

System Management Parameters

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PARAMETERS

One of the features of the Amlib Library Management System is the ability for each library to set their own parameters for many of the functions in Amlib. Most parameters are User-defined, which enables each library to customise the system to suit their needs. There is only one source code so therefore Special Libraries, School Libraries and Special Libraries use the same Amlib Programs, but alter parameters as required.

While many of your existing defaults can be used, you may wish to use this as an opportunity to review current defaults and parameters.

Many of the parameters for the overall system are found in the :

Supervisor/LibraryMenu/Installation parameters.

Defaults are set in the **Application Menu of each individual Modules.**

For example, global Circulation parameters are set in the Installation/Circulation. However the actual Loan Defaults for each Borrower Type is set in Borrower/Application/BorrowerTypes.

If changes are made to parameters or defaults, it is usually necessary to log off the particular Application and load it up again, to refresh the parameters or defaults used. In the Supervisor User (permissions) parameters, it will be necessary to close Amlib and login again to effect the changes.

Version 5.1 brought many changes to the way the Parameters and Defaults are used, as it now incorporates Library Groups. This enables Branches and Campuses to have their own Installation settings and permissions (e.g. ability to View and/or Modify each other's Items or Borrowers etc.).

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PARAMETERS: SUPERVISOR MODULE

The Supervisor Module contains many of the System parameters in the Installation Tables. Another very important set of parameters are the User Permissions which sets the Menu and Button security for Login.

When setting up a new location, there are also installation parameters that must be activated.

The screenshot shows a window titled "Locations - STAFF at Main Library". It has a menu bar with "Main" and "LibraryMenu". Below the menu bar is a toolbar with buttons for F1 New, F2 Insert, F3 Save, F4 Delete, F5 Query, F6 Print, F7 NetWk, F8 Plans, and F9 Hours. The main area contains a table with the following data:

Library Group Code	Locn Code	Location Description
BID	BID	BID
LIB	BLT	BLACKLIST
LIB	BLTL	BLACKLIST LOCAL
LIB	BOX07B	box
LIB	BPK	Bianca PARK (ex. Sw
LIB	CL	CORPORATE LIB
LIB	CLRET	CLAIM RETURNED
LIB	DBCL	DEBT COLLECTOR

The screenshot shows a window titled "Installation - STAFF at Main Library". It has a menu bar with "Main", "LibraryMenu", and "Installation". Below the menu bar is a toolbar with buttons for F3 Save and F5 Query. There are several tabs: All, Borrower, Catalogue, Circulation, Stockitem, System, and Other. The "Main Library" section is active, showing a table of installation parameters:

Description	Value
Loan by STATS (Y) or FORM (N)	N
Loan limits by Library Group (Y) or by Location (N)	N
Location is Valid for Holdings	Y
Location is Valid for OPAC Enquiries	Y
Location is Valid for Registrations & Circulation	Y

New parameters are identified by the blue text in the Supervisor Module/Installation table unless they have been previously downloaded from the Amlib website.

These new parameters include:

- * Calculate renewal date from due date (Y/N)
- * Claims returned process code
- * Include closed days in fine calculations (Y/N)
- * Use cat worksheet for periodical cataloguing
- * Use the (L)ogin group or (C)atalogue group for the group code of non-authority tags?

LIBRARY GROUPS AND SECURITY

Library Groups have been implemented to set permissions via a Group level for the User Login Location. This will be used predominately by Union Catalogues, Multi-Branch or Multi-Campus Libraries, where Access and Control security is important. For example Borrower details in other Groups can be viewed but not modified or deleted.

Library Group Code	Locn Code	Location Description
EAST	ARM	Armadale
EAST	C	Council library
EAST	EAS	Eastville
EAST	EAST	EAST
LG	INET	Inet
LG	KMS	Kelmscott
LG	LIB	AmlibNet Library
LG	VDX	Virtual Directory Ex
LG	WEB	WEB
LN	KWS	Kelmscott extra
LW	LW	LW
LW	LWST	Lower West
WEST	WES	Westfield
WEST	WEST	WEST

It allows one Group to be responsible for all resources but still allows other groups to add, modify or delete the resources within their group. The Location table holds only the location names and the Group name. The Group code a mandatory field in the Locations table. If you wish to alter the name of the Group, you need to do so in Supervisor / LibraryGroups.

Details for each location are stored in the Installation table [Supervisor / Installation].

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Library Group	Return Status If set to Y - items returned at a group member will have temp Locn set to this group name	For a return of an item that belongs to a locn within the current group Do you want a message ?	Allow Non Group Return If Set to N , Returns of items for items not belonging to group are disallowed Unless Issued by a group meml
BID	N	Y	Y
LIB	N	Y	Y
MOB	N	Y	Y
W	Y	Y	Y

The decision to implement Group Security in Amlib is optional. However, the use of Group codes is mandatory.

To use Group security, a group code will need to be created for locations. There is no limit to the number of locations that can have the same Group Code and no limit to the number of Groups that can be used.

When a Group Code is created, the Supervisor module will assign the group code to the appropriate records based on the current location field of those records.

Catalogue and Authority records will be assigned a Group code when a Super Group code is entered in the Supervisor module. The Super Group code is entered in Supervisor, Installation – Default.

Description	Value
Database containing the Amlib Catalogues	CAT
Database containing the Amlib Parameters	LOCAL
Database containing the Amlib Statistics	STATS
Database containing the Amlib Web Session Data Tables	CAT
Default attachment security level	0
Default authority security level	0
Default catalogue security level	0
Default search cache size	60
Default tag security level	0
Disallow financial changes once values entered and saved	N
Fixed Window offset position fromTop & Left (numeric in the form TTT-LLL)	
Group Restrictions? (Y/N)	Y
Group Supervisor	LG
If price includes tax, the tax is removed before depr and recal after	Y
Item cost on new financial entry to (C)Charge(P)Paid(B)Both(N)None	C

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This facility was implemented to set permissions via a Group level for the User Login Location. It allows one Group to be responsible for all resources but still allows other groups to add, modify or delete the resources within their group.

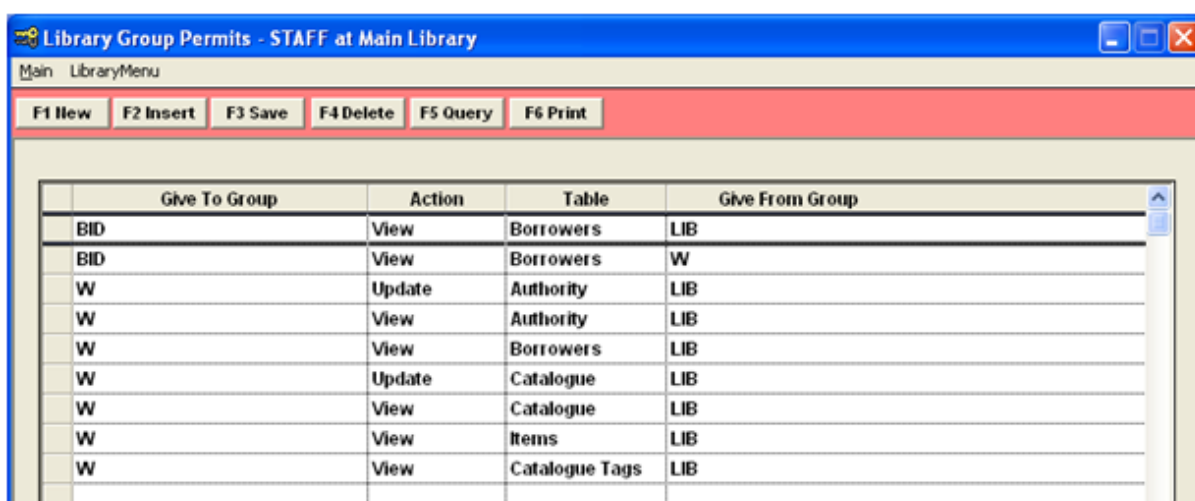
The Groups permissions include:

- View
- Update
- Insert
- Delete
- Batch (report process)
- Attach
- Hold
- Loan
- CheckIn
- Transfer
- Renew

The Tables that can be applied include:

- Authority
- Borrowers
- Catalogue
- Catalogue Tags
- Items
- Periodicals
- Documents
- Orders
- Parameters
- Login
- Calendar
- Location

Screens now have an option to view the Current Group or other Groups allowed through the Supervisor, Group Permits Table.



Give To Group	Action	Table	Give From Group
BID	View	Borrowers	LIB
BID	View	Borrowers	W
W	Update	Authority	LIB
W	View	Authority	LIB
W	View	Borrowers	LIB
W	Update	Catalogue	LIB
W	View	Catalogue	LIB
W	View	Items	LIB
W	View	Catalogue Tags	LIB

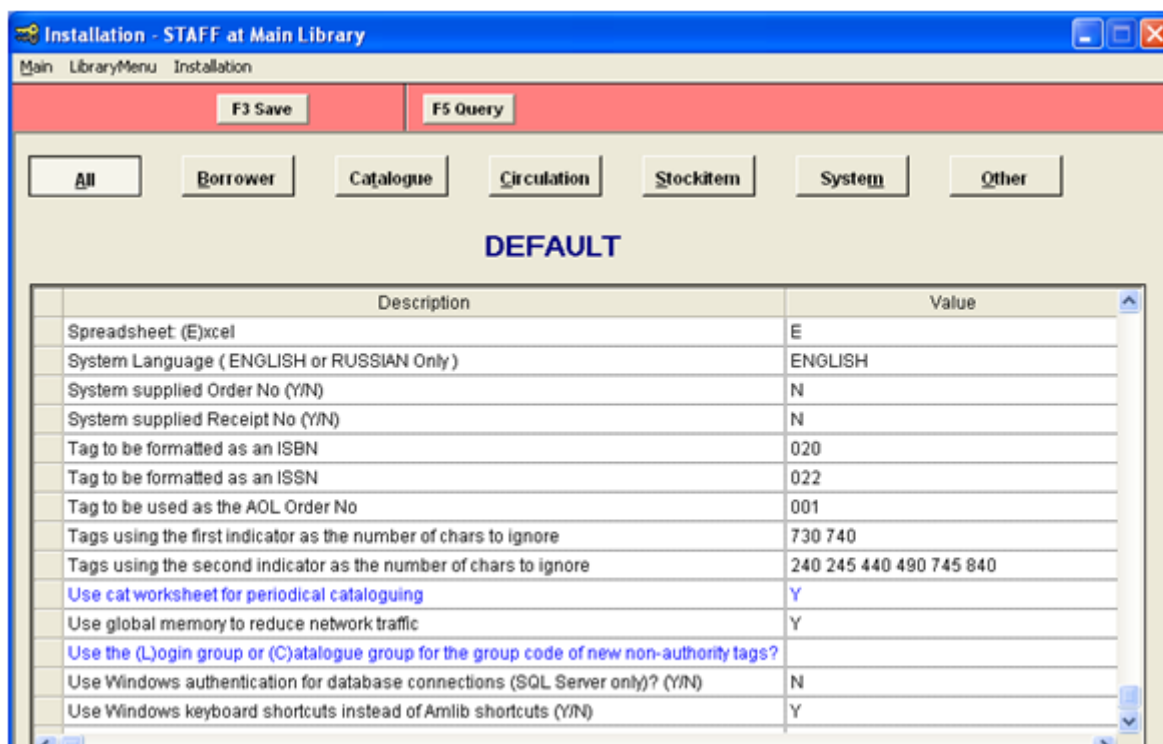
System Management Parameters

SUPERVISOR MENU SUMMARY

MENU	EXPLANATION
Calendar	To set the closed dates for Items due
CheckDigits	To set Barcode validations
DIYParams	Do It Yourself Circulation parameters – separate Module
FuzzyMatch	Allows entries of synonyms, possible plurals, rules & alternatives for words and symbols that may be entered in Opac e.g. men/man, & etc.
Installation	To set parameters for the system. In Version 5.1, parameters can be set via Location
IssuesAudit	When an Issue proceeds after a Caution message (i.e. Item Reserved or Loan Limit exceeded), an audit record is created and kept as a log which can be viewed in this screen. If set, don't forget to delete the log!
LibraryGroups	For Union, multi branch or multi campus libraries to allow permissions to be set. The decision to implement Group Security in Amlib is optional. However, the all locations now must have a Group code
Library Group Permits	Allows restrictions to be set as required
LocRepSMTP	SMTP Parameters by Location for Reporting – includes Location, Screen, Report Type, Sender's Email and Carbon Copy Email
MainMenuApps	Ability to list other applications into the Main Menu e.g. Word for Windows, Report Writer
MemoTypes	To set User Defined Memo Types for Borrower & Stockitem
Opacs	To set parameters for Opacs (many of these are for the traditional Opacs, rather than Netopacs)
SoundTable	To set the Sounds to be audible within Circulation transactions
SpreadSheetParams	To set Columns and Rows to be used for Statistics that is to be imported to Excel
StatsParams	To set the Statistic Parameters to be counted on the System
SystemActivity	To display graphs of activity and to send Spreadsheets to Excel
UserNames	To set Permissions for Login
WindowNames	To set Button Names for the System. This is not usually changed by the User but Updated within Upgrades of Amlib
WebParams	Used when compiling Netopacs. Once Netopacs are compiled, the table is populated with Netopac settings

INSTALLATION

Blue text within the Window indicates that the Installation parameter is new in the current Version.



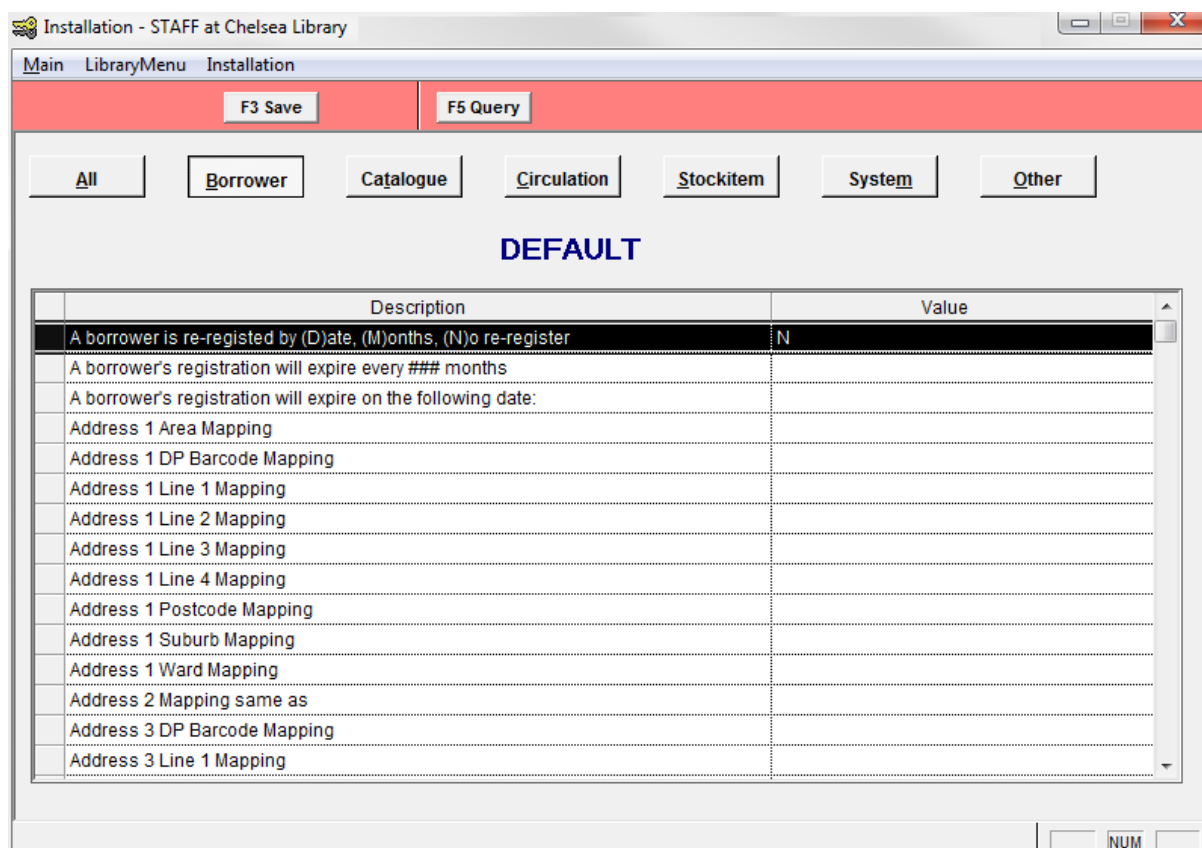
Parameters are divided into groups. To view the parameters for different functions click the appropriate button.

All	Borrower	Catalogue	Circulation	Stockitem	System	Other
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All

Displays all parameters for all groups, in Alphabetical Order. For details, see specific sections e.g. Borrower, Catalogue etc.

Borrower



FIELD	EXPLANATION	EXAMPLE
A borrower is re-registered by (D)ate, (M)onths, (N)o re-register	When a borrower is created, an expiry date is given (unless an N is entered). This expiry date is either based on today's date plus a number of months, or an exact date. Enter an M to use the monthly method or a D to use the defined date method (If D is used, there must be a date entered in the third parameter before the table is saved)	M
A borrower's registration will expire every ### months		36 (number only entered if option above is set to be M not D)
A borrower's registration will expire on the following date:		01/12/12 (date only entered if option above is set to be D not M)
Address 1 Area Mapping	For use with QAS (Quick Address Software) – depending on which Addresses are to mapped to the Amlib Borrower Address	
Address 1 DP Barcode Mapping	For use with QAS, to bring in the Post Office Barcode	DP Barcode (Default)
Address 1 Line 1 Mapping	For use with QAS	Line 1

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Address 1 Line 2 Mapping	For use with QAS	Suburb Alternatively Line 4 to get Suburb on same line e.g. Osborne Park, WA, 6017.
Address 1 Line 3 Mapping	For use with QAS	State
Address 1 Line 4 Mapping	For use with QAS	
Address 1 Postcode Mapping	For use with QAS	Postcode
Address 1 Suburb Mapping	For use with QAS	
Address 1 Ward Mapping	For use with QAS	
Address 2 Mapping same as	For use with QAS	3
Address 3 DP Barcode Mapping	For use with QAS, to bring in the Post Office Barcode	DP Barcode
Address 3 Line 1 Mapping	For use with QAS	Leave Line alone since it normally contains a Guardian Name
Address 3 Line 2 Mapping	For use with QAS	Line1
Address 3 Line 3 Mapping	For use with QAS	Suburb
Address 3 Line 4 Mapping	For use with QAS	State
Address 3 Postcode Mapping	For use with QAS	Postal Code
Address Check Provider	For use with QAS	QASDialog
Borrower Images to be kept in files enter (e.g. .jpg or .gif)	Images may be kept on the database or in Files. The directory is defined in Supervisor, Location, Picture Directory and in a subdirectory, determined by the first 3 letters of the surname. The filename itself is the unique Amlib number for the Borrower plus an extension (e.g. jpg, gif). The default image type is .jpg	.jpg
Default Borrower Type	Values entered in this column will automatically be entered into the relevant field/s when a new borrower is created. If left blank, the Borrower Type can often be entered automatically based on Date of Birth and settings in the Borrower Type parameter. If Default is entered that calculation will not be made	A
Default Borrower Class		R12
Default Borrower Group		R
Default Borrower Status		OK

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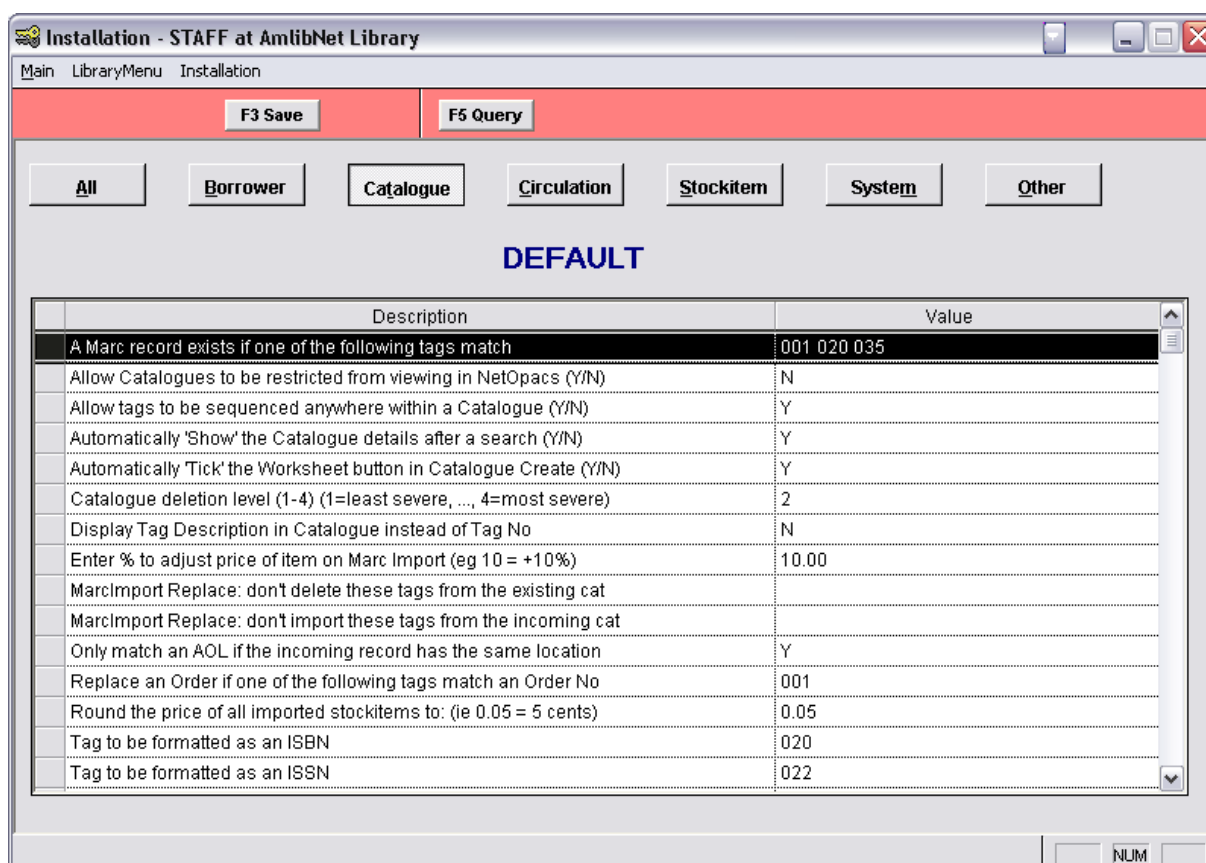
Delete a borrower memo when it is ### days old	When creating a borrower's memo you may supply an expiry date. Otherwise the system will calculate the expiry as being the current date plus the number of days entered in this field. A report can be run to delete expired memos from the system.	365
Description of Borrower Address1	Labels for these field/s may be entered here, which will display as headings for the relevant field/s in the Borrower Details window.	Residential
Description of Borrower Address2		Alternative
Description of Borrower Address3		Guardian
Description of Borrower Reference1		Internet Approval given
Description of Borrower Reference2		ID viewed
For New Borrower Display Address Create Window (Y/N)	<p>If this parameter is set to N, a Popup window of common addresses (those specified in the address window as being a Pop Up type). You may then select an address from this list to use for the new borrower. This facility is designed to allow users to give all borrowers the same address without going through the linking process. See PopUp Address.</p> <p>If set to Y, the new address window screen will automatically display the Create a new address window, for a new address to be entered.</p>	Y/N
Lock Corporate Borrower Data from being modified	Specifically relates to Libraries using the Corporate Data function for Borrower Online importing. Sites using this function should have it set to Y.	Y/N
QAS Caption	For use with QAS	Address Check
QAS Country	For use with QAS	AUS
QAS Hide Licensing Dialog	For use with QAS	N If set to Y a dialog shows current Licence dates
QAS Ini Path	For use with QAS	
QAS Layout	For use with QAS	Barcode
QAS No Help	For use with QAS	Y
QAS No Pro Bitmap	For use with QAS	Y

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QAS Read Only	For use with QAS		Y
Show Memos in Borrower Automatically	Y	Memos appear upon accessing a borrower record automatically if Show is Y.	Y
	N	Memos do not display automatically when accessing Borrower records within the Borrower Module. The Memos can be accessed by using the Borrower Menu. The Memos will still automatically show in Issues	

<p>NOTE:</p> 	Borrowers expiry may also be set using Borrower Type parameters
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Catalogue



Description	Value
A Marc record exists if one of the following tags match	001 020 035
Allow Catalogues to be restricted from viewing in NetOpacs (Y/N)	N
Allow tags to be sequenced anywhere within a Catalogue (Y/N)	Y
Automatically 'Show' the Catalogue details after a search (Y/N)	Y
Automatically 'Tick' the Worksheet button in Catalogue Create (Y/N)	Y
Catalogue deletion level (1-4) (1=least severe, ..., 4=most severe)	2
Display Tag Description in Catalogue instead of Tag No	N
Enter % to adjust price of item on Marc Import (eg 10 = +10%)	10.00
MarcImport Replace: don't delete these tags from the existing cat	
MarcImport Replace: don't import these tags from the incoming cat	
Only match an AOL if the incoming record has the same location	Y
Replace an Order if one of the following tags match an Order No	001
Round the price of all imported stockitems to: (ie 0.05 = 5 cents)	0.05
Tag to be formatted as an ISBN	020
Tag to be formatted as an ISSN	022

FIELD	EXPLANATION	EXAMPLE
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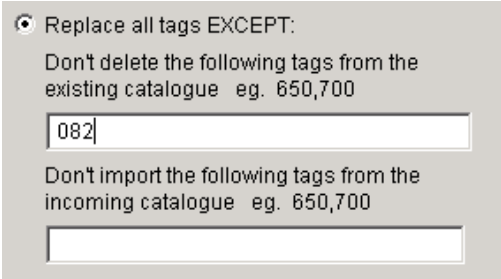
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<p>A Marc record exists if one of the following tags match</p> <p>(Found in Default Settings only)</p>	<p>A check is made for existing data matching the Tag numbers entered with the importing data. Note: ISBN has 2 modes when dealing with Multiple ISBNs. If the 020 Tag is included, Amlib will look at all the ISBN's within an incoming record and match as required</p>		001 020 022
	<p>Match any: Enter only one ISBN in the Value column</p>	<p>The ISBN/s of the existing record must match any one of the multiple ISBN's within the incoming record for it to be considered existing e.g. When the Importing File has 2 ISBNs and the existing Catalogue has only 1 (or more) a match will occur if at least one ISBN matches</p>	001 020 022
	<p>Match exact - Enter the number of 020s to match the incoming with the existing</p>	<p>The ISBN/s of the existing record must match with the same number of multiple ISBN's entered here. If they ALL match the ISBNs with those in the incoming record it will be considered existing</p> <p>The record from the input file with multiple ISBN's must match ALL the existing catalogue ISBN's (e.g.001 020 020), so if the incoming record has 2 ISBNs a match with an existing record will take place only if BOTH ISBNs match</p>	001 020 020 022
<p>Allow Catalogues to be restricted from Viewing in Netopacs Search</p>	N	<p>The Opac View Restriction (Y/N) default within the Catalogue window will be set to N and the checkbox will not be able to be edited</p>	N
	Y	<p>The Opac View Restriction (Y/N) default within the Catalogue window will be set to N but the checkbox is able to be edited</p>	
<p>Allow tags to be sequenced anywhere within a Catalogue (Y,N)</p>	N	<p>The Marc Tags in the Display section of Catalogue can only be moved within the Tag No and not anywhere else. The Arrows will be inactive once the end of the section is reached</p>	<p>If set to N, the order of the Tags in the 650 section for example, can be altered but not beyond the 650 section. If set to Y, the order of the Tags can be set anywhere on the display e.g. a 650 Tag could display above the 020 Tag.</p>
	Y	<p>The Marc Tags in the Display section of Catalogue can be moved anywhere in the record. The Arrows will be active to move to any Tag sequence</p>	
<p>Automatically 'Show' the Catalogue details after a Search (Y/N)</p>	Y	<p>When the Catalogue Details Window displays always display the full Bibliographic data for the Catalogue record, rather than the User clicking the Show button on the Screen</p>	Y
	N	<p>When the Catalogue Details Window displays, the User will need to click the Show button or choose Show as default from the Catalogue menu, to display the full Bibliographic data for the Catalogue record</p>	

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Automatically 'Tick' the Worksheet button in Catalogue Create (Y,N)	Y	Set the Default to have the Worksheet displayed for Catalogue creation	Y
	N	The Default is not set to Worksheet and the user may click the Worksheet button if it is required	
Catalogue deletion level (1-4) (1 least severe, 4 most severe)	<p><i>When catalogues are deleted, all the Non Authorities are automatically deleted. The levels below only apply to the Authorities that were attached to the Catalogue that is to be deleted.</i></p> <p>Levels 1, 3 & 4 also delete the non-preferred authority if the preferred authority is not attached to a catalogue. Level 1 does this because a unique authority should not have anything seeing it.</p>		<p>Level 1 Least SEVERE! - The Authority will only be deleted if it is:</p> <ol style="list-style-type: none"> 1. Not attached to any other Catalogue 2. A Unique Authority
			<p>Level 2 - The Authority won't be deleted if it:</p> <ol style="list-style-type: none"> 1. Is attached to any other Catalogue 2. Is 'Seen By' another Authority 3. Has a 'See Also' reference to another Authority 4. Is 'Seen Also By' another Authority
			<p>Level 3 - The Authority won't be deleted if it:</p> <ol style="list-style-type: none"> 1. Is attached to any other Catalogue 2. Has a 'See Also' reference to another Authority that is attached any other Catalogue 3. Is 'Seen Also By' another Authority that is attached to any other Catalogue
			<p>Level 4 – Most SEVERE!</p> <ol style="list-style-type: none"> 1. The Authority won't

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		be deleted if it: Is attached to any other Catalogue
Default for Catalogue Opac Restrict	Enable the Catalogue Restriction to Opac to be set. Most sites would have this set to N	N
Display Tag Description in Catalogue instead of Tag No	Y	Displays a description rather than a Tag number. The descriptions are set in Authority, Marc Tags
	N	Displays the Marc Tag number. The descriptions are set in Authority, Marc Tags
Enter % to adjust price on item on Marc Import (10 = +10%)	The percentage entered will be the default in Marc Import for the price adjustment in the Bibliographic Option Window. This allows for the Item price in Marc Import to be appreciated automatically. For example to allow for GST. This default can be overridden within the Marc Import window if required	10 (defaults to +10%)
Marc Import Replace: Don't delete these tags from the existing cat (Found in Default Settings only)	<p>Sets the Default for the Marc Import option - When using Authority, Marc Import, and identifying Tags that are not to be replaced</p> <ul style="list-style-type: none"> ❖ Does not delete the existing data in the specified Tag ❖ Does import the new data in the specified Tag. Influences the Marc Takeup Import Options. 	Y
Marc Import Replace: Don't import these tags from the incoming cat (Found in Default Settings only)	<p>Sets the Default for the Marc Import option - When using Authority, Marc Import, and identifying Tags that are not to be replaced</p> <ul style="list-style-type: none"> ❖ Does not delete the existing data in the specified Tag ❖ Does not import the new data in the specified Tag. Influences the Marc Takeup Import Options – the Tag is automatically placed in the Don't Import... field box 	N

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	<div style="border: 1px solid gray; padding: 5px; background-color: #f0f0f0;"> <input checked="" type="radio"/> Replace all tags EXCEPT: Don't delete the following tags from the existing catalogue eg. 650,700 <input style="width: 150px;" type="text" value="082"/> Don't import the following tags from the incoming catalogue eg. 650,700 <input style="width: 150px;" type="text" value="082"/> </div>	
Only match an AOL record if the incoming record has the same location	For Advanced Order Records (W.A. State Government of Western Australia data only). Will only match an AOL record from an exchange if the AOL has the same location as the incoming record	Y/N
Replace an Order if one of the following tags match an Order No	For State Government of Western Australia sites only : The system compares the Order Numbers on an incoming exchanges and replaces the existing data only if the Order Numbers are matched to the data in the specified Tags	001, 035
Round the price of all imported Stockitem to (0.05 = 5 cents) (Found in Default Settings only)	When importing Stockitem records with prices, the Item Current cost and the Original Cost (if new items), are to be rounded to the amount set in this parameter	0.05
Tag to be formatted as an ISBN (Found in Default Settings only)	ISBNs and ISSNs are usually formatted with - separators between the numbers. The actual formatting depends on a number of rules and is based on the starting numbers in a group.	020
Tag to be formatted as an ISSN (Found in Default Settings only)		022
Tag to be used as the AOL Order No (Found in Default Settings only)	For State Government of Western Australian sites only. When AOL files are processed the system will generate an order number based on the contents of the Tag Number field defined in this parameter.	001
Tag using the first indicator as the characters to ignore	For filing, the first indicator displays a number of characters to ignore. For example "the" would have a second indicator of 4.	730 740

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(Found in Default Settings only)		
Tags using the second indicator as the number of characters to ignore (Found in Default Settings only)	For filing, the second indicator displays a number of characters to ignore. For example "the" would have a second indicator of 4.	240 245 440 490 745 840
Use the (L)ogin group of (C)atalogue group for the group code of new Non Authority tags?	The Library Group code used when inserting Non-Authority tags usually would be the same as the Catalogue Group code. However, there may be instances where libraries may want the option of using the Login location's Group code	C (Default)

Circulation

Description	Value
Adjust the date due by ### minutes for overnight hourly loans	2
All items must be returned by the following date:	01/12/2010
All Semester loans are due back on the following date:	04/06/2006
All Term loans are due back on the following date:	01/04/2006
All Year loans are due back on the following date:	
Allow hourly loans to be issued overnight (Y/N)	Y
Are there different closed days depending upon the location (Y/N)	Y
Are there different loan parameters for each location (Y/N/G)	Y
Automatically answer Y to Fines on Chute Returns	N
Automatically answer Y to Fines on Normal Returns	Y
Calculate all fines from the grace (Y) or overdue (N) date	N
Check (B)orrower or (I)tem for fines and charges	B
Days of week where ALL locations are closed (0=Sun, ..., 6=Sat)	0
Display a confirmation message of Credit (Y/N)	Y
Display Chute Returns on the Main Menu instead of Returns	N

FIELD	EXPLANATION	EXAMPLE
Adjust the Date due by ### minutes for overnight hourly loans	When an hourly loan is forced into an overnight loan because of the closing time, the loan becomes due back nn minutes/hours after next opening.	20



System Management Parameters

<p>All items must be returned by the following date</p>	<p>Set a Final Return Date for all Loans. This will override any other Loan parameter. No Loans are allowed past this date. All subsequent issues will use this date as a return date if the calculated return date is greater than the date entered in this parameter. Useful for Schools and Colleges where there is a finite end of year.</p> <p>Final return dates can also be set for individual borrower types in Borrower Types/Return by date.</p>		<p>06/12/2012 (this date will need to be altered each year if set each year). If the date has not been changed a Warning message will display when opening the Issue screen if the date has been passed</p>
<p>All Semester loans are due back on the following date</p>	<p>Set a date for Semester Loans. A Semester Loan Time can be set in Borrower or Stockitem within the Loan Parameters. See Borrower, Application, BorTypes or Stockitem, Application, Forms (or Stats), Loan Parameters</p>		<p>01/07/2012 (this date will need to be altered each semester if used)</p>
<p>All Term loans are due back on the following date</p>	<p>Set a date for Term Loans. A Term Loan Time can be set in Borrower or Stockitem within the Loan Parameters. See Borrower, Application, BorTypes or Stockitem, Application, Forms (or Stats), Loan Parameters</p>		<p>01/04/2012 (this date will need to be altered each term if used)</p>
<p>All Year loans are due back on the following date</p>	<p>Set a date for Year Loans. A Year Loan Time can be set in Borrower or Stockitem within the Loan Parameters. See Borrower, Application, BorTypes or Stockitem, Application, Forms (or Stats), Loan Parameters</p>		<p>06/12/2012 (this date will need to be altered each year if used)</p>
<p>Allow Hourly loans to be issued overnight (Y,N)</p>	<p>If set to Y will make any hourly loan calculated as being due back after the closing time for the library, actually due back the next day</p>		<p>Y</p>
<p>Are there different closed dates depending on Location (Y,N) (Default settings only)</p>	<p>Y</p>	<p>There will be a Location Menu item in the Calendar menu so that each Location can be set</p>	<p>N (Note: Only available in Default parameter set)</p>
	<p>N</p>	<p>There will no Location Menu item in the Calendar menu so that each Location can be set</p>	
<p>Are there different Loan parameters for each Location (Y,N) (Default settings only)</p>	<p>Y</p>	<p>There will be a Location option [F7] button, in Borrower, Application, BorTypes, Loans</p>	<p>N (Note: Only available in Default parameter set)</p>
	<p>N</p>	<p>There will be a Location option [F7] button in Borrower, Application, BorTypes, Loans</p>	
<p>Automatically answer Y to Fines on Chute Returns</p>	<p>If set to Y, a borrower a charge is automatically calculated according to the table in Borrower Types on either Chute Returns, Normal Returns or both types of returns</p>		<p>Y</p>
<p>Automatically answer Y to Fines on Normal Returns</p>			<p>Y</p>

System Management Parameters

Calculate all fines from the grace (Y) or overdue (N) date	Fines may be calculated from the day the item was overdue or an allowance may be made for the grace period. Enter a Y to make the grace period a fine free period		Y
Calculate renewal date from due date (Y/N)	Y	Sets any renewals done through Circulation, Stockitem or Netopacs to be renewed from the Date Due	N
	N	Sets any renewals done through Circulation, Stockitem or Netopacs to be renewed from the Current Date (Default)	
Check (B)orrower or (I)tem for fines and charges	If an automatic charge has been raised via a circulation report for an item, you have the option to cancel the charge. On return, you may check only charges so created for the Returning Borrower (set to B), or for any borrower (set to I)		I
	B	The system checks the Financial records for a match on the Borrower Barcode, the Item Barcode and the term Autocharge on accounts still outstanding	
	I	The system checks the Financial records for a match on only the Item Barcode and the term Autocharge on accounts still outstanding. It therefore gives the option to cancel charges on the Item for previous Borrowers whose charges are still outstanding	
Claims returned process code	Enter a valid Process Code to apply the creation of a Process Code and Process Date to any Item set to Claimed Return (set through Circulation, Issues, Items - ItemClaimedRet. A Memo and Process will be automatically created if a Process Code is entered.		CLAIMEDRET
Days of week where ALL locations are closed (0 = Sun,.....,6=Sat)	Enter the days of the week where closed dates are to be set within the Calendar and where no Issues will be due for Return. This applies where the closed dates are to be for ALL locations		036(e.g. for Sunday, Wednesday and Saturday) 0 (Sun), 1 (Mon), 2 (Tues), 3 (Weds), 4 (Thurs), 5 (Fri), 6 (Sat)
Debt Collection Borrower Status (Default settings only)	Allows a Borrower Status to be defined for Debt Collection. Cannot assign a status already in use elsewhere.		DC
Default Booking Increment	Allows the Advanced Reservation to alter the Default Booking time (Default is 15 minutes)		45
Display a confirmation message of Credit (Y/N)	When an item is returned as described in Check Borrower or Items for Fines and Charges you may get a confirmation message. To hide the message but still apply the credit, enter a N in this parameter.		N

System Management Parameters

Display Chute Returns on the Main Menu instead of Returns	When the Returns icon is selected, the Chute Returns Window will display if the parameter is set to Y		Y	
			N	
Fines for an item cannot exceed the cost of the item	Set as Yes, the fines cannot exceed the cost of the item. Set as No, the fines can exceed the cost of the item		N	
Give a Message when an Interlibrary loan is Returned	If set to Y, the Operator is alerted that an Interlibrary loan has been wanded at returns		Y	
Hide the Message ITEM BELONGS AT LOCATION XX in Returns	If set to Y, the Operator will not get a message about Foreign returns		N	
If a borrower owes money go straight to collect on Issue window	If set to Y, a Collect box displays where you are able to enter an amount paid and Receipt number automatically if the borrower owes money on Issues or Returns.		Y	
If a borrower owes money go straight to collect on Returns window			Y	
If set to Y allows an Issue return date > than the specified ILL Return Date	If set to Y, the Return Date in Issues can exceed the date set in the Stockitem ILLs section at the base of the Stockitem screen where a Return date for the specific Library can be set <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 0 auto;">ILL Lib: P3ALB ILL Ren: Y ILL Due: 24/03/2002</div>		N	
If set to Y allows renewals to be due after the ILL Return Date	If set to Y, the Renewal Date in Issues can exceed the date set in the Stockitem ILLs section at the base of the Stockitem screen where a Return date for the specific Library can be set <div style="border: 1px solid black; padding: 2px; width: fit-content; margin: 0 auto;">ILL Lib: P3ALB ILL Ren: Y ILL Due: 24/03/2002</div>		N	
Include closed days in fine calculations (Y,N)	Y	Closed days from the calendar are included in calculations for Fines (Default)	Y	
	N	Closed days from the calendar are NOT included in the Fine calculations		
Increase the date due by ### days if due back on a holiday	When the due date falls on a holiday then you may extend the date due by the number of days in this field. Usually 1 or 7. Staggering of date due is possible. When there are consecutive closed days, all items due over 2 or more closed days can be set to not being due on the first day the library is reopened. A random number of days (in range 1 thru 9) will be added until an open day is found. This option is set by setting the Value to 0		1	
Issues Report to use when printing all	Enables a specific Report Template to be selected when printing loans from		&ci1iss.qrp	

System Management Parameters

loans	the Issues/Print/Print Issues Only Menu [F9]	
Issues Report to use when printing all loans & reserves	Enables a specific Report Template to be selected when printing loans from the Issues/Print/Print Statement Menu [F10]	&ci1000.qrp
Issues Report to use when printing all new loans	Enables a specific Report Template to be selected when printing loans from the Issues/Print/Print New Issues Only Menu [F8]	&ci1new.qrp
Keep a cache of the last circulation statistics	To improve performance in busy circulation libraries Amlib can store circulation statistics in a cache on each PC. After a number of transactions have been made the statistics will then be updated. This may be set to any value between 1 and 99. Note, however, that a system or PC crash will cause the loss of this data.	20
Keep a reservation for a maximum ### days	When a reservation is ready for collection it is given an expiry date of this value plus the current date. A report can be run that deletes reservation past the expired date.	7
Keep the last ### history records	Borrower and Item history records are kept until purged by the user. When they are purged at least ### records will be kept despite any user report parameters.	100
Loan limits by STATS (Y) or FORM (N)	Loan parameters by default are based on Borrower type and Form type combinations (set to N). As an alternative, you may use Borrower type and item Statistics codes by setting this value to Y	N
Loan limits by Library Group (Y) or by Location (N)	For libraries that use Groups to differentiate between Branches that have separate loan parameters. Items that have been issued by locations that fall within a particular group are subject to Loan limits set up for that Group. See Library Groups	N (Most sites would use Location)
Memo borrower when a reserved item is returned (Y/N)	A setting of Y will cause a memo to be created for the next reservation's owner. This memo will display when that borrower's barcode is next wanded.	Y
Memo library on reservations (Y)- All, (F) Foreign, (N) Don't memo	If set to Y or to F (and the person placing the reservation is not at the location of the item), a memo will be created of a type RESGET to the borrower record nominated to get resget memos.	F
Order of columns to display within reservation	Users may change the order in which columns are displayed in the potential reservations window. Entering a comma-separated list in this field does this. See the Table below for the field names that can be used.	COLSTK_LINE1, COLSTK_FORM , COLSTK_STATS_CODE [Note - it is possible to enter just some of the fields for your customised order, and the system will fill the rest with

System Management Parameters

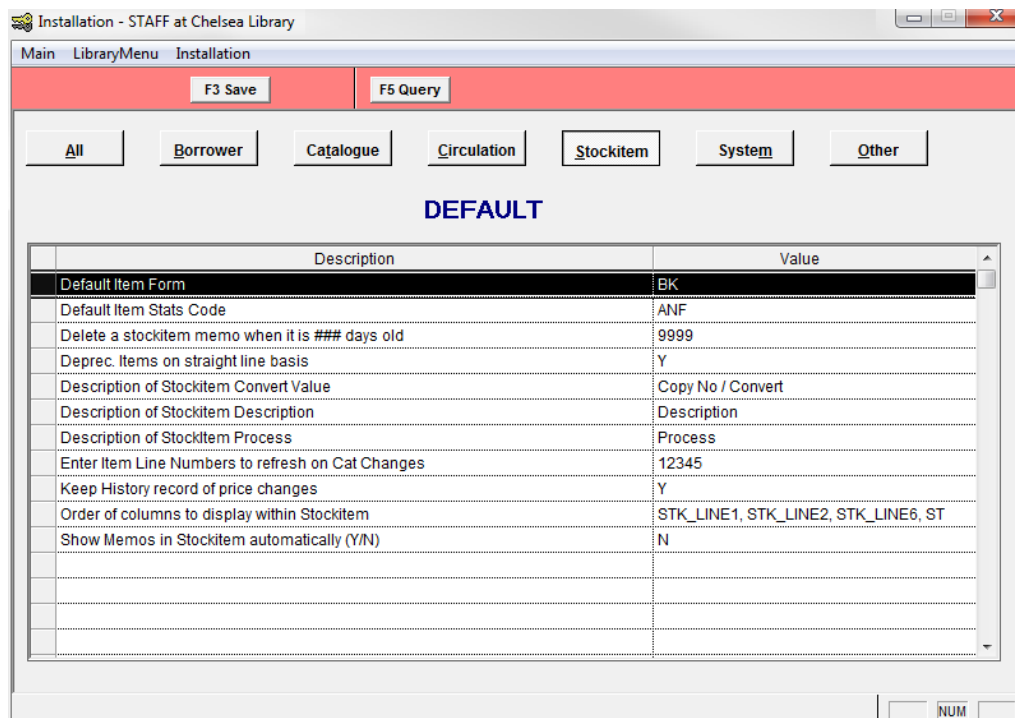
			the default]
Overdue items can be renewed without needing override permission (Y/N)	N	Operators without Override Permission (set in Supervisor, Usernames) will be unable to renew Overdue items (Default)	N
	Y	Operators are allowed to renew Overdue items even though permission has not been given to Override in Supervisor, Usernames	
Show subsidiary items when returning a master item (Y/N)	Allows for a Display of Subsidiary items when returning Master items where the Circulation operator can process Subsidiary items individually. The items can be returned individually, not be returned, have Memos and Processes added or the whole return abandoned		Y
Show the 'Borrower read ...' message up until ### days	If Borrower Keep History is set to Y, can limit the number of days for which the message "Borrower has read this.." message will display		365

Reservation Fields for Table Sequence

The following fields can be used to create the list for the setting "Order of columns to display within reservation":

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

Stockitem



FIELD	EXPLANATION	EXAMPLE
Default Item Form	Allows you to define the default Form code to be automatically generated for new items	BK
Default Item Stats Code	Allows you to define the default Stats code to be automatically generated for new items	ANF
Delete a Stockitem memo when it is ### days old	When creating an item memo you may supply an expiry date. Otherwise the system will calculate the expiry as being the current date plus the number of days entered in this field. A report can be run to identify memos that should be deleted from the system.	365
Deprec. Items on a straight line basis. Regardless of the Depreciation method, the same Depreciation Tables are used within Amlib. The essential difference is in the calculation and which cost price is used for the calculation.	Y Depreciate using Original cost and percentage to calculate No of years for depreciation	N
	N Depreciate using current cost and percentage to give the item a Reducing Balance based on No of years for depreciation. See Stockitem, Application, StockStatsGroup	
Description of Stockitem Convert Value	This allows you to define you own label for this field on the Stockitem Window.	Comment

System Management Parameters

Description of Stockitem Description		Copy No.
Description of Stockitem Process		Process
Enter Item Line Numbers refreshed on Cat changes	Stockitem lines entered will automatically be refreshed if associated Tags are updated in the Catalogue Application. Line Numbers are entered, without spaces or commas. If the automatic refresh is not required, enter 0.	12345
Keep history record of price changes	If set to Y, an audit is kept of depreciation changes made to Stockitem prices, which can be reported using a Stockitem History report	Y
Order of columns to display within Stockitem	<p>The order of columns in the Stockitem table window may be changed using this parameter. (If you do change this you may have to adjust your table window report program - \$itelist.qrp)</p> <p>The names of the columns need to be typed in capitals, comma separated in the order that you want them to appear. You do not need to type in all the column names. The column names you type in will be placed at the beginning of the table and the default will continue for any column names you have not typed in</p> <p>The Table below displays the fields that can be used for the display:</p>	See table below
Show Memos in Stockitem automatically (Y/N)	If set to N, hide memos in Stockitem (even when Memo is a Show memo) but still display in Circulation	Y

Stockitem Fields for Table Sequence


The following fields can be used to create the list for the setting “**Order of columns to display within Stockitem**”:

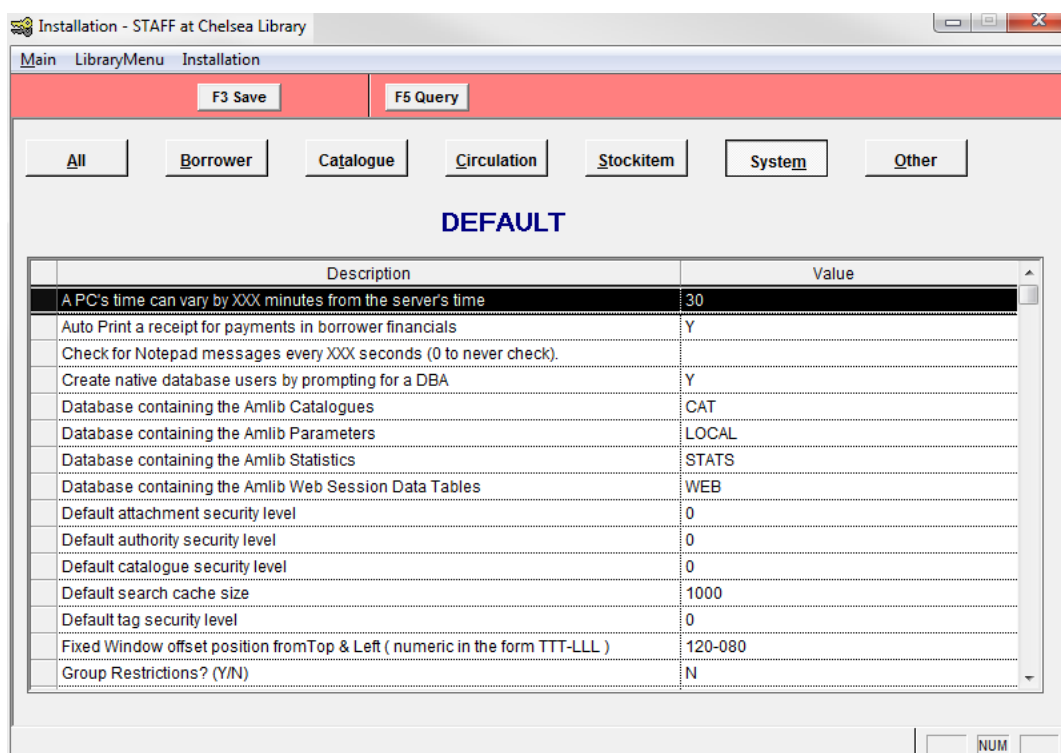
Title in Table	Column Name	Title in Table	Column Name
Title	STK_LINE1	Volume	STK_VOLUME
Author	STK_LINE2	Temp Location	STK_LOC_TEMP
Call No	STK_LINE6	Floor Location	STK_LOC_FLOOR
Form	STK_FORM	Item No (barcode)	STK_ITEM_NO
StatsCode	STK_STATS_CODE	Convert Val.	STK_CONVERT_VALUE

System Management Parameters

On Loan?	STK_IS_ON_LOAN	Description	STK_DESCRIPTION
On Order?	STK_IS_ON_ORDER	Borrower barcode	STK_BOR_BAR_NO
Reserved?	STK_IS_RESERVED	Borrower Name	STK_BOR_NAME
Due Date	STK_ISS_DUE	ILL Supplier	STK_ILL_SUPP
Perm Location	STK_LOC_PERM	ILL Renew	STK_ILL_RENEW
Process	STK_PROCESS	ILL Due Date	STK_ILL_DUE
Edition	STK_EDITION	Call Set	STK_CALL_SET

System

 WARNING	Many of these parameters are set up as Defaults and should not be changed unless advised by Amlib Support Staff
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FIELD	EXPLANATION		EXAMPLE
A PCs time can vary by XXX	0	There is no checking of the Time between PC and Server	15

System Management Parameters

minutes from the Server's time	xxx	No of minutes can be set to ensure that an operator is not operating with a different time and therefore Circulation activity is not accurate. If the time varies, to the time set, the operator will not be able to logon. If the operator is already logged on when the time changes, the operator will be logged off and a Notepad memo will be sent to all operators with Level 9 permissions.	
AutoPrint a receipt for payments in Borrower Financial	Y/N	Automatically prints a receipt after completing a payment in the Borrower Financial Window	N
Check for Notepad messages every XXX seconds (0 to never check)	0	There is no checking of the Time between PC and Server	10
	xxx	No of minutes can be set to check Notepad messages. This will work well if Reservation prompts are sent to Operators regularly	
Create Native Database users by prompting for a DBA	No longer used by the System.		
Database Administrator Password (Default settings only)	This is used by Amlib when creating new users and should not be changed		SYSADM
Database Administrator Username (Default settings only)			SYSADM
Database containing the Amlib Catalogues (Default settings only)	Amlib may be implemented over 1 or more physical databases and/or server machines. Four separate areas may be defined. These parameters are generally defined at installation time and are rarely changed		CAT
Database containing the Amlib Parameters (Default settings only)			LOCAL
Database containing the Amlib Statistics (Default settings only)			STATS
Database containing the Amlib Web Session Data tables (Default settings only)			WEB

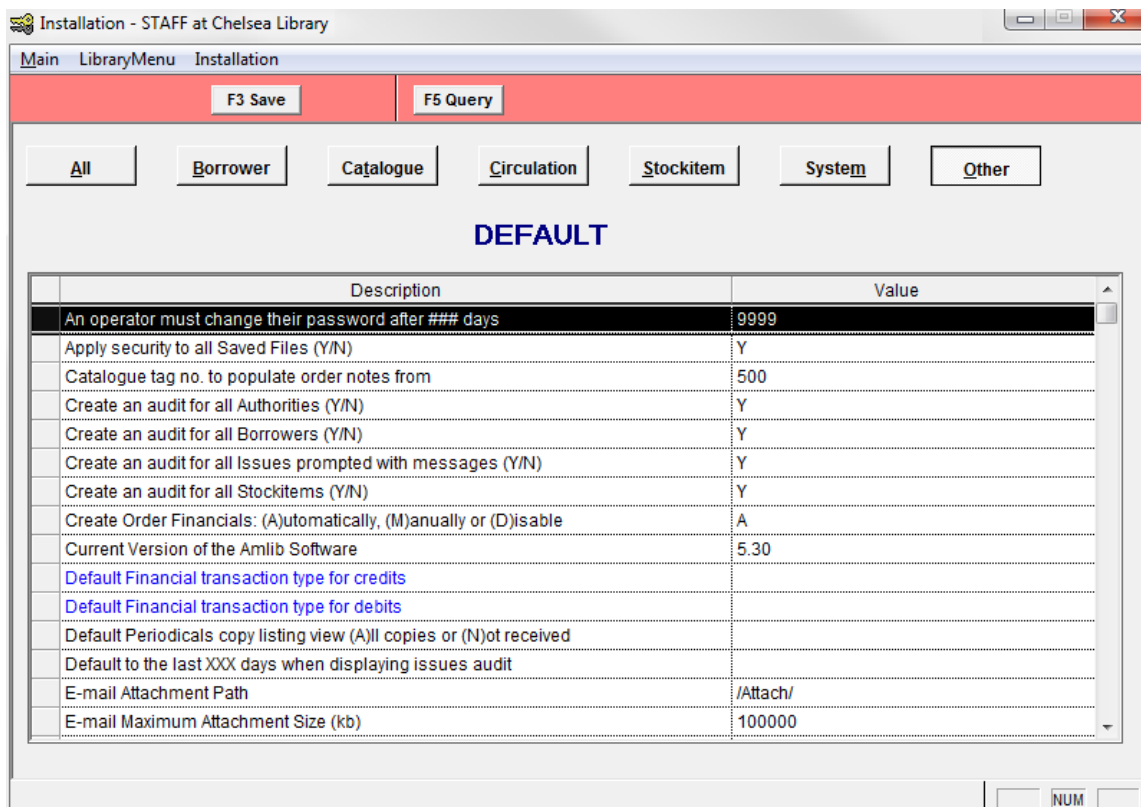
System Management Parameters

Default attachment security level (Default settings only)	Set to determine a user's permission to create and delete attachments to authorities and catalogue records	1-100	
Default authority security level (Default settings only)	Set to determine a user's permission to create and delete authorities	1-100	
Default catalogue security level (Default settings only)	Set to determine a user's permission to create and delete catalogue records	1-100	
Default search cache size	The maximum number of results found for an Amlib Query through Amlib Programs if not already a setting in Supervisor, Locations, Network	350	
Default tag security level (Default settings only)	Set to determine a user's permission to create and delete non authority tag records	0	
Fixed window offset position from Top and Left (numeric in the form TTT – LLL)	The Module Windows can be set to overlay or cascade. If there is no value in the Table, the modules will cascade. If the value is entered in the Table, the Windows will overlay each other, so that only one Window can be seen at a time. If the value (in Pixels) is set to 001-001 the windows for each module will overlay each other in the top left hand corner. The higher the number, the further from the top left hand corner the screens will display. 100 – 100 positions the screens in the middle of the Desktop if the Screen display is 1024 x 768. If the Screen display is set to 600 x 800, the Module Windows will take up the whole screen	100 - 100	
Group Restrictions? (Y/N) (Default settings only)	If set to Y Group restrictions are applied. If set to N Group restrictions are not available.	N	
Group Supervisor (Default settings only)	Determines the Group which has authority to administer Group restrictions.	LIB	
If price includes 10% GST this is removed before deprec and recalc after	Allows the Depreciation process to remove the 10% GST from the items and then recalculate the 10% GST after Depreciation	N	
Item cost on the new Financial entry to be (C) Charge, (P) Paid, (B) Both, (N) None	C Charge	The Current Cost for the Stockitem screen will automatically be entered into the Charge column of the Borrower Financial Table when an Item is identified in this Table e.g. by Barcode	C
	P Paid	The Current Cost for the Stockitem screen will automatically be entered into the Paid column of the Borrower Financial Table when an Item is identified in this Table e.g. by Barcode	

System Management Parameters

	B Both	The Current Cost for the Stockitem screen will automatically be entered into both the Charge and Paid columns of the Borrower Financial Table when an Item is identified in this Table e.g. by Barcode	
	N None	The Current Cost for the Stockitem screen will not be entered into any columns of the Borrower Financial Table when an Item is identified in this Table e.g. by Barcode	
Play a sound when a notepad message is received (Y/N)	Alert the Amlib operator if a notepad message sent		N
Read only cache (Y/N)	These facilities are only available for SQLBase users and are set at installation time. Note: If read only cache is set to Y, the F11 function key in Stockitem and Borrower table will not be activated		N
Read only OPAC (Y/N)			Y
System Supplied Receipt No	If set to Y (Yes) the system will generate a Receipt Number on the Borrower Financial Table when a Receipt is generated		Y
Use global memory to reduce Network traffic	The Menu security is loaded once and moved into global memory if set to Y, rather than loading for each module. Amlib should load slightly faster over a slow network		Y
Use double entry accounting (Y/N) (Default settings only)	Y	Operators are not able to change Borrower Financial credits or debits on the row once saved. The Charges (Debits) are on separate lines to Payment details. No entries may be edited once created on the circulation Borrower Finance window. CANNOT BE DISABLED. Financial Upgrade must be RUN to reconfigure SQL databases to Double-Entry accounting. Must be enabled for Debt Collection Processes.	N
	N	Operators are able to change Borrower Financial credits or debits on the row once saved. The Charges (Debits) are on the same lines to Payment details. Entries may be edited once created on the circulation Borrower Finance window.	
Use windows authentication (SQL Server only)? (Default settings only)	Allows connection to the Database. Note that you cannot use Windows Authentication unless at least one Active Directory user has been defined. See Library Menu, Active Directory Mapping and Tasks, Active Directory Mapping		N
	Y	Windows Authentication (using the credentials of the currently logged in windows user) when connecting to the database.	

Other



FIELD	EXPLANATION	EXAMPLE
An operator must change their password after ### days	A setting entered will force users to change their password. If left blank, there will be no compulsion to change the password	365
Apply security to all Saved Files (Y,N)	Y Allows the creator of the File/s to stipulate whether other operators are able to access the File/s – see below	Y
	N No security applied to the File/s	
Catalogue tag no. to populate order notes from	Information in the tag no specified will appear in Order record Notes field	520
Create an audit for all Authorities (Y/N)	If you need to check additions, deletions or modifications to the database, this setting would be set to Y . Reports can be generated for the Audit type. If you do not require audit records these fields, set the relevant settings to N	Y/N
Create an audit for all Borrowers (Y/N)		Y/N
Create an audit for all Issues prompted with messages (Y/N)		Y/N
Create an audit for Stockitems (Y/N)		Y/N
Create Financial Entries for Orders Automatically (A), Manually (M) or Disable (D)	A Automatically create Budget links from the Orders created within an Order Header to Finances. Must also have the Transaction Types table with the appropriate setting (e.g. Must use OrderPlace, and OrderInvoice and/or Subscription) See Transaction Types	Create separate orders for each item which then commits the amount to the current Budget, e.g. 10 fiction items, with Stockitems created, the Order links to the Fiction

System Management Parameters

		Budget.	
	M	Manually create Budget links from Financial Transactions, without using the Orders or Order Header. It is possible to create Commitments and/or Invoices within Finances [Ctrl F] . Must also have the Transaction Types table with the appropriate setting (e.g. Must use OrderPlace or OrderInvoice and/or Subscription) See Transaction Types	Create bulk order for items from a supplier which also commits the amount to the current Budget, e.g. 10 fiction items, no Stockitems created, the Order links to the Fiction Budget
	D	Disable the link from Orders to Budgets so that Orders can be used independently of the Finance Application. If this option is chosen, there is no need to set up the Transaction Types Table as this option disables use of Transaction Types	Create separate orders for each fiction item but do not commit the amount to a Budget, e.g. 10 fiction items with Stockitems created, but no links to the Fiction Budget
Current Version of the Amlib software	This is used by the programs as a check to make sure that you are not running out of date software. This field is generally updated automatically during an upgrade of Amlib software		5.3
Default Financial transaction type for credits	Optional. Enter the Financial Transaction Type most commonly used, which will be the Default when paying a Borrower Financial transaction		PAYDAM
Default Financial transaction type for credits	Optional. Enter the Financial Transaction Type most commonly used, which will be the Default when creating a New Charge for a Borrower Financial transaction		DAM
Default periodicals copy listing view (A)ll copies of (N)ot received	When Processing Periodicals the Default for displaying the Periodical Table can show All copies or only those yet to be received		A
Default to the last xxx days when displaying issues audit	When displaying an Issues Audit, the display can be limited to show just a certain number of audits rather than the entire audit		7
E-mail Attachment Path	Enter the path where the destination of the attachments can be copied during the Email process		D:\My Documents\Attachments
E-mail Maximum Attachment Size (kb)	Enter a maximum size for the attachments allowed for email		1000
Emails are sent using the following methods (M)API, (I)nternal or SMTP	MAPI (Mail Application Program Interface) or SMTP (Simple Mail Transfer Protocol) are the preferred protocols. If MAPI is used with Windows XP, security in Windows will cause a confirmation dialog box to be displayed with every message sent. SMTP can be used to avoid the display of these messages		SMTP
Location is Valid for Holdings	If set to Y, the Location is available for Stockitems so Permanent or		Y

System Management Parameters

	Temporary Locations can be set to this Location.	
Location is Valid for OPAC Enquiries	If set to Y, the items can be viewed via Opac or Netopacs	Y
Location is Valid for Registrations and Circulation	If set to Y, the Location is available for Borrowers. Also, available when setting Circulation Parameters based on Location	Y
Location's Base file name ILLS Net Interface	The filename to be used by the PC that is linking to the ILLs Net Interface	c:\base.htm
Location's Borrower barcode for memos	Used to identify the borrower record to attach system generated memos eg. RESGETS for reservations from other branches	LIBRARY
Location's Depreciation Account No.	Type the exact Account Name code in this column, if an Account in the Finance Application Budget is assigned for Depreciation. When depreciation is conducted, the system will put the calculated amount into the Account.	
Location's Depreciation Allocation	Type the exact Allocation code in this column, if an Allocation is to be assigned for Depreciation in the Budget (within the Financial Application). When depreciation is conducted, the system will put the allocation into the Budget adjustment e.g. 2005 Auto Depreciation.	
Location's EAN for EDI	European Article Number – unique 13 digit identifier ensures the Supplier's products comply with EDI standards e.g. Barcoded as per EAN rules (Electronic Data Interchange (EDI) – enables structured business messages to be transmitted electronically between computer applications)	9377888126616
Location's Help Files Ref Directory	The file name that is used to bring up the Help files in htm or Word. If the site has a Web server and IIS installed the directory will depend on the alias created e.g. http://localhost/help/ or to bring up the Word Version the path could be \\servername\help	
Location's Picture Directory	Enter the path of the pictures held on the system. This is usually a Shared folder and the path will be determined by how this folder has been shared e.g. \\servername\images	\\webamlibnet\temp\pics
Location's SAN for EDI	Standard Address Number is a unique 7 digit identifier for organisations in or served by the Publishing Industry. Used for EDI (as above)	9020075
Location's Sound Directory	Enter the path of the sounds held on the system. This is usually a Shared folder and the path will be determined by how this folder has been shared e.g. \\servername\sounds	e:\amlib\amlibnet\cirnet\htmfiles\cir
Location's User Password for ILLS Net Interface	User Password as entered when using the ILLs Web Page	gebras777
Location's User Name for ILLS Net Interface	User Name as entered when using the ILLs Web Page	MP1WAR

System Management Parameters

Only Show Reports for Location (L), Group (G), Operator (O) or All (A)	Restricts Reports to display only those set via this parameter e.g. Location. This will only apply to new Reports (those installed since Version 4.1) or those modified since this Version.	A
Path of Spreadsheet	Enter the path to the Spreadsheet	"C:\Microsoft Office\Office\EXCEL.EXE"
VDX Alert email level – None (N), Error (E), Success (S), Both – Error and Success (B)	Enter the level for Email alerts in association with VDX integration	B
VDX CC Email address for alerts	Enter the Email address where alerts will be copied for VDX Email alerts if required	manager@library.gov.au
VDX Email address for alerts	Enter the main Email address to which VDX Email alerts will be sent	systems@library.gov.au
VDX POP3 server address	Enter the Server name or IP address for handling of VDX Email alerts	LibraryServer
VDX POP3 server login	Enter the user name needed to login to the above Server for VDX Email alerts	xxx
VDX POP3 server password	Enter the password needed to login to the above Server for VDX Email alerts	yyy
Reservation prompt on order placement (Y/N)	If Yes a prompt to reserve item will appear when an order is inserted	N
Reservation prompt on order receipt (Y/N)	If Yes a prompt to reserve item will appear when an order is received	N
SMTP Blind Copy Email Address	If using the SMTP for emails. Enter only if copies of the email are to sent to a chosen email address e.g. for Testing purposes	trudy@eldorado.com.au
SMTP Sender Email Address	If using the SMTP for emails, enter the Address you wish to indicate as the sender	library@eldorado.com.au
SMTP server login	From your Systems Administrator	
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 Email communication protocol, responsible for receiving and forwarding email messages	MyExchangeServer
SMTP server password	From your Systems Administrator	
SMTP server requires a login?	If Yes, supply a SMTP server login and password If No, leave SMTP server login and password blank	Y/N
Spreadsheet (E)Excel	Enter the program for the Spreadsheet (at present Amlib supports only Excel)	Excel
System language (ENGLISH or RUSSIAN Only)	System language for Windows. Must be only ENGLISH or RUSSIAN	ENGLISH

System Management Parameters

System supplied Order No. (Y/N)	Y	The system will generate an Order Number	Y/N
	N	The system will allow entry of a specific Order Number	
Use cat worksheet for periodical cataloguing	Insert Catalogue records for Periodical Issue or Main entry Periodicals using a Catalogue Worksheet. This allows checking for established Authorities e.g. as Subject Headings		Y
Use Windows keyboard shortcuts instead of Amlib shortcuts (Y/N)	Enables Amlib to use the same shortcuts as Windows e.g. Ctrl C to copy, and the shortcut for Catalogue then becomes Ctrl M. See below		Y

Apply Security to All Saved Files

If set to Y, an option will allow the creator to the File to stipulate whether other Users can access the Files. Only the Creator of the File can access the Column to “Allow other operators to access this File”, the Details column and to access the New, Empty, Save and Delete Buttons.

Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
esp marc	N	9	24/04/2003 11:59:53 AM	2856
JUNIOR ITEMS	N	4799	24/04/2003 11:59:53 AM	2889
KIT B245	N	6	24/04/2003 11:59:53 AM	2881
MASS RENEWAL	N	6	24/04/2003 11:59:53 AM	2882
MUSIC	N	13	24/04/2003 11:59:53 AM	2824
SPORT	N	0	24/04/2003 11:59:20 AM	2916
PER Copies Deletions	Y	2	23/04/2003 11:15:14 AM	2915
EXCH GK 2605	Y	119	15/04/2003 12:03:38 PM	2890
SCIS 0203	Y	31	29/01/2003 1:26:34 PM	2825
GK	Y	23	10/01/2003 10:19:46 AM	2724

Another Operator would not be able to see that this File exists, only being able to view the Files allowed to be accessed. Other Operators cannot alter the “Allow other operators ...” column to change the Y to a N. If the Operators are able to access the Files they are prevented from deleting, emptying files or modifying the description. Other Users are able to Copy and Paste the Files they are allowed to access to their own Operator set of Files.

System Management Parameters

Stockitem Saved Query Results				
F1 New F2 Empty F3 Save F4 Delete F5 Query F6 Print F7 Copy F8 Paste F9 Select				
Operator: STAFF				
Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
PER Copies Deletions	Y	2	23/04/2003 11:15:14 AM	2915
EXCH GK 2605	Y	119	15/04/2003 12:03:38 PM	2890
SCIS 0203	Y	31	29/01/2003 1:26:34 PM	2825
GK	Y	23	10/01/2003 10:19:46 AM	2724

Shortcuts available

Shortcut	Amlib	Windows
Ctrl A	Authority	Authority
Ctrl B	Borrower	Borrower
Ctrl C	Catalogue	Copy
Ctrl D	Not used	Not used
Ctrl E	Not used	Exit Amlib
Ctrl F	Finance	Finance
Ctrl G	Not used	Not used
Ctrl H	Invoke Help Word Document	Invoke Help Word Document
Ctrl I	Issues	Issues
Ctrl J	Not used	Not used
Ctrl K	Stockitem Keyword	Stockitem Keyword
Ctrl L	Log Off Application	Log Off Application
Ctrl M	Marc Take Up	Catalogue
Ctrl N	Notepad	Notepad
Ctrl O	Orders	Orders
Ctrl P	Periodicals	Periodicals
Ctrl Q	Reservations	Reservations
Ctrl R	Returns	Returns
Ctrl S	Stockitems	Stockitems
Ctrl T	Transfers	Transfers

System Management Parameters

Ctrl U	Not used	Not used
Ctrl V	Not used	Paste
Ctrl X	Exit Amlib	Cut
Ctrl Y	Not used	Not used
Ctrl Z	Chute Returns	Chute Returns
Alt + Backspace	Not used	Undo typing
Shift + Delete	Cut	Cut
Ctrl + Insert	Copy	Copy
Shift + Insert	Paste	Paste

Installation Menu

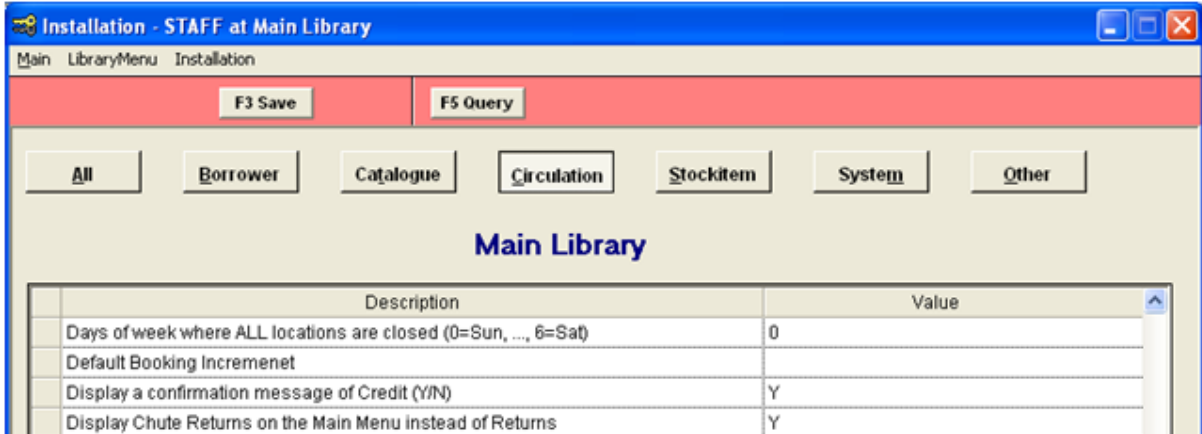
Choose Location

Select the Location from the Drop-down box. This will then display the Installation parameters for the relevant Location.

Copy From Copy the Installation Parameters from one Location to another. Before selecting this Button, ensure the Location is selected, with the current Location's parameters displayed on the Window. After choosing Copy From, select the Location to be the source for the copy. A confirmation message will display. Read the message carefully to ensure the copy is to be made correctly e.g. "Are you sure you want to overwrite parameters for EAS with parameters from KMS? Please note that this process does NOT overwrite location parameters that were originally in the Locations table." Once the copy has been made a message will display confirming the parameters have been copied

CALENDAR

It is possible to mark days to be 'closed' in the calendar. When an item is issued, the program will ensure that the item is not due for return on a closed date. Days of the week that are always closed at all Branches (e.g. Saturday, Sunday) can be set in Supervisor, Library Menu, Installation, Circulation. Dates closed from the Supervisor, Installation appear as a Pink colour on the Calendar and those dates closed by setting within the Calendar facility appear as a Red colour.



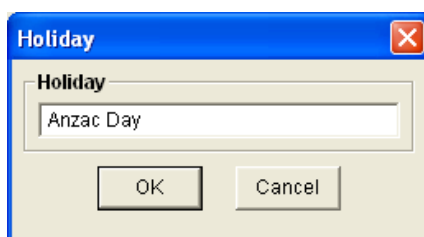
Within the Calendar, clicking a red date will cause the explanation to appear in the status line at the base of the screen. Dates may entered as far in advance as desired. To mark a date as a closed day click the date and click Set [F2].




Clicking a red date will cause the explanation to appear in the status line at the base of the screen. When an item is issued, the program will ensure that it the item is not due for return on closed dates. Reservations will not be due for collection on closed dates. Dates may be entered as far in advance as desired.

To mark a date as a closed day click the date and click Set [F2].

Type a suitable description in the dialogue box and click OK.



<p>NOTE:</p> 	<p>Where a Return By date falls on a closed date, the system allocates the next non closed date past that date.</p>
--	---

Once the dates have been set, select Update [F3]. Any closed dates can be opened by highlighting a closed date and selecting Delete [F4].

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

CHECK DIGITS

Amlib allows variations in the validation of Stockitem and Borrower numbers (Item No. field of Stockitem and Barcode field of Borrower).

These are mathematically manipulated to give a check digit defined in the Check Digits table. If the digit (or character) on the card or book being wanded corresponds to a calculation in the table, the article has a valid check digit.

System Management Parameters

Check-digit Calculations - STAFF at Main Library

Main LibraryMenu

F1 New F2 Insert F3 Save F4 Delete F5 Query F6 Test


Item Borrower Press F6 to test the Barcode

The leading and trailing columns can be a combination of alphanumeric characters and the following symbols:
 # - Indicates any numeric character
 ? - Indicates any alphabetic character
 & - Indicates any alphanumeric character

(I)Item (B)orr	Weights Left to Right comma separated list	Use as Cd Depending on remainder	Leading Chars	Trailing Chars	Length	Mod
B			&&	&&	4	0
B			&&&	&&&	6	0
B	1,2,1,2,1	0123456789			6	10
I			&&&&&&	&	7	0
B			&&&&&&		7	0
I			&&&&&&	&&	8	0
I	11,128,64,32,16,8,4,2	01234567890			9	11
I	10,9,8,7,6,5,4,3,2	01234567890			10	11
B	10,9,8,7,6,5,4,3,2	01234567890			10	11
B	7,6,5,4,3,2	0123456789X	&&&&&&	&	14	11
I	8,7,6,5,4,3,2	0123456789X	&&&&&	&	14	11
I	1,2*,1,2*,1,2*,1,2*,1,2*,1,2*	4567890123	3		14	10
B	1,2*,1,2*,1,2*,1,2*,1,2*,1,2*	6789012345	2		14	10

(I) Item (B) Borrower	Defines whether the calculation is to be set for Item No (Stockitem) or Barcode (Borrower)
Weights left to right comma separated text	The multiplication pattern used in the calculation of the Barcode check digit. This is usually unique to the Barcode Supplier
Use as Cd Depending on remainder	Depending on the remainder calculated in the barcode algorithm, this table indicates the symbol required for the check digit. In most cases this is a number but could also be a letter. The number of characters indicate the number of characters in the modulo column
Leading chars	Can be specific alpha numeric characters or any, indicated by #(numeric),?(alpha) or & (alpha or numeric) the number of characters as typed in the column
Trailing chars	Can be specific alpha numeric characters or any, indicated by #(numeric),?(alpha) or & (alpha or numeric) the number of characters as typed in the column
Length	The number of characters in the barcode including the check digit
Mod (Modulo)	The number of characters in the modulo (calculation)

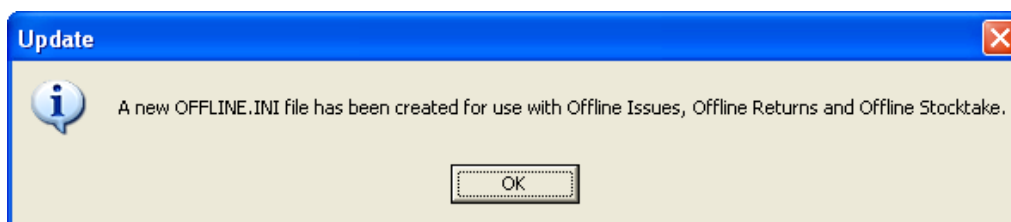
NOTE:




It may be necessary to widen the columns to add more digits to the barcode number. At the column header place the cursor on the column line. A symbol of a double arrow will display which can be dragged with the left mouse button to make the column large enough to fit the required characters

System Management Parameters

Once the parameters for the Check Digit are saved using Save [F3], a message will display indicating the Offline.Ini file has been created.

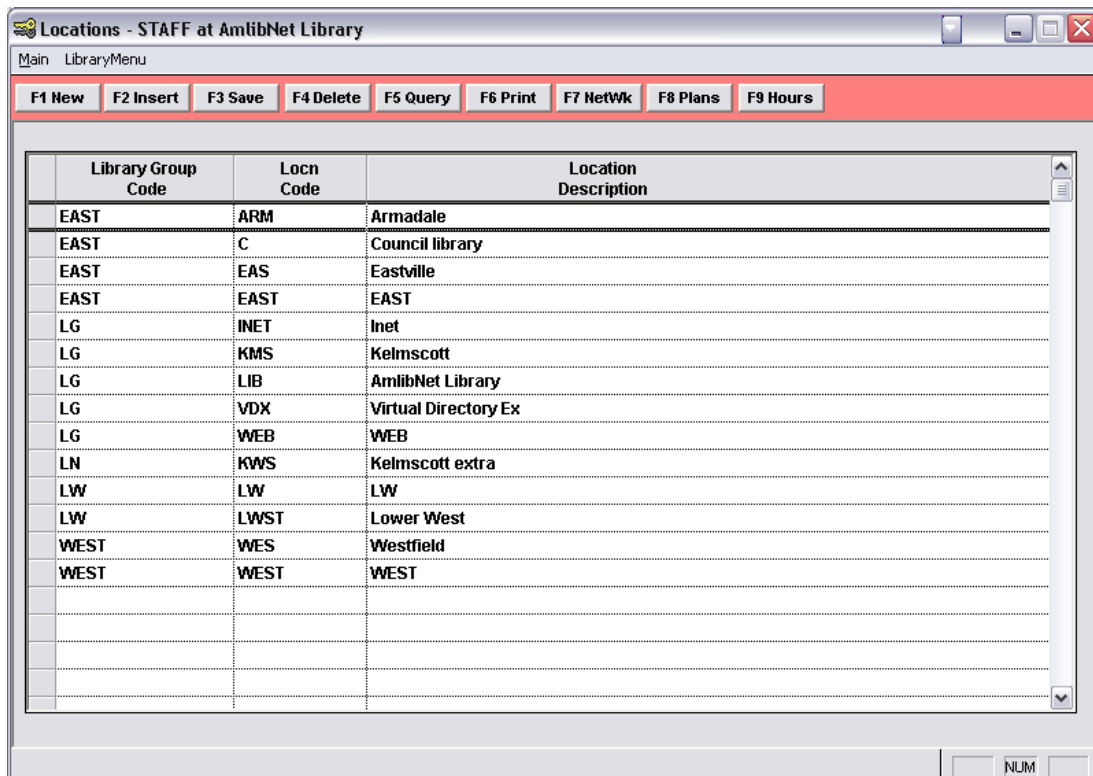


<p>HINT:</p> 	<p>Any PCs that may need to run the Offline Issues, Offline Returns or Offline Stocktake should have the Offline.Ini file saved on the drive that contains the Offline.exe program so that the barcodes are validated correctly</p>
--	---

After setting the parameters, it is possible to wand the item in the barcode in the box at the top of the screen, indicate the type of barcode (Item or Borrower) and test it using Test [F6]. A message will indicate whether it was a valid or an invalid read.

LOCATIONS

Sets the Locations and Groups



Library Group Code	A Library Group code must be assigned
Location Code	A code to identify the branches for a site
Location Description	A description than can assist identification of the Location code

Network

The **F7 Network** option can be used to restrict the number of search results returned at certain locations. If the Search Size will be the same for each Location enter the Search Size in **Main > Supervisor > Installation > System** tab.

Network Traffic Restrictions by Location ✕

F1 New
F2 Insert
F3 Save
F4 Delete
F5 Query
F6 Print

For

Enter Days a: 0 - Saturday Enter Hours a:
 6 - Friday 00 - 23

	Day of Week	Hour From	Hour To	Transmit Qty	Low Login Override	Transmit Low Qty	
0		7	23	350	8	60	↑
2		7	23	350	8	60	
3		7	23	350	8	60	
4		7	23	350	8	60	
5		7	23	350	8	60	
6		7	23	350	8	60	↓

Hours

Needs to be set up if you require using the new Bookings facility

Working Hours - Main Library ✕

F3 Save
F5 Query

Please type the opening and closing time for each day of the week if using Advanced Bookings or Hourly Loans.
 Format can be Hours:Minutes e.g. 16:00 or 4:00 PM.

Day	Open Time	Close Time
Sunday	8:00 AM	8:00 PM
Monday	8:00 AM	8:00 PM
Tuesday	8:00 AM	8:00 PM
Wednesday	8:00 AM	8:00 PM
Thursday	8:00 AM	8:00 PM
Friday	8:00 AM	8:00 PM
Saturday	8:00 AM	8:00 PM

Memo Types

Stockitem and borrower memos may belong to a pre-determined type. Use this window to define the valid types. A popup will appear in memo creation giving a list of choices. You do not need to enter a memo type when creating memos but if you do then the type must be defined in this table.

System Management Parameters

HINT:



Defining Memo Types assists in Reporting & Deleting Memos, inserts a message automatically into the memo (which saves typing)

Memo Type	Description	Valid for Holdings	Valid for Members	Show As Default	Expires n days time
ACC	TO ACCOUNTS CLERK	Y	N	Y	5000
BARCODE	Borrower's old barcode	N	Y	N	750
BORCHGDETS	A borrowers change of details has been acknowle	N	Y	N	28
CLAIMRET	Claim Return	Y	Y	Y	5000
CLIB	Customer contacted Library to advise that they are	Y	Y	Y	5000
CREDIPAC	Credipac collection efforts unsuccessful	N	Y	Y	5000
DAM	Damaged item with LISWA inv no.	Y	N	Y	5000
DEBT	DEBT COLLECTORS To Accounts CSO IMMEDIATEL	Y	N	Y	9000
DVD	CHECK FOR DAMAGE ON EVERY ISSUE & RETURN.	Y	N	Y	5000
EMR	Email bounced, verify email, change Notice to Y.	N	Y	Y	1000
F	Check Finance	Y	Y	Y	0
FILEISSUE	Item issued from Saved File	N	N	Y	1000
ID USED	Member used ID. They have been advised that they	N	Y	Y	182
ILL SRVDON	ILL SURV ITEM PLEASE DONT DELETE	Y	N	Y	35
ILL SURV	Inter Library Loan Survey	Y	N	Y	35

WARNING:



BARCODE, CLAIMRET, FILEISSUE, MERGED, RESRET, BORCHGDETS, & RESGET are system generated Memo Types and should not be deleted

If this Memo Type has a default message this is automatically populated. Any further message details can then be added.

Show	Date	End Date	Type	Memo Details	Bor Bar No if ap
N	12/04/2006	05/01/2009	REPAIR	Repair the item	

OPAC

Many of these parameters are for the Traditional Windows Style Opacs though a few relate to NetOpacs (those marked with ***)

Buttons: Sets which buttons are to be used in Opac


Display: Sets the colours that appear on the first OPAC window

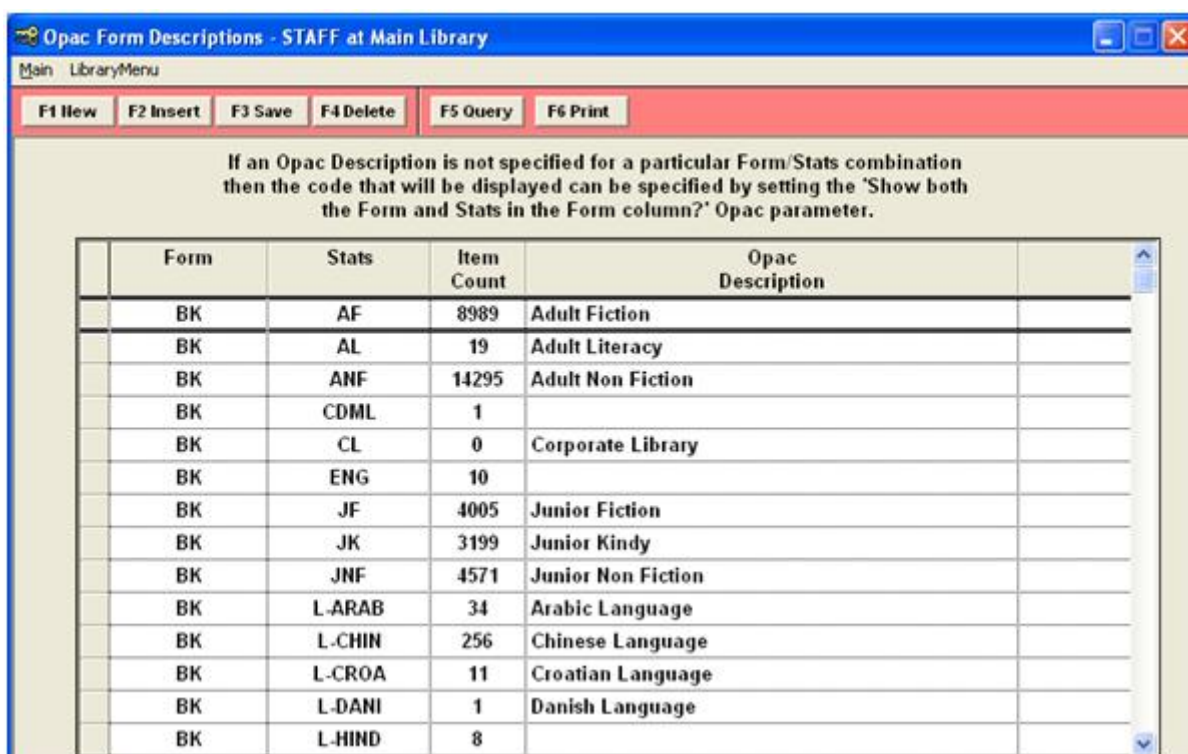
Enquiry Opts: Sets the ranges for the enquiry options within the OPAC module and other applications

***FormDescriptions: Descriptions given to Form that will display in OPAC results. If descriptions are not defined or chosen, the Form code will display

This option enables the entry of "User friendly" descriptions that are seen by Opac Users in the Form column of the Opac screen. The System Administrator enters these from a combination of Form and Stats codes.

For example, instead of the Opac user seeing the codes of LP and AF in the form column, a Form Description of Large Print Fiction can be given.

<p>NOTE:</p> 	<p>If an Opac Description is not specified for a particular Form/Stats combination, the code that will be displayed can be specified by setting the Opac Enquiry Option "Show both the Form and Stats in the form columns?" parameter</p>
--	---



Form	Stats	Item Count	Opac Description
BK	AF	8989	Adult Fiction
BK	AL	19	Adult Literacy
BK	ANF	14295	Adult Non Fiction
BK	CDML	1	
BK	CL	0	Corporate Library
BK	ENG	10	
BK	JF	4005	Junior Fiction
BK	JK	3199	Junior Kindy
BK	JNF	4571	Junior Non Fiction
BK	L-ARAB	34	Arabic Language
BK	L-CHIN	256	Chinese Language
BK	L-CROA	11	Croatian Language
BK	L-DANI	1	Danish Language
BK	L-HIND	8	

Messages: Sets the content and occurrence of messages in OPAC in response to borrower enquiries

System Management Parameters

Other Facilities: Other applications available to Opac users with the path defined e.g. Word for Windows

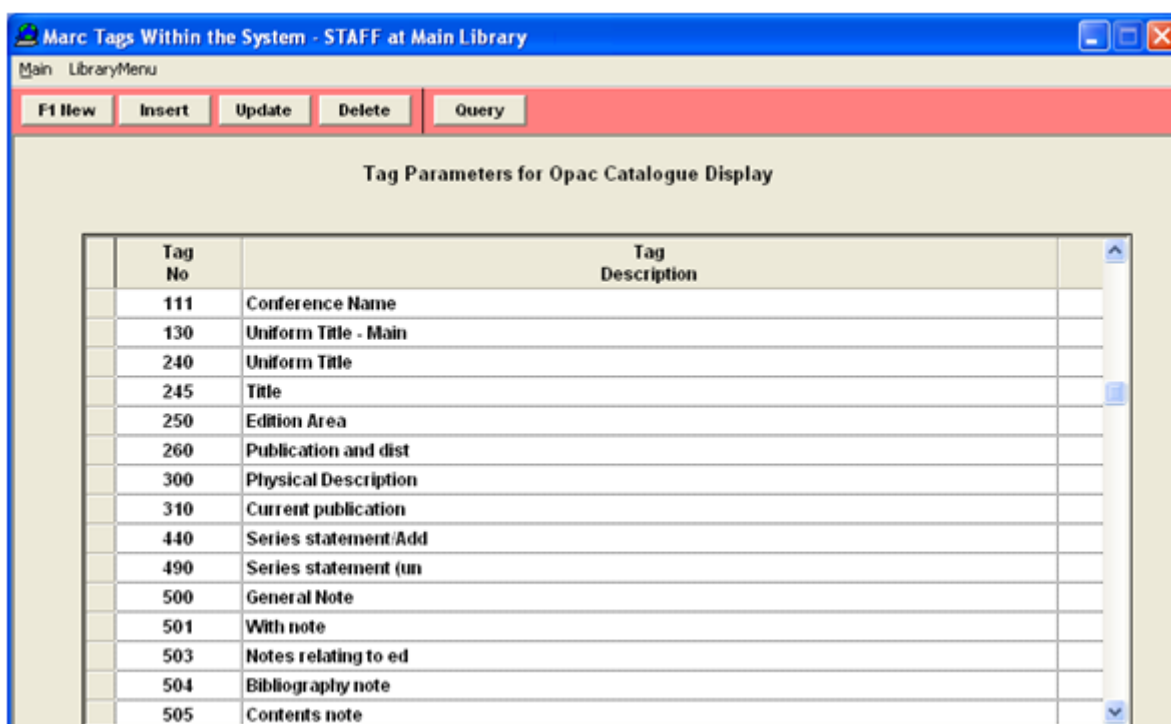
Queries: Log of successful and unsuccessful searches. These can be defined for a certain period

Suggests: Log of suggestions, which enables staff to read and respond

****DisplayTags: Defines the Marc tags to be viewed in the full catalogue details in OPAC

This option allows the selection of Tags to display when the Catalogue details are displayed in Opac. FromAuth button will insert all the tags from the Authority, Application, MarcTags to be imported into this table. You are then able to delete the tags not required to be viewed in the Catalogue screen.

OpacDisplayTags: The Tags that will display in a Catalogue record in Opac, Netopacs.



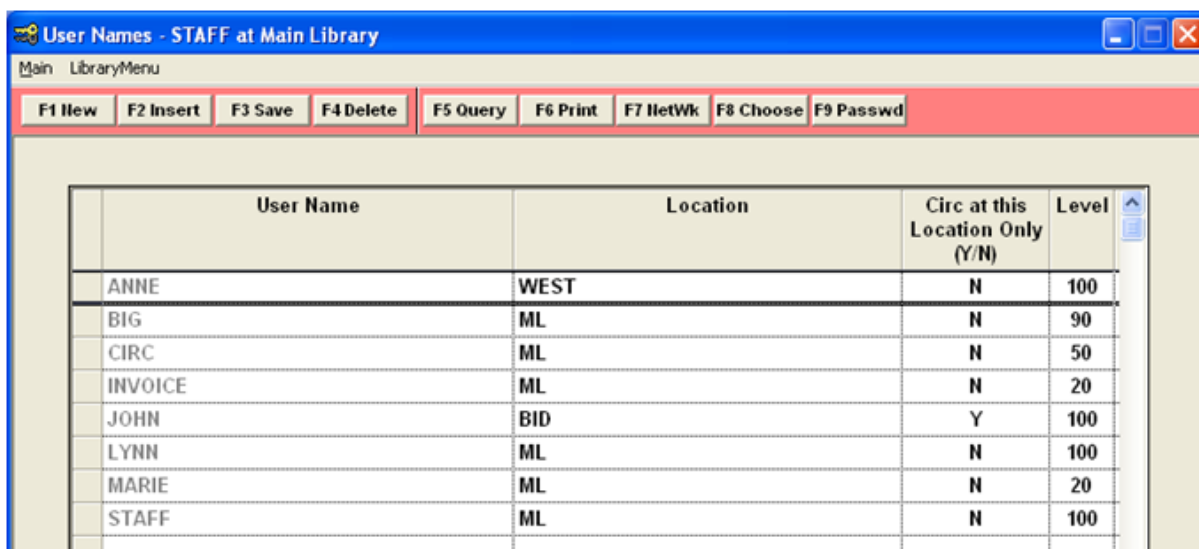
Tag No	Tag Description
111	Conference Name
130	Uniform Title - Main
240	Uniform Title
245	Title
250	Edition Area
260	Publication and dist
300	Physical Description
310	Current publication
440	Series statement/Add
490	Series statement (un
500	General Note
501	With note
503	Notes relating to ed
504	Bibliography note
505	Contents note

Restrict: Allows you to limit some searches within OPAC e.g. new videos only, non fiction only, Junior school only

User Names: Sets the OPAC User names and their locations


USER NAMES

Specific User Names for the various staff who log on can be set up from this Window. New User Names can be added this list so permissions can be defined at login, by selecting New [F1].



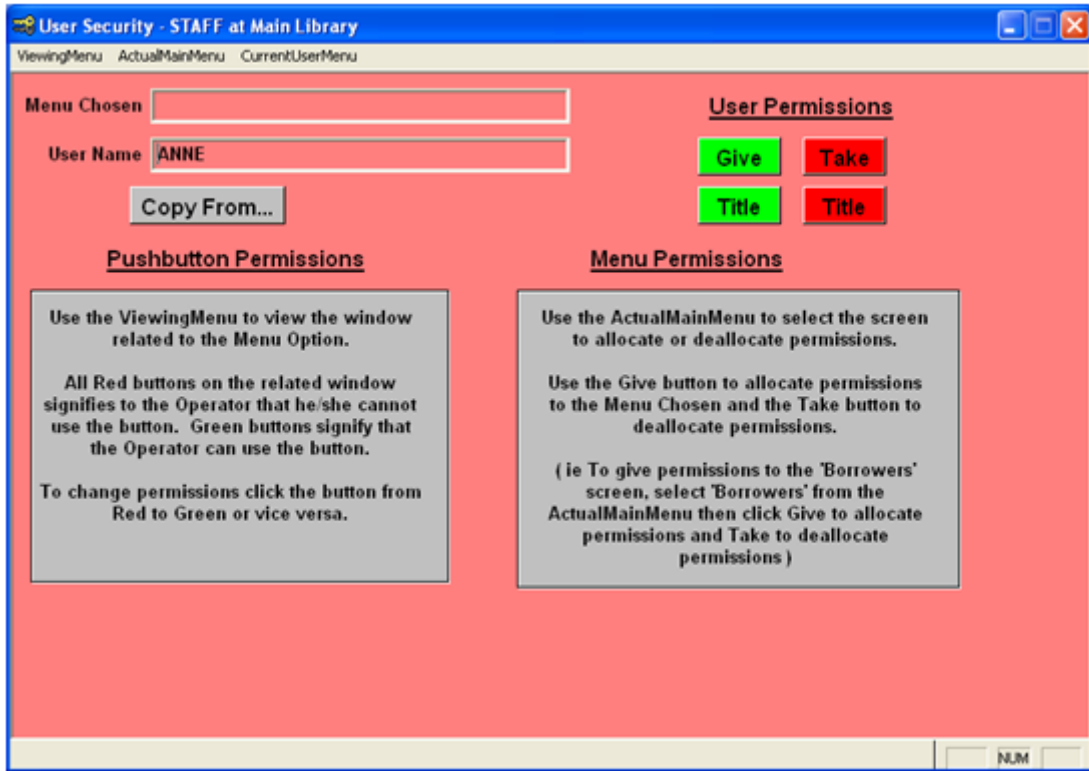
User Name	Location	Circ at this Location Only (Y/N)	Level
ANNE	WEST	N	100
BIG	ML	N	90
CIRC	ML	N	50
INVOICE	ML	N	20
JOHN	BID	Y	100
LYNN	ML	N	100
MARIE	ML	N	20
STAFF	ML	N	100

FIELD	EXPLANATION
User Name	For entry at login
Location	Which displays as a default when this user logs into the system
Circ at this Location Only (Y/N)	Y: Can operate Circulation only at the Location specified in the Location selected in the previous column N: Can operate Circulation at all Locations within the system
Level	An indication of the level of User. It is now possible to set a User Level to be between 0 and 100 and certain Tasks can be set to be performed by a User with a Security more than a certain Number

<p>NOTE:</p> 	<p>Setting the level on the first window does not actually set permissions to Menus. This is done on the "User Security" Window which is accessed after the User Name is chosen with [F8]</p>
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To facilitate the creation of new users an existing User permissions may be copied and permission either removed or added if required For example, the new User Name ANNE can be selected using F8 Choose. The User Security Window display. An existing Operator's permissions can be copied to ANNE.

System Management Parameters

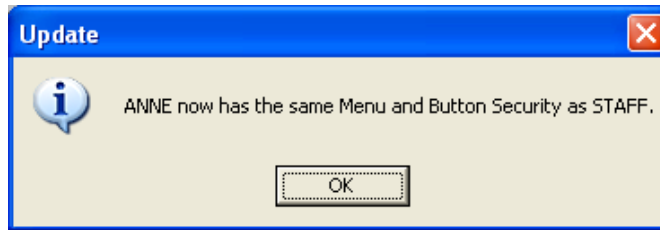


Select Copy From button. A list of the existing User Names will display.



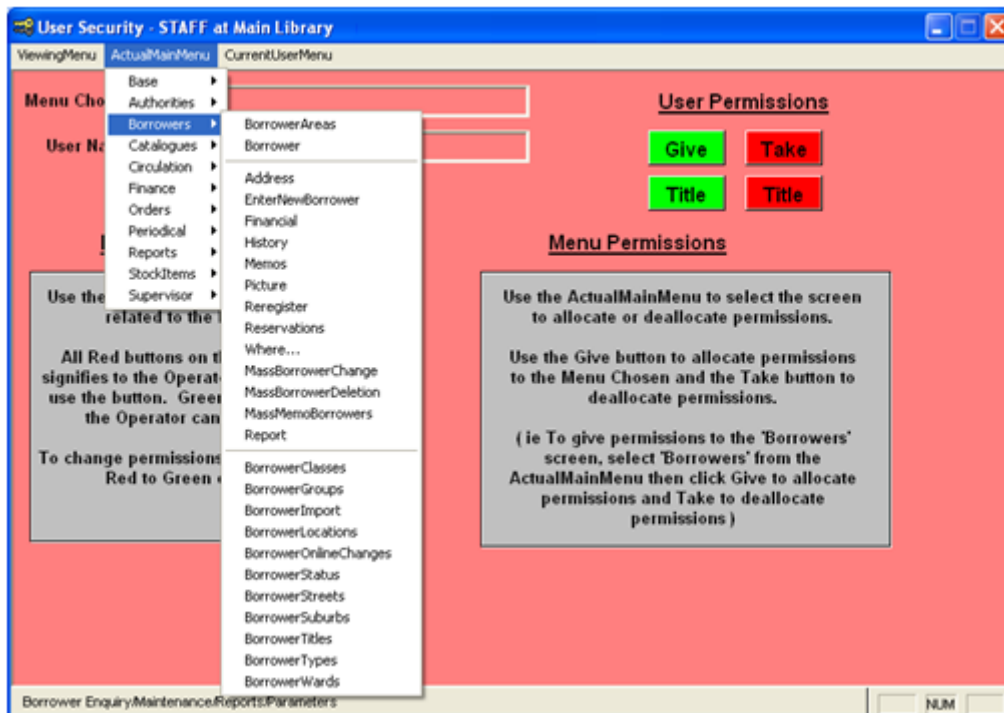
Highlight the Operator from whom to copy and press the copy button.

System Management Parameters



ViewingMenu	Allocates pushbutton privileges
ActualMainMenu	Lists the total menu to identify a menu option to Give or Take away
CurrentUserMenu	Displays the existing permissions for the selected User

Permissions currently available can be seen from the CurrentUserMenu. Any permissions not granted display as greyed text.

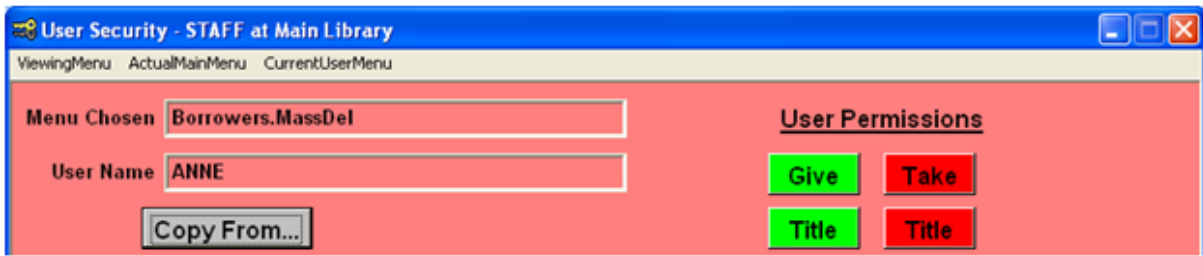


Now that the permissions are copied, it is possible to give or remove privileges from the current User.

For example, if it was decided that the MassBorrowerDeletion menu be taken away from the current User, the following steps would need to be taken. From the ActualMainMenu, select Library, Borrowers, MassBorrowerDeletion.

System Management Parameters

This Menu item now displays in the MenuChosen field at the top of the window. Press the Take Button to remove the permission from the User Name.



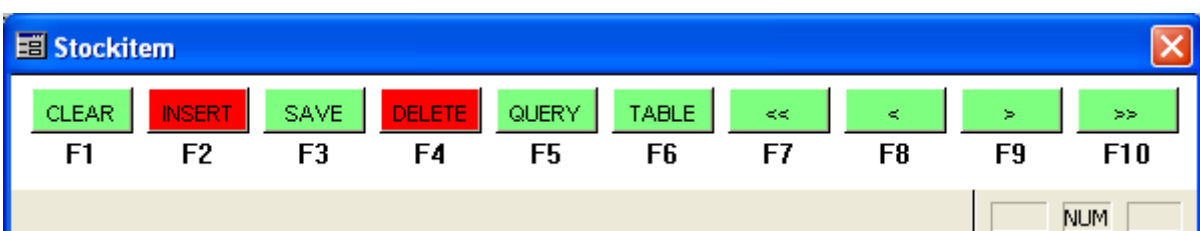
Give	Gives specific menu options for the selected user. For example, GIVE access to certain menu items e.g. Borrower, Mass Borrower Change
Take	Removes specific menu options for the selected user. For example, TAKES access away to certain menu items e.g. Borrower, Mass Borrower Change
Title	Gives access to the ICON in the chosen Application for the selected user. For example, can access the Borrower application
Title	Removes the ICON in the chosen Application for the selected user. For example, cannot access any Borrower application

If many of the Titles are taken, the Login User may then only have access to the Titles given, for example only Issues, Reservation, Borrower and Returns. As well as permissions there are also some defaults that can be set within these screens for a User. For example, Circulation Override, Reservation Any or Every, Modify button to be deactivated for Shared Authorities.



Viewing Menu


Push button options are determined by selecting the desired window on the viewing menu. This will display all the potentially available push buttons in the toolbar of the selected screen.



Red buttons: these will not display when the selected User accesses the corresponding screen after login.

Green buttons: these will display when the selected User accesses the corresponding screen after login.

To change the state of a button, clicking on it toggles from red to green and vice versa.

<p>NOTE:</p> 	<p>Any security changes only apply from the next log in for the user</p>
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Permissions to Note

Catalogue – No Shared Authority Update – makes the Modify button grey for Authorities that are shared e.g. Subjects, Authors etc.

Circulation – ReserveDefAll – sets the Default to All – most want it to be set to Any

Circulation – StopOverride

4.1 Changed Menus: Permissions will need to be set for the following if you have upgraded and need to use these options:

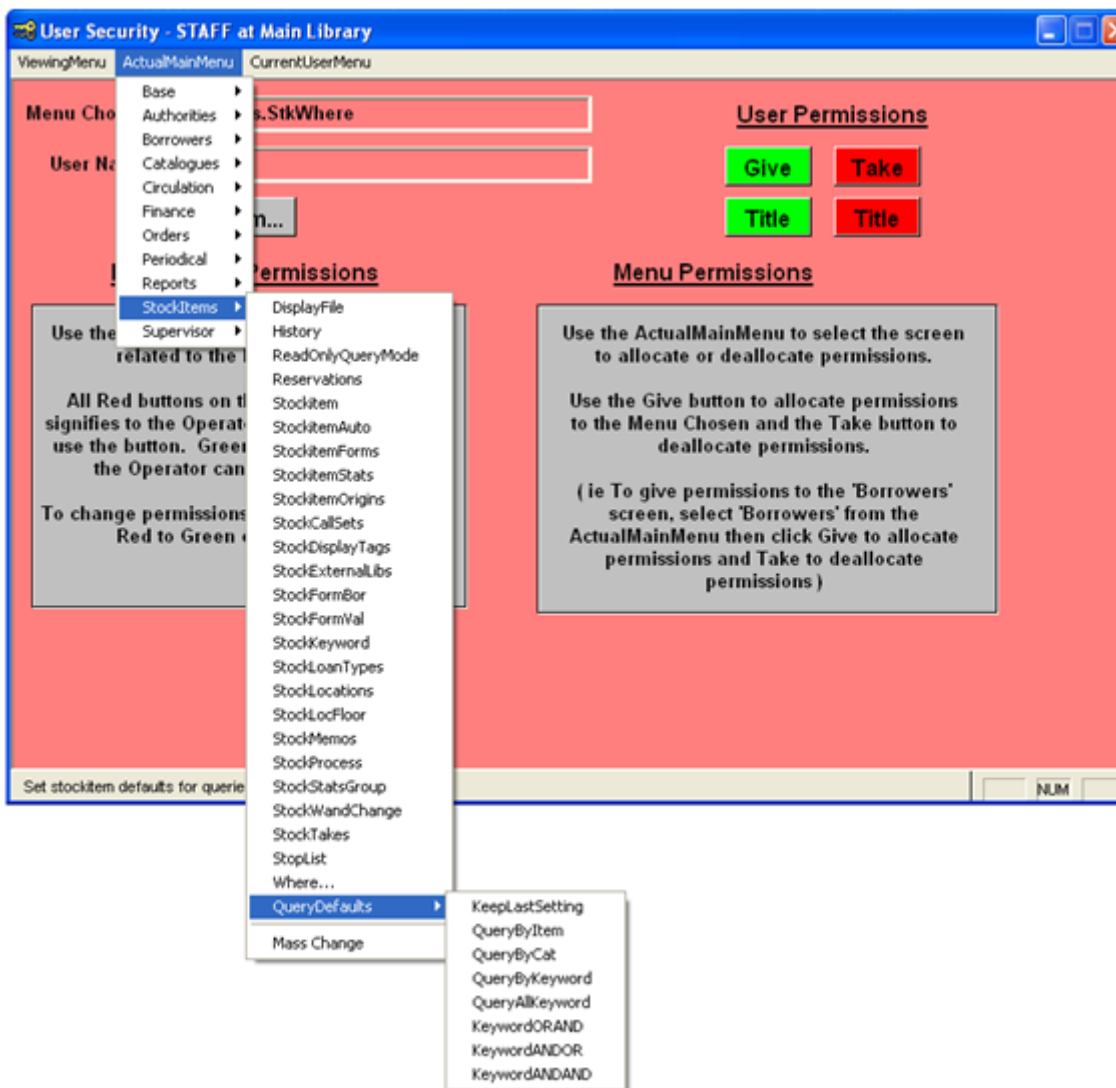
CatZSearch + Viewing buttons for each screen

Catalogue Maintenance + Viewing Buttons for each screen

Stockitem – Query Settings – sets defaults

Multiple Keywords on Separate Lines

When multiple lines are used for the query it is as if an AND search has been requested. Parameters can be set in User Names as to which is the Default.



For example, Line 1 term RAGE is combined with Line 2 term SMITH. This would retrieve items by an author named SMITH and title, which included the term RAGE.

Keyword On a Stockitem Search

KeywordORAND	Same line use OR, and if another line use AND	Gleitzman OR Jennings as Author, AND Television as Subject
KeywordANDOR	Same line use AND, and if another line use OR	Children AND Humour as Subjects, OR Dahl as an Author
KeywordANDAND	Same line use AND, and if another line use AND	Children AND Humour as Subjects, AND Dahl as an Author

DEPRECIATION

Depreciation can be set to be depreciated on a Straight Line basis or on a Reducing Balance basis. The method is selected in Supervisor, Library Menu, Installation, Stockitem – Deprec. Items on straight line basis. An option as to whether 10% GST is removed prior to depreciation and then

System Management Parameters

reapplied can be selected from Supervisor, Library Menu, Installation, System – If price includes GST this removed before depr and recalculated after. Regardless of the Depreciation method, the same Depreciation Tables are used within Amlib. The essential difference is in the calculation and which cost price is used for the calculation.

The Depreciation can be performed on one item or as a Mass Depreciation from Stockitem, StatsGroups.

The date Depreciation uses is the Accession Date of the Stockitem. If there is no Accession Date, it uses the Received Date of the Stockitem.

As the item is depreciated, the system considers:

Method of Depreciation e.g. Straight Line or Reduced Balance

The Stats Group code which has the Percentage Rate, Minimum price restrictions

Last Depreciation date (items Depreciated in the last 12 months will not be included or new items accessioned in the current year will not be subject to Depreciation)

Rounding formulas as set in Stockitem, Application, StockOrigins for the particular Source

Each Stockitem Stats code is associated with a Group. These groups are used to assign depreciation rates and cost prices to items. The actual prices used are formulated by STATE LIBRARY OF WESTERN AUSTRALIA. By Depreciating by Groups varying percentage depreciation figures can be set, and Local stock can be exempt from depreciation as required. Depreciation can be set via Location or for All Locations using [F8] for specific Location and [F9] for All Locations.

Group Code	Price Group Description
AF	Adult Fiction
ANF	Adult Non-Fiction
J	Junior
JF	Junior Fiction
LOC	Local Stock
YN	Young Adult Non-Fiction

NB: F8 / F9 All Price Groups are depreciated

File Number

Start Depr From:

End At

System Management Parameters

To view Price information for any of the Stats groups, highlight the line and select AccPri [F7]. A table will display, which allows the entry of current depreciation rates and minimum prices for each Form.

Form Type	Year of First Average Price	Year of Last Average Price	Always use Average Price Before Year	Depreciation Rate (%)	Minimum Depreciation Cost (\$)
BK	1960	2007	1960	10	5.00
CA	1960	2003	1960	10	5.00
CDM	0	0	0	10	5.00
CDR	1997	2006	0	10	5.00
CDS	1990	2006	0	0	5.00
CM	0	0	0	0	0.00
CR	0	0	0	0	0.00
DB	0	0	0	0	0.00
DI	0	0	0	0	0.00
DVD	1995	2006	0	10	5.00
DVR	1997	2006	0	10	5.00
EN	0	0	0	0	0.00

COLUMN	EXPLANATION
Form Type	Available Form Types that can be allocated average prices
Year of First Average Price	First average price as defined on the Prices Table for this particular form.
Year of Last Average Price	Last average price as defined on the Prices Table for this particular form.
Always use Average Price Before Year	Before the year entered in this column, give the average price for the particular year rather than calculate according to percentage
Depreciation Rate (%)	The rate at which the prices will be depreciated in the new calculation
Minimum Depreciation Cost (\$)	A minimum amount, so that if the value of the calculation falls below this amount, enter this amount in the cost field rather than the calculated figure

To be eligible for depreciation, depreciation rates must be entered for every type of Form.

In addition, an average price for each year can be entered for Forms of items by selecting Prices [F7].

System Management Parameters

Average Stock Prices

F3 Save F5 Query F6 Print

Group Code: AF Form: BK

Year	Cost (\$)
2012	
2011	
2010	
2009	
2008	
2007	32.00
2006	28.00
2005	26.00
2004	23.00
2003	21.00
2002	19.00

PARAMETERS - BORROWER MODULE

Areas	Can be used to gather statistics according to an either an external criterion, eg. Australian Bureau of Statistics or criteria designed by the Library
Classes	Extra categories for borrower eg Resident/ Non Resident
Groups	Extra categories for borrower eg Clubs
Locations	Displays the Locations for Borrower registrations and circulation functions. The validations may be set from the Supervisor module
Status	Reflects the behaviour of the borrower and whether any restrictions will apply
Streets	May be used to enter streetnames so that a ward code may be automatically assigned on creation or change of a borrower's address
Suburb	Will provide for statistical information and ensure suburb and postcode data entry is standardised. At this table the client library may also restrict the registration of borrowers to libraries within their own suburb
Title	Provides a list of standardised personal titles, i.e. Mr, Mrs, Prof, etc
Types	<p>Main Category for borrower. Includes many of the defaults for the borrower</p> <p>Borrower history kept</p> <p>Statistics inclusion</p> <p>Maximum number of items that may be borrowed.</p> <p>If you add Age parameters and Borrower Group codes in this window, they will automatically be added when you EnterNewBorrower.</p> <p>Validation These parameters set the mandatory fields for creating or amending a borrower record. They are set per borrower type</p>
Wards	This table will provide for statistical data per local government ward

Borrower Areas

The Borrower Area code is optional within the system and may be used to classify borrowers by area. For example, by some kind of external coding (For example, Bureau of Statistics) . The area code may be up to 10 characters in length with a 25-character description.

Borrower areas are a means of gathering statistics. These codes are not vital to the day to day operation of the Library.

Code	Description
001	Broome
002	Halls Creek
003	Derby - West Kimberley
004	Wyndham - East Kimberley
0101	Roleystone
0102	Kalamunda
0103	Cockburn
0103	Bibra Lake
0104	Gosnells
0105	Kwinana
0106	Mundaring
0107	Rockingham

BorrowerClasses

In this window we can create, modify or delete Borrower class codes and/or descriptions. This function allows us to separate the borrowers into different groups such as individual Tutorial Groups, Rooms, Primary school children, Teenagers, Young Adults or Seniors. Borrower Classes are usually significant for School Libraries. The borrowers can also be classed according to other things such as surname or where they live.

Classes may be used for reporting, statistical and enquiry purposes.

CLASS	Class Name / description
NR	Non resident
R	Resident

BorrowerGroups

This function allows us to separate the borrowers into different groups such as Resident/Non Resident etc. Borrower Groups are often used for School Libraries. The Group and Class codes can be used whenever the need to categorise borrowers is important when reporting, gathering statistics or for enquiry purposes.

In this window we can create, modify or delete Borrower group codes and/or descriptions.

GROUP	Group Name / description
A	A
B	Borrower (Default)
E	Expired
I	J or YA Internet Perm
L	Library
N	Internet User
NON	Non Active member
O	Others
X	Adult with no Net Access

Borrower Import

The Borrower Import program enables sites to import borrower data from an Administration system (e.g. Maze, Cosy Corner, Principal's Assistant, SIS, EDSAS etc.) into the Amlib Borrower Details screen. Usually applies to schools and colleges. The Setup is required but then can be saved so it does not have to be redone for each import.

Borrower Locations

This window is a view of the total Library locations list maintained in Supervisor, LibraryMenus, Locations, which allows you to select which locations may be used as registration points for Borrowers. Certain locations would be not valid for registration or circulation. To amend the Valid for Borrower entry column, enter a Y or N in the appropriate row and select Save [F3].

Locn Code	Location	Valid for Borrower	Valid for Holdings	Valid for Enquiry
DBCL	DEBT COLLECTOR	Y	Y	N
HHC	Haselby Holt Centre	Y	Y	N
ILLS	ILLS	N	Y	N
INC	Incomplete Items	Y	Y	N
LLRC	LEARNING LANGUAGE RE	Y	Y	Y
LOC	LOCAL HISTORY	Y	Y	Y
MER	Mertang	Y	N	N
ML	Main Library	Y	Y	Y
MOB	Mobile	Y	Y	N
PD	LB55	N	Y	N
SVC	Swan Valley Centre	Y	Y	N

System Management Parameters

NOTE:



Only existing locations can be amended. New locations, deletions and other validation amendments are processed in Supervisor, LibraryMenu, Locations

Borrower Status

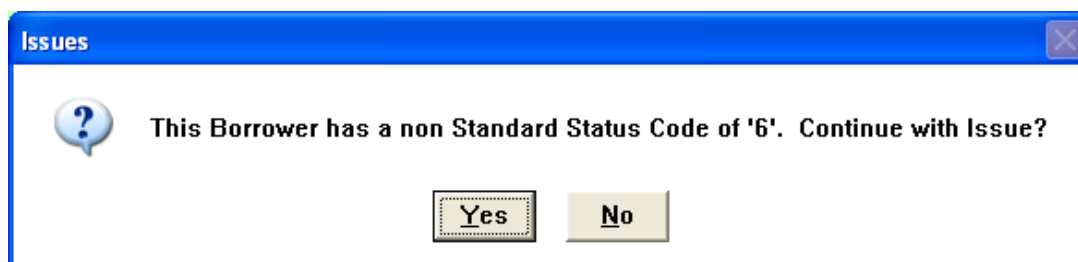
Enables the Library Administrator to allocate statuses to indicate loan restrictions of individual borrowers, usually reflecting the behavior in terms of loans/returns history.

Borrowers usually have no restrictions (the default.) Borrowers who have any other status may be blocked from borrowing items.



Status	Description	Override?	Banned?
0	OK	Y	N
1	Suspended	N	Y
2	Blacklisted	N	Y
3	Permanently banned	N	Y
4	Stolen card/ID	N	Y
5	Lost Card	N	Y
6	Validation Req'd	Y	N

At the time of issuing, an operator who attempts to loan an item to a borrower who has a status other than OK will be alerted. For example, if the status has a Y in the Override column, the following message displays:

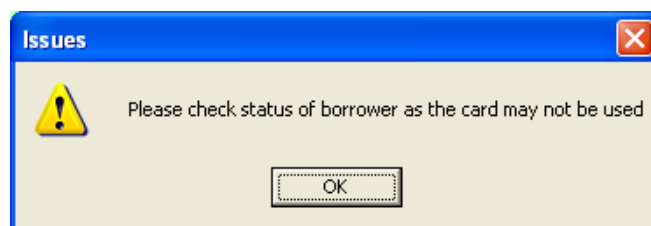


Where the operator proceeds with a loan, an audit is raised within the system. These may be reviewed from time to time by authorised users from Supervisor, Issues Audit, which displays any overrides allowed in Issues.

System Management Parameters

If there is an N in both columns, a similar message displays but it does not give the option to continue with the issue.

If there is a Y in the banned column, the following message displays:

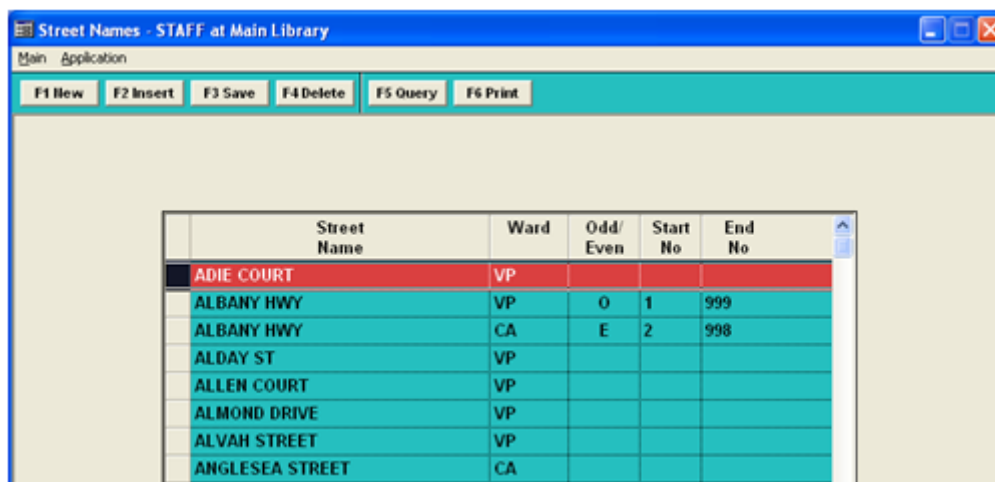


BorrowerStreets

Street names are entered so that a ward code may be automatically assigned on the creation or change of a borrower's address. This is useful for Shire libraries wanting statistics on ward usage.

Matching is done via a fuzzy match on street name and number. The Street names table allows the entry of street names with an indication of odd or even, with corresponding start and end numbers. A Ward code is matched for the range of numbers. For example on a long street, there may be several wards, depending on the number range. There may be odd numbers belonging to one ward and across the street, even numbers belonging to another ward.

When entering street names only the full name is required. For example, Albany Highway and two entries will usually be required for each street. One will be an odd number parameter and the other an even number parameter.



Street Name	Ward	Odd/Even	Start No	End No
ADIE COURT	VP			
ALBANY HWY	VP	O	1	999
ALBANY HWY	CA	E	2	998
ALDAY ST	VP			
ALLEN COURT	VP			
ALMOND DRIVE	VP			
ALVAH STREET	VP			
ANGLESEA STREET	CA			

In order for this to be effective, the ward code must have a Y value in the Validation table in Borrower, Application, Borrower Types.

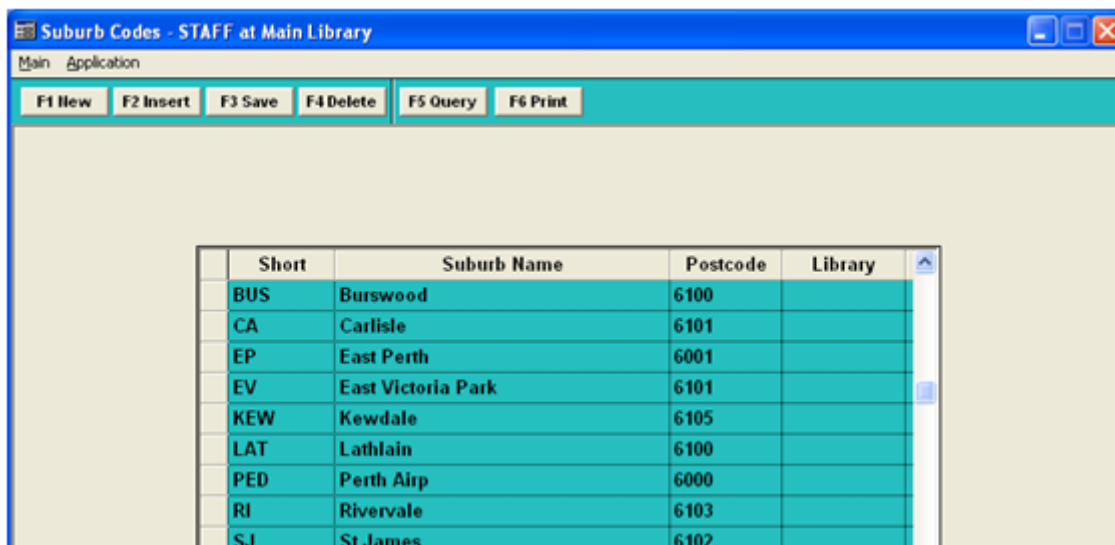
When the Borrower Address is being entered, the corresponding Ward code is entered automatically by the system, in relation to the Street Names table.

Borrower Suburbs

System Management Parameters

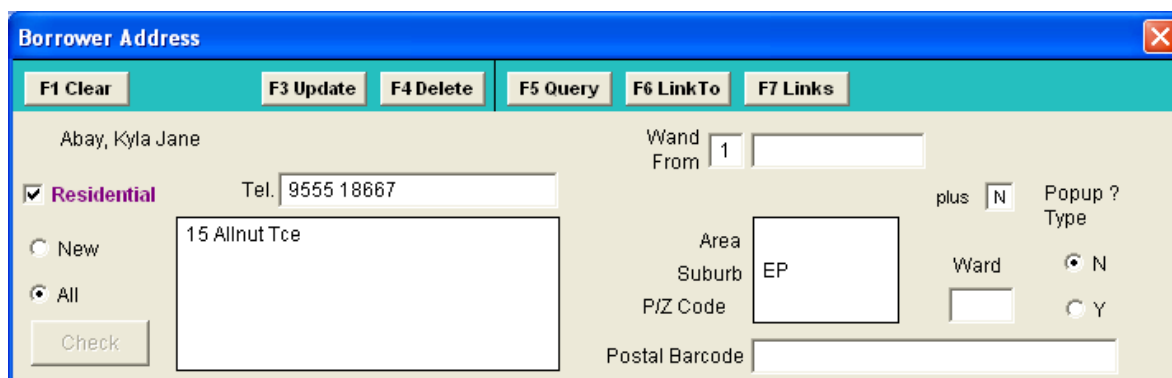
Mandatory/Optional field on Borrower Address record under validation control.

By setting the Suburb codes and Postcodes, a selection list of suburbs and associated postcodes is available when processing the Borrower Address.



Short	Suburb Name	Postcode	Library
BUS	Burswood	6100	
CA	Carlisle	6101	
EP	East Perth	6001	
EV	East Victoria Park	6101	
KEW	Kewdale	6105	
LAT	Lathlain	6100	
PED	Perth Airp	6000	
RI	Rivervale	6103	
SJ	St James	6102	

Enter just the Street Address in Address 1, and go to the Suburb Code.



Abay, Kyla Jane

Wand From 1

Residential Tel. 9555 18667 plus N Popup ? Type

New

15 Allnut Tce

Area Suburb EP Ward N

P/Z Code Y

Postal Barcode

Check

Once the Suburb Code is selected from the list box, the correct Postcode is automatically entered, and the line with the Suburb description is populated after the Street Address. Suburb codes are used in circulation statistics.

It may also be used to limit the registration location of borrowers to a particular location based on their Suburb code.

If a default library is entered, borrowers living in a particular Suburb would be expected to register at a particular library. Where no library code is entered against a Suburb then the system assumes borrowers may register at any Library branch.

When entering a new Borrower, the Location entered on the initial screen determines the Suburbs available in the Address screen. In the example above, if Bentley is entered as the Location for a borrower, only Bentley and Ferndale would show on the Selection List when entering the Suburb for that borrower.

Borrower Titles

The borrower titles table ensures consistency in the entering of titles when entering borrower details. It is a mandatory/optional field subject to validation. Borrower Title entries are held in proper case. i.e. Mr, Mrs, Ms, Doctor.

Valid Titles	Default Sex
Dr	
Father	
Master	
Miss	
Mother	
Mr	
Mrs	
Ms	

Borrower Types

The Borrower Type code is a MANDATORY attribute of a borrower and is a vital part of the Circulation Module. They reflect the main categories of borrower at a particular library. Public Libraries and School Resource Centres would normally have differing categories, reflecting their range of clientele.

System Management Parameters

Check the Supervisor, Installation parameters for settings that impact on the Loan options that can be set.

Type	Description	Keep House Bound Borr History (Y/N)	Include In Stats (Y/N)	Max Items On Loan	Max No. Of Reserves	Return By Date	Age >=	Age <=	Exp Days	Exp Date
A	A	N	Y	20	10		18	999		
B	Business	N	Y	12	999					
C	Council	N	Y	40	999					
D	Bulk loans	Y	Y	12	999		18	999		
E	ILL Country	N	Y	999	999					
G	HB Large Bulk Ho	Y	Y	999	999					
H	HBRS	Y	Y	999	999					
I	ILL Metro	N	Y	999	999					
J	Junior	N	Y	12	999		0	12		


COLUMN NAME	EXPLANATION	ENTRY
Keep History	History of past reading records is kept for borrowers until deleted, if a Y is entered in this column. They system will notify the operator if an item has been borrowed previously and how many days ago. If the Borrower history is not kept, the system still keeps Stockitem history so the items that a person has borrowed can still be checked.	Y/N
Included in Statistics	Statistics can be recorded to the hour, day, month or year depending upon the settings in Supervisor, StatsParams for the Borrower Types that have a Y set in this column.	Y/N
Maximum Items on Loan	Sets the total number of items on loan. Specific privileges based on form or stats codes of the items are set by selecting Loans [F7].	nn
Maximum No. of reserves	Sets the total number of reservations. Specific privileges based on form or stats codes of the items are set by selecting Loans [F7].	
Age	When a new borrower is created the system will assign the appropriate borrower type parameter depending on age if an entry is added within these fields. This is useful for creating Junior members in Public Libraries.	≥ Greater or equal to a certain age. ≤ Less or equal a certain age
Expiry Days	The number of days for expiry for this Borrower Type. Once a	nn

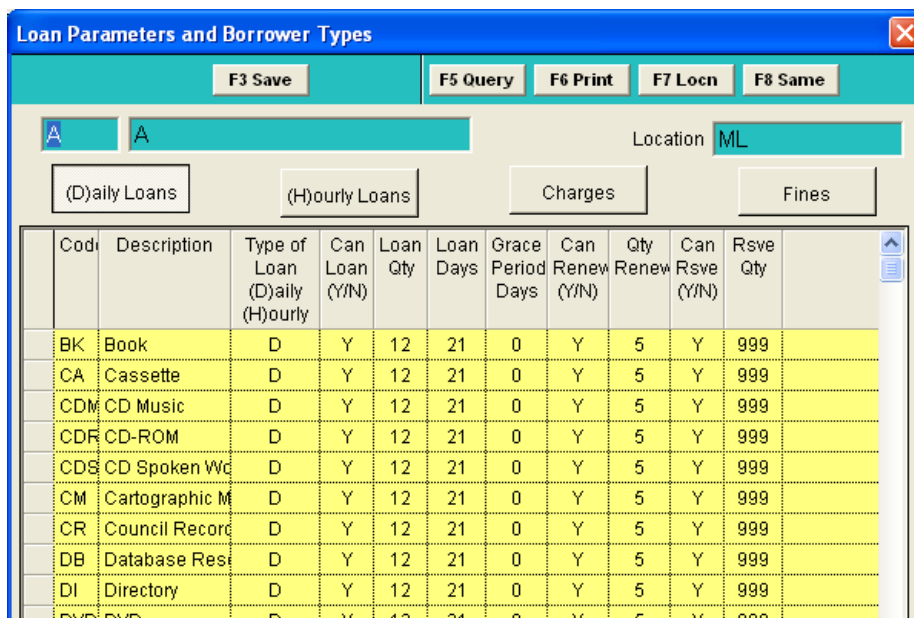
System Management Parameters

	borrower has expired they would need to Reregister before allowing activity on the system. The Supervisor, Installation, Borrower parameters would need to be set to M or D for the above to be effective.	
Expiry Date	The actual expiry date for expiry for this Borrower Type. Once a borrower has expired they would need to Reregister before allowing activity on the system. The Supervisor, Installation, Borrower parameters would need to be set to M or D for the above to be effective	nn/nn/nn
Borrower Group	A borrower type parameter may be set to assign a default borrower group to a new borrower when the type is entered. The relevant Group code needs to exist in the Borrower/Group table. For example, all Teachers could be assigned a group of Staff, all Students be assigned a group of Students, all differing categories of staff (e.g. Library Staff, Council Staff could be assigned a group of S for Staff). It can assist in defining groups of borrowers for searching or reporting purposes.	Enter a Group code e.g. STA , STU etc.

F7 Loan

This window is accessed by highlighting a Borrower Type and selecting Loans [F7].


<p>NOTE:</p> 	<p>Separate Loan parameters may be created for different Library Locations/Branches. To alter Location, select Locn [F7].</p>
--	---



Cod	Description	Type of Loan (D)aily (H)ourly	Can Loan (Y/N)	Loan Qty	Loan Days	Grace Period Days	Can Renew (Y/N)	Qty	Can Rsv (Y/N)	Rsv Qty
BK	Book	D	Y	12	21	0	Y	5	Y	999
CA	Cassette	D	Y	12	21	0	Y	5	Y	999
CDM	CD Music	D	Y	12	21	0	Y	5	Y	999
CDR	CD-ROM	D	Y	12	21	0	Y	5	Y	999
CDS	CD Spoken Word	D	Y	12	21	0	Y	5	Y	999
CM	Cartographic Material	D	Y	12	21	0	Y	5	Y	999
CR	Council Record	D	Y	12	21	0	Y	5	Y	999
DB	Database Resource	D	Y	12	21	0	Y	5	Y	999
DI	Directory	D	Y	12	21	0	Y	5	Y	999
DVD	DVD	D	Y	12	21	0	Y	5	Y	999

System Management Parameters

Associated with each Borrower Type parameter is a corresponding loans parameter for every instance of Stockitem Form (or Stats code) existing on the system. The parameters for each Type (or Stats code) must exist for Circulation events to take place. Use the scrollbar at the bottom of the screen to view other fields.

<p>NOTE:</p> 	<p>Whether Stockitem Form or Stats codes display on the table depends on the setting in Supervisor, Installation, Circulation</p>
--	---

These parameter records may also be created and maintained in the StockItem applications in which case all Borrower type parameters for that form type will be displayed.

For a new Borrower Type the window display is a suggested loan combination (which must always be saved even if no changes are made) for the new borrower type and all existing stockforms.


Daily Loans

The fields the window include:

COLUMN NAME	EXPLANATION	ENTRY
Code	Displays the Form/Stats code for each corresponding Stockitem Form or Stats code	
Description	Displays the Form or Stats description for each corresponding Stockitem Form or Stats code	
Type of Loan (D,H)	Displays whether the Loan is a Daily or Hourly type Loan. Extra Loan options are available if set in Supervisor/Installation/Circulation	D/H
Can Loan?	Is this form available for the particular Borrower Type e.g. Borrower Type of Junior may not be available to loan items with a Form of CD?	Y/N
Loan Qty	The number of Items of this Form that may be on loan to this borrower type at any one time. For example, a Borrower Type may be allowed 8 items but only 1 item with a Form of Video.	nn
Loan Days	The usual loan period in days (which can be overridden at the time of Issue).	nn
Grace Period	Period by days before which a charge will be made for late items. Whether the charge itself is calculated from the actual due date or the due date plus the grace period is determined in the Supervisor, Installation menu.	nn
Can Renew?	Determines whether borrowers can renew items of this type.	Y/N

System Management Parameters

Renew Times	Controls the number of times a renewal of a loan for items of this Form for or by a borrower.	nn
Can Reserve?	Determines whether borrowers can make or request reservations for this type of item.	Y/N
Reserve Qty	Controls the number of reservations allowed for items of this Form for or by a borrower	nn

<p>HINT:</p> 	<p>Set the first line of the parameters to the value that would be the default for most of the Stockitem Form types. Select Same [F8]. Alter the lines that would be different loan parameters to the default</p>
--	---

Hourly Loans

COLUMN NAME	EXPLANATION	ENTRY
Code	Displays the Form/Stats code for each corresponding Stockitem Form or Stats code	
Description	Displays the Form or Stats description for each corresponding Stockitem Form or Stats code	
Type of Loan (D,H)	Displays whether the Loan is a Daily or Hourly type Loan	D/H
Can Loan?	Is this form available for the particular Borrower Type e.g. Borrower Type of Junior may not be available to loan items with a Form of CD?	Y/N
Loan Qty	The number of Items of this Form that may be on loan to this borrower type at any one time. For example, a Borrower Type may be allowed 8 items but only 1 item with a Form of Video.	nn
Loans in Hours	The usual loan period in hours (which can be overridden at the time of Issue).	nn.nn
Grace Period Hours	Period of hours before which a charge will be made for late items. Whether the charge itself is calculated from the actual due date or the due date plus the grace period is determined in the Supervisor, Installation menu.	nn
Can Renew?	Determines whether borrowers can renew items of this type.	Y/N
Renew Times	Controls the number of times a renewal of a loan for items of this Form for or by a borrower.	nn
Can Reserve?	Determines whether borrowers can make or request reservations for this type of item.	Y/N

System Management Parameters

Reserve Qty	Controls the number of reservations allowed for items of this Form for or by a borrower	nn
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Charges

COLUMN NAME	EXPLANATION	ENTRY
Type	Displays the Form/Stats code for each corresponding Stockitem Form or Stats code	
Description	Displays the Form or Stats description for each corresponding Stockitem Form or Stats code	
Type of Loan (D,H)	Displays whether the Loan is a Daily or Hourly type Loan	D/H
Can Loan?	Is this form available for the particular Borrower Type e.g. Borrower Type of Junior may not be available to loan items with a Form of CD?	Y/N
Loan Charges	A charge which is applied when an item is loaned.	\$ Value
Can Renew?	Determines whether borrowers can renew items of this type.	Y/N
Renew Charge	A charge which is applied when an item is renewed.	\$ Value
Can Reserve?	Determines whether borrowers can make or request reservations for this type of item.	Y/N
Res Charge	A charge which is applied when an item is reserved.	\$ Value

NOTE:



Grace periods are set within the Daily/Hourly Loans tables

Fines

System Management Parameters

Loan Parameters and Borrower Types
✕

F3 Save
F5 Query
F6 Print
F7 Locn
F8 Same

A

A

Location ML

(D)aily Loans

(H)ourly Loans

Charges

Fines

Code	Description	Type of Loan (D)aily (H)ourly	Can Loan (Y/N)	Can Renew (Y/N)	Late Per Hour	Late Per Day	Late Per Week	Max O'Due Chrg
BK	Book	D	Y	Y	\$0.30	\$2.00	\$0.50	\$0.00
CA	Cassette	D	Y	Y	\$0.30	\$2.00	\$0.50	\$0.00
CDM	CD Music	D	Y	Y	\$0.30	\$2.00	\$0.50	\$0.00
CDR	CD-ROM	D	Y	Y	\$0.30	\$2.00	\$0.50	\$0.00
CDS	CD Spoken Wd	D	Y	Y	\$0.30	\$2.00	\$0.50	\$0.00
CM	Cartographic M	D	Y	Y	\$0.30	\$2.00	\$0.50	\$0.00
CR	Council Record	D	Y	Y	\$0.30	\$2.00	\$0.50	\$0.00
DB	Database Res	D	Y	Y	\$0.30	\$2.00	\$0.50	\$0.00
DI	Directory	D	Y	Y	\$0.30	\$2.00	\$0.50	\$0.00
DVD	DVD	D	Y	Y	\$0.30	\$2.00	\$0.50	\$0.00
DVR	DVD-ROM	D	Y	Y	\$0.30	\$2.00	\$0.50	\$0.00

COLUMN NAME	EXPLANATION	ENTRY
Code	Displays the Form/Stats code for each corresponding Stockitem Form or Stats code	Code is displayed
Description	Displays the Form or Stats description for each corresponding Stockitem Form or Stats code	Description is displayed
Type of Loan (D,H)	Displays whether the Loan is a Daily or Hourly type Loan	D/H
Can Loan?	Is this form available for the particular Borrower Type e.g. Borrower Type of Junior may not be available to loan items with a Form of CD?	Y/N
Late per hour	A charge per hour which is applied when an item is returned late	\$ Value
Late per day	A charge per day which is applied when an item is returned late.	\$ Value
Late per week	A charge per week which is applied when an item is returned late.	\$ Value
Max Overdue Charge	The maximum charge that will be raised for a fine for any one particular late return.	\$ Value

NOTE:	Grace periods are set within the Daily/Hourly Loans tables
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F8 Validation

This window is accessed by selecting F8 Validtn on the Borrower type window Toolbar.

Validation Rules for Borrower Types																		
Type	Title	Status	Sex	Locn	Group	Class	Ref1	Ref2	Given Name	Birth Date	Ward	Sub urb	Post/Zip code	Area	Addr 1	Addr 2	Addr 3	PIN Y/N
A	Y	Y	Y	Y	Y	Y			Y	N	N	N	Y	Y	Y	Y	Y	N
B	N	Y	N	Y	Y	Y			N	N	N	N	Y	Y	Y	Y	Y	N
C	N	Y	N	Y	Y	Y			N	N	N	N	Y	Y	Y	Y	Y	N
D	N	Y	Y	Y	N	N	N	N	N	N	N	N	N	N	Y	N	N	N
E	N	Y	N	Y	Y	Y			N	N	N	N	Y	Y	Y	N	N	N
G	N	Y	N	Y	Y	Y			N	N	N	N	Y	Y	Y	Y	Y	N
H	N	Y	N	Y	Y	Y			N	N	N	N	Y	Y	Y	N	N	N
I	N	Y	N	Y	Y	Y			N	N	N	N	Y	Y	Y	N	N	N
J	Y	Y	Y	Y	Y	Y			Y	Y	N	N	Y	Y	Y	Y	Y	Y
K	Y	Y	Y	Y	N	N	N	N	N	N	N	N	Y	Y	Y	Y	Y	N
L	N	Y	N	Y	Y	Y			N	N	N	N	Y	Y	Y	Y	Y	N
P	Y	Y	Y	Y	Y	Y			Y	N	N	N	Y	Y	Y	Y	Y	N

Yes/No values present in a column indicate whether or not the field must be present when creating or amending borrowers of a particular type. When an N is entered, the field is optional. If a column has a Y value, the field must be entered before the borrower information is saved. A message prompting which fields are missing will display if not completed.

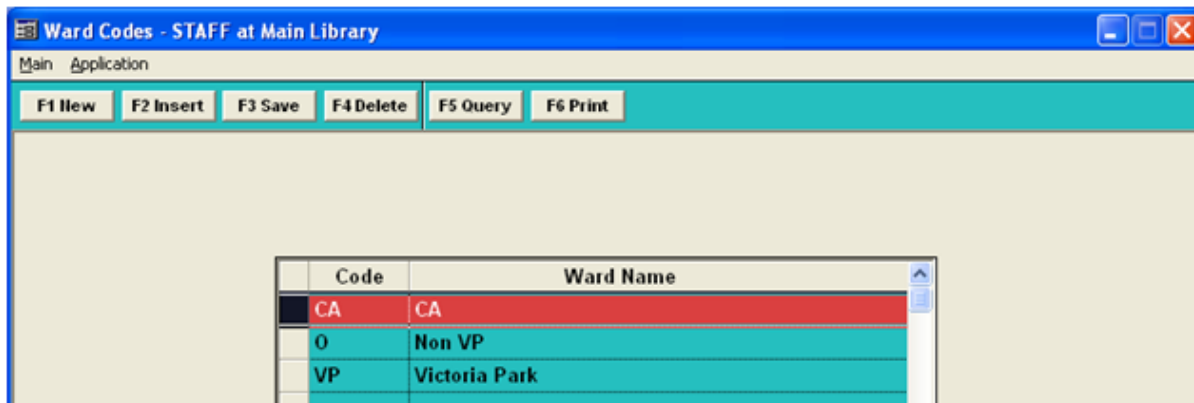
Borrower Barcode, Borrower Type, Surname and Address1 are mandatory fields.

Optional Fields include: Title, Sex, Status, Location, Given Name, DateofBirth, Ward Code, Suburb Code, PostCode, Area Code, Address 2, Address 3, Reference1 field, Reference 2 field, Class and Group codes

Borrower Wards

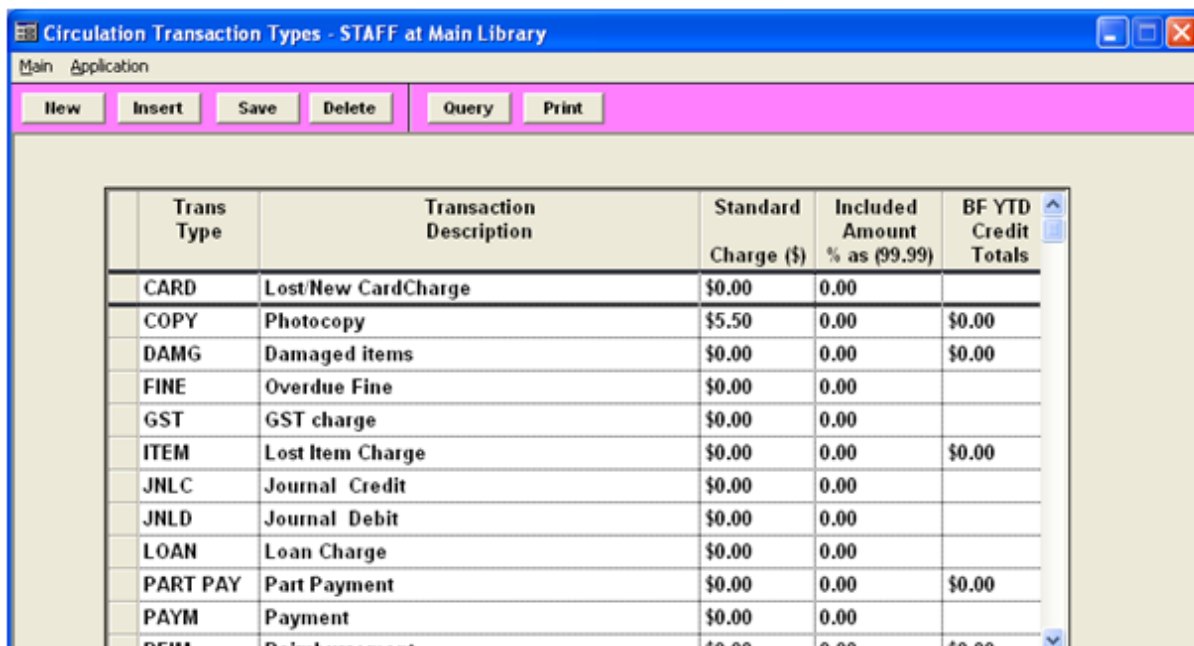
Wards are purely used for statistical purposes and are optional within the system. If ward codes are to be entered, entries must exist on the table.

System Management Parameters



FINANCIAL TYPES

Financial Types can be set up in Finance/Circulation Finance/Circulation/Financial Types.



MORE BUTTON

The Report e.g. Invoice will need to be set up correctly to include this function.



The More button provides extra parameters to allow the User to apply charges when running the reports. These charges will not apply unless the Print [F6] is used and the Report/Application/RepStartSchedule is active.

System Management Parameters

Final Notice - More
✖

F1 New
F2 Insert
F3 Save
F4 Delete
F5 Query

Final Notice

Note: No validation can be performed on these parameters - take care.
Some assistance is given by the column titles below

Report Line Number eg 1,2,3	Line 1 account history Line2 Fee per Item \$ Line3 SMS	Line 1 overdue history Line2 Fee per Notice \$ Line2 SMS Message	Line 1 Financial record Line2 Fee Print Line Line3 Email Address
1	2nd Overdue		ACCOUNT
2		3.00	Include fees of:

HINT	If you later want to do Where searches etc. using Financial Type it would be advisable to add the new Financial Types to the Table in Finance/Circulation Transactions/Circulation Types
-------------	--

The Report Template can be amended to include charges in Report Writer. The Field to enter in the Report is FORM_CHARGES.

General Charges		Invoice Number:		
Barcode	Title	Due Date	Call Number	Price
▲ Detail Block				
STK1_ITEM_NOSTK1_LINE1		STK1_DUE	STK1_LINE6	K1_COST
▲ Footer: BOR_BAR_NO				
	USER_LINE1			CHARGES
	Total for this invoice			CHARGES

The Field FORM_CHARGES can be added to the Total charge or left as a separate charge on the Form as required. The Field USER_LINE1 can also be included which will contain the text entered in the MORE parameters.

General Charges		Invoice Number:		
Barcode	Title	Due Date	Call Number	Price
980114488	The fisherman's boat / [by] Vic McCristal.	30/01/2003	799.1 MACC	\$30.00
980482344	Horse Canyon / Jim Slaughter	30/01/2003	LP SLAU	\$29.95
	Includes fees of:			\$3.00
	Total for this invoice			\$62.95

By running the report in Update mode, a Financial will be written to the Borrower Financial Window using the specifications (Account Type) and Fee charge as outlined in the MORE parameters.

System Management Parameters

Type	TransDate	Locn	Comments	Item	Title	Qty	Charge (Debit)	Inv_No	Inv Date	Paid (Credit)	Receipt No
ACCO	13/03/2003	HALLA	Auto Charge for	98048234	Horse Canyon / Jim	1	\$29.95	1948	13/03/2003	\$0.00	
ACCO	13/03/2003	HALLA	Auto Charge for	98011448	The fisherman's boat / [by]	1	\$30.00	1948	13/03/2003	\$0.00	
FEE	13/03/2003	HALLA	Auto Charge Fees for	NA	Total Fees	1	\$3.00	1941	13/03/2003	\$0.00	

A History will also be added to the Borrower History screen if the Update History is defined as a "Y", with the Report Type defined as set in the MORE parameters.

B346 No of Loans: 6 Renewals: 0
 No of Reserves: 0 Opacs Use: 0
 Visits: 2

Date	Action	Locn	Title (Item)
30/01/2003	OnLoan	HALLAM	980114488 The fisherman's boat / [by] Vic McCristal/ MCCRISTAL, VI
30/01/2003	OnLoan	HALLAM	980482344 Horse Canyon / Jim Slaughter/ SLAUGHTER, JIM

Date	Report Type	Title	Rep Name
13 Mar 2003 12:03 P	2ND OVER	HORSE CANYON / JIM SLAUGHTER	CANINV.QRP
13 Mar 2003 11:16 A	2ND OVER	THE FISHERMAN'S BOAT / [BY] VIC MCCRISTAL	CANINV.QRP

COLUMN	EXPLANATION	EXAMPLE
Report Line Number	Line 1 or 2 depending on what parameters are being entered	Line 2 if adding the Fee amount
Column 1	<p>Line 1 Account History NAME</p> <p>Line 2 Fee per Item</p>	<p>2nd OVERDUE (Note: Only 8 characters display in the Reports History Type column)</p> <p>2.00 if \$2.00 is to be charged for every item in the report. If 10 items are listed in the report, a fee of \$20.00 (10x\$2) will apply</p>
Column 2	Line 1 Overdue History Name	OVDUE 1 (Note: Only 8 characters display in the

System Management Parameters

		Update History has a "Y" and it is run in Update mode - Report [F6] with the schedule active.. It is possible to type in an Alternative name	Reports History Type column
	Line 2 Fee per Notice	Enter only if a fee is to be charged for the Notice per borrower	2.00 if \$2.00 is to be charged for each Notice. It does not matter how many items are listed in the report, a \$2 will apply per Notice
Column 3	Line 1 Financial record NAME	If left blank, the system will put a FinancialType of OVERDUE in the Borrower Financial window for AutoCharge for overdue items if the Update Fin column has a "Y" and it is run in Update mode - Report [F6] with the schedule active. It is possible to type in an Alternative name	ACCOUNT
	Line 2 Fee Print Line	Will update the Field on the actual Report with the Text entered here, if the Report Template includes a USER_LINE1 Field	Includes fees of:
Column 4	Line 1 Fee Type Name	If left blank, the system will put a FinancialType of FEE in the Borrower Financial window for reports that have a FORM_CHARGES field in the Report. This will only apply if the Update Fin column has a "Y" and it is run in Update mode - Report [F6] with the schedule active. It is possible to type in an Alternative name	ADMINFEE (only 8 characters display as a Financial Type)

PARAMETERS - AUTHORITY MODULE

AuthQueryOptions	Sets the enquiry options by setting the tag ranges per enquiry mode. These are preset by AMLIB
KeywordDesc	Provides links between tag fields to apply to a keyword search, i.e. t=title for tags 245, 240, 740 etc.
KeywordStopList	Supplies a list of words or characters upon which a search will not be undertaken, i.e. a, an, the, di, das, etc.
MarcItemDefs	By defining US Marc Items or Orders, corresponding Tags from the Marc TakeUp will link through to the Tags on existing items (e.g. for Orders).
MarcTags	Marc Tags, as defined by USMarc, that are used. The staff have the ability to limit the tags to their particular use or creation. It is vital that these parameters are set accurately for conversion of records and down loading of data
Subfields/Format	Sets the correct subfields and formats (or punctuation) used for each Marc tag. Again, it is of vital importance that these parameters are accurately entered into the system before any record conversions or down loading of data is undertaken

Marc Tags

Amlib stores catalogue data in the Marc standard tag and subfield format. The Marc tag definitions that you maintain in the Authority module have a vital role within the system and must be set up before any conversion or entry of Catalogue records onto the system. All tags that you wish to use within the system must be defined here. If a Tag is imported into the system it will not be inserted into a Catalogue or Authority unless it is defined in this Table of Amlib

Tag No	Tag Description	Defa Ind 1	Defa Ind 2	Can the Tag be Repeated in a Catalogue (Y/N)	Is the Tag an Authority that is only used in 1 Catalogue (Y/N)	Keyword Search Code	Default Catalogue Show Sequence	Allow Tag Xrefs with these comma sep list
001	Innopac Number			N	Y		100	1
008	LISWA accession number			N	N		50	8
015	National Bibliography number			Y	N		1500	15
019	ABN number			Y	N		1900	19
020	ISBN			Y	N		2000	20
022	ISSN			N	Y		2200	22
035	URICA BRN			N	Y		3500	35
080	UDC Classification Number			Y	N		8000	80
082	DDC Number			Y	N	D	8200	82
099	Call Number			Y	N	D	9900	99
100	Personal Author	0		N	N	A	10000	100
110	Corporate Author	0		N	N	A	11000	110
111	Conference Name	0		N	N	A	11100	111
130	Uniform Title - Main Entry	0		N	N	T	13000	130
240	Uniform Title	0		N	N	T	24000	240
245	Title	0		N	Y	T	24500	245

Marc Tag Subfields

InfoVision provides default settings for the subfields of all the above Marc tags. A full list of these can be sent on request. These can be discussed with InfoVision and subfields can be added or deleted as desired. When importing catalogue records from external files, Amlib will save all subfields listed. Therefore, if you do not want all subfields in your catalogue records, they will need to be deleted.

Please don't hesitate to discuss Marc Tags with InfoVision staff as the setting up of the Tags before conversion will affect the look of your Catalogue records and, therefore, Stockitems and Opac.

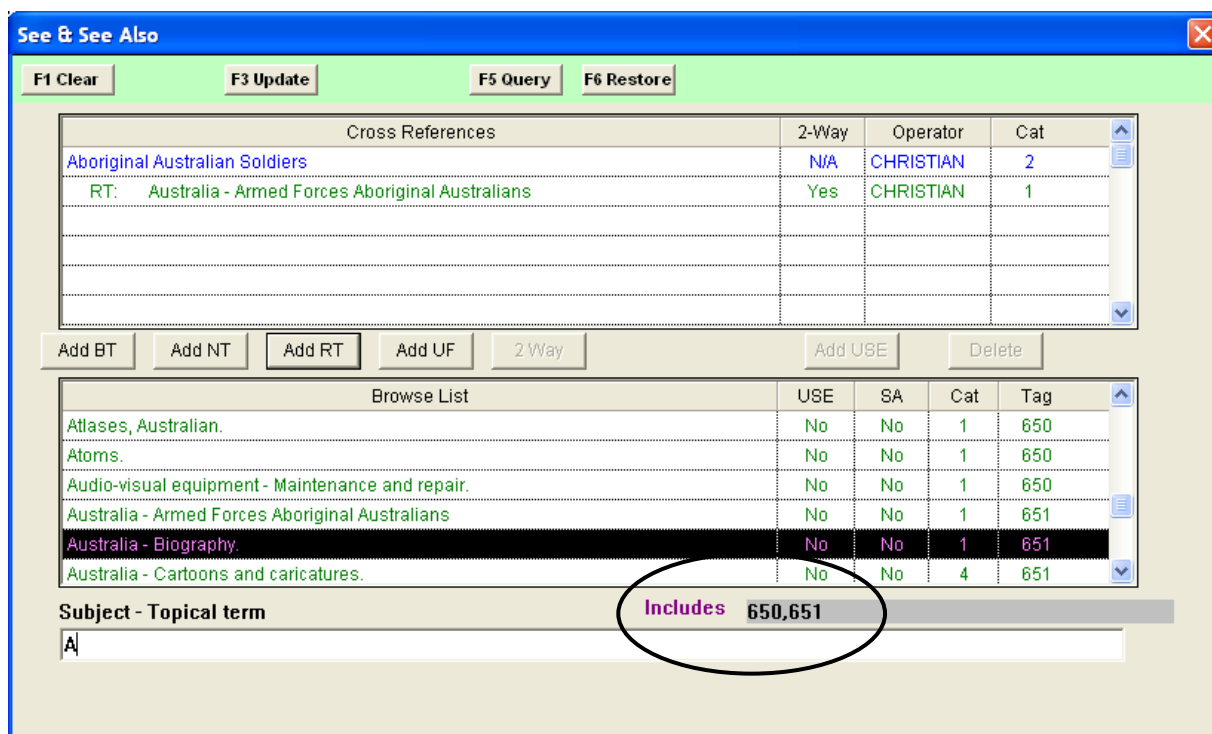
Sub-field	Subfield Description	Can be Repeated (Y/N)	Used In Search Key (Y/N)	Used In Marc Display (Y/N)	Create Key-words (Y/N)	Seq No	Also Create Tag	Also Create SubF
a	Title Proper	Y	Y	Y	Y	10		
b	Remainder of title	Y	Y	Y	Y	15		
k	Form	Y	Y	Y	N	17		
h	Medium (GMD)	Y	Y	Y	Y	20		
l	Parallel Title	Y	Y	Y	Y	40		
c	First Statement of Resp. (A)	Y	Y	Y	Y	60		
n	Volume or part Number (Au	N	Y	Y	Y	80		
p	Volume or part Title (Aus h	N	Y	Y	Y	90		
f	Second statement	Y	Y	Y	Y	100		

See and See Also References Across Marc tags

It is now possible to set See and See Also references across different Marc tags through the Authority module.

System Management Parameters

Simply add a comma and the next tag number in the “Includes” box. For example, to search through Subject – Topical Term and Subject – Geographic Term, the search phrase would be 650,651.



Cross Referencing against different Tag Numbers

Cross referencing against different tag numbers is now permitted. A new column has been created in the Authorities MarcTags table called “Allow Tag Xrefs with these comma sep list”. This allows other tags to be inserted against the Authority.

The screenshot shows a window titled "Marc Tags Within the System - STAFF at Main Library" with a menu bar containing F1 New, F2 Insert, F3 Update, F4 Delete, F5 Query, F6 Print, F7 SubF, and F8 Format. It displays a table with the following columns:

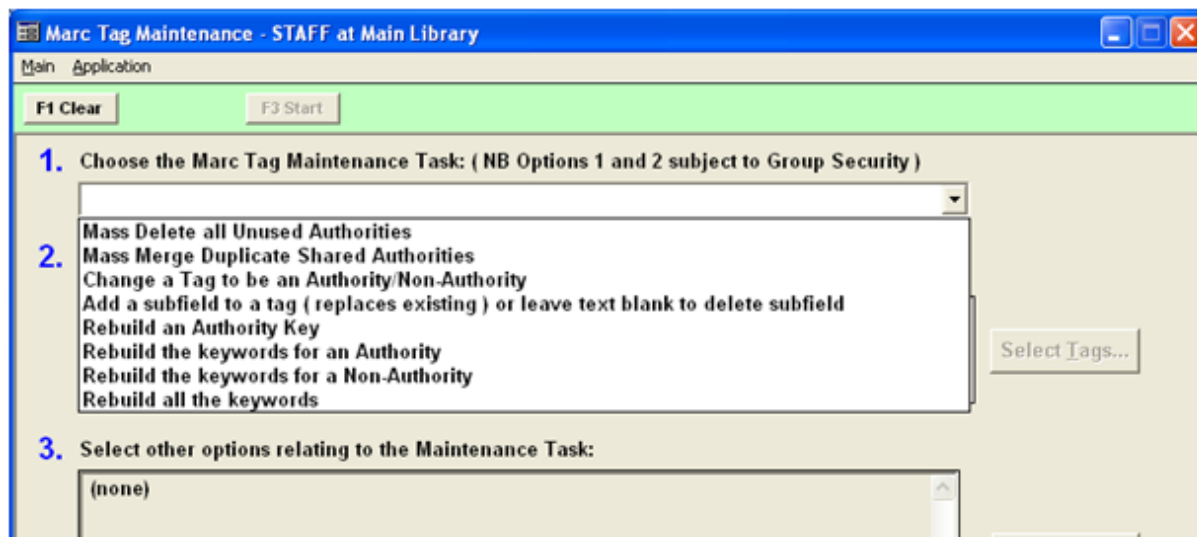
Tag No	Tag Description	Defa Ind 1	Defa Ind 2	Can the Tag be Repeated in a Catalogue (Y/N)	Is the Tag an Authority that is only used in 1 Catalogue (Y/N)	Keyword Search Code	Default Catalogue Show Sequence	Allow Tag Xrefs with these comma sep list
035	URICA BRN			N	Y		3500 35	
080	UDC Classification Number			Y	N		8000 80	
082	DDC Number			Y	N	D	8200 82	
099	Call Number			Y	N	D	9900 99	
100	Personal Author	0		N	N	A	10000 100,700	
110	Corporate Author	0		N	N	A	11000 110	
111	Conference Name	0		N	N	A	11100 111	
130	Uniform Title - Main Entry	0		N	N	T	13000 130	
240	Uniform Title	0		N	N	T	24000 240	
245	Title	0		N	Y	T	24500 245	

The row for tag 100 is circled in the image, highlighting the value "100,700" in the "Allow Tag Xrefs with these comma sep list" column.

MarcTag Maintenance

Choose the Marc Tag Maintenance Task from Field 1.

System Management Parameters



OPTION	EXPLANATION	EXAMPLE
Mass Delete Unused Authorities – See options in more detail below	<p>3 options that can be chosen. Level 1 will delete the least data, Level 3 the most data:</p> <p><i>Level 1: Only Authorities that have never been used on your database will be deleted. Therefore subject headings that have been used as a See, See also, RT, NT etc. will not be deleted</i></p> <p><i>Level 2: Will delete Authorities that are not attached to a Catalogue record but will retain Authorities where one of the references (NT, BT etc.) is attached to a Catalogue record</i></p> <p><i>Level 3: Will delete any Authority that is not directly attached to a Catalogue record</i></p>	See below in Table format “ Mass Delete Unused Authorities ”
Mass Merge Duplicate Shared Authorities	<p>This merges authorities that have identical Search keys and merges them to one Authority without User Intervention</p> <p>Note: This option should be used with caution as some Authors may have the same name but in fact are different Authors</p>	John Smith (1866- 1924) and John Smith (1948 -) are different authors but they have the same Search string – these would be merged if this option is run
Change a Tag to be an Authority/Non Authority	Allows the User to alter an Authority to be a Non Authority or a Non Authority to be an Authority. Options are listed below in “ Change a Tag from Authority/Non Authorities ”	Publisher may be set as an Authority and it may be required to set it as a Non Authority
Rebuild an Authority Key	If an authority parameter is altered, the authorities already on the system will not be altered to the new parameter. By running this option, the authorities will be refreshed according to the new parameters	StopList word is added or Show in Display is set differently
Rebuild the keywords for an	If an authority parameter is altered for keywords, the authorities already on the system will not be altered to the new	An existing Tag is changed in regard to

System Management Parameters

Authority	parameter. By running this option, the authority keywords will be refreshed according to the new parameters	keyword code e.g. Series Code changed from T to Z Keyword codes
Rebuild the Keywords for a Non-authority	If a Non authority parameter is altered for keywords, the data already on the system will not be altered to the new parameter. By running this option, the Non Authority keywords will be refreshed according to the new parameters	An existing Tag is changed in regard to keyword code e.g. A 504 Tag is given an N Keyword code
Rebuild all the keywords	If any Authority or Non Authority parameter is altered for keywords, the data already on the system will not be altered to the new parameter. By running this option, the keywords will be refreshed according to the new parameters.	An existing Tag is changed in regard to keyword code e.g. Series Code changed from T to Z Keyword codes OR A 504 Tag is given an N Keyword code

Change an Heading to be Authority/Non Authority

To Convert an existing Tag choose from the following options. This will change the existing data to convert to the options set. Ensure also that the Tag definitions set in Authority, Application, Marc Tags also comply with the options required to ensure that any new data entered will be correct.

OPTION	EXPLANATION	EXAMPLE
Non-Shared Authority (unique)	To convert the Tag to a Unique Authority which is not shared by any other catalogue	ISBN is usually unique as it should be specific to a catalogue
Shared Authority	To convert the Tag to a Non Unique Authority which is shared by other catalogue	Title may be set to be Shared but a decision made to make it Unique
Non Authority	To convert the Tag to be a Non Authority	Publisher may be set to be an Authority and a decision made to make it a Non Authority (free text)
Combined Authority/Non Authority	To convert the Tag to have some Subfields set as an Authority and some set as a Non Authority	Series title may be set to Authority and the Subfield v which refers to the Number can be set as a Non Authority
Keyword Code	The Keyword prefix assigned to a code. This can be altered if required	A Tag may have no Keyword code e.g. 655. This option can assign a Keyword code e.g. S. This should also be assigned in

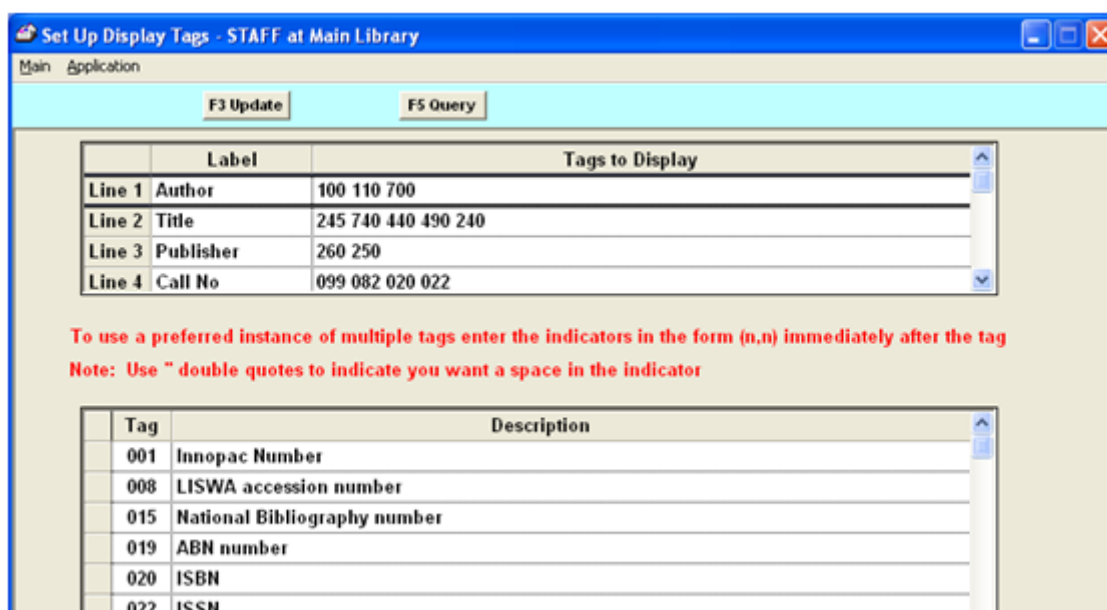
System Management Parameters

		Authority, Marc Tags
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PARAMETERS - CATALOGUE MODULE

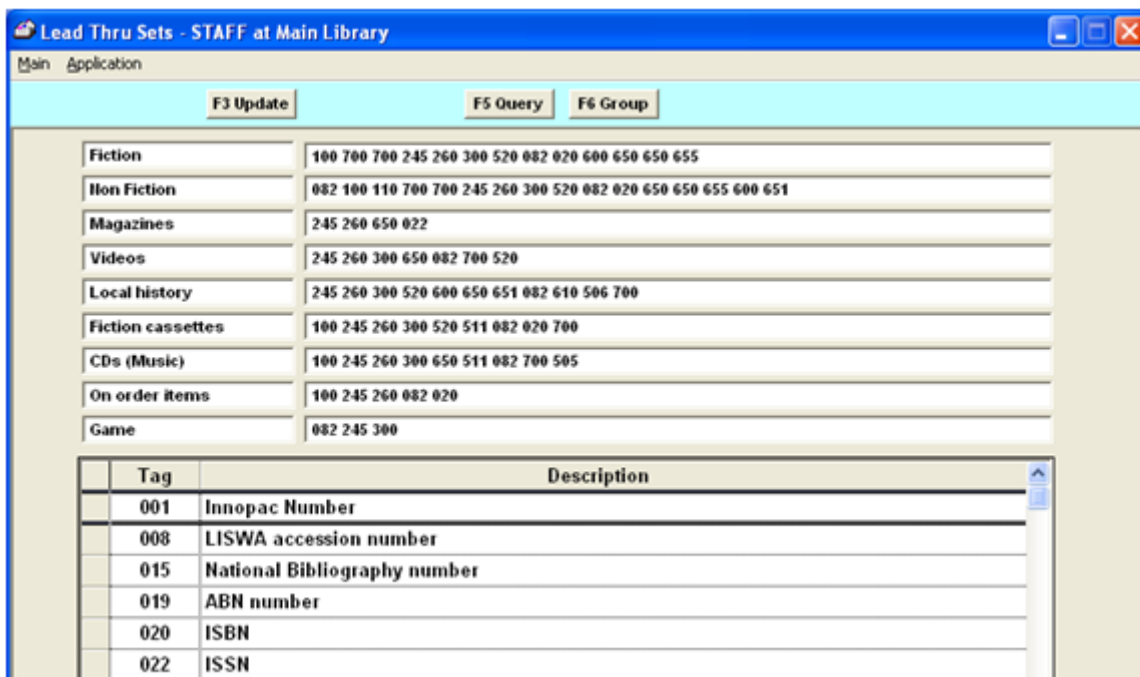
CatDisplayTags	Sets the Marc tags that will appear in the brief catalogue record
CatQueryOptions	Sets the enquiry options by setting the tag ranges per enquiry mode. These are preset by AMLIB
CatLeadThruSets	Used to present prompts of certain tag field groups for specific catalogue record types, i.e. nonfiction, fiction, video.
CatZSearch	Setting up for CatZSearch Servers and Searching

DISPLAY TAGS



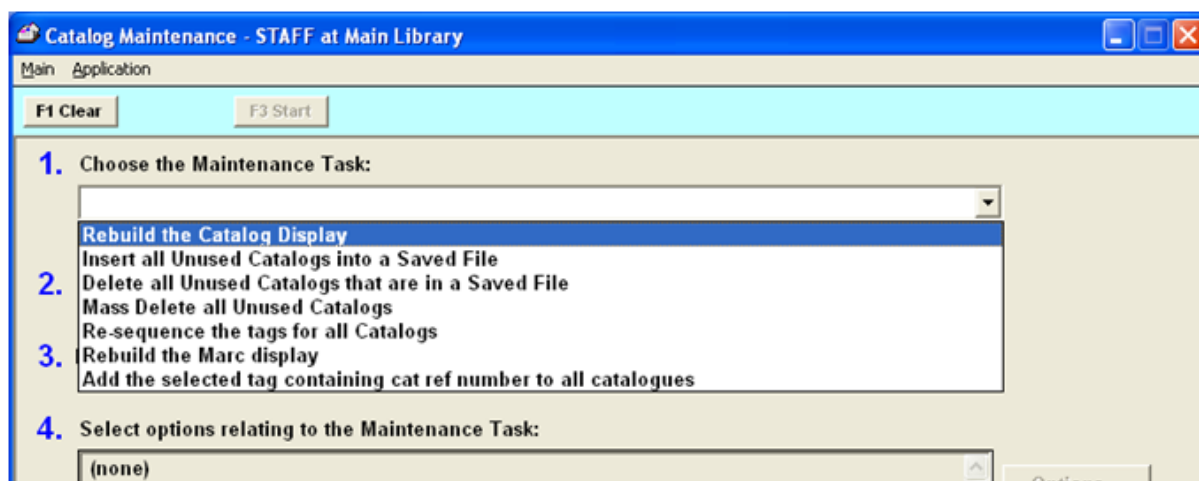
LEAD THRU SETS

Up to 40 tags can be set for the 9 groups



Catalogue Maintenance

Allows maintenance within the Catalogue module for various tasks. The specific Maintenance Task is selected from Field 1.



OPTION	EXPLANATION	EXAMPLE
Rebuild the Catalogue Display	If a catalogue parameter is altered for the tags to be displayed in the Catalogue display at the top of the Catalogue window, this maintenance task will rebuild the display of all existing Catalogue records	If Line 4 changes from 099 082 to be 099 082 020, the rebuild is needed to refresh existing items
Insert all Unused Catalogs into a Saved File	A file is created which contains all the Catalogues that have no related Stockitem, Periodical or Order records. This enables the Catalogues to be viewed before running the Mass Delete	File of CATs to be Deleted in the Mass Delete Maintenance Task

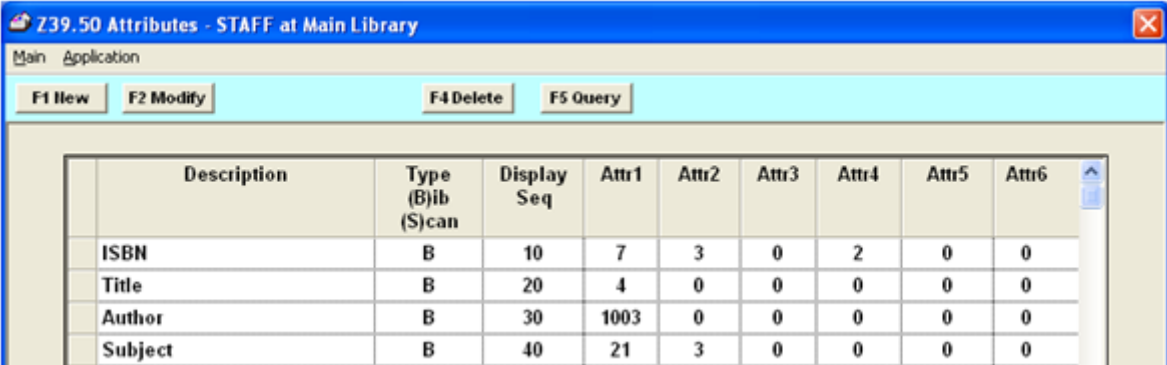
System Management Parameters

Delete all unused catalogues that are in a saved file	Delete the Catalogue records from a selected File that are not referenced by a Stockitem, Order or Periodical.	A File has already been created that contains Catalogues to be mass deleted. Select this File when prompted
Mass Delete all Unused Catalogues (Purge)	All Catalogue records that are not referenced by a Stockitem, Periodical or Order records will be deleted without User Intervention. If the Catalogue records are to be checked prior to running this, the Unused Catalogs can be inserted into a Saved File, using the first choice within this facility	Level of deletion of associated Authorities is set in Supervisor, Library Menu, Installation, Catalogue
Re-sequence the tags for all Catalogues	Refreshes the Marc display based on the Default Catalogue Show Sequence column within the Marc Tag Table in Authorities, Application, Marc Tags	Correct "Floating Tags" where the sequence has been corrupted. For example the Subject displays before ISBN
Rebuild the Marc display	Refreshes the Marc display based on the "Used in Marc Display" column in Marc Tags/Tag subfields. Can be Y or N. A Marc Tag	If this column is changed this task must be performed for the changes to be seen when the catalogue record is displayed.
Add the selected tag containing cat ref number to all catalogues	Add the Catalogue Reference to each Catalogue. Mostly this will be used for adding the Catalogue Reference Number as the 035 Tag	Mainly used for integration with Libraries Australia batch deletion process – the need to export the 035 Tag to Libraries Australia

Z39.50 Searching: Settings and Parameters

CatZAttributes

Attributes create the sequence of display of the records returned. Bib searches return Marc records, Scan searches return Authorities. Scan searches are not currently supported in Amlib. Attr1 concerns the Use attributes and should be set up as displayed here.



Description	Type (B)ib (S)can	Display Seq	Attr1	Attr2	Attr3	Attr4	Attr5	Attr6
ISBN	B	10	7	3	0	2	0	0
Title	B	20	4	0	0	0	0	0
Author	B	30	1003	0	0	0	0	0
Subject	B	40	21	3	0	0	0	0

CatZServers

System Management Parameters

Description	Display Seq	Host	Port	Database	Display
Worldcat	5	zcat.oclc.org	210	OLUCWORLDCAT	Y
Worldcat Test	6	zgate-test.oclc.org	7210	OLUCWORLDCAT	Y
SL of SA	10	surtees.slsa.sa.gov	210	INNOPAC	N
SL of NSW	12	192.231.59.37	210	INNOPAC	Y
SL of Vic	20	192.190.180.3	7090	VOYAGER	Y
SL of WA	30	202.14.152.4	210	INNOPAC	Y
NLA	40	catalogue.nla.gov.au	7090	VOYAGER	Y
LC	50	z3950.loc.gov	7090	VOYAGER	Y
University of Sydney	60	opac.library.usyd.edu.au	210	INNOPAC	Y

Servers are the Libraries or databases you wish to search. F1New enables you to enter new databases to search. A list of accessible Z39.50 target databases in Australia can be found at the following link from the National Library <http://www.nla.gov.au/libraries/z3950/z3950list.html>

Description = the description you will see in Amlib of the Library or database.

Display Seq = the order in which you wish the list to display eg 1, 2, 3 etc. The number here needs to be unique.

Host = the Internet Address of the Library or database. If this is not correct, you cannot be connected to perform a search.

Port = TCP/IP port. The most common port number for Z39.50 is 210.

Server Type is generally Other unless it is an Amlib site.

Database is the name of the database. This will also need to be supplied by the Library or database being searched.

Adding a New Server

Press F1 New.

Fill the Details on each TAB before pressing OK to save.

Server

General | Search | Advanced | Attributes | Groups

Description: Murdoch University

Display Seq: 70

Host: library.murdoch.edu.au

Port: 210

Server Type: Other

Database: INNOPAC

Server

General | Search | Advanced | Attributes | Groups

Display server in list of Available Servers: Yes No

Allow Scan Searches (Not yet available): Yes No

Allow importing from this server: Yes No

Initial number of records to fetch after a search: 10

Maximum number of records to fetch from a search: 200

System Management Parameters

	Attribute Name	Type
<input checked="" type="checkbox"/>	ISBN	BIB
<input checked="" type="checkbox"/>	Title	BIB
<input checked="" type="checkbox"/>	Author	BIB
<input checked="" type="checkbox"/>	Subject	BIB
<input type="checkbox"/>		
<input type="checkbox"/>		

	Group Name	Number of Servers
<input type="checkbox"/>	State Libraries	3
<input type="checkbox"/>		
<input type="checkbox"/>		

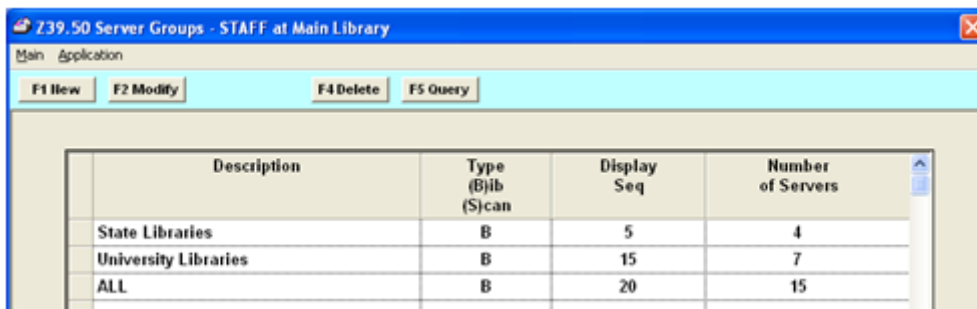
CatZOptions

There are four options that are currently in use.

Description	Explanation	Value
A server is not working if it does not respond in XXX seconds	Can be any amount of time you want to wait.	60
Alternate path to Z39.50 client	Is not currently used	
Tag(s) to use when Displaying a Title	Can be as many Tags as you like.	245
Tag(s) to use when Displaying an Author	Can be as many Tags as you like.	100,110
Registration Key	Is not currently used	
Display all records as (US)Marc or (UK)Marc	Display Marc records in US or UK version.	US

CatZGroups

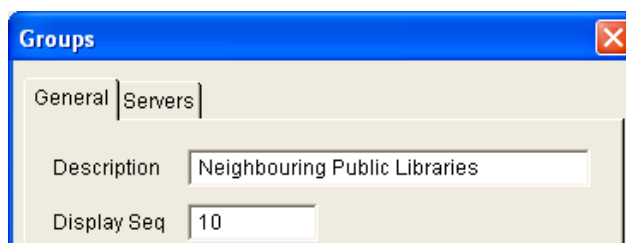
The Servers being searched can be grouped together so that parallel searches are performed across multiple databases.



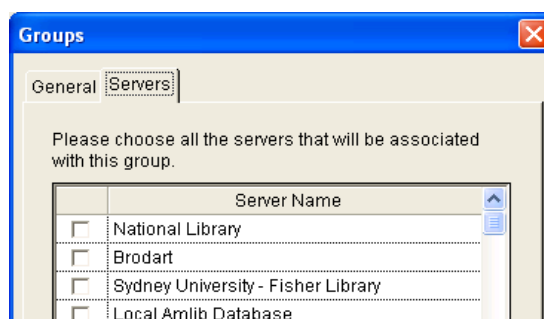
The screenshot shows a window titled "Z39.50 Server Groups - STAFF at Main Library". It has a menu bar with "Main Application" and a toolbar with buttons for "F1 New", "F2 Modify", "F4 Delete", and "F5 Query". Below the toolbar is a table with the following data:

Description	Type (Bjib (S)can)	Display Seq	Number of Servers
State Libraries	B	5	4
University Libraries	B	15	7
ALL	B	20	15

F1New



The screenshot shows the "Groups" dialog box with the "General" tab selected. The "Servers" sub-tab is also visible. The "Description" field contains "Neighbouring Public Libraries" and the "Display Seq" field contains "10".



The screenshot shows the "Groups" dialog box with the "Servers" tab selected. It displays a list of servers with checkboxes for selection:

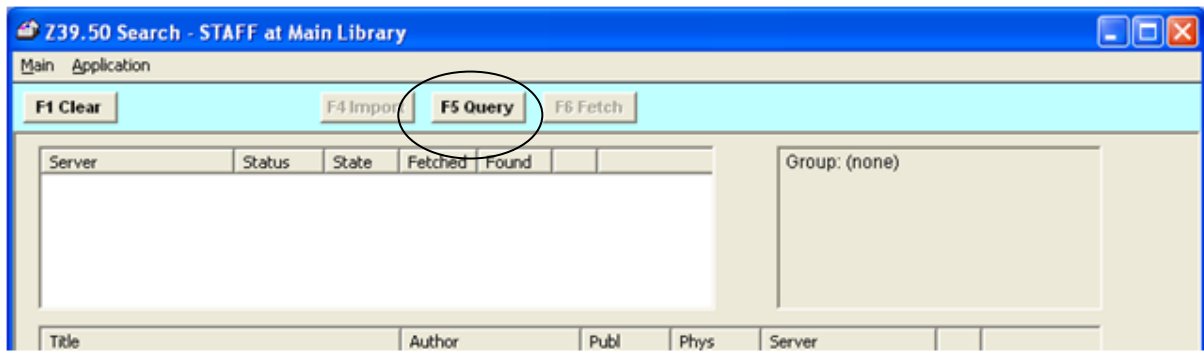
- National Library
- Brodart
- Sydney University - Fisher Library
- Local Amlib Database

When you have entered the Description and sequence, you need to click on the Servers tab and tick the Servers you wish to be in this Group.

Z39.50 Searching

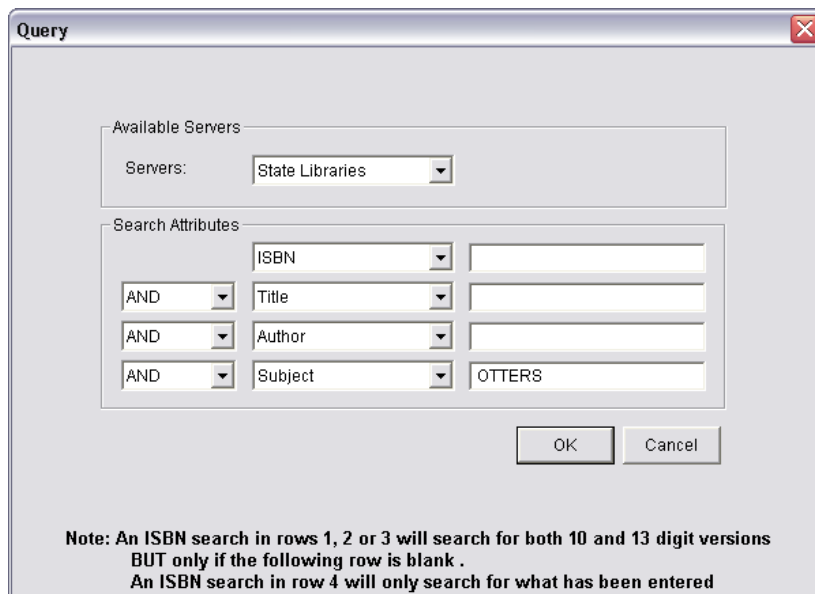
Catalogue module/Application dropdown menu/CatZSearch

System Management Parameters



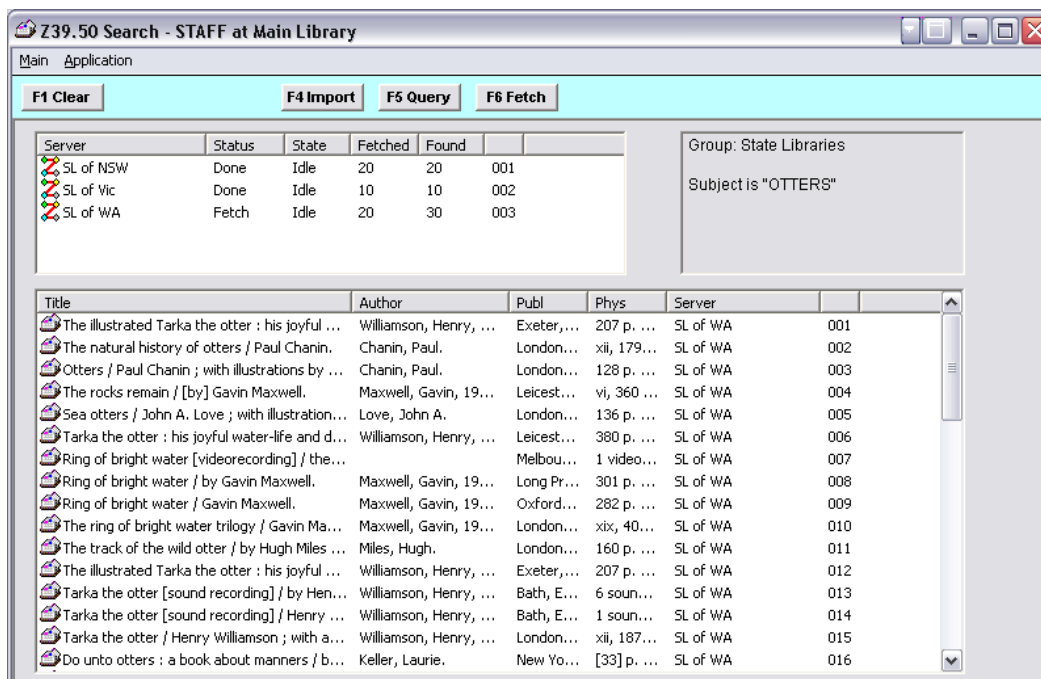
F5Query

Select the Server or Server Group from the Available Servers.



Click on the down arrow and select the Server or Group you wish to search by highlighting it. Type in the search term eg ISBN, Title, Author, Subject or combination of these. Click OK.

System Management Parameters



By highlighting records (hold the Ctrl key and click on records to highlight more than one record) and clicking F4Import, the highlighted records will be imported to a Saved File in Amlib.

PARAMETERS - STOCKITEM MODULE

Stockitem Forms

The Form code of a Stockitem usually reflects the physical description (General Material Designation) of the Stockitem. A record must exist on this table for every type of Form that you wish to use. Typical Forms could be BK, CD, VID.

The Form code plays a vital role within the Circulation Module and may also be used in Query, Reports and gathering Statistics.

Form	Description	Allow Loan	Floating ?	Cat Def Defined
BK	Book	Y	N	N
CA	Cassette	Y	N	Y
CDM	CD Music	Y	N	Y
CDR	CD-ROM	Y	N	Y
CDS	CD Spoken Word	Y	N	N
CM	Cartographic Material	N	N	N
CR	Council Record	N	N	N
DB	Database Resource	N	N	N
DI	Directory	N	N	N

WARNING:




When a new Form is created, ensure that the Loan [F7] parameters are saved to ensure that the system will not treat it as an invalid code in Circulation

F8 Validatn

This window controls what fields must be present when creating or amending Stockitems of a particular Form. The fields that are needed before a Save is allowed. An entry of Y or N in a column indicates whether or not the field must be included.

Form	Line 1	Line 2	Line 3	Line 4	Line 5	Line 6	Stats Code	Cost	Perm Locn	Temp Locn	For Loan	Acc Date	Recd Date	Item Origin	Loan Type
AC	Y	N	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	N	N
BK	Y	N	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	N	N
CA	Y	N	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	N	N
CDM	Y	N	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	N	N
CDR	Y	N	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	N	N
CDS	Y	N	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	N	N
CM	Y	N	N	N	N	N	N	N	Y	N	Y	Y	Y	N	N
CR	Y	N	N	N	N	N	N	N	Y	N	Y	Y	Y	N	N
DB	Y	N	N	N	N	N	N	N	Y	N	Y	Y	Y	N	N
DI	Y	N	N	N	N	N	N	N	Y	N	Y	Y	Y	N	N
DVD	Y	N	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	N	N
DVR	Y	N	N	N	N	N	N	Y	Y	N	Y	Y	Y	N	N
EN	Y	N	N	N	N	N	Y	Y	Y	Y	Y	Y	Y	N	N
EP	Y	N	N	N	N	N	N	N	Y	N	Y	Y	Y	N	N

Form Code and Item No (usually Barcode) are compulsory fields, so are not validated using this table.


<p>NOTE:</p> 	<p>Date received and Date accessioned are filled in automatically with the current date (if date field is empty) if these fields are Mandatory fields in the Validation Window</p>
---	--

Use the scroll bar at the bottom of the window to view all validation settings.

Lines 1 – 6 relate to the Stockitem Display but usually defaulted to:

Line 1	Usually the Title	Summary Cataloguing information. Line displays are set in Stockitem, Application, Form, Display
Line 2	Usually the Author	
Line 3	Often Subject (only 1 Subject Heading is displayed on this screen) or Publisher	
Line 4	Usually the Series or ISBN	
Line 5	Often Publisher or Subject	
Line 6	Usually the Call Number	


System Management Parameters

<p>HINT:</p> 	<p>Use the Down Arrow on the keyboard to scroll down a column or the TAB key to go across rows. This highlights the next entry where the new value can be entered by overtyping the existing data without having to use the Delete key</p>
--	--

When an N is entered, this particular field is optional when saving a Stockitem screen. If the field is supplied and it is of a reference nature (for example, StockitemStatsCode) it must exist on the related table.

F9 Display

Stockitems can be associated with Catalogue Records or may exist on their own (for example, Equipment items, Games). Where Stockitems originate from a Catalogue Record and where Stockitems are imported by a MARC TakeUp), the system looks at this table to determine which MARC tag data should appear in the six lines of display and search key origination fields for a StockItem. Where items are manually keyed, you may type any data into these fields.

<p>NOTE:</p> 	<p>It is recommend that the top line is always used for the Title and the sixth line for Classification or Call Number</p>
--	--

You do not need to always use all 6 lines. This depends upon the Form of the Item and the Validation parameters previously discussed.

Stock Display Tags
✖

F3 Save
F5 Query

	Label	Tags to Display
Line 1	Title	245 740
Line 2	Author	100 110 111
Line 3	Subject	600(1,0) 600(2,0) 650 651 630 610 611 65
Line 4	Series	440 490
Line 5	Publisher	260
Line 6	Call Number	099 082

To use a preferred instance of multiple tags enter the indicators in the form (n,n) immediately after the tag
 Note: Use " double quotes to indicate you want a space in the indicator

Edition Volume Price
Form

** NOTE: You can use these parameters for another form code by entering that form code here.

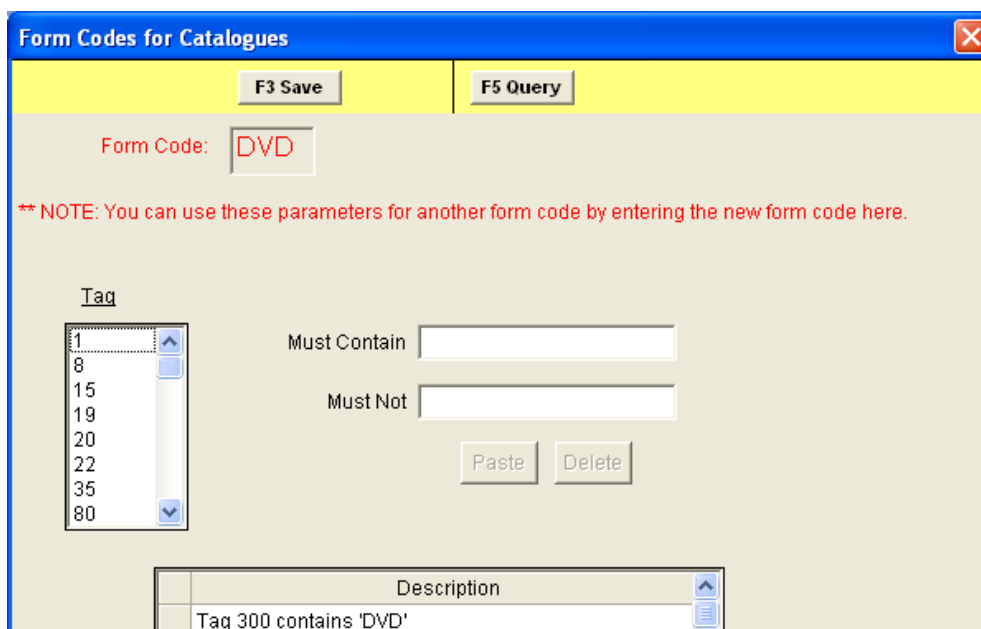
Tag	Description
001	Innopac Number
008	LISWA accession number
015	National Bibliography number
019	ABN number
020	ISBN
022	ISSN

Window Menu

Cat Defs

This menu option allows definition of relationships between Form types and MARC parameters to assist in the automatic allocation of Form types to items created from MARC downloads, if StockItem records are to be generated during the load.

From Window Menu, Stockitem/ Application/ Form Codes.



Stockitem Stats

Stats Code	Allow Loan	Floating ?	Stats / Collection Description	Price Group Code	Cat Def Defined
AF	Y	Y	ADULT Fiction	AF	Y
AL	Y	N	ADULT LITERACY	AF	N
ANF	Y	N	ADULT NON-FICTION	ANF	Y
ASC	Y	N	Ascending Stairs	AF	N
CDML	Y	N	COMPACT DISC MUSIC LOCAL	LOC	Y
CL	Y	N	CORPORATE LIBRARY	ANF	N
EDB	N	N	EBSCO DATABASE RESOURCE	ANF	N
ENG	Y	N	ENGRAVER	LOC	N
GA	Y	N	GAMES	LOC	N
IAF	Y	N	ILL AF	AF	N
IAN	Y	N	ILL ANF	ANF	N
IJUN	Y	N	ILL JUNIOR	J	N
INT	Y	N	INTERNET PC	LOC	N

COLUMN HEADING	EXPLANATION
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System Management Parameters

Stats Code	Stats code, up to 6 characters in length
Allow Loan	Y or N. Although forms may be specified as Not Allowed for Loan, this may be overridden at the point of issue
Floating	If set to Y, this allows items of this stats code to 'float' between locations. If an item is borrowed from location A then returned to location B, instead of being sent back to location A where it belongs, it will be returned to the shelves at location B.
Stats / Collection Description	Description, up to 50 characters in length
Price Group Code	Used to assign items with this stats code to a particular group for pricing and depreciation purposes.
Cat Def Defined	Y or N. This is automatically updated by defining Catalogue Definitions using the [F8] option. This allows definition of relationships between Stats types and MARC parameters to assist in the automatic allocation of Stats codes to items created from MARC downloads. See Cat Defs

Any Stockitem Stats codes used in the Stockitem Application must exist on this database table. The codes are used mainly in the statistics gathering process but may also be used as enquiry points and in report parameters.

F8 Cat Def

This menu option allows definition of relationships between Stats codes and MARC parameters to assist in the automatic allocation of Stats codes to items created from MARC downloads, if StockItem records are to be generated during the load.

System Management Parameters

This menu option allows definition of relationships between Stats codes and MARC parameters to assist in the automatic allocation of Stats codes to items created from MARC downloads, if StockItem records are to be generated during the load.

FIELD		EXPLANATION	EXAMPLE
Tag Drop Down Box		Highlight the Tag for the Cat Definitions	082
Numbers	Ignore	Ignore whether there are numbers in the Tag field	
	Must Contain	The Tag defined must have numbers within the data	Non Fiction Stats Code: Call number must contain numbers e.g. 591.994 SMI
	Must Not Contain	The Tag defined must have not have numbers within the data	Fiction items Stats Code: Call number must not contain numbers F SMI
Tag	Starts with	The Tag defined must start with certain data. Once this field is selected, the data can be entered in the Data field below. Note, multiple codes may be entered separated by commas	F, QF
	Contains anywhere before first space	The Tag defined contains data, but before the first space. Once this field is selected, the data can be entered in the Data field below. Note, multiple codes may be entered separated by commas	Biographies: Call Numbers must contain B before the first space e.g. B/305 SMI
	Contains anywhere in the tag	The Tag defined contains data anywhere in the content. Once this field is selected, the data can be entered in the Data field below. Note, multiple codes may be entered separated by commas	Large Print: Extent Tag e.g. 300 tag must contain Large Print
Must Start with		The text of the field changes depending on the Tag button chosen. Enter the relevant data, separating multi values with commas	F, QF
Must Not Start with		The text of the field changes depending on the Tag button chosen. Enter the relevant data, separating multi values with commas to exclude items	JF, JK

System Management Parameters

After defining the conditions for the Stats code, select Paste to display the cat definition in the Description Window. To delete Cat definitions, highlight the description in the Window and press the Delete button.

STATS DEFINITIONS Some example for SLWA SITES

ANF	DEFAULT as set up in Supervisor, Installation, Stockitem or set in Marc Take up
AF	Tag 99 must not contain numbers. Must contain F but not contain J before the first space.
JK	Tag 99 Must contain JK before the first space
JNF	Tag 99 must contain numbers Must contain J but not contain JK before the first space.
JF	Tag 99 must not contain numbers Must contain J but not contain JK before the first space.

Stockitem Origins

Origin /Source of Item	Description	Allow Depreciation	Keep Depr History	Round up	Round Down	to Nearest 'n' dollar
ASC	Austral Secondhand Curios and Bookstore	N	N	Y	N	0.50
DON	Donation	N	N	N	N	1.00
DYM	Dymocks	Y	Y	N	N	1.00
JAF	JAFWA collection	Y	Y	Y	N	1.00
LIS	LISWA	Y	Y	Y	N	1.00
LOC	Local stock	N	N	N	N	1.00

This option can be used to describe the source of an item. For example, it could be used as the supplier or display of funding source (e.g. Bookland, Donation, Music Dept funded, or display LISWA or LOCAL STOCK).

System Management Parameters

COLUMN	EXPLANATION
Origin/Source of Item	Code of up to 3 characters in length to identify the origin of the item
Description	Description of up to 50 characters in length to describe the origin of the item
Allow Depreciation	Enter Y/N to allow depreciation on this group of items
Keep Depreciation History	Enter Y/N to keep a depreciation history on this group of items
Round up	Enter Y/N so that during depreciation, round up to the nearest dollar as shown in the last column
Round down	Enter Y/N so that during depreciation, round down to the nearest dollar as shown in the last column
To Nearest "n" dollar	Enter the amount that the rounding up or down will be calculated.

Stock Call Sets

Range Id	Call From (Greater or Equal)	Call To (Less than)	Description
GEN	000	100	Generalities
PSY	100	199999	Psychology
REL	200	299999	Religion
SS	300	399999	Social Sciences
LAN	400	4999999	Languages
AST	520	525	Astronomy
PHY	530	540	Physics
ART	700	799999	Art

Stock External Libs

This option allows viewing, modifying or addition of details regarding external libraries. This is useful for Inter Library Loans as the window lists the phone numbers, addresses and email addresses of all the local libraries.

FIELD	EXPLANATION
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System Management Parameters

Code	Can be an alpha code or VDX or old DDO identification code (if you wish to launch DDO from Amlib). For example the code for Albany Public Library may be ALB. In DDO it may have been p2alb.
Lib Name	Enter the name of the Library which will display on the VDX request. It could also be a good idea to include VDX as a library to use when first creating the ILLs record
Phone	Enter the phone number of the Library
Request Method	Enter the request method e.g. Fax. DDO request WAS Base.htm. You could enter an E for Email
Fax	Fax number of Library
Email	Email Address of Library
Contact	Contact person at the Library
Add Line 1	Address Line 1 of the Library
Add Line 2	Address Line 2 of the Library
Add Line 3	Address Line 3 of the Library

Code	Lib Name	Phone	Request Method	Fax	Email	Contact	Addr Line 1	Addr Line 2
P1AUG	Augusta Public Library	0897581800	BASE.HTM	9758 1800	auglib@			
P1AUS	Australind Public Library	0897971430	BASE.HTM	9797 1096	auslib@			
P1BAL	Balingup Public Library	0897641037	BASE.HTM		balingup			
P1BAS	Bassendean Public Library	9279 2966	BASE.HTM	92791869				
P1BAY	Bayswater Public Library	9271 2340	BASE.HTM	9271 5789	baylibra			
P1BOY	Boyup Brook Public Library	0897651200	BASE.HTM	9765 1485				
P1BRI	Bridgetown Public Libravy	0897611555	BASE.HTM	9761 5023				

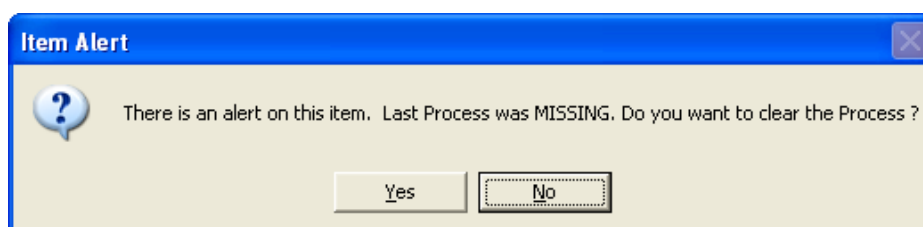
Stock Process

This table allows you to identify various Stockitem processes e.g. WITHDRAWN, IN PROCESS, MISSING 06, LOST etc. This field is optional. If the table is not defined, the field will not appear in the Stockitem window. Within the Stockitem Window, there is a date field associated with the Process code. This is useful when checking or reporting items.

System Management Parameters

Process	Show in Opac (Y/N)	Operator Alert (Y/N)	For Loan (Y/N)	Remove on Return (Y / N / P(prompt))
BINDING	N	Y	N	P
BLACKLIST	N	Y	N	P
BLACKLIST LOCAL	N	Y	N	P
CHILDRENS LIBRARIAN	Y	Y		P
CLAIM RETURNED	N	Y	N	P
CORPORATE	N	Y	N	P
DEBT COLLECTORS	N	Y	N	P
DISPLAY	Y	Y	Y	P
DMG'D BY READER	N	Y	N	P
DMG'D NO READER	N	Y	N	P
EXCHANGE	N	Y	N	P
IN PROCESS	N	Y	N	P
INCOMPLETE	N	Y	N	P

COLUMN	EXPLANATION	
Process	Description of Process that will display in the Stockitem screen	
Show in Opac (Y, N)	The Stockitem with this particular process will/will not appear in Opac	
Operator Alert (Y, N)	If a Stockitem number is identified (e.g. by Barcode) the operator will/will not be alerted that the item has a particular Process	
For Loan (Y,N)	If a Stockitem number is identified (e.g. by Barcode) the operator will/will not be able to loan the item with that particular Process	
Remove on return	Y	The process code will automatically be removed when the item is returned
	N	The process code will not be removed when the item is returned. Process code must be removed manually from the stockitem record of the item.
	P	A message will be displayed when the item is returned, asking the operator if they want to remove the process code. The operator then has the option to either automatically remove the process code or leave the process code on the item record.

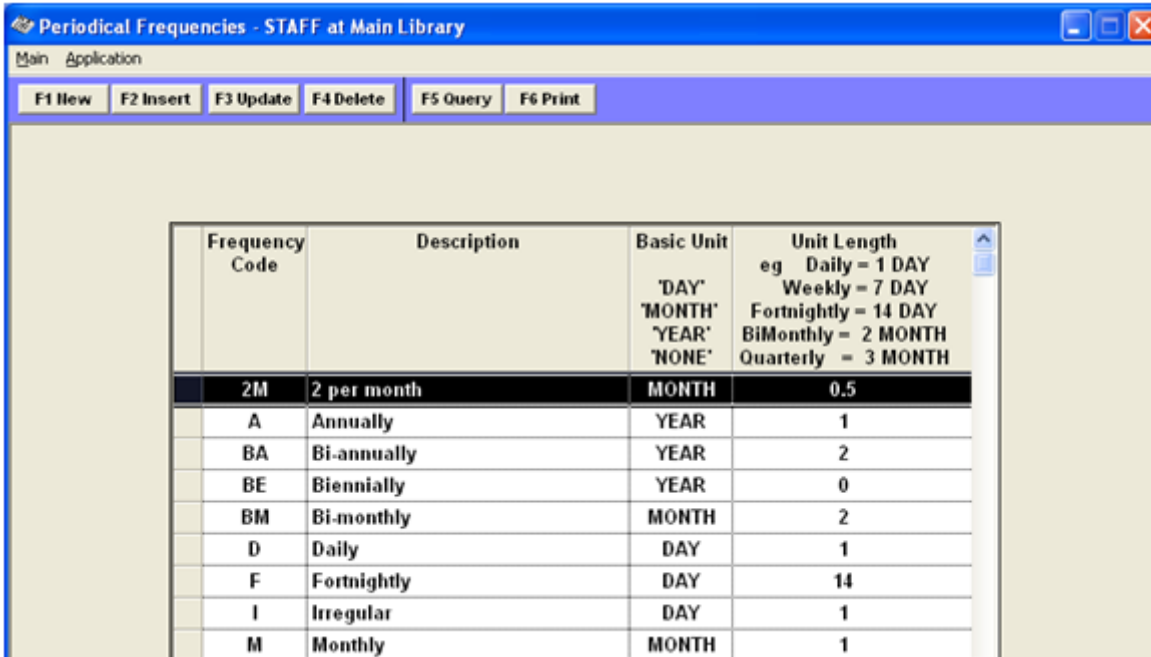


System Management Parameters

PARAMETERS - PERIODICAL MODULE

PubFrequency Table	Sets the frequencies for Periodical issue creation when Subscriptions are created
Suppliers	Suppliers for Periodical subscriptions.

Publication Frequency Table



Periodical Frequencies - STAFF at Main Library

Main Application

F1 New F2 Insert F3 Update F4 Delete F5 Query F6 Print

Frequency Code	Description	Basic Unit	Unit Length eg Daily = 1 DAY Weekly = 7 DAY Fortnightly = 14 DAY BiMonthly = 2 MONTH Quarterly = 3 MONTH
2M	2 per month	MONTH	0.5
A	Annually	YEAR	1
BA	Bi-annually	YEAR	2
BE	Biennially	YEAR	0
BM	Bi-monthly	MONTH	2
D	Daily	DAY	1
F	Fortnightly	DAY	14
I	Irregular	DAY	1
M	Monthly	MONTH	1

Suppliers

Suppliers - STAFF at Main Library

Main Application Supplier References

F1 Clear F2 Insert F3 Update F4 Delete F5 Query F6 Table F7 << F8 < F9 > F10 >>

Supplier No: 70013 External Company No./ABN: Last Change: STAFF 28/10/2009 2:16 PM

Company: Dianella Newsagency

Comments: Show Comments in Orders (Y/N)

Postal Address: Dianella Plaza Shopping Centre Waverley St Dianella Zip / Postcode: 6062 Street Address: Zip / Postcode:

Contact Person: Telephone: 275 4022 Fax: 275 4068 Tax Code: GST

E-mail: Use E-mail (Y/N) N Forex Code: AUS

E-mail for EDI orders: Use EDI (Y/N) Claim Delay Code:

SAN(EDI): EAN(EDI): Normal Lead Time (days): 90

Membership /Update: Payment Terms (days):

Web Address: Discount: Amount: \$ %

Web login: Web password: Supplier Web Address: NUM SCRL

APPENDIX 1: STATS PARAMETERS

You may change descriptions and collection flags for any of these items but you may not alter the intrinsic value of a code i.e. 05 is always an issue even though you may give it a description of "loan" rather than "issue" The issue program has been set to add 1 to the 05 code set every time an issue is made.

Some codes can be created by users. For example, codes can be added to Reports to collect the number of reports run (Circulation reports also can collect the number of reports sent e.g. How many invoices sent in May which is entered in the Detail Stats code of the Reports screen. A corresponding entry has to be made to the Stats Params table).

These customised codes only refer to:

Opac Other (old Windows Opac)	200s
Reports	300s
NetOpacs	500s

Because statistics are kept by the actual day month and year values, maintenance of statistics (e.g. indexing) is not required and you do not need to print monthly stats at the exact end of month. i.e. you can print stats for July in December if you so desire.

Some statistics are kept by Location and some are not recorded. For example, Catalogues and Periodicals are not kept by location. Stockitems and Circulation would however be kept according to location.

Statistics are kept on the database until deleted.

STATISTICS CODES USED BY AMLIB

Stats Type	Description	Explanation
04	Foreign Issues	All issues from locations other than the Login Location
05	Issues	All issues from the Circulation, Issues screen
06	Renewals	All renewals, including single and multiple renewals from the Issues screen
07	Borrower Visits	Every time a borrower is active (has a transaction so that their Borrower Barcode displays in the Borrower ID field) in Amlib – either from Issues or Reservation (Borrower Opac visit is collected separately)
10	Returns	All returns, including Chute Returns, Returns screen, Issues screen returns
11	Foreign Return	All returns from locations other than the Login Location
15	Reservations	All reservations made from the Reservation Application (Opac Reservations are collected separately)
16	Satisfied Reservations	Reservations that have been satisfied on the issue of the item to the borrower who has had the reservation on the item
17	Expired Reservation	Reservations that have passed the expiry date set up in Supervisor, Installation, Circulation
18	Cancelled Reservation	Reservations cancelled by an operator (Opac Reservation cancellations are collected separately)
19	Foreign Reservation	Reservations made from any other location other than the Login Location
20	Location Transfers OUT	All Permanent and Temporary Location outgoing transfers using the Circulation/Issues/Transfer screen.
22	Location Transfers IN	All Permanent and Temporary Location incoming transfers using the Circulation/Issues/Transfer screen.
25	In House	Circulation Statistics from Items scanned using Issues, Application, Process In House
26	Bookings	All Bookings made from the Reservation Application (Opac Bookings are collected separately)
27	Satisfied Bookings	Bookings that have been satisfied on the issue of the item to the borrower who has had the Booking on the item
28	Cancelled Bookings	Bookings cancelled by an operator (Opac Booking cancellations are collected separately)

Amlib System Management Parameters

29	Expired Bookings	Bookings that have passed the expiry date set up in Supervisor, Installation, Circulation
30	New Orders	All orders using the Order Application as well as AOL import
31	Del Orders	All orders that were deleted
35	New Periodicals	All Master/Main Entry Periodicals newly created in the Periodical Application
36	Del Periodicals	All Deleted Periodical Masters/Main Entries
41	New Per Copies	New Periodical Copies received
42	Del Per Copies	Deleted Periodical Copies
50	All Enquiries	All Enquiries made from the Borrower, Stockitem or Catalogue screens (Opac and NetOpac Enquiries are collected separately)
51	Opac Author	All searches performed through the Opac screens, corresponding to the type of search shown in the Description. This does not include NetOpac search (these are kept separately in the 500 Statistic parameters)
52	Opac Title	
53	Opac Subject	
54	Opac Dewey	
55	Opac Periodicals	
56	Opac Borrower	Any time that a Borrower has entered their barcode to look at Borrower Details from the Opac screen
57	Opac Reserves	Reserves – only made from the Opac screen. Does not include Reservations made from the Reservation module
58	Opac Renewals	Renewals – only made from the Opac screen. Does not include Renewals made from the Circulation module
61	Borrower Enquiries	Queries performed from the Borrower Application for Borrower Details
62	Stock Enquiries	Queries performed from the Stockitem, Application for Stockitem Details
63	Catalogue Enquiries	Queries performed from the Catalogue Application for Catalogues
64	Authority Enquiries	Queries performed from the Authority Application for Authorities
80	New Borrowers	New borrowers manually entered onto the database (does not include Borrower Import)
81	Del. Borrower	Borrowers deleted from the database either individually or as a Borrower Mass deletion

Amlib System Management Parameters

82	Re Register	Borrowers who have been re-registered
83	Upd Borrowers	Borrowers who have had their details changed in some way by an operator and these changes have been saved (does not include Mass Borrower Change)
90	New Items	New stockitems created manually (Items created through an exchange are collected separately)
91	Del Items	Stockitems deleted from the database either individually or as a Stockitem Mass deletion
93	Upd Items	Stockitems which have had their details changed in some way by an operator and these changes have been saved (does not include Mass Stockitem Change)
94	New ILLs	ILLs created in the ILLs window of the Stockitem Application
95	Del ILLs	Stockitems deleted that were created from the ILLs record of the Stockitems Application
96	New Order Items Received	New orders received in Orders. Subset of New Items, so counted in that Statistic as well (90). Statistic gets created as soon as the Order Line Item is received
97	Del Order Items	Orders deleted from Orders
98	New Order Placed	New Orders created in the Order. Statistic is created as soon as the Status is changed to Ordered
100	New Cats	New catalogues created manually
101	Del Cats	Catalogue records deleted from the database either individually (via the Stockitem or Catalogue Application) or as a Stockitem Mass deletion if set to delete Catalogue entries if the Stockitem is the last for the catalogue.
103	Upd Cats	Catalogues which have had their details changed in some way by an operator and these changes have been saved
110	Cats via Marc	New catalogues created via the Marc Import process
111	Items via Marc	New stockitems created through an exchange, that has been configured to create stockitems as part of the Marc import process
112	Orders via Marc	New orders created through the AOL import process (this would only be valid for WA LISWA sites)
113	Auths via Marc	New authorities created via the Marc Import process
114	Bump Cats via Marc	Any catalogue that has been automatically replaced via the Bump facility in the Marc Import Process

Amlib System Management Parameters

200	Opac Other	Users who have used the Opac Other function in Opac (usually F10)	
201	Other #1	Users who have used the Opac Other function in Opac (usually F10), which can be specified e.g. #1 may be Word facility, #2 may be linking to the Internet etc. (These need to be set in the parameters in the Supervisor, LibraryMenu, Opac Other table – first column Sequence refers to the Stats collection code and a corresponding entry in the Stats Params table)	
203	Other #2		
204	Other #3		
300	Borrower Reports	Borrower reports that have been run (if there is a stats code entered for that report in the Report Stats code and a corresponding entry in the Stats Params table)	
310	Circulation	These are User defined Stats codes. Circulation reports that have been run (if there is a stats code entered for that report and a corresponding entry in the Stats Params table) and individual letters/slips sent via this reports (entered as Stats Details and a corresponding entry in the Stats Params table). 311, 312, 313 are examples.	
311	AutoAccounts		
312	Overdue reminder letter (no auto financial update run)		
313	Overdue - slips sent		
500	WebAuthor	Searches performed via the NetOpacs for an Author query	These are User defined Stats codes. Set in Web Parameters in the Supervisor, LibraryMenu menu. The Stats Parameters shown here are examples only and are the defaults set with the system
501	WebTitle	Searches performed via the NetOpacs for a Title query	
502	WebSubject	Searches performed via the NetOpacs for a Subject query	
503	WebKeyword	Searches performed via the NetOpacs for an Any Keyword query	

Amlib System Management Parameters

504	WebBorr	When a borrower identity is entered into the NetOpacs (to view Borrower details, reserve or renew items)	
510	WebIssue	Items issued via the NetOpacs	
511	WebRenew	Items renewed via the NetOpacs	
512	WebReturn	Items returned via the NetOpacs	
513	WebReserve	Items reserved via the NetOpacs	
531	WebJoin OnLine	Members joined via the Netopacs	
532	WebRequests	Members who have requested ILLs or new purchase suggestions via the Netopacs	
533	WebChangeDetails	Members who have altered Address details via the NetOpac	