheduled reports (including emails) and then shut down.

Sample Command Line Parameters

[Exe path] [login] [password] [database] [location] [default window]

For example: **D:\Amlib\Amlib\Programs\Reports.exe staff Amlib LIVE LIB RepPrintProgress**

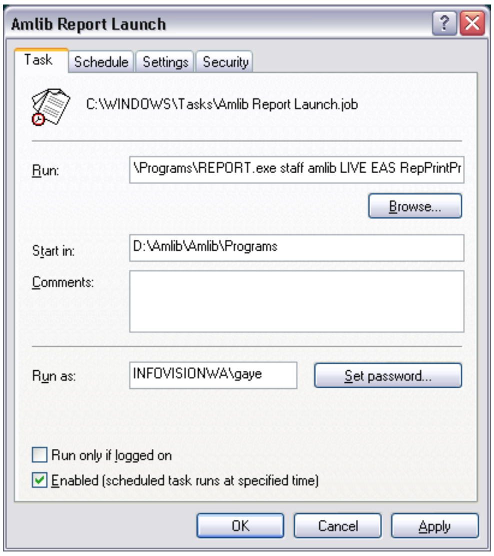
In the above example:

- [Exe path] **D:\Amlib\Amlib\Programs\Reports.exe**
- [Login] **staff**
- [Password] **Amlib**
- [Database] **LIVE**
- [Location] **LIB**
- [Default Window] **RepPrintProgress**

The Database Login e.g. LIVE must be in **Upper Case** in the Command Line **path** as well as in the **C:\Windows\Amlib.ini** (configuration settings) found on the PC on which the Automatic Reports Scheduler is to be launched.

The Location code will be validated. It must be correct within the Command Line.

Substitute the above Command Paths and Login details to reflect your own Command Paths and Login details. These details can then be entered into a Windows/Scheduled Task pane. We can send separate notes on this if required.



Report Functionality

If Reports is started using a command line that includes RepPrintProgress as the default window argument, the *Reports* module starts up and opens the Print Progress window. The *scheduler* is started and ALL scheduled reports that are listed to be launched **prior** to the current date/time will be processed.

Once there are no more reports to process the application shuts down.

It is important to understand that the *Reports* application will stay open as long as it takes to process all jobs where the date and time is EARLIER than the current time. The Report exe does NOT look ahead and stay open for jobs that will become due at some future time.

Example:

- Print Job #1 scheduled for 29th March 2007 at 2:00am
- Print Job #2 scheduled for 29th March 2007 at 3:30 am

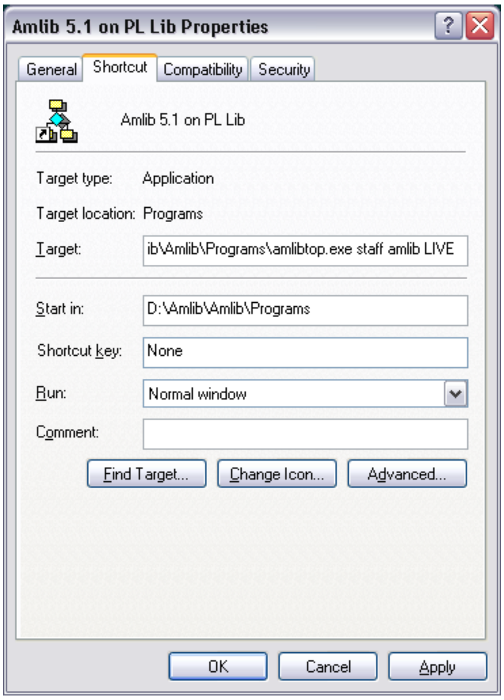
If the **Report.exe** is loaded at 3:00 am Print Job #1 **will** be processed but Print Job #2 **will NOT** be processed, unless Print Job #1 takes more than 30 minutes to run.'

Please Note:

Currently only Report.exe does anything with the default window parameter, but the Database and Location parameters can be used with any *Amlib* executable.

The passed Location code is validated. If it is OK then the application logs on to that Location, otherwise the Location selection dialogue is displayed.

For example launch *Amlib* automatically without logging in manually by setting the *Amlib* desktop Icon to have the Properties set to the User's login details. For example:

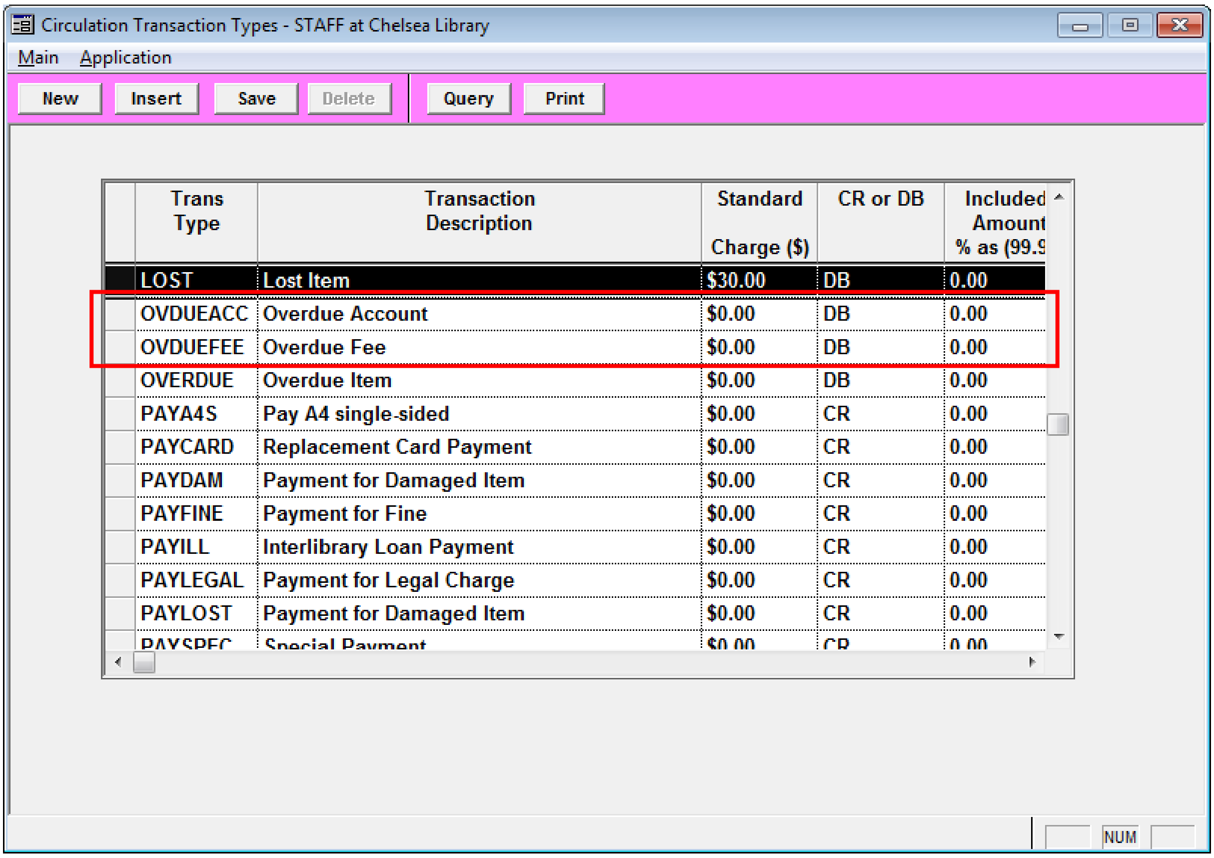


APPENDICES

Appendix 1: Add the User-Defined Financial Record and Fees Type Names to the Circulation Transactions Types (RepCirculation and RepReservations Only)

Please Note: Any user-defined names in column 4 and 5 (Line 1 Financial record NAME and Line 1 Fees type name) in the **F10 More** screen must also be added to the Circulation Transaction Types table.

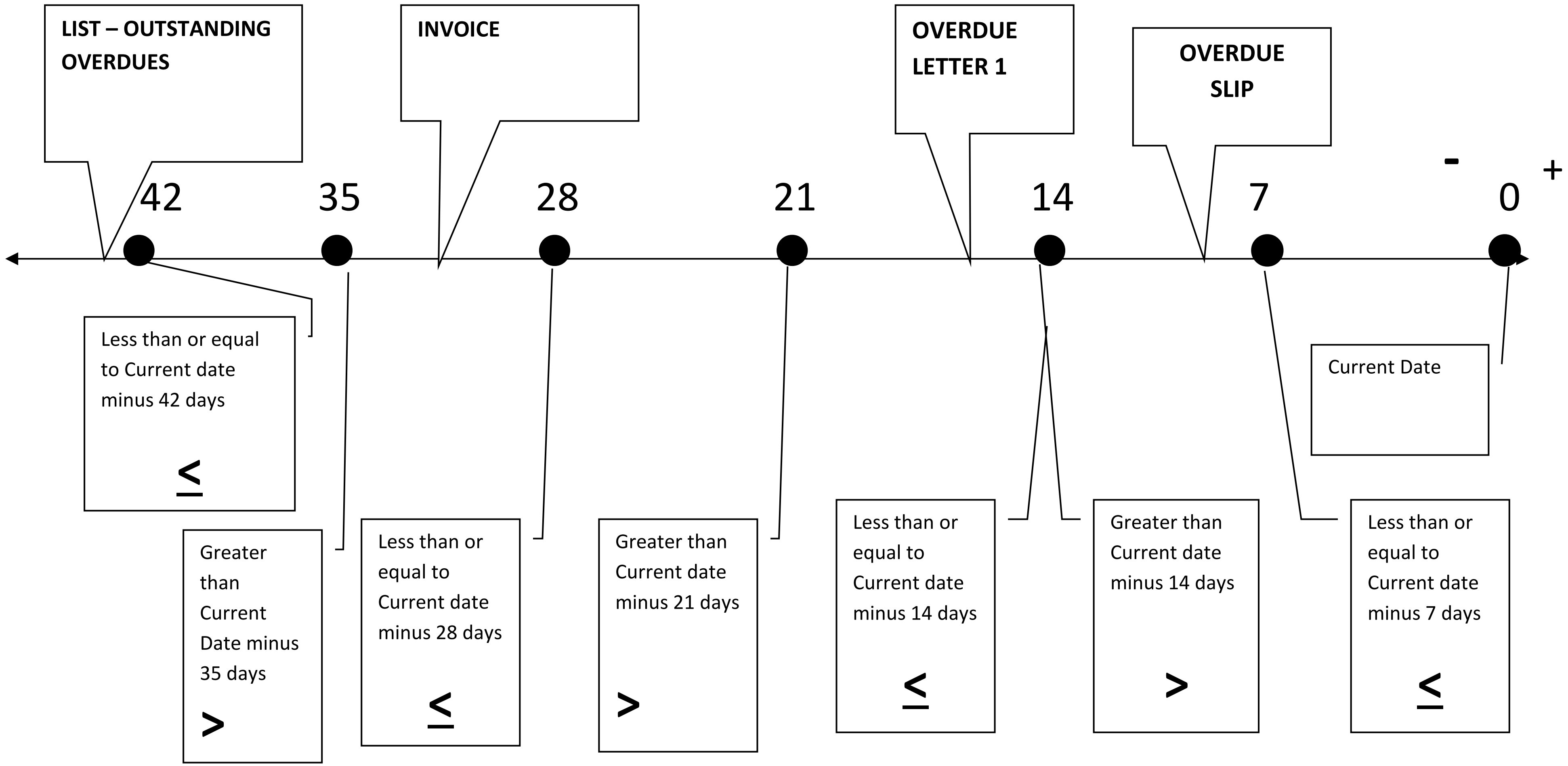
1. Go to **Main** > **Finance** > **CircFinTypes** – Circulation Transaction Types screen will display:



Trans Type	Transaction Description	Standard Charge ($)	CR or DB	Included Amount % as (99.9
LOST	Lost Item	$30.00	DB	0.00
OVDUEACC	Overdue Account	$0.00	DB	0.00
OVDUEFEE	Overdue Fee	$0.00	DB	0.00
OVERDUE	Overdue Item	$0.00	DB	0.00
PAYA4S	Pay A4 single-sided	$0.00	CR	0.00
PAYCARD	Replacement Card Payment	$0.00	CR	0.00
PAYDAM	Payment for Damaged Item	$0.00	CR	0.00
PAYFINE	Payment for Fine	$0.00	CR	0.00
PAYILL	Interlibrary Loan Payment	$0.00	CR	0.00
PAYLEGAL	Payment for Legal Charge	$0.00	CR	0.00
PAYLOST	Payment for Damaged Item	$0.00	CR	0.00
PAYSPEC	Special Payment	$0.00	CR	0.00

2. To add a new Transaction Type:
   a. Click the **New** or **Insert** button
   b. Trans Type – type in the user-defined name – for example: **OVDUEACC** or **OVDUEFEE**
   c. Transaction Description – for example: **Overdue Account** or **Overdue Fee**
   d. CR or DB = **DB**
   e. Click the **Save** button when complete

Appendix 2: Sample Overdue Date Line



Appendix 3: Operators

OPERATORS	LIKE	LIKE	IN	IN	=	≠	<	<	>	>	F12
For Reports & Where Searches	Begins with	**Does not begin with**	**Include these multiple codes - for example: J,A**	**Do not Include these multiple codes**	**Equal to…**	**Not Equal to…**	**Less than**	**Less than or Equal to**	**Greater than**	**Greater than or Equal to**	**PRINT SCREEN**