System Management - Tasks

Last Updated: **26 February 2013**

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

This course includes:

System Maintenance which includes backup and deletes unnecessary logs etc.

System Management which includes tasks that are included in the day to day operations as the site deems necessary.

Data Management which includes database deletions and changes again as the site deems necessary.

Written policies and procedure manuals are useful tools when implementing system management.

Policy

Relatively brief and available to outline the "bigger picture". Useful when issues arise as certain decisions have been made and documented, rather than making quick decisions at the time.

Procedures Manual

Step by step detail for tasks performed internally. It becomes very important if staff rotate jobs or new staff need to be trained. Enhances consistency and accuracy. Maintenance plans and Disaster Recovery plans and trials should be considered.

Note: Screen dumps are useful for including in such documents. Use **[F12]** to dump a screen or use ALT PRINT SCREEN keys from the keyboard to send an image to the clipboard. This image can then be pasted into a Word Processing package e.g. Ctrl V into a Word document.

SUMMARY OF SYSTEM ADMINISTRATION TASKS

SUMMARY OF SYSTEM MAINTENANCE TASKS

DAILY	Checking Backup Logs – Amlib Backup Log and Tape verification
	Backing up the system
	Delete unwanted Files
	Delete unwanted Print jobs in Report Scheduler
	If Issues Audit on, delete logs
	Copy Image Files to CD
WEBSITE updates	Check the OCLC Website for updates www.amlib.net.au
Incidents	Assistance, faults and enhancements – needs User Name and Password to log in
e.g. every 6 weeks	Check Server Disk Space
	Delete Netopac Logs
	Delete Amdberror.log in Amlib folder
After Release	Check the Amlib/Previous folder for Previous folder and check for old programs that can be deleted
	Ensure Release notes are accessible to view changes e.g. copy to My Documents or print them out

SUMMARY OF SYSTEM MANAGEMENT FUNCTIONS

Offline Application	Emergency offline for when server is down
User Names	User Permissions
Depreciation & Average Pricing	Optional
Creating Periods within Stockitem History	Autolink facility. Optional
Cat Definitions for STATE LIBRARY OF WESTERN AUSTRALIA exchange	Stockitem Application/Form & Stats codes
Setting Calendar	For setting dates closed
Circulation Overdue Notices	Finance Update (Y/N)

SUMMARY OF DATA MANAGEMENT TASKS

Many of these tasks will depend on the individual library as if these tasks are performed, how often and when appropriate

Deletions	Catalogue purge
	Stockitems without Catalogue
	Unreferenced Authorities
	Mass Delete of items/borrower
	Borrower History
	Stockitem History
Changes	Mass change of files
	Stockwand change – can save the process
	Borrower change – from Junior to Young Adult or Junior
Catalogue and Authority Maintenance	Global Updates to Authority or Catalogues
Stockitem Autolink	Global Updates to Stockitem
History deletions	Available in Borrower Reports, Stockitem Autolink
Reservation Expiry	Run through reports or cancel manually

MANAGEMENT REPORTS

System Activity	Supervisor/Library Menu
Statistics	Reports/Repstatistics
Audit Reports	Reports/RepStockitem, RepAuthority, RepBorrower
Value of Collection	Reports/RepStockitem/CountbyForm,Stats
Counts	Reports from RepBorrower or RepStockitem
Where Searches	Stockitem/Borrower for a huge variety of useful reports e.g. items never borrowed, ILLs late coming from Supplying library, Reserves of more than 5, items with cost over $500, borrowers inactive for 2 years, Juniors who should be YA, Young Adults who should now be Adult members, AOL orders not received after 6 months etc. etc.

SYSTEM MAINTENANCE

Database Set-Up

The RDBMS (Database) can be:

- Microsoft SQL Server
- Oracle

The Data is spread over 4 separate Databases:

- **AMCAT**: Authority, Catalogue
- **AMLIB**: Borrowers, Circulation, Stockitem, History, Reports
- **AMSTATS**: Statistics
- **AMLOCAL**: Every Parameter, Defaults
- **AMWEB**: Some sites have this for Netopacs

Maintenance

Most of the maintenance of the system is incorporated into the Backup (e.g. Indexing, clearing logs).

Backing Up Your Database

All **SQL Server** installations should have a *Database Maintenance Plan*:

The plan should:

- Optimise the indexes
- Back-up the databases (CAT, LIB, LOCAL and STATS) at least once every day.
- Backup the logs - You can specify how long the backup files are kept - make sure that it is long enough for the backup to tape to pick them up. For example if a Daily backup is done it may be decided to keep the Backup files for 3 days.

It is important to check the logs created by backup to ensure that the Backup was successful. It should be possible to have this log accessed away from the Server For example - by Library Staff

If the site is running **SQL Server Express** Version there is a special Backup that can be run. See Appendix for instructions.
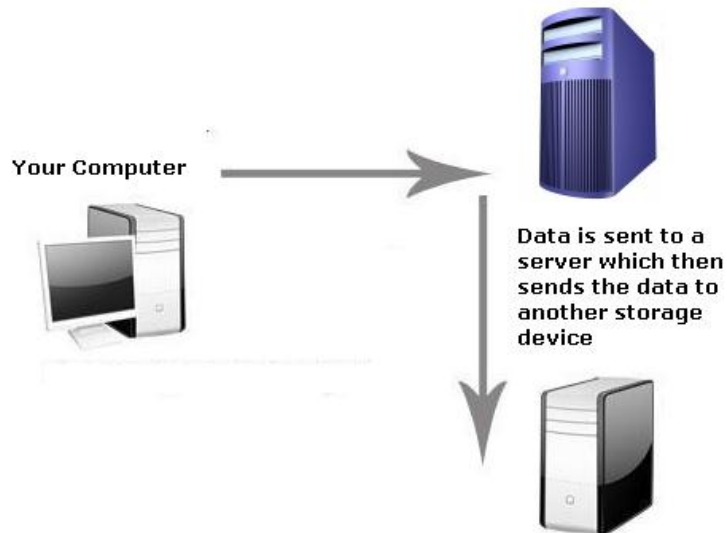
Backup to External Device

We rely on you to implement a backup maintenance plan in order to reconstruct lost or altered Customer files, data or programs. We also need you to implement a database maintenance plan to ensure that the Relational Data Base Management System (RDBMS) is operating at optimal levels.

If there are problems with either the date or error messages in Backups or any questions about creating backups please contact Support for further advice as soon as possible.

- Ensure the Databases are backed up to an external device – for example: Tape

- Ensure the Logs of the Tape Backup are checked to ensure it was successful

- Consider the restore capabilities from that Backup device – can the Tape be read by other Tape Drives to enable a restore of the data?

- Consider backup onto an alternative Backup device – for example: a CD-R regularly as double insurance

- If you have any queries about backup do not hesitate to contact *Amlib Support*

Your Computer

Data is sent to a server which then sends the data to another storage device

Ensure the Images folder is backup to an external device (e.g. CD, Flashram) if there are images on either borrower or catalogue records

Tasks To Be Performed Daily
- Checking Backup Logs
- Backing up the system

Ensuring that you have sound backups of your system is your insurance that your data can be recovered if the need ever arises.

Backing up should be done regularly. We recommend a daily backup.

SCHEDULED REPORTS

1. Launch the *Amlib* client

2. Go to **Main** > **Reports** > **RepPrintProgress** – the Print Progress screen will display

This window will display any Reports which are listed when the **F6 Print** button is chosen in Reports. Examples of Reports sent through the Report Scheduler are scheduled to update accounts, send emails, update history etc. There are 3 windows to check:

- Waiting
- Running
- Printed

Ensure that the queue does not have unwanted print jobs blocking the queue. It is also worthwhile to delete the Printed jobs occasionally.

To delete the Print Jobs
1. Click the Printed Radio button
2. Highlight the jobs to be deleted and press **F4 Delete**
3. A message will display
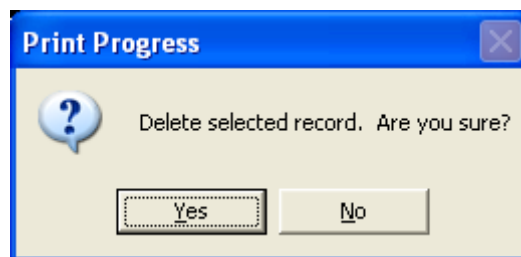
4. Answer **Yes** to confirm deletion
5. This will mark them for deletion with a **X** in Column 1
6. Press **F3 Save** to save the deletions

Files – Delete Unwanted Files
It is recommended to delete all unwanted Files e.g. Import files regularly. Files can be checked in Borrower, Authority, Catalogue and Stockitem. Below is the procedure to delete unwanted Stockitem Files

1. Launch the *Amlib* client

2. Go to **Main** > **Stockitem** > **Stockitem** – the Stockitem screen will display

3. Go to **File > Display File**

4. Highlight the Files to be deleted and press **F4 Delete**
5. This will mark them for deletion with a **X** in Column 1

Note: It is possible to cancel the deletion at this stage by highlighting the Files NOT TO BE DELETED and pressing the **F4 Delete** button (again). This will remove the X from the highlighted Files and then will not be included in the deletion

6. Press **F3 Save** to save the deletions
7. A confirmation message will display
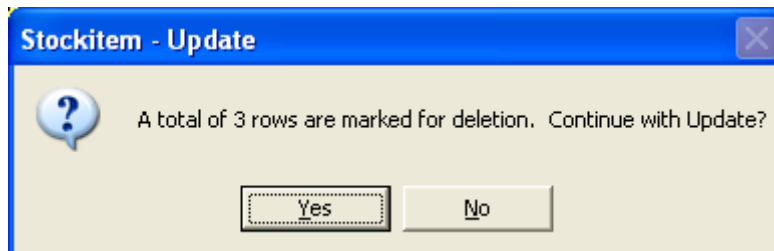
8. Answer Yes to delete or No to cancel.

**Note**: The same procedure can be used for the Files in the Authority, Catalogue and Borrower Modules

Issues Audit

This Audit is set in Supervisor > Installation > Other > "Create an audit for all Issues prompted with messages (Y/N)

Warning: If activated, delete logs regularly, as each transaction in Issues *that invokes a message* is recorded. Therefore this log builds up very quickly.

To check or delete the logs

1. Launch the *Amlib* client
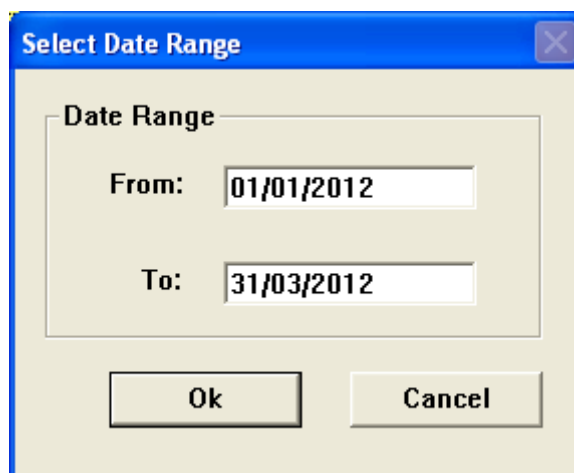2. Go to **Supervisor > Library Menu > Issues Audit**

3. The Issues Audit window will display

4. To Order the Issues Audit go to **Issues Audit Menu > Order**

5. The Choose Order Columns Window will display
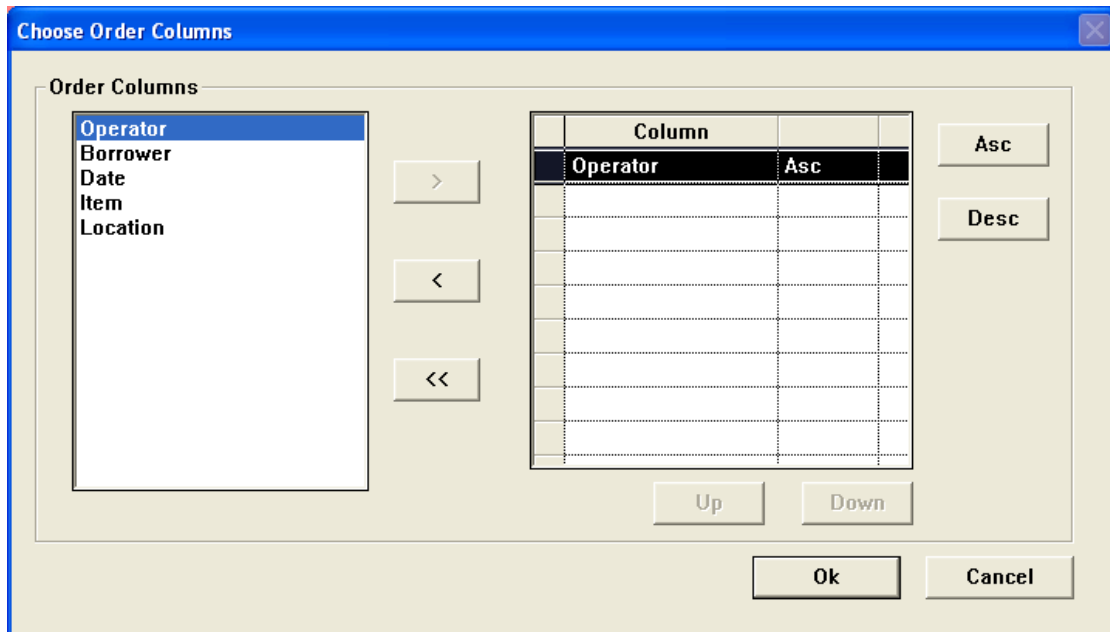
6. Highlight the required Order and arrow across to the right hand Column. Select Asc (Ascending) or Desc (Descending) as required

7. Click OK when the Order has been selected

To Filter the Display by Date

1. To filter the display by date go to **Issues Audit Menu > Filter by Date**

2. The Choose Select Date Range will display

3. Enter the required Date range for the beginning (From) and for the end (To:) in the format dd/mm/yyyy and click OK.

To Delete logs from the Issues Audit Table

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **Supervisor** – the Locations screen will display

3. Go to **Library Menu > Issues Audit**

4. Highlight the Issue Audit logs to be deleted and press **F4 Delete**
5. This will mark them for deletion with a **X** in Column 1
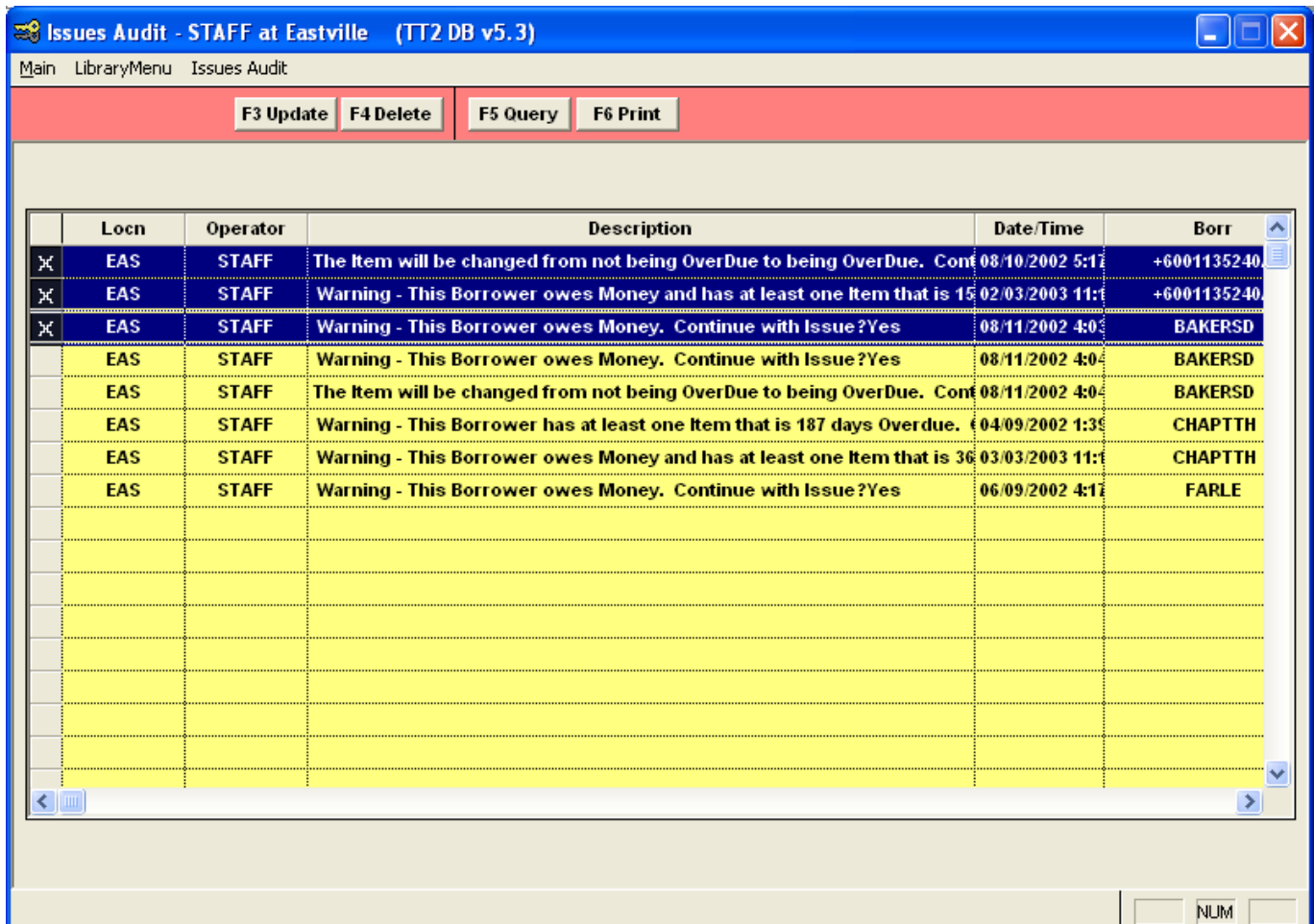
Note: It is possible to cancel the deletion at this stage by highlighting the Logs NOT TO BE DELETED and pressing the **F4 Delete** button (again). This will remove the X from the highlighted Logs and then will not be included in the deletion

6. Press **F3 Save** to save the deletions
7. No confirmation message will display. The Logs will be deleted

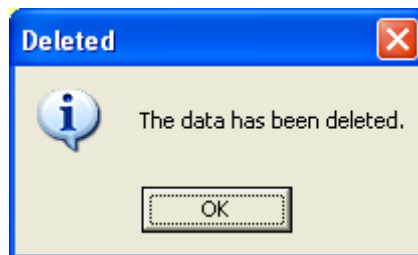**Delete Issue Audit Logs by Date Range**

1. To Delete by date go to **Issues Audit Menu > Delete by Date**

2. The Choose Select Date Range will display

3. Enter the required Date range for the beginning (From) and for the end (To:) in the format dd/mm/yyyy and click OK.

Last Updated: 26 February 2013
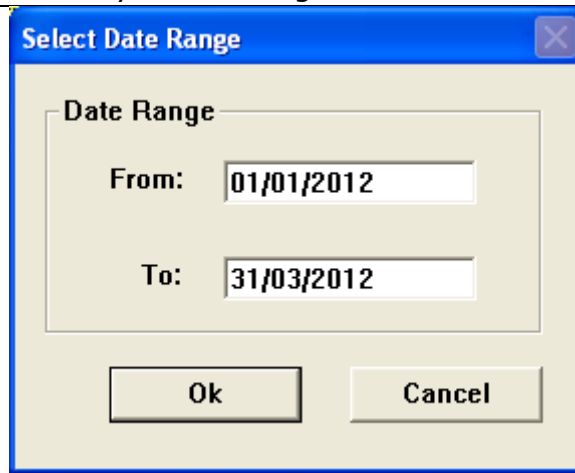
4. A Confirm Delete message will display
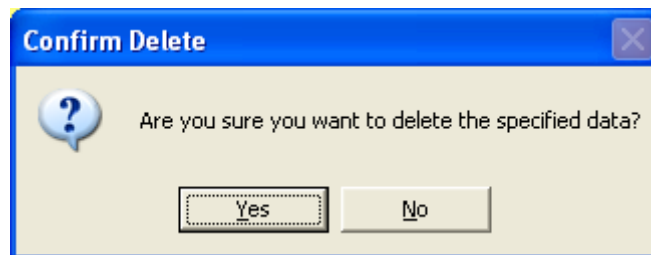
5. Answer Yes to delete or No to Cancel
6. If Yes is selected a message will display. Select OK to continue

Netopac Logs

A log record is automatically created whenever an error occurs on the database when using Netopacs. The Netopac.log will be located on the Web Server in the **NetOpacs Folder**. The Netopac.log can be deleted occasionally.
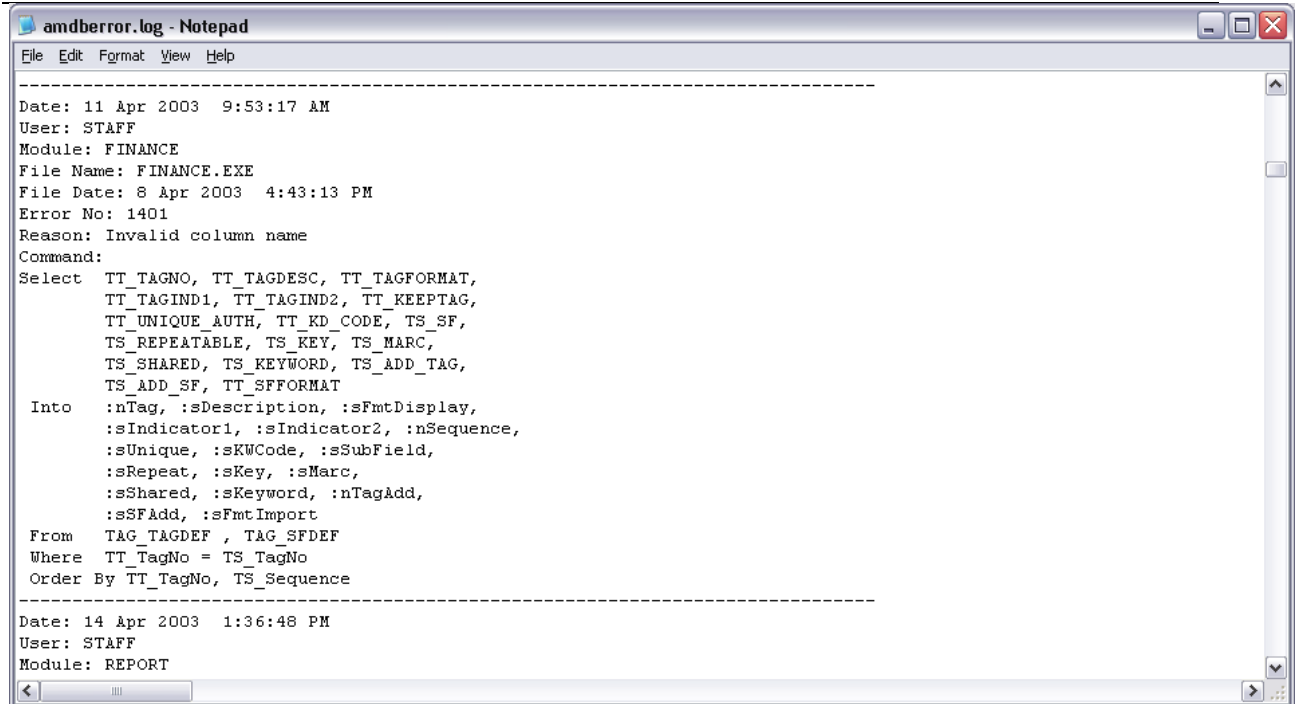

Old entries can be deleted e.g. older than 2 months
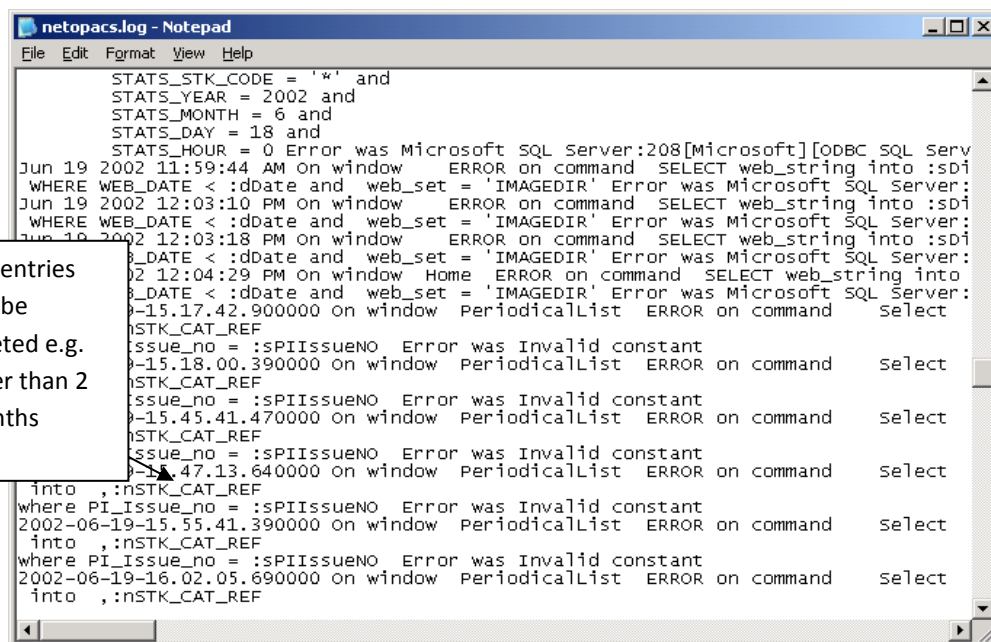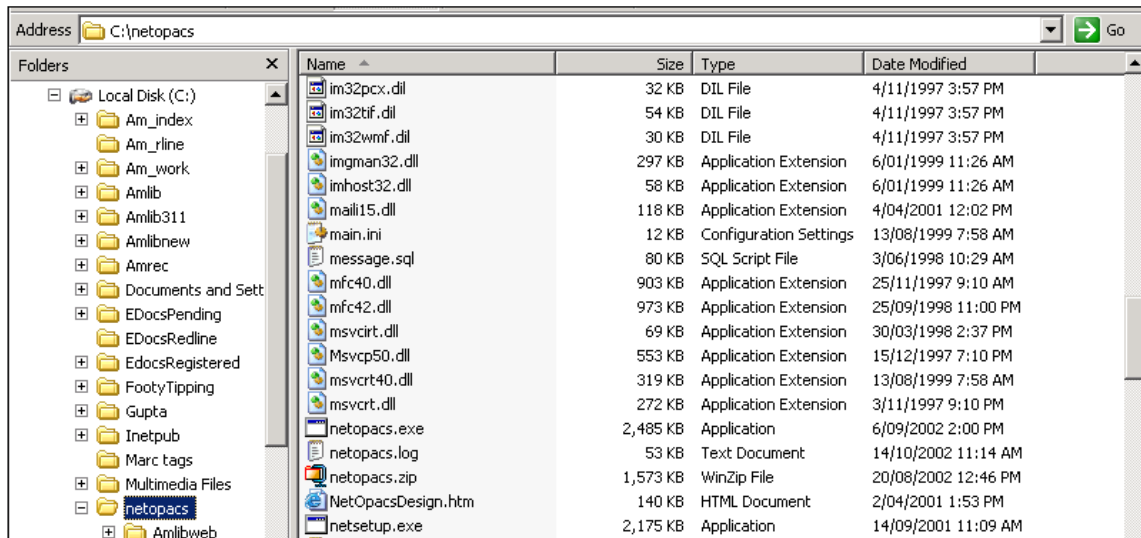
Amdberror.Log

Any SQL errors are written to a log. In case of SQL errors encountered, this log can be emailed to OCLC support for verification. This error log can be accessed from the **Amlib Folder**.

The report is in ascending date order and therefore the *latest errors* are at the end of the document. The Text file can be cleared by highlighting and deleting the text e.g. every 6 months.

Check Server Disk Space

Ensure that the free space on the server running SQLBase or Oracle. Generally there should be at least 500 Mb free space. If the free space falls below 100 MB immediate action will be required to prevent a system crash.

Icon Setup On New Pcs

When installing a new Amlib Client machine, a decision needs to be made as to where to access the Amlib programs according to the following options:

- Access to Amlib Programs from the Server **or**
- Install the programs locally and access from the new PC

If you are not sure where you currently access the Amlib program from you can find out by:

1. Right-click on the Amlib Icon of a different Amlib Client and select **Properties**

2. On the shortcut tab, locate the **Target** field and note the file path

    - If the Target point to a different drive – for example a library drive or I:/ drive etc then you are most likely accessing Amlib from a server: follow **Option 1**

    - If the file path points to C:/Amlib/Amlibtop.exe then you are most likely accessing the program from a locally install on the PC- follow **Option 2**
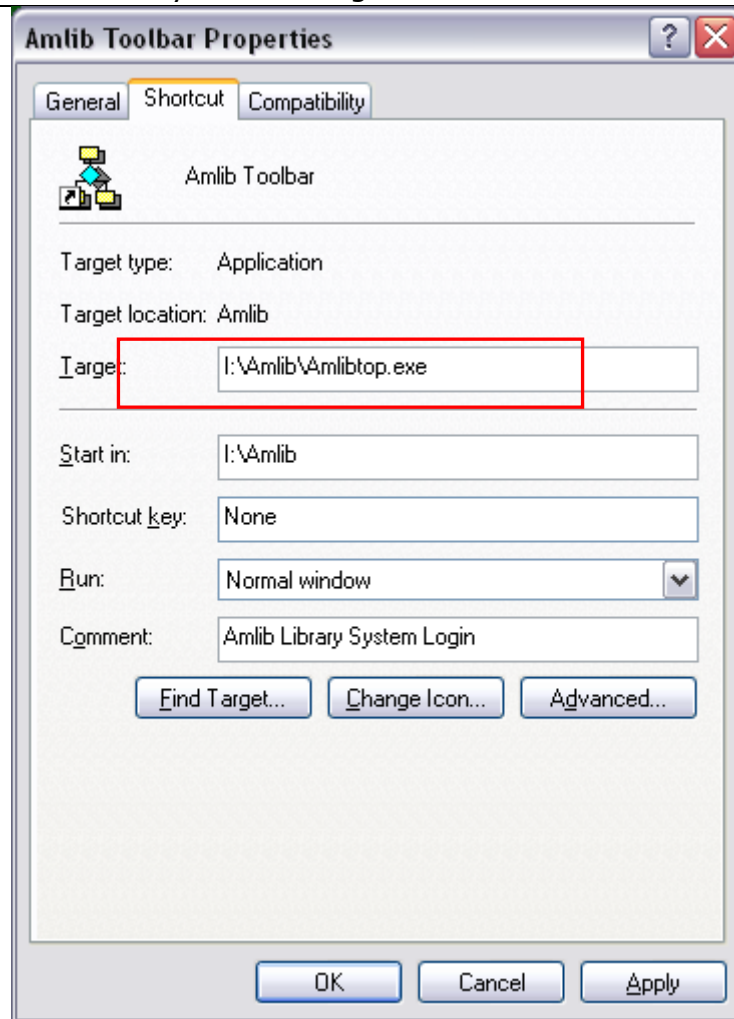
Option 1- Access the Programs from the Server

In the *Amlib* folder on the server, navigate to Amlib > Utilities > Icons > Iconsetup.exe

Copy the Iconsetup.exe file to the new PC and run the file on the PC as below, browsing to the Amlib folder on the server – see notes below

Option 2- Install the Amlib programs

Copy the Amlib folder from an existing PC that is running Amlib (or from the Server). This will ensure that the Programs are the Version suitable for the Database.
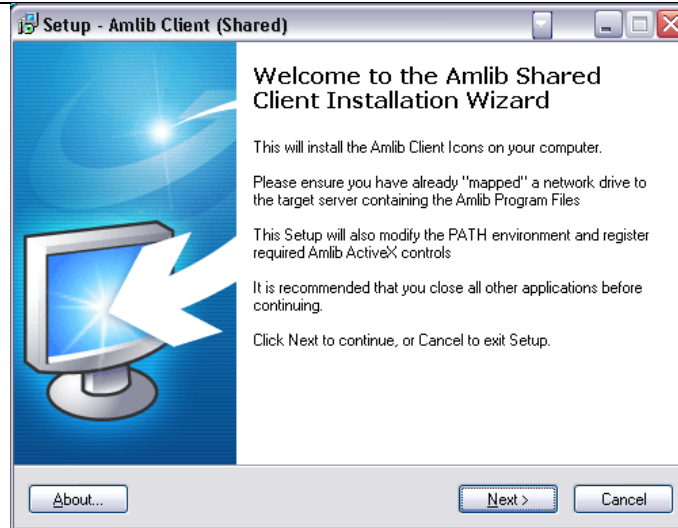
Run the Amlib > Utilities > Icons > Iconsetup.exe file on the PC and browse to the Amlib folder on the local PC where you have just saved it

Running the IconSetup Facility

This is used to set up PC Icons, set the Database Login, and for installing Active X.

1. Access the Icon Setup facility from Amlib > Utility >Icons > IconSetup.exe. Double clicking on it will bring up a Wizard

2. Browse for the path of the Amlib program files. Find the folder where this PC will access Amlib from (as per Option 1: the Server, or Option 2: Local PC). Once selected click **Next**
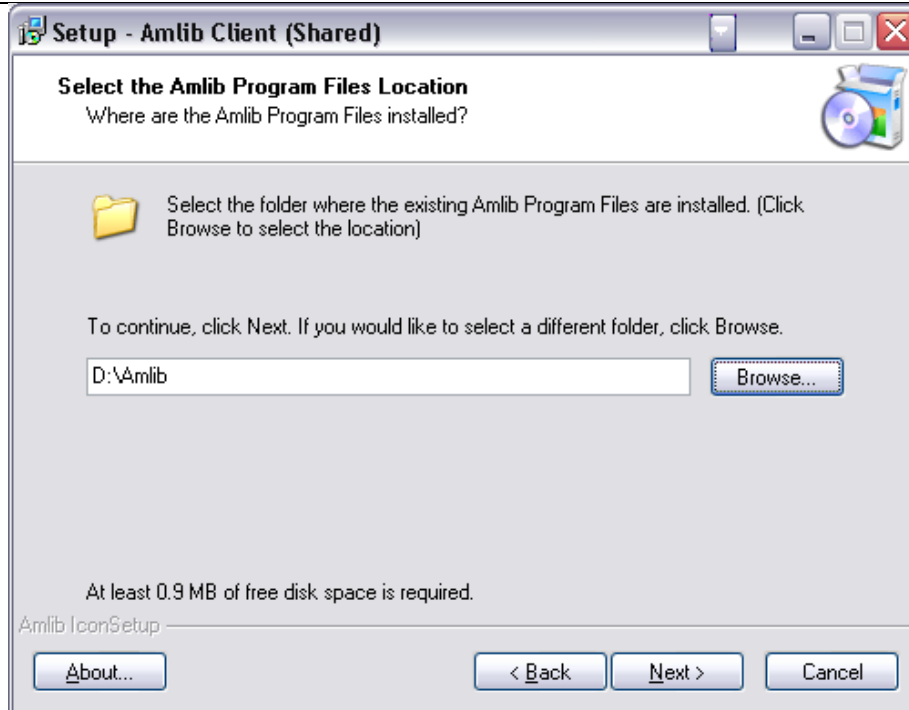
3. In the "Select Components" dialog, "Choose Modules To Install" and also generally select the boxes for "Admin Tasks" (to ensure the Database connection is correct in the Amlib configuration file). Click **Next**
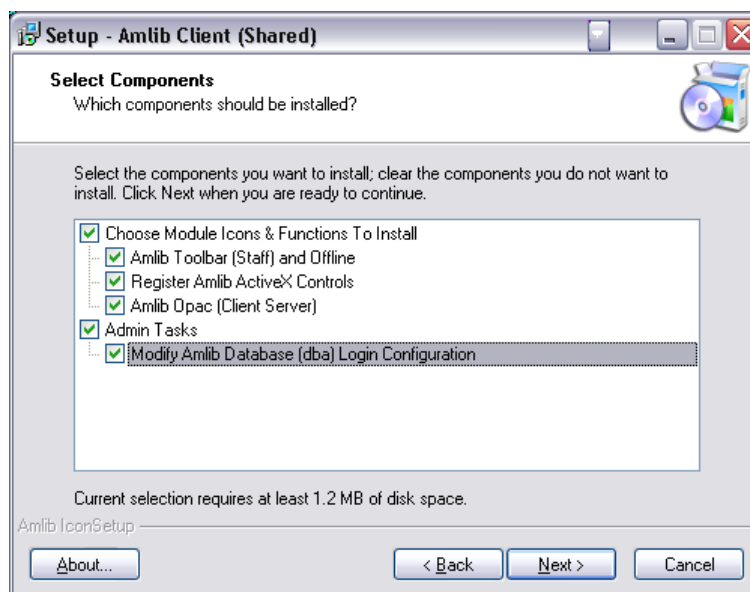

4. Enter the Database login and Password. Enter the correct Username and Password (usually SYSADM for both). For security reasons, this will be encrypted when stored in the configuration file. Click **Next**
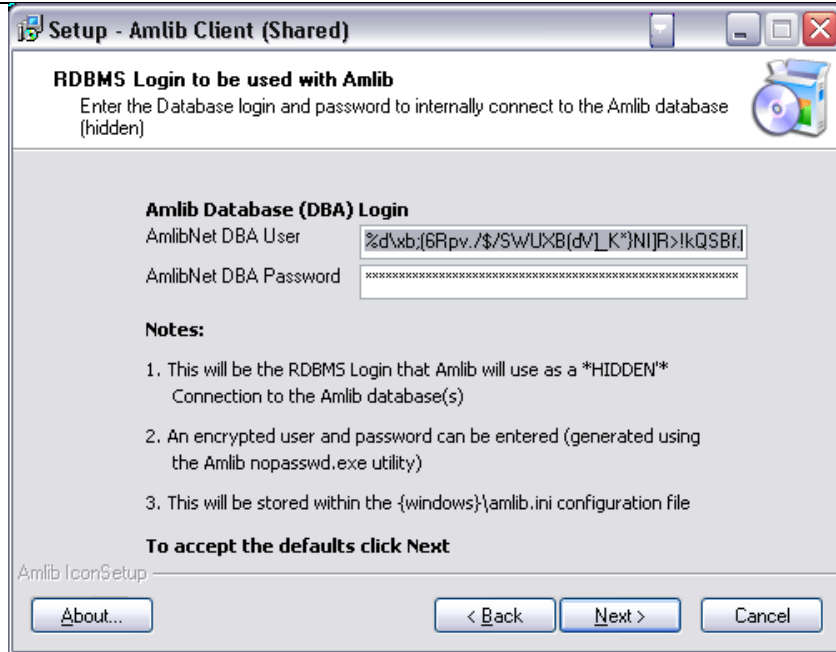
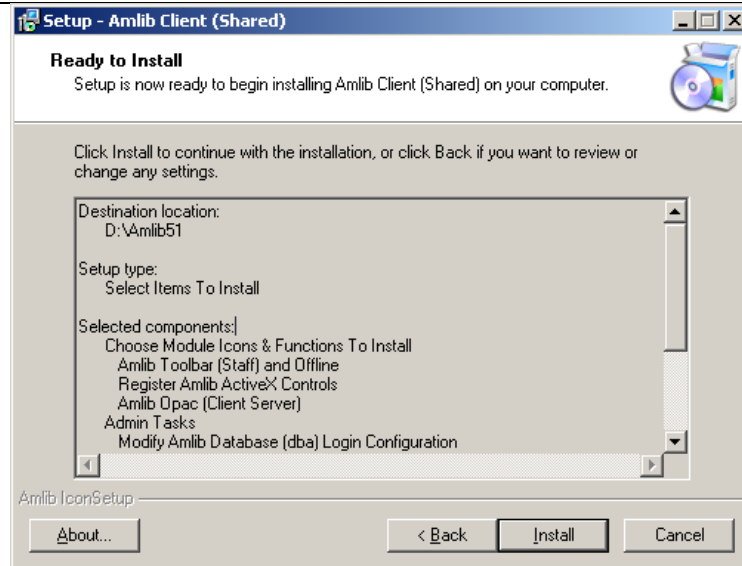5. Choose the Destination for the Shortcut. Usually the default is fine. Click **Next**
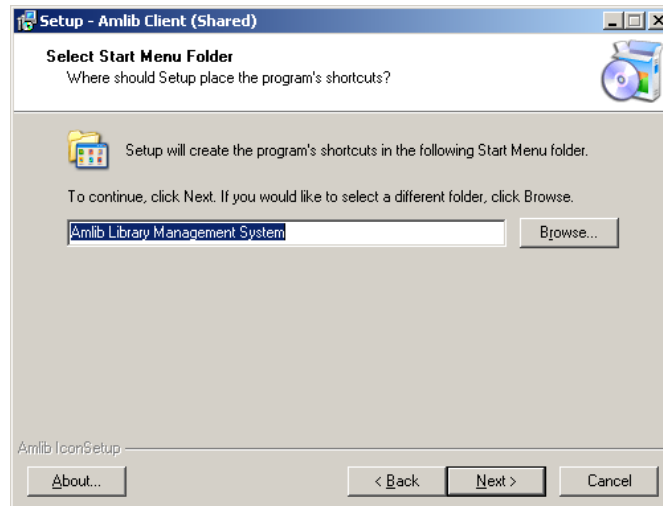
Select Additional Task. Generally Install desktop icons for selected Components. Click **Next.**
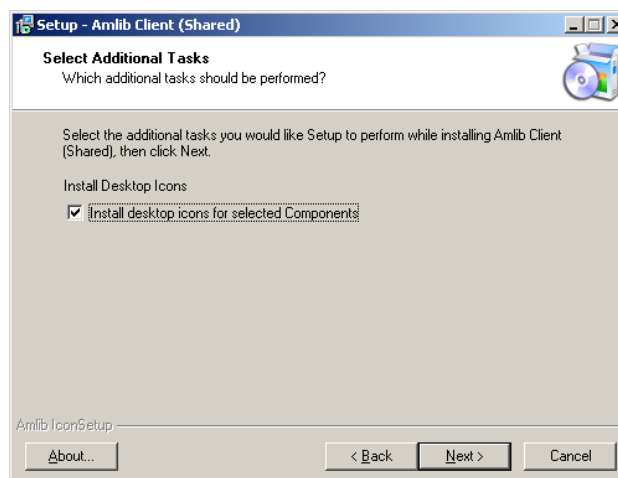
6. Ready to Install. Review and Confirm and select **Install**

7. Select **Finish** to exit the IconSetup Utility

Note: If the Amlib path is already pointing to the correct file and you wish only to set the Database Login, take off the ticks in Select Components Window - **Choose Module Icons and Functions to Install** at Step 3. Click **Next.**

SYSTEM MANAGEMENT FUNCTIONS

Emergency Planning

In the event of emergencies, the most important precaution is to have sound backups. If the Server hard disk fails or for some reason becomes unusable, it may be necessary to restore your data from tape. Check the backup information supplied with this manual.

Offline Circulation

Setting Up Offine On A Pc

Amlib Offline is a facility which enables barcodes to be read while the Amlib Programs are unavailable from the Server. It can also be used on a computer disconnected from the network e.g. A laptop used for a Mobile library. When the Server is available again and the Issues screen is in operation, the files from Offline can be downloaded using the Borrower/Offline Issues menu from the Issues Window.

Check the Supervisor/Check Digits screen to ensure that there is a table of Barcode validations set up. If this is blank, it will be necessary to enter the validations of the Barcodes that are used (see below). Every time this table is updated, a message will display. The new offline.ini that is created will need to be copied to the offline folder on each PC.
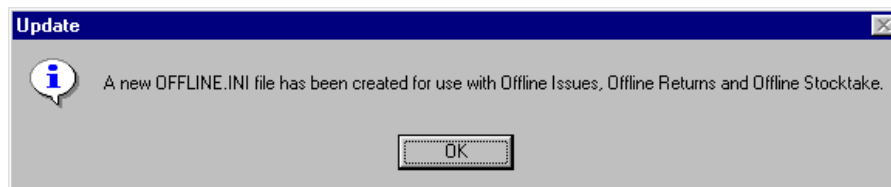
A Folder needs to be created on the local disk (e.g. C:\ drive) of Circulation PCs in a separate directory, especially where Amlib is loaded from a network drive. This will enable the Offline module to be used even if the network or server is down. This folder needs to contain:

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

Offline.exe (offline application)

Deploy (contains many of the dll files needed to run the program). Copy all files from the Deploy folder to the Offline folder. As well as the Deploy contents, one extra dll (Amshell.dll is needed - This found in the Amlib/Programs directory.

Offline Operation

A Windows Shortcut can be set up on the Desktop. When loaded, select the relevant application from the Options menu.
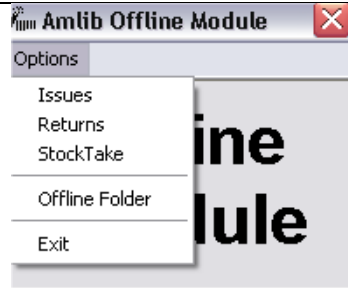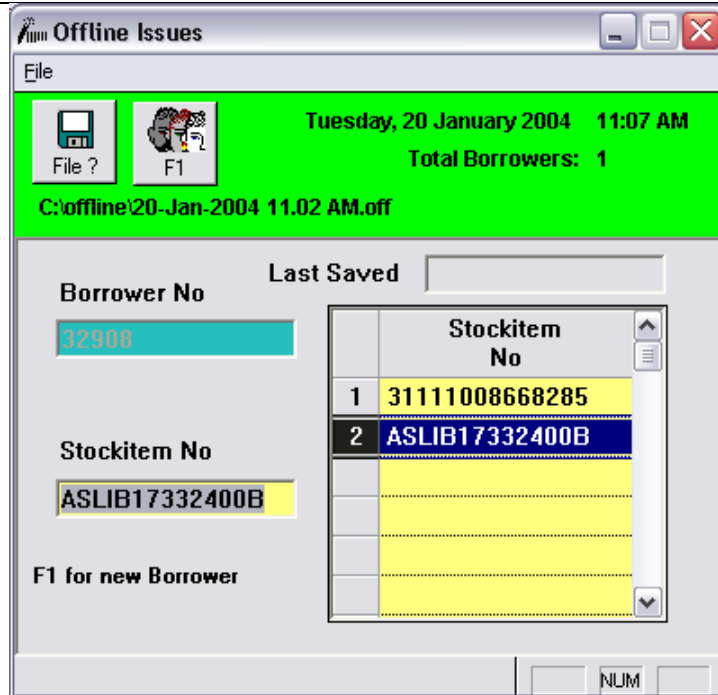
When an option is chosen, a File is created automatically with the date and time as a File Name. Ensure the path is correct.
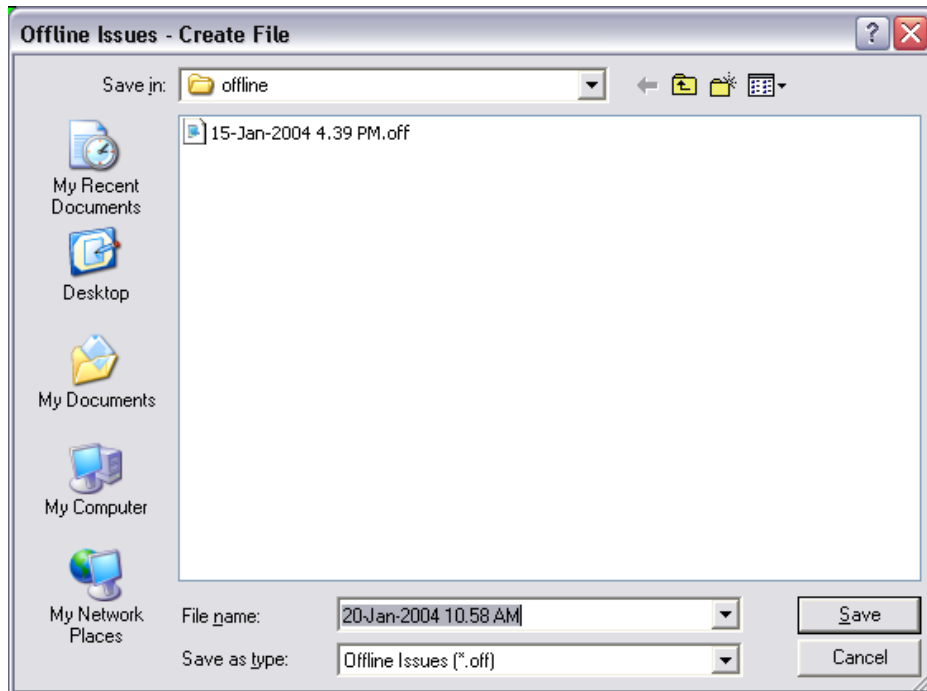
If an existing File is chosen, it is possible to overwrite the existing file or append to it. This is useful for Mobile libraries where there are several stops.
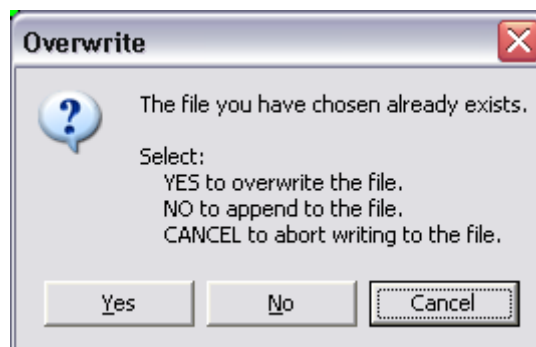
As Borrower and Item barcodes are entered, the system will write records to the file. To change to a new borrower select **[F1].** The table is cleared whenever a new Borrower barcode is wanded. If a Barcode does not comply to the Offline.ini file a message will display:

If many offline transactions are being entered, e.g. for half a day or more, it would be a good idea to start a new file. To change to a new file just click the file ? icon.

The offline facility may also be used to capture Returns and Stocktake information. The Returns and Stocktake output file format is one item number per record.

Note: In order for the program to correctly validate check digits there must be a file of the name 'offline.ini' in the working directory of the PC. This file is recreated whenever you change the Check Digits window in the Supervisor module.

Once captured to file as above, the barcodes are able to downloaded when the Server is available once more. Download:

- Offline Issues (from Issues/Borrower menu)
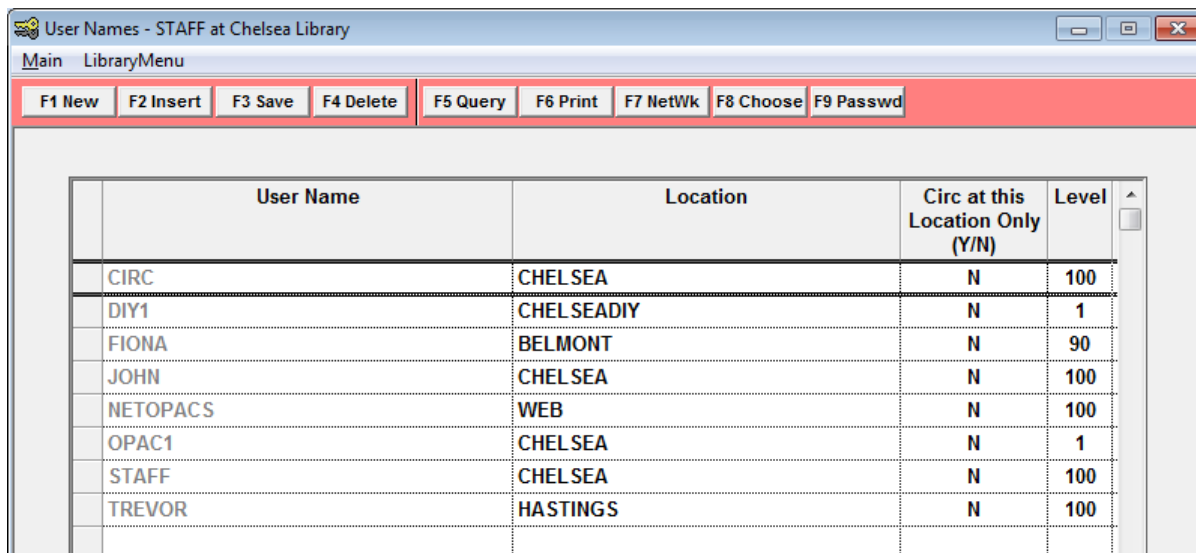- Offline Returns (from Returns/Borrower menu

CREATING NEW USERNAMES

It is possible to create to create user-specific logins for the *Amlib* client which can then be configured to allow access to only certain modules, screens, menu items and buttons.

View Existing Usernames

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **UserNames** – the User Names table will display:

3. A list of existing User Names will be visible with the following settings:

FIELD	EXPLANATION	
User Name	This is the User Name used when logging onto the *Amlib* client	
Location	The default location that displays when the User logs into the Amlib client (the user may select a different location	
Circ at this Location Only (Y/N)	Y	Can operate Circulation only at the location specified in the Location field
	N	Can operate Circulation at all Locations within the system
Level	An indication of the user's permissions levels setup. Some of the tasks on the system can also be limited using User Level (for example: Attachment security level, default Authority security level , etc), although it is rarely used.	

Enter a New User

1. Click the **F1 New** or **F2 Insert** button – a new entry will appear in the table

2. Type in the following:

   a. User Name – use one word only (for example: **CHRIS** or **CHRISW**)

   b. Location – the default login location of the user

   c. Circ at this Location Only – **Y** or **N**

   d. Level – the level against a User is used only as a guide

3. Click the **F3 Save** button – the Operator Password screen will display:

4. Type in a Password and Confirm Password

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

6. Close and restart the *Amlib* client to allow the new User Name to come into effect

Resetting User Passwords

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **UserNames** – the <u>User Names</u> table will display

3. Highlight the User Name in the table

4. Click the **F9 Passwd*** button – the <u>Operator Password</u> screen will display:

5. Type in the new <u>Password</u> and <u>Confirm Password</u>

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

7. Click the **F3 Save** button

8. Close and restart the *Amlib* client to allow the new Password to come into effect

***Please Note:** If the **F9 Passwd** button is not visible – the button will have to be activated for the User who is resetting the password (see <u>below</u>).

USER PERMISSIONS

Amlib client User Names can be configured to allow access to only certain modules, screens, menu items and buttons. Only Users with full Supervisor permissions can edit the permissions for other Users.

View Existing User Permissions

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **UserNames** – the User Names table will display

3. Highlight a **User Name** in the table – for example: **JOHN**

4. Click the **F8 Choose** button – the User Security screen will display:
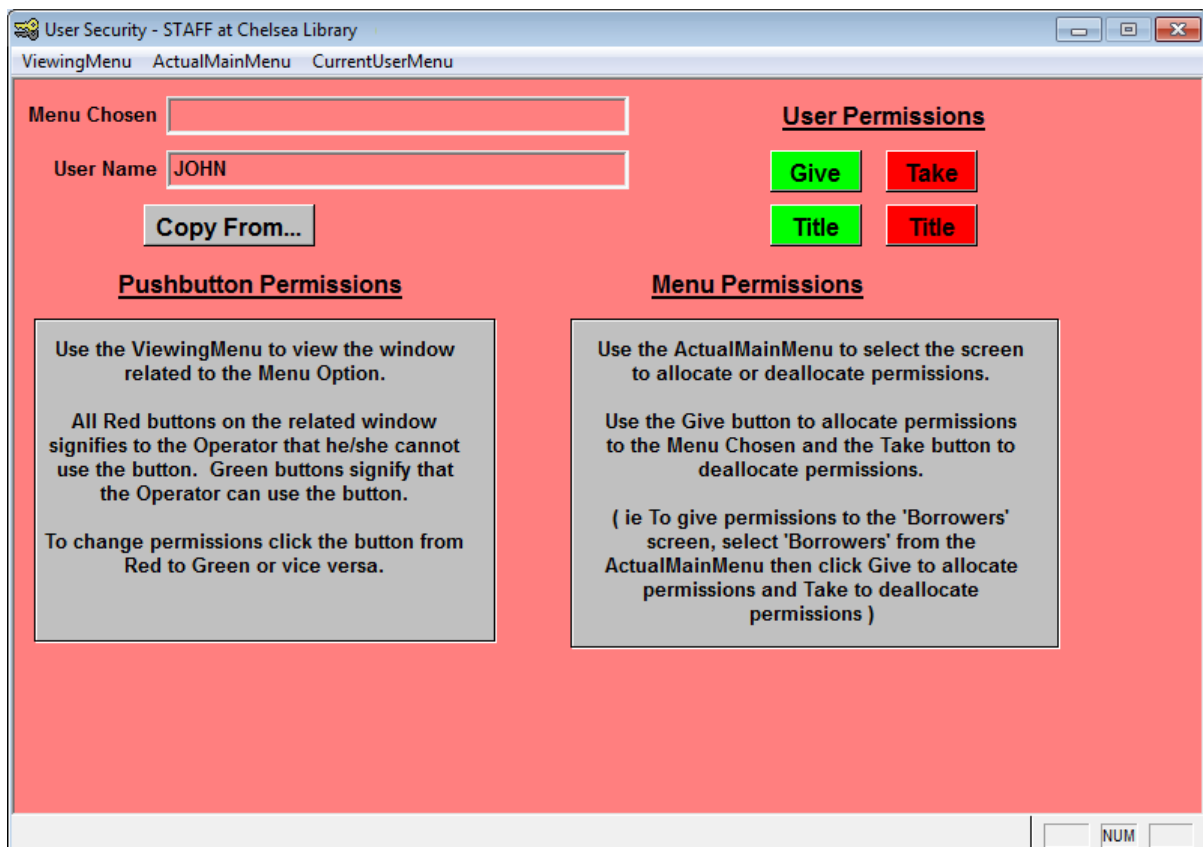
Menu Options

*   **ViewingMenu:** is used to show/hide the buttons that appear on any given screen for the selected User

*   **ActualMainMenu:** lists the modules/screens/options available which could *possibly* be assigned to the selected User

*   **CurrentUserMenu**: lists the modules/screens/options *actually* assigned to the selected User (**bold** for active, grey for inactive)

Give	When a screen/option is selected from the <u>ActualMainMenu</u>, the **Give** button is used to ENABLE the selection – for example: **MassBorrowerChange**
Take	When a screen/option is selected from the <u>ActualMainMenu</u>, the **Take** button is used to DISABLE the selection – for example: **MassBorrowerChange**
Title	When a screen/option is selected from the <u>ActualMainMenu</u>, the **green Title** button is used to ENABLE access to the module as a whole – for example: **Borrower** module
Title	When a screen/option is selected from the <u>ActualMainMenu</u>, the **red Title** button is used to DISABLE access to the module as a whole – for example: **Borrower** module

- If access to certain Titles (modules) is DISABLED, the selected User will see fewer icons on the *Top Bar* once they log in (the module names will also be *greyed* out):

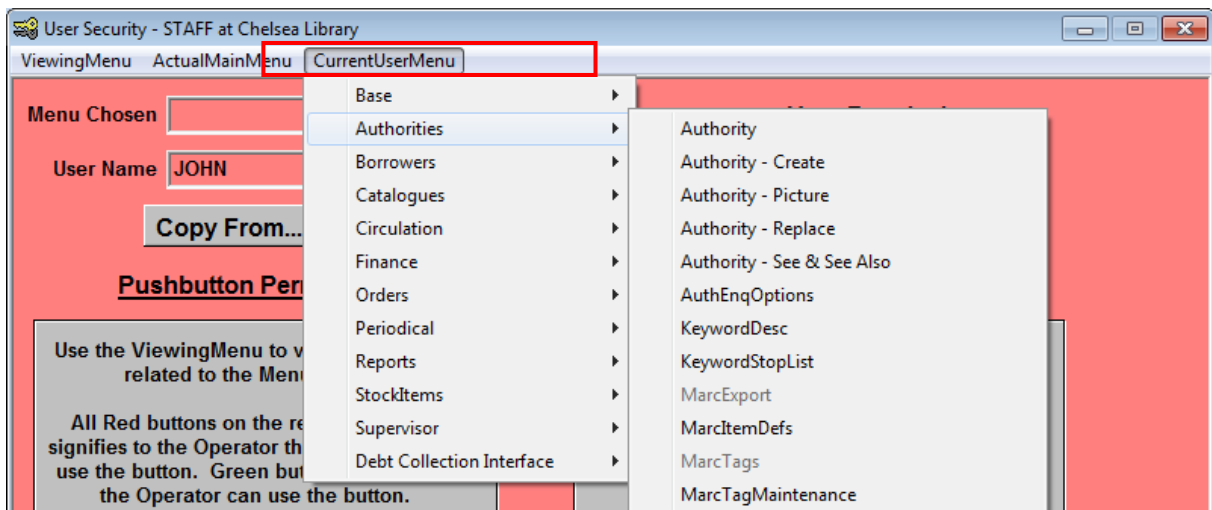## Enabling a Single Username Permission

1. Go to **Main** > **Supervisor** > **UserNames** – the <u>User Names</u> table will display:

2. Highlight the **User Name** you would like to grant a permission to and click the **F8 Choose** button – the <u>User Security</u> screen will display

3. Navigate to the **CurrentUserMenu** to see the permissions that the user currently has ENABLED (any options that appear in *grey* in the menu are permissions that the user does not currently have):
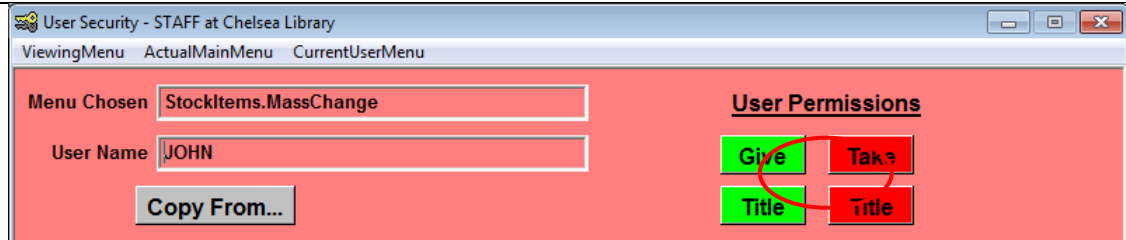

4. To enable a permission, navigate to the ActualMainMenu and then to the menu option you wish to grant- this example uses Stockitem > Mass Change
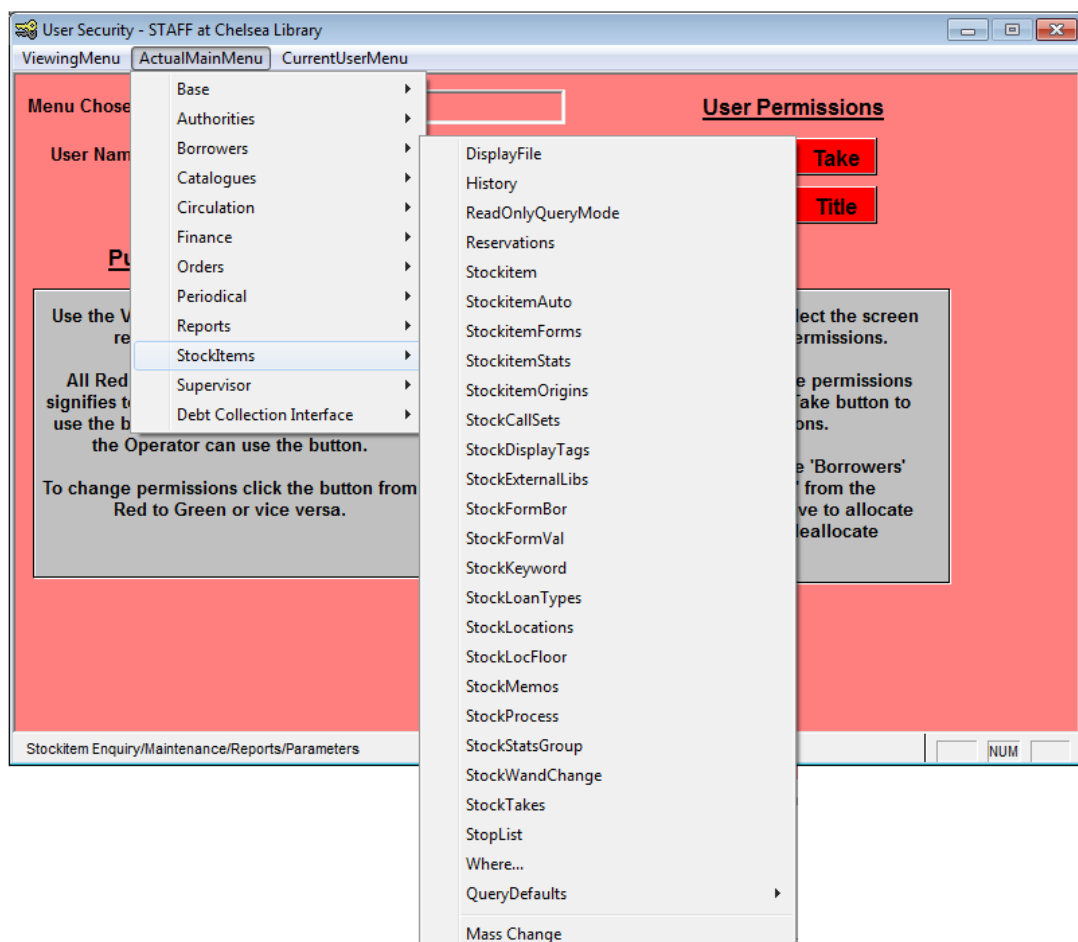
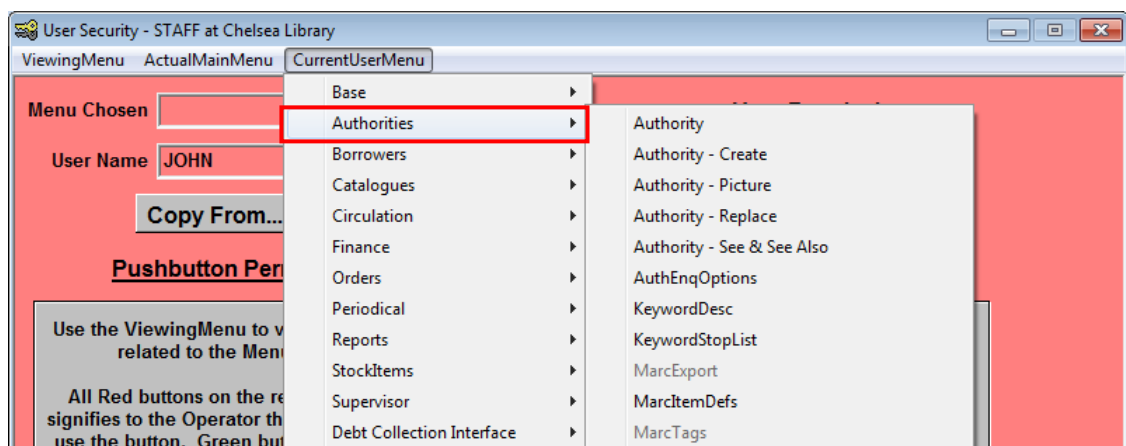4. The chosen menu item will then display in the Menu Chosen box – for example: **Stockitems.MassChange**

5. Click the green **Give** button

6. You can then recheck the setting in the CurrentUserMenu to see if it has been ENABLED (it will be **bolded**)

7. Then close out of the window and restart the *Amlib* client for the change to have effect

Disabling a Single Username Permission

1. Go to **Main** > **Supervisor** > **UserNames** – the User Names table will display:

2. Highlight the **User Name** you would like to grant a permission to and click the **F8 Choose** button – the User Security screen will display

3. Navigate to the **CurrentUserMenu** to see the permissions that the user currently has ENABLED (any options that appear in **bold** in the menu are permissions that are enabled):
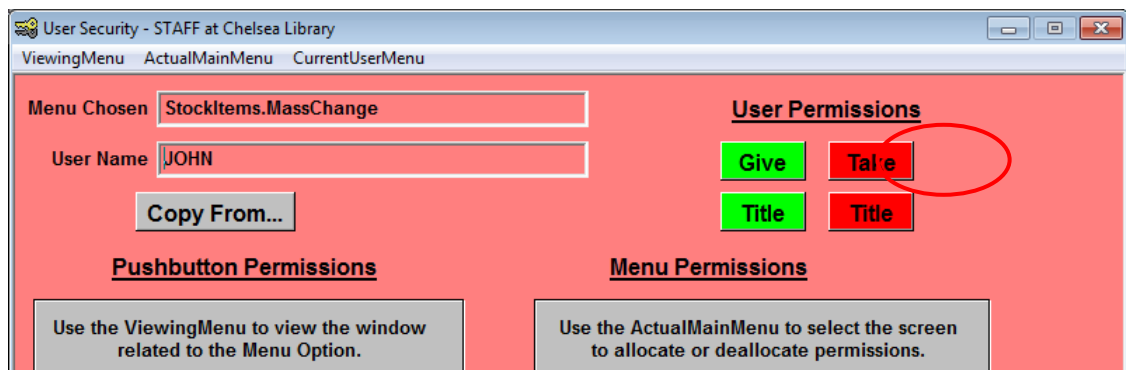

4. To disable a permission, navigate to the **ActualMainMenu** and then to the menu option you wish to grant- this example uses **Stockitem** > **Mass Change**
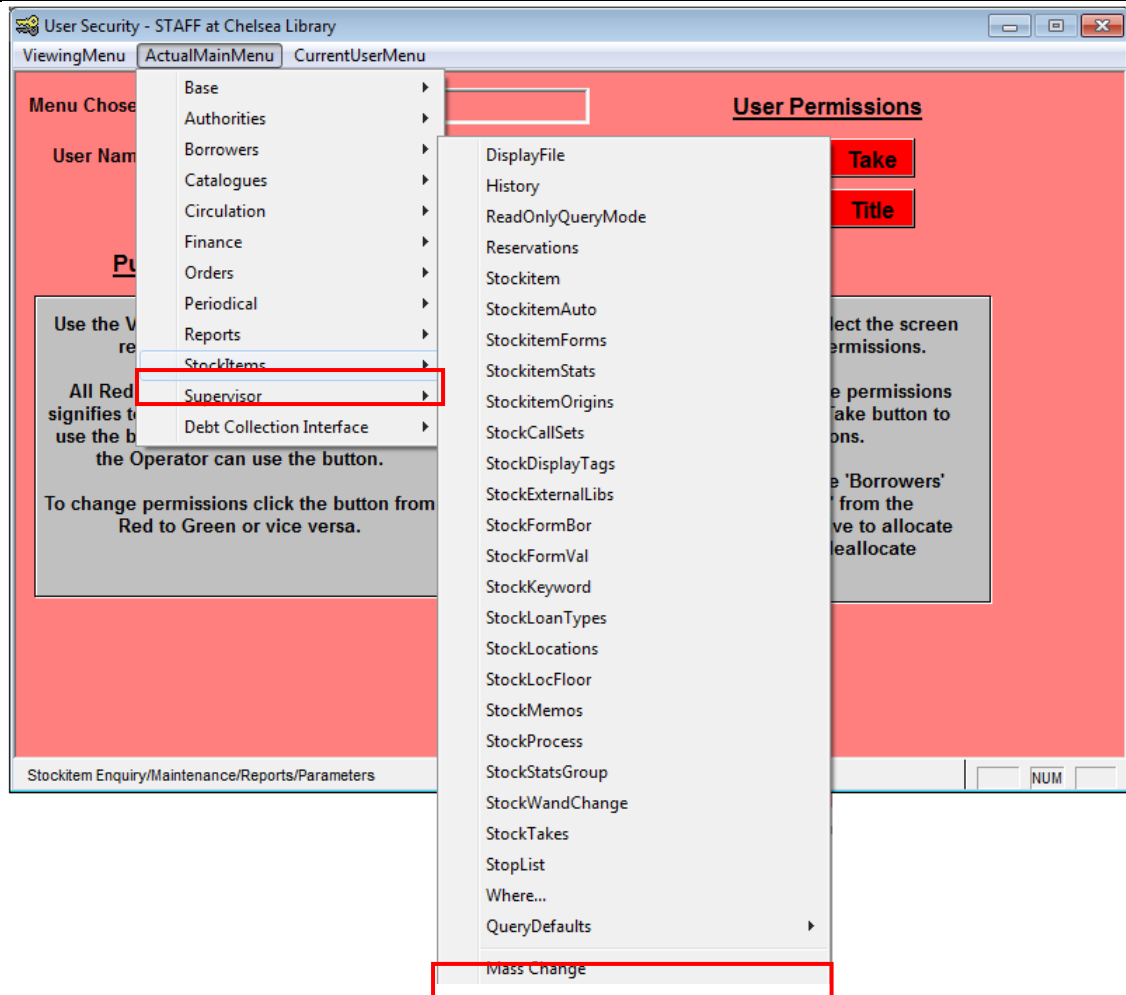
5. The chosen menu item will then display in the <u>Menu Chosen</u> box – for example:
    Stockitems.MassChange

6. Click the red <mark>Take</mark> button

7. You can then recheck the setting in the <u>CurrentUserMenu</u> to see if it has been DISABLED (it will be *greyed* out)

8. Then close out of the window and restart the *Amlib* client for the change to have effect

Enabling Access to an Entire Module

It is possible to control a user's access to entire module.

1. Go to **Main** > **Supervisor** > **UserNames** – the User Names table will display:

2. Highlight the **User Name** you would like to grant a permission to and click the **F8 Choose** button – the User Security screen will display

3. Navigate to the **CurrentUserMenu** to see the permissions that the user currently has – any module names that appear in *grey* in the menu are permissions that the user does not currently have – for example: **Authorities**, **Borrowers** and **Periodicals** amongst others are not permitted for the **CIRC** Username login example below:
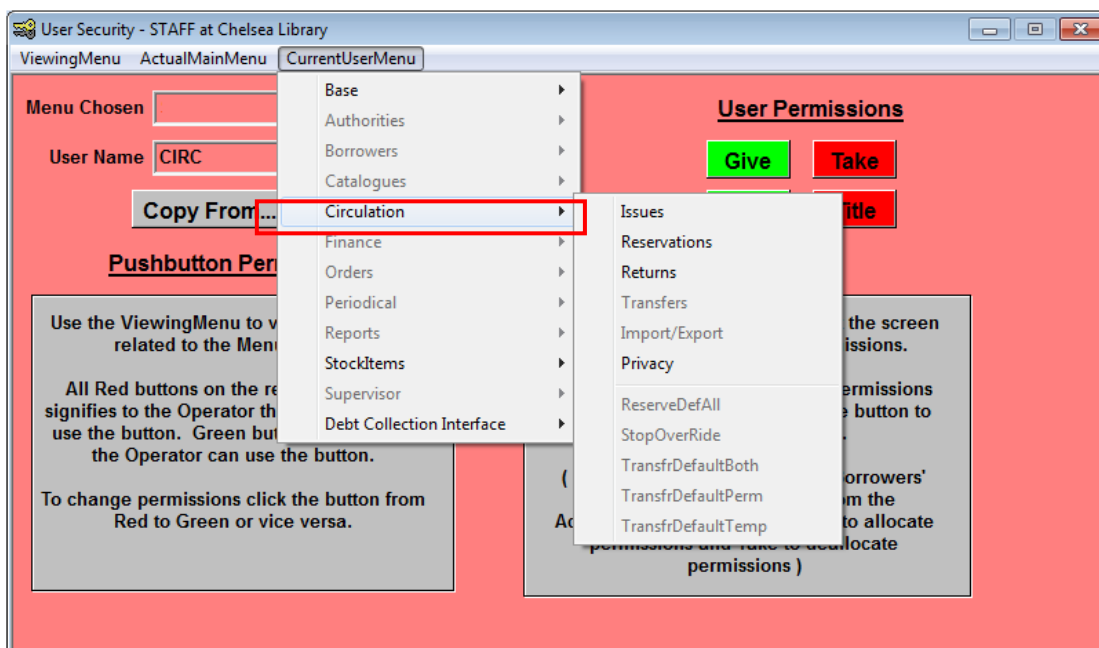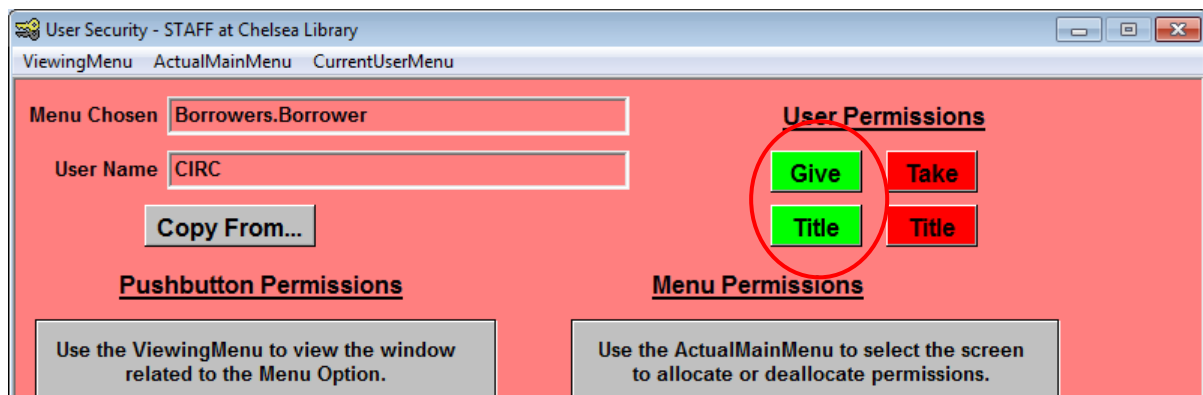

4. To enable a module, navigate to the **ActualMainMenu** and then to the menu option you wish to grant – for example: **Borrowers** > **Borrower**
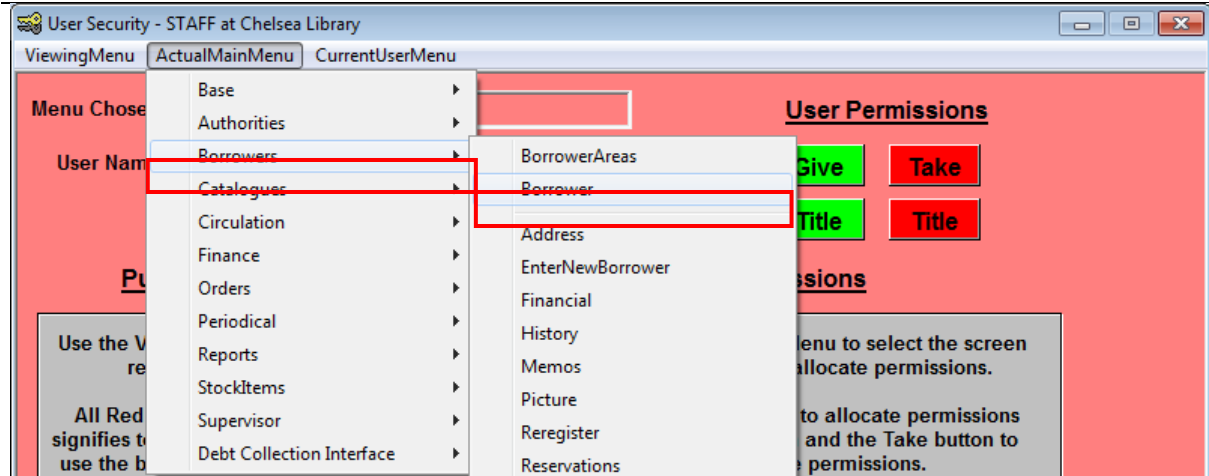
5. The chosen menu item will then display in the <u>Menu Chosen</u> box – for example:
   Borrowers.Borrower

6. Select the green **Give** button and then the green **Title** button

7. Selecting the **Current User Menu** at this stage will show that you have granted access to the <u>Borrower</u> screen only – you still need to add individual menu screen permissions – for example: **History** and **Memos** using the steps outlined above
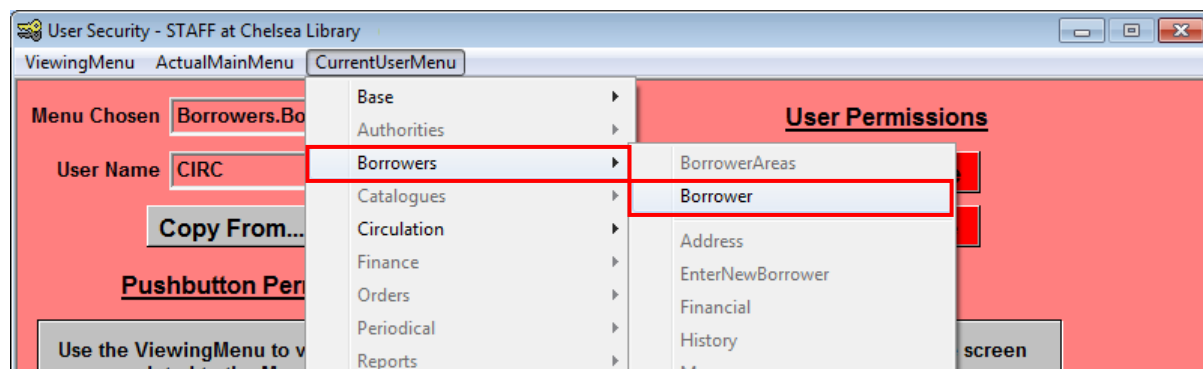
8. Then close out of the window and restart the *Amlib* client for the change to have effect

Disabling Access to an Entire Module

1. Go to **Main** > **Supervisor** > **UserNames** – the <u>User Names</u> table will display:

2. Highlight the **User Name** you would like to grant a permission to and click the **F8 Choose** button – the User Security screen will display

3. Navigate to the **CurrentUserMenu** to see the permissions that the user currently has – any module names that appear in *grey* in the menu are permissions that the user does not currently have – for example: **Authorities**, **Borrowers** and **Finance** amongst others are not permitted for the **CIRC** Username login example below:
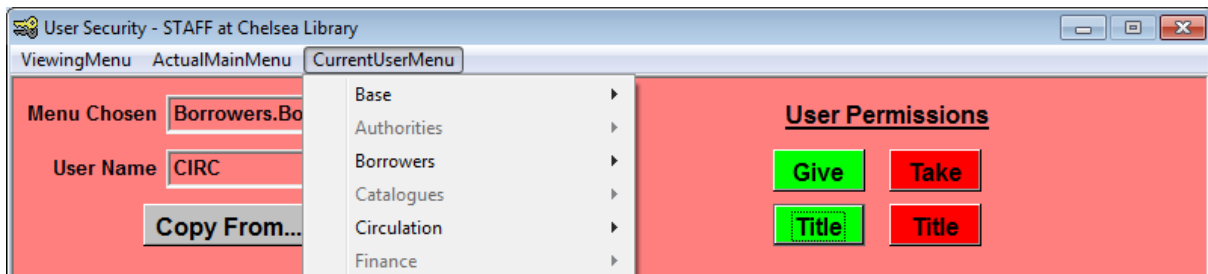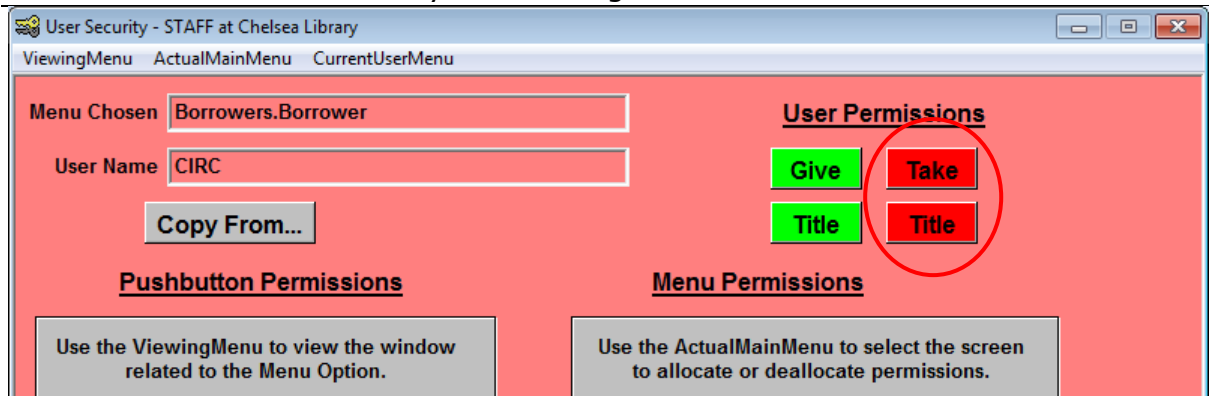

4. To disable a module, navigate to the **ActualMainMenu** and then to the menu option you wish to remove – for example: **Borrowers** > **Borrower**
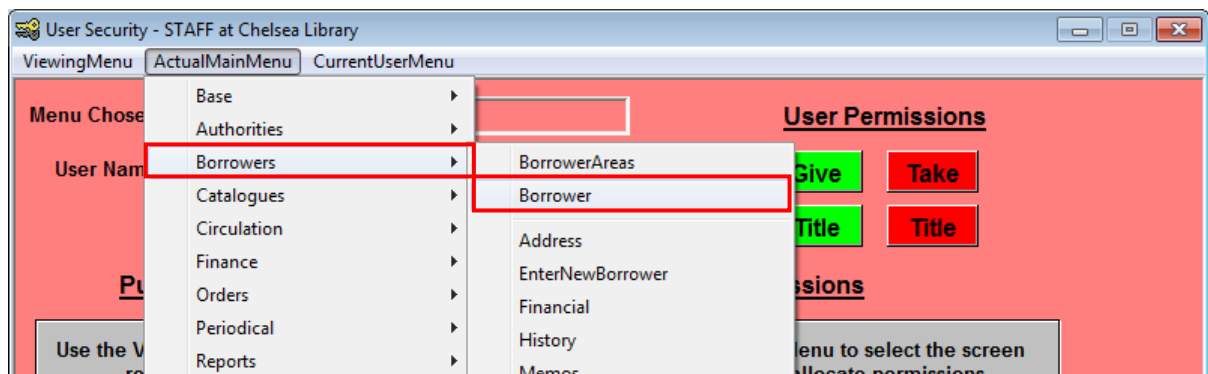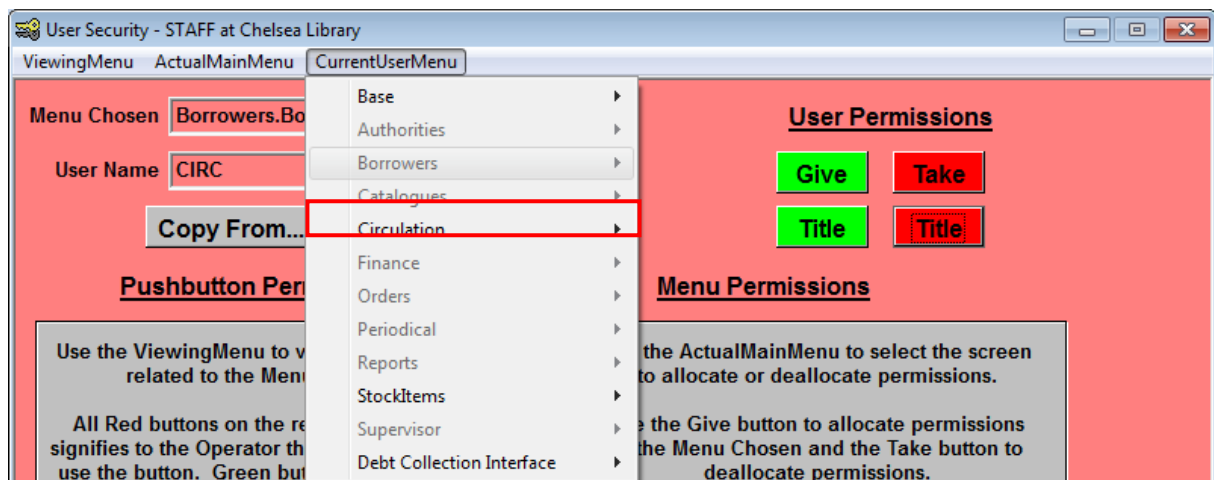

5. The chosen menu item will then display in the Menu Chosen box – for example: **Borrowers.Borrower**

6. Select the red **Take** button and then the red **Title** button

7. Selecting the **Current User Menu** at this stage will show that you have disabled access to the Borrower module

8. Then close out of the window and restart the *Amlib* client for the change to have effect
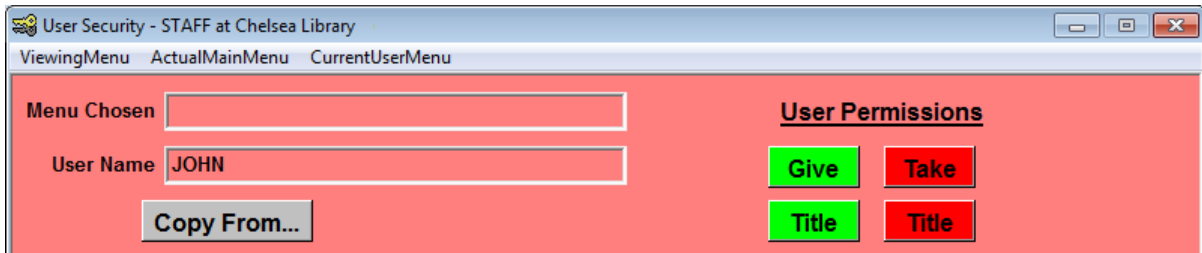
Enabling/Disabling Buttons

It is possible to show/hide the buttons the user sees on any given screen – this can be used to restrict the user's ability to perform certain tasks – for example: perform updates or delete records

1. Go to **Main** > **Supervisor** > **UserNames** – the User Names table will display:
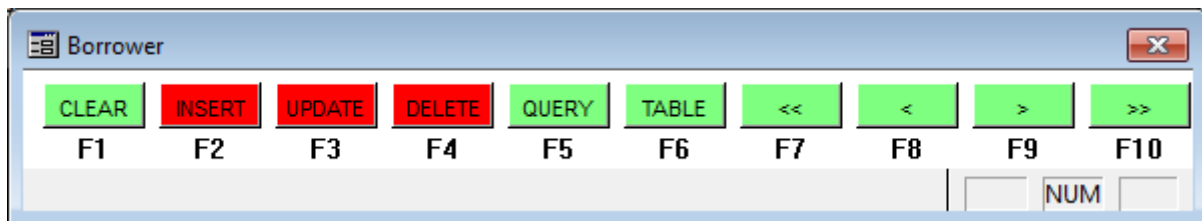
2. Highlight the **User Name** you would like to grant a permission to and click the **F8 Choose** button – the User Security screen will display:


3. Navigate to the **ViewingMenu** and then to the menu option you wish to enable/disable buttons for – for example: **Borrowers > Borrower** – the Borrower buttons menu will display:

The enabled (and therefore visible) buttons will be displayed in **green**, the disabled (and therefore hidden) buttons are in **red**.

4. To enable (show) a button, simply click a **red** button with your mouse – the button will then turn **green** – in the following example, the **DELETE** button has been enabled:
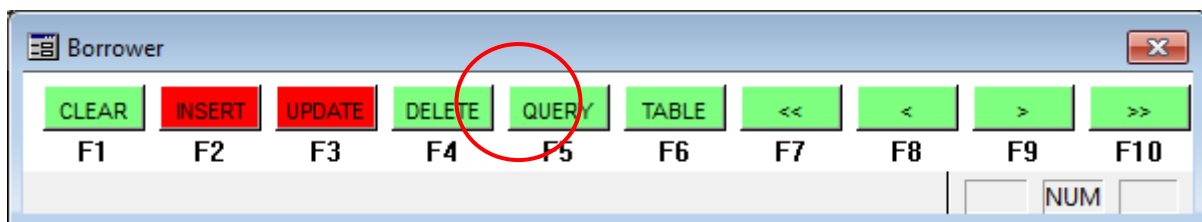
5. Similarly, to disable (hide) a button, simply click a **green** button with your mouse – the button will then turn **red**

6. Then close out of the button menu, the User Security window and restart the *Amlib* client for the changes to take effect
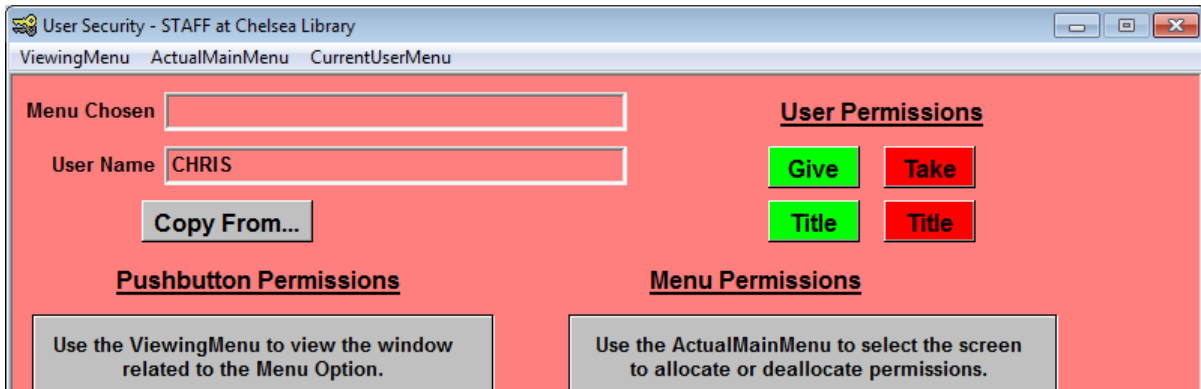
Enabling the F9 Passwd Button on the User Names Screen

1. Go to **Main > Supervisor > UserNames** – the User Names table will display:
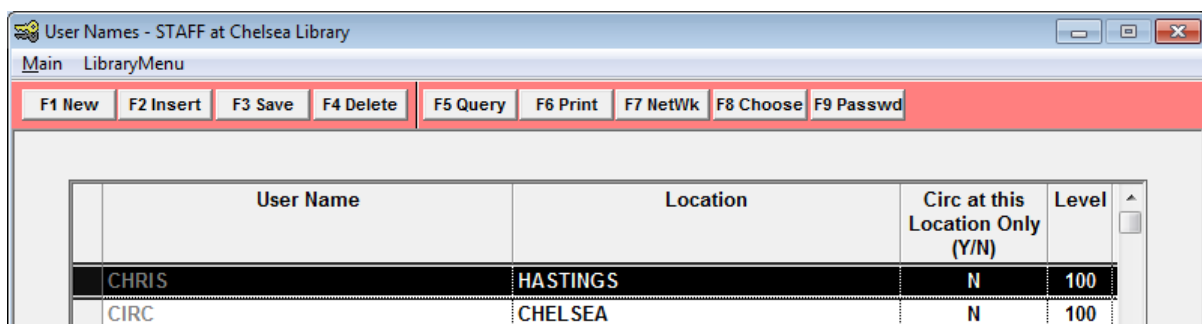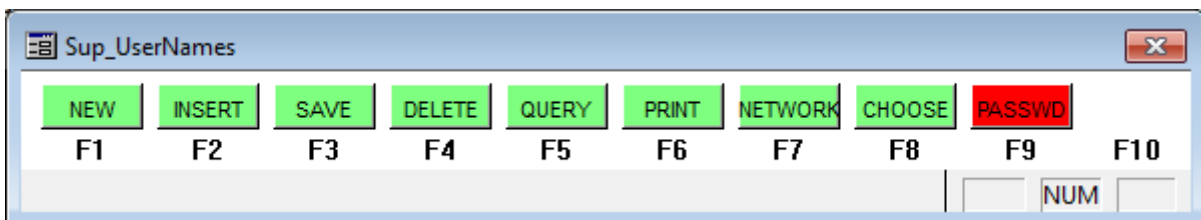
2. Highlight the **User Name** you would like to grant a permission to (this will be the operator who is ALLOWED to reset User passwords) and click the **F8 Choose** button – the User Security screen will display:
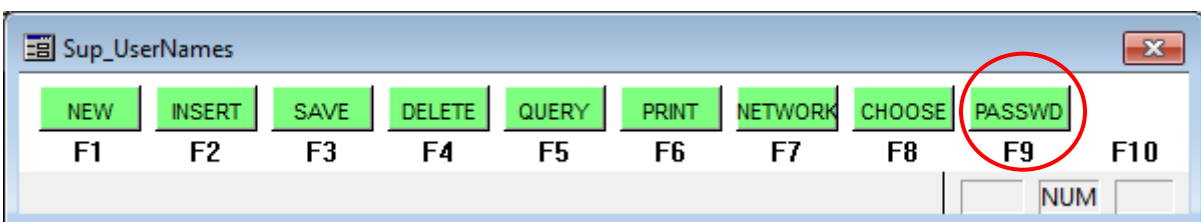

3. From the menu, select **ViewingMenu** > **Supervisor** > **UserNames** – the Sup_UserNames button menu will display:

The enabled (and therefore visible) buttons will be displayed in **green**, the disabled (and therefore hidden) buttons are in **red**.

4. Click the **red** **PASSWD** button with your mouse – the button will then turn **green**:

5. Then close out of the button menu, User Security window and restart the *Amlib* client for the changes to take effect

6. The button will now be visible on the User Names screen when the selected User is logged in

Copying Permissions from One User to Another

It is possible to copy the permissions from another User – for example: copy JOHN's permissions to CHRIS.

1. Go to **Main** > **Supervisor** > **UserNames** – the User Names table will display:

2. Highlight the **User Name** you would like to copy the permissions to (for example: CHRIS) and click the **F8 Choose** button – the User Security screen will display:

3. Click the **Copy From...** button – a Copy From list will display with all the other Users listed:

4. Highlight the Operator whose permissions you would like to copy – for example: **JOHN**
   5. Then click the **Copy** button – a prompt with the following message will display: **XXXXX now has the same Menu and Button Security as XXXXX.**
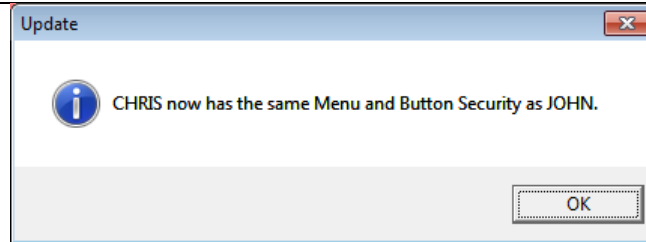
6. You can review the permissions now enabled for this User by selecting the **CurrentUserMenu** – **bolded** selections are enabled, disabled selections are *greyed* out

7. Then close out of the window and restart the *Amlib* client for the changes to have effect

STOCKITEM CAT DEFINITIONS

By setting the Cat Definitions for Forms and Stockitem codes, the correct Stats and Form codes are given to items as they are created. The <u>Default</u> codes **do not** need Cat Definitions as they will automatically be inserted unless an alternative rule applies.

Form Codes: Cat Definitions

<u>Form</u> Cat Definitions are found in the <u>Window</u> Menu of the Stockitem <u>Form</u> code screen.

1. Launch the *Amlib* client

2. Go to **Main** > **StockItems** > **StockitemForms** – the <u>Form Codes</u> table will display:

3. Highlight a <u>Form</u> code in the table – for example: **AC – Audio Cassettes**

4. From the menu, select **Window** > **Cat Defs** – the <u>Form Codes for Catalogues</u> window will display:

5. To set a Cat definition:

   a. Select a <u>Tag</u> number – for example: **300**

b. Enter the data that MUST be present for valid items to be given this Form Code in the Must Contain field– for example: **Sound Cassette**

c. Enter the data that MUST NOT be present for valid items to be given this Form Code in the Must Not field – for example: **CD**

d. Click the **Paste** button

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

Stats Codes: Cat Definitions

1. Launch the *Amlib* client

2. Go to **Main** > **StockItems** > **StockitemStatsCodes** – the Stats Codes table will display

3. Highlight a Stats Code in the table – for example: **J – Junior Fiction**

4. Click the **F8 Cat Def** button – the Stats Codes for Catalogues window will display:

5. To set a Cat definition:

a. Select a Tag number – for example: **82**

     b. <u>Numbers</u>:

       i. Select either the **Must Contain** or **Must Not Contain** radio button (the **Ignore** button is only used when creating non-numerical definitions)

       ii. Enter <u>Must Start With</u> and/or <u>Must Not Start With</u> data (optional)

       iii. Click the **Paste** button

     c. <u>Tag</u>:

       i. Ensure <u>Numbers</u> is set to **Ignore**

       ii. Select either the **Starts With**, **Contains anywhere before first space** or **Contains anywhere in tag** radio button

       iii. Enter <u>Must Start With</u> and/or <u>Must Not Start With</u> data

       iv. Click the **Paste** button

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

A setup for Schools might be:

CODE	EXAMPLE
NF	DEFAULT as set up in **Main** > **Supervisor** > **Installation** – <u>Stockitem</u> tab or set in MARC Take up
F	**Tag 82 must not contain numbers**

A setup for Public Libraries might be:

CODE	EXAMPLE
ANF	DEFAULT as set up in **Main** > **Supervisor** > **Installation** – <u>Stockitem</u> tab 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.

CALENDAR

Days Closed

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

1. Launch the *Amlib* client

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

3. Select the **Circulation** tab

4. Adjust the following settings:

   - Days of the week when ALL Locations are closed (Sun=0, ..., Sat=6) – type in **06** if closed Saturday and Sunday

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

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

Holidays

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

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

To mark a date as a closed:

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **Calendar** – the Calendar screen will display

3. Use the **F7**, **F8**, **F9** and **F10** buttons to navigate to a month where you want to set a closed date:
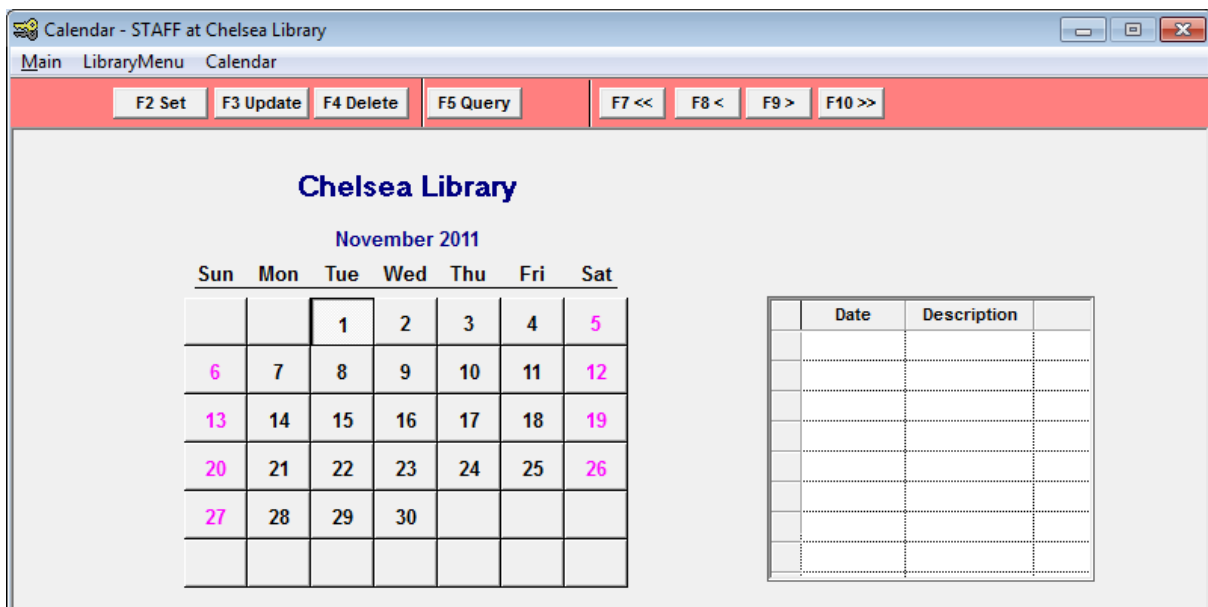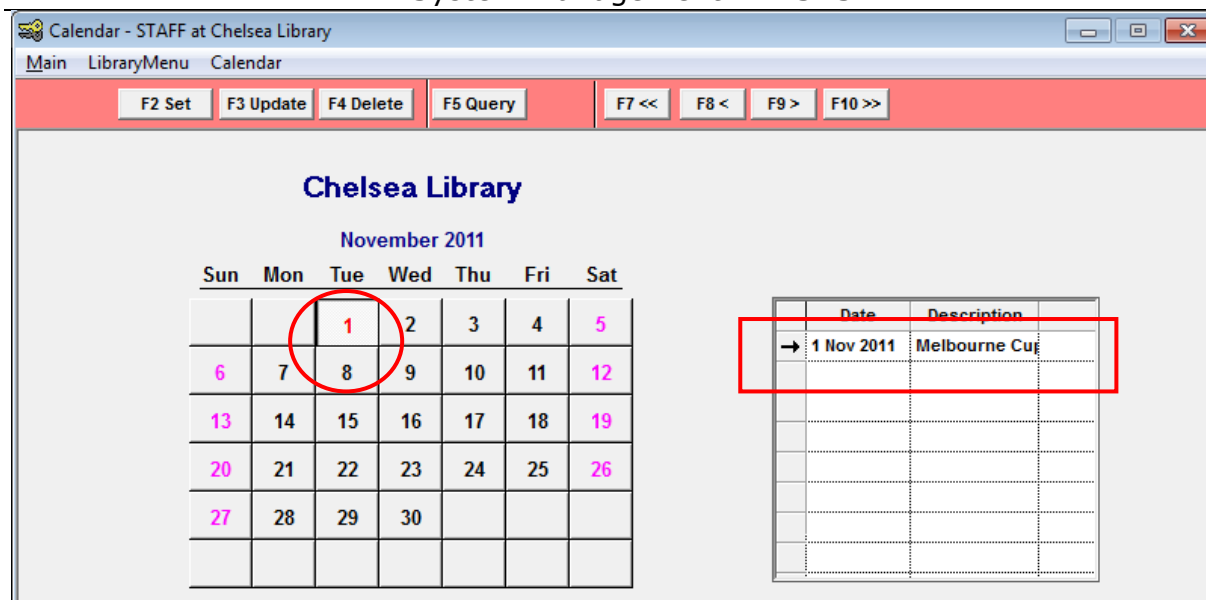

4. Select a date with your mouse – for example: **1 November 2011**

5. Click the **F2 Set** button – the Holiday prompt will display:
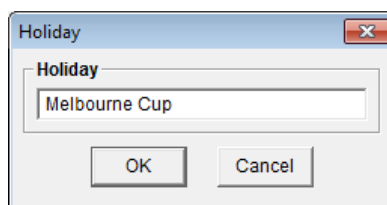
- Type in a suitable description in the dialogue box – for example **Melbourne Cup** or **Term Break**

- Click the **OK** button

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

7. Once the dates have been set, click the **F3 Update** button

8. Exit and restart the *Amlib* client for the new settings to take effect

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

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

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

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

Remove a Closed Date

1. To remove a closed date, highlight the date

2. Click the **F4 Delete** button – this will **mark** [**x**] the Closed date for deletion

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

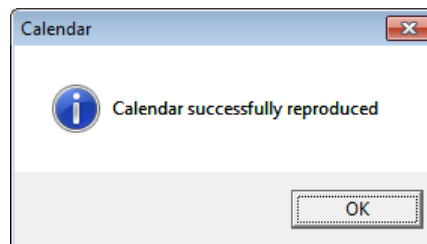4. Exit and restart the *Amlib* client for the new settings to take effect

Copy a Closed Date to Other Locations

Closed dates in Calendar can be copied to other Locations.

1. From the menu, select **Calendar** > **Copy To All** – a prompt will display asking: **This will make every location have exactly the same holiday settings as 'XXX'. Continue?**
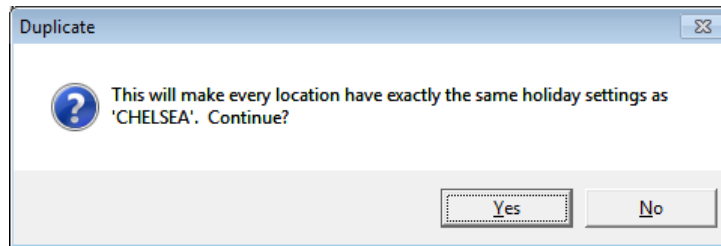
2. Click the **Yes** button – this will copy the closed settings to ALL locations

3. Once complete, a prompt will display with the following message: **Calendar successfully reproduced.**

4. Click the **OK** button

5. Exit and restart the *Amlib* client for the new settings to take effect

Different Closed Dates for Each Location

If different closed dates are required for different Locations.

1. From the menu, select **Calendar** > **Choose Location** – a Location prompt will display

2. Select the Location and click the **OK** button

3. The set the closed dates for this Location

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

5. Exit and restart the *Amlib* client for the new settings to take effect

DEPRECIATION

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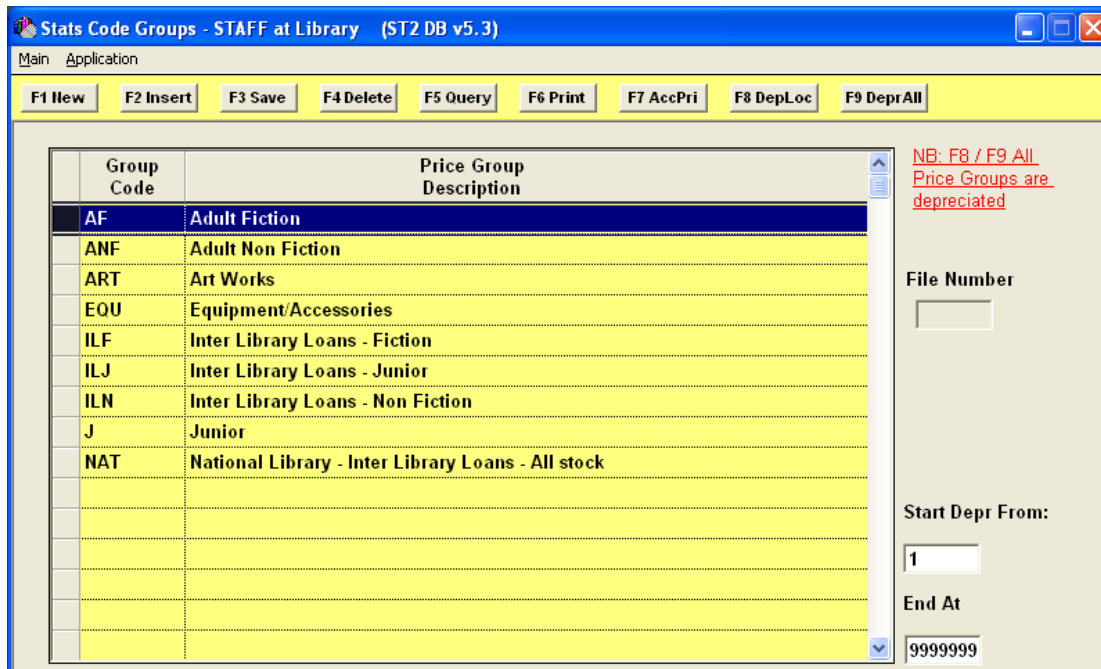
To view Price information for any of the Stats groups, highlight the line and select AccPri **[F7]**. A table will display, which allows the entry of current depreciation rates and minimum prices for each Form.

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]**.

Running 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 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

Straight Line Depreciation

A Straight Line Depreciation uses the Original Cost Price which is stored in Stockitem/Item/History.

Note: The Original Cost field is assigned the same value as the cost field when a new item is manually inserted *Example or Straight Line Depreciation*

An item worth $27.00 was purchased in 1995, and therefore 6 years old at 2001.

Within the tables, the depreciation rate is set at 10%

It simply calculates 60% (6 years x 10% = 60%) of the Original Cost e.g. of $27.00

This will be $16.20

So the Depreciated pricing will be $27-$16.20= $10.80, rounded off will be $11.00

Note: Rounding parameters are set in Stockitem, Application, StockitemOrigins

Reducing Balance

A Reducing Balance the current cost (i.e. the value visible on the Stockitem Window) is used.

Example or Reducing Balance Depreciation

An item worth $27.00 was purchased in 1995, and therefore 6 years old at 2001.

Within the tables, the depreciation rate is set at 10%

- 1st year it depreciates to $24.30
- 2nd year it depreciates to $21.87 ($24.30 – 2.43)
- 3rd year it depreciates to $19.69 ($21.87 – 2.18)
- 4th year it depreciates to $17.73 ($19.69 – 1.96))
- 5th year it depreciates to $15.96 ($17.73 - 1.77)
- 6th year it depreciates to $14.37 ($15.96 – 1.59)

Rounded off that will be $14.00

Depreciation Process

The Depreciation process can take a large amount of system resources to implement, and should not be done when the library is busy as all other applications will be slow

Items can be depreciated on a yearly basis. Depreciate all items at the Login Location via the Stats Group Table by selecting DepLoc **[F8]**. To depreciate all items use DepAll **[F9]**.

Start Depr From, End At

The value in this field is the unique Stockitem number and depending upon your installation could be in the range 1 to 999999 depending upon how many items are in the database.

A message will display:
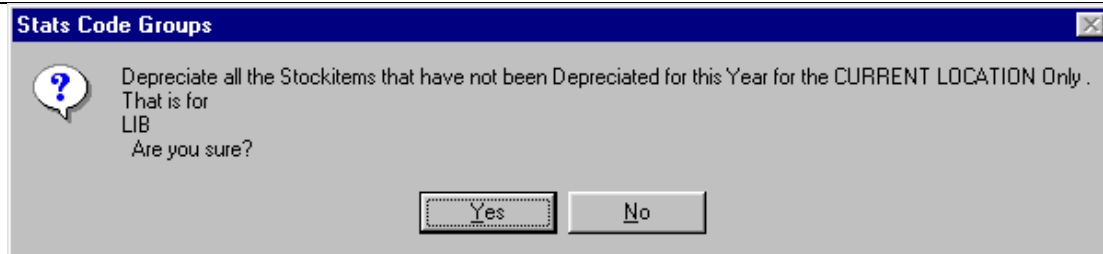
For every item on the database at the Current Location this will

Assign an average price if the price is 0.00 and a parameter entry can be found

Depreciate the current price by the respective % if the price has not be depreciated within the last 12 months (a field in the Stockitem History records the last depreciation date).

At the end of the process, a message will display.
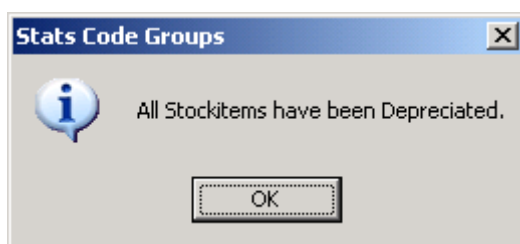
The Accession date of an item is used in these calculations.

Note: New items accessioned within the last 12 months will not be depreciated

The Stockitem history will keep a note of the Depreciation change and enters the Last Depreciation Date.
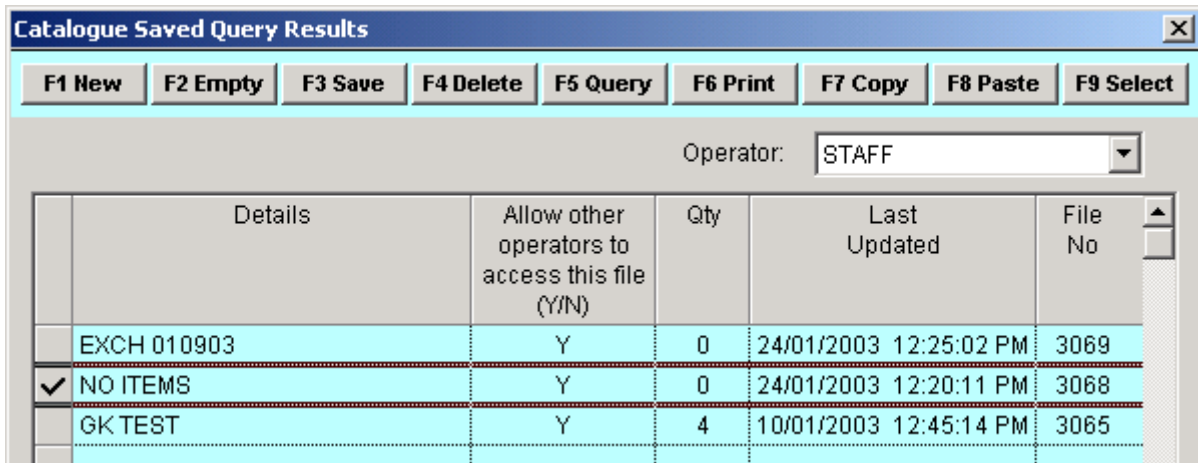

Individual items can also be depreciated from Stockitem, Item, Depreciate item.

DATA MANAGEMENT

Catalogue Maintenance

Insert all Unused Catalogues Records into a Saved File

1. In *Amlib* go to **Main** > **Catalogue** > **CatMaintenance**
2. Choose the Maintenance Task from Field 1 – **Insert all unused Catalogues into a Saved File**
3. Enter an appropriate date in the "Only consider catalogue records before" parameter
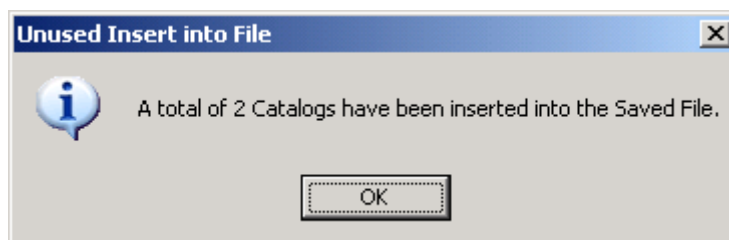4. Click the **Options** button to select or *create a file* for the Unused Catalogs

5. Press Start **[F3]** to begin the task.
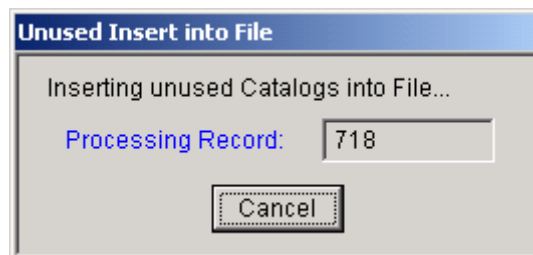
6. A message will display at the end of the task, giving a summary of the changes made.

The items can then be viewed by displaying the Catalogue File.

7. The records can be investigated.
8. If the catalogue records are to be deleted, the task can be run "Delete all Unused Catalogues that are in a Saved File" in the same way as shown above

Authority Maintenance

Mass Delete Unused Authorities

To mass delete Authorities that are not being reference by catalogue records select this option. Schools that import the SCIS Authority File should not perform this task, as they will want to keep the unused headings for future use.

10. In *Amlib* go to **Main** > **Authorities** > M**arcTagMaintenance**
11. Choose the Marc Tag Maintenance Task from Field 1 – **Mass Delete All Unused Authorities**
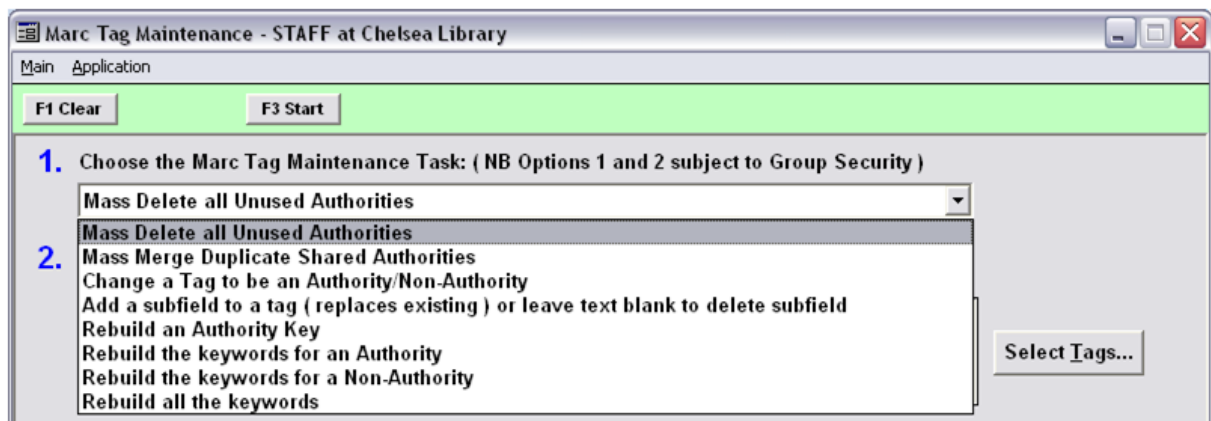
12. Under field 2, use the **Select Tags...** button select the tag the maintenance task is to apply the deletion to. Some tasks allow multi selection of tags, whilst some will allow only one tag. Tick the tags you want to delete the unused authorities from and select **OK**
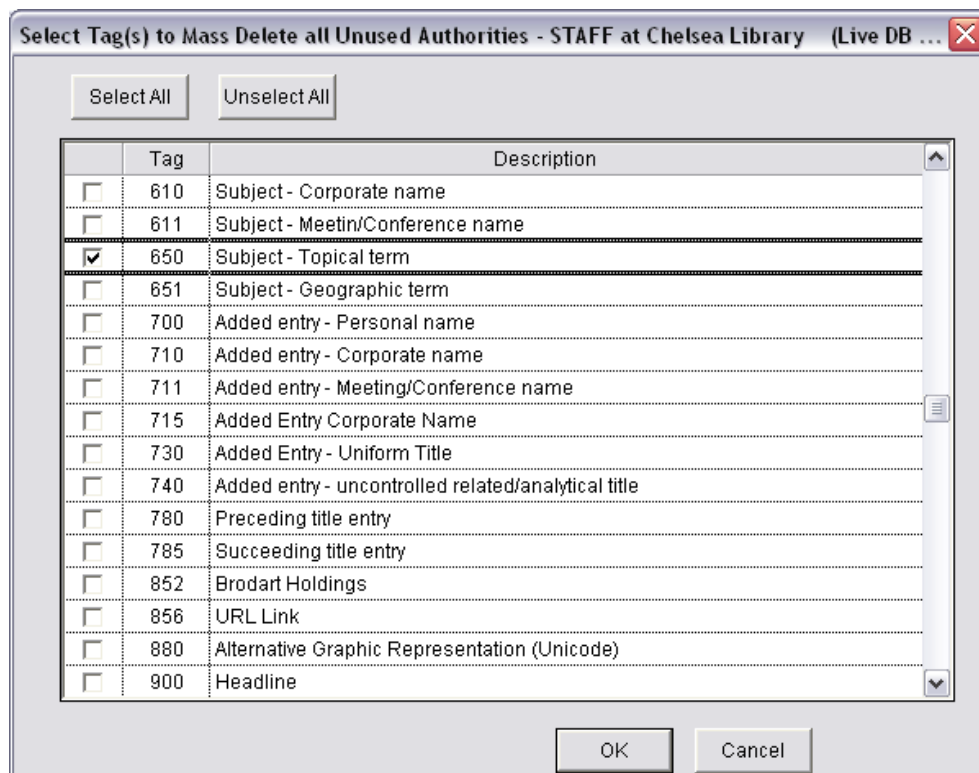
13. Under field 3 select the **Options...** button to choose the deletion level from Level 1, Level 2 or Level 3 then select **OK** (these are explained further below)

OPTION	EXPLANATION	EXAMPLE
Mass Delete Unused Authorities – See options in more detail below	3 options that can be chosen. Level 1 will delete the least data, Level 3 the most data: **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* **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 **Level 3**: *Will delete any Authority that is not directly attached to a Catalogue record*	See below in Table format "Mass Delete Unused Authorities" **NB: As schools import SCIS Authority headings, they may not wish to delete the Unused headings**

14. Press **F3 Start** to begin the task

15. A confirmation message will be seen, select **OK**

Authority Mass Delete
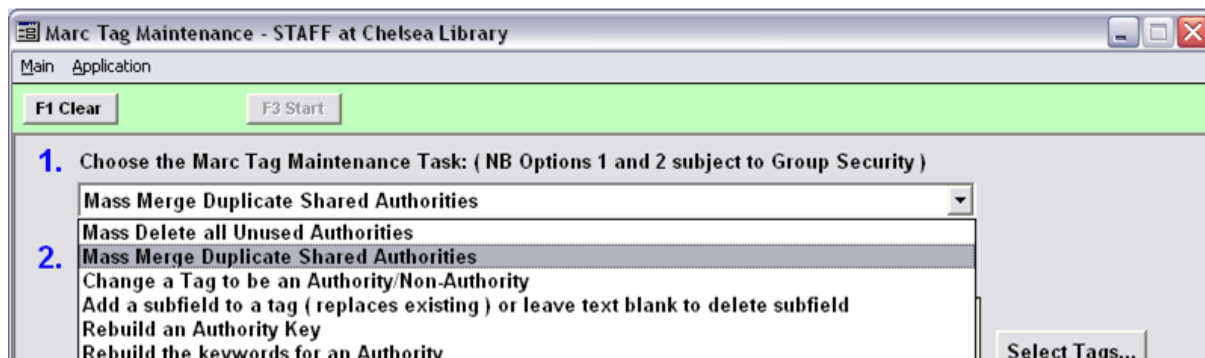
The 159 Authorities have been processed and 2 Authorities have been deleted.

OK
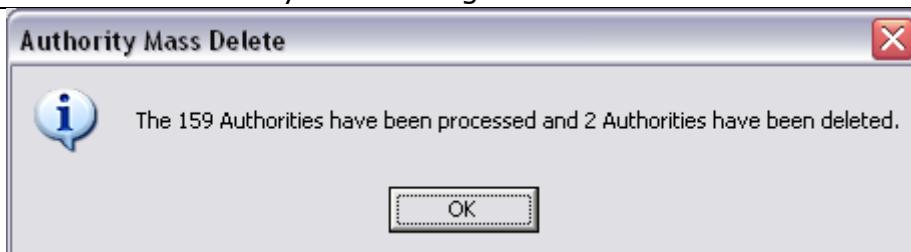
EXAMPLE – WILL THE TERM BE DELETED??				
Term	Usage	Level 1 *Only Authorities that have never been used on your database will be deleted. Therefore subject headings that have been used as a See, See also, RT, NT etc. will not be deleted*	Level 2 *Will delete Authorities that are not attached to a Catalogue record but will retain Authorities where one of the references (NT, BT etc.) is attached to a Catalogue record*	Level 3 *Will delete any Authority that is not directly attached to a Catalogue record*
Cats	0	**Y**	**Y**	**Y**
Cats NT Kittens	0 0	**N** - (the heading is used by the system by having a cross reference)	**Y**	**Y**
Cats NT Kittens	0 1	**N**	**N** -Neither term will be deleted (the Cats heading is being referenced by a catalogue record through the cross reference)	**Y** - The Term Cats will be deleted. The Term Kittens will remain (the heading is being directly referenced by a catalogue record)
Cats NT Kittens	1 0	N	**N** - Neither term will be deleted (the Kittens heading is being referenced by a catalogue record through the cross reference)	**Y** - The Term Kittens will be deleted. Cats will remain (the heading is being directly referenced by a catalogue record)
Cats NT Kittens	1 1	**N**	**N**	**N** - (both headings are being directly referenced by a catalogue record)
Cats	1	**N**	**N**	**N**

## Mass Merge Duplicate Shared Authorities

This is a Mass merge process and the system automatically merges any duplicate shared Authority - for example Subject headings or Authors, without allowing the User to first view any duplicates. It will keep the fuller authority and merge the shorter version to the larger version.

1. In *Amlib* go to **Main** > **Authorities** > M**arcTagMaintenance**

2. Choose the **Mass Merge Duplicate Shared Authorities** Task from Field 1

| OPTION	EXPLANATION	EXAMPLE
Mass Merge Duplicate Shared Authorities	This merges authorities that have identical Search keys and merges them to one Authority without User Intervention **Please Note:** This option should be used with caution as some Authors may have the same name but in fact are different Authors	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

3. Under Box 2 highlight the Marc Tag to which to apply the task then select **OK**. If merging Subject Headings, tick the Tag for the 650. You will need to redo the other tags if they are required e.g. 651
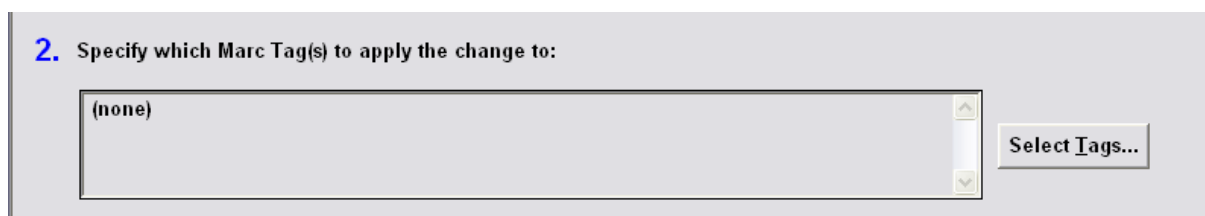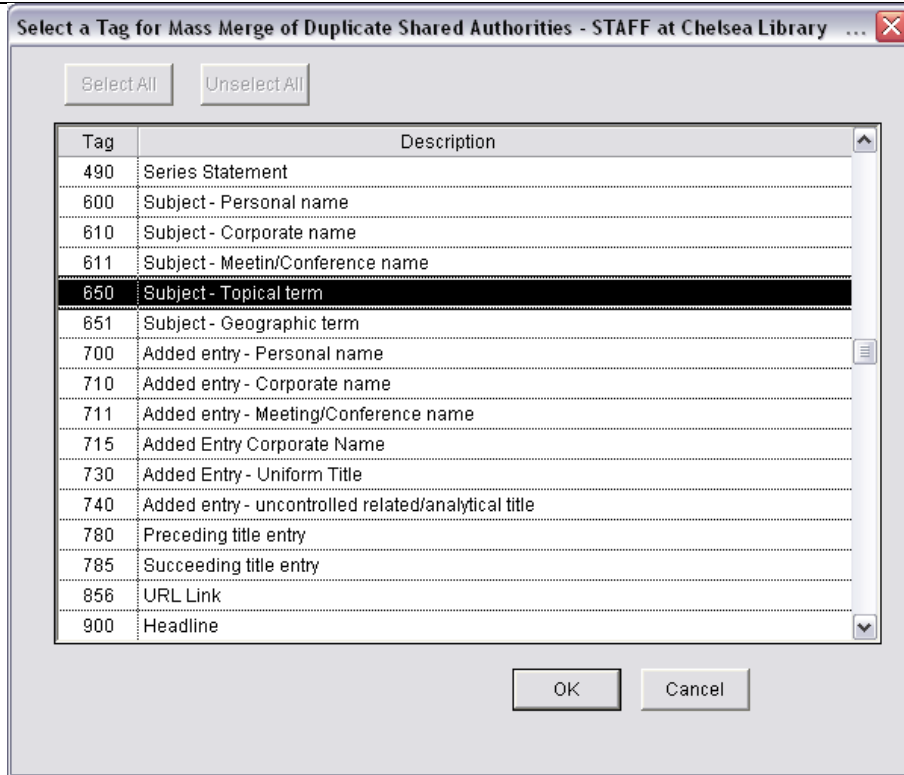
4. Ignore Fields 3 and 4 as these are not required for this task

5. Press **F3 Start**
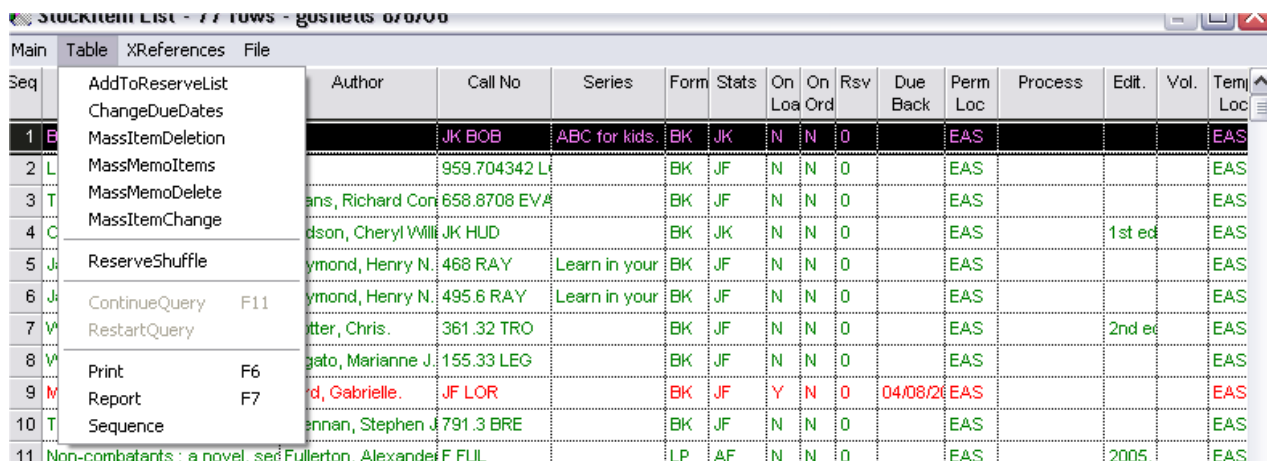
6. You will receive a notification, select OK
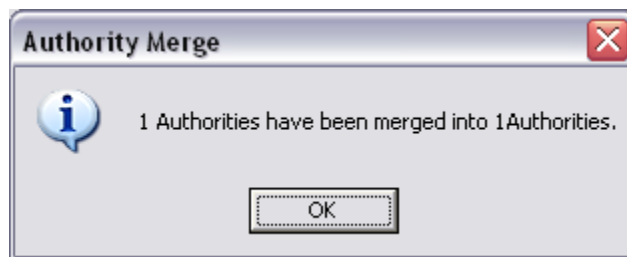
Stockitem Maintenance

Item Table Menu

Contains maintenance tasks for Stockitems.

NOTE:	Change Due Dates & Mass Item Change need a File for Processing. If a File is not chosen first, the Menu options will remain grey

Stockitem Mass Item Deletion

Stockitem Mass Change is useful for maintenance of Stockitem Records.

NOTE:	*MassItemDeletion will only become available after displaying a Saved File as the File references are used to determine which Stockitems on the Database will be deleted.*

The procedure is to firstly create a Saved file within Stockitem Module

Secondly we then mass delete the items within the file.

***Creating the Saved File with stockitems for deletion***

There are three different ways to conduct the query within Amlib to collate the stockitems necessary to save to the Stockitem File. Simply choose from either of the following three suggested methods depending on your needs.

To create a File in Stockitem, either:

- Wand into File
- Conduct a Query in Stockitem
- Perform a Where Search or

File creation alternative 1 - Wand into File

1. From the **Stockitem > Application** screen, select File. Select the menu option **WandIntoFile.**
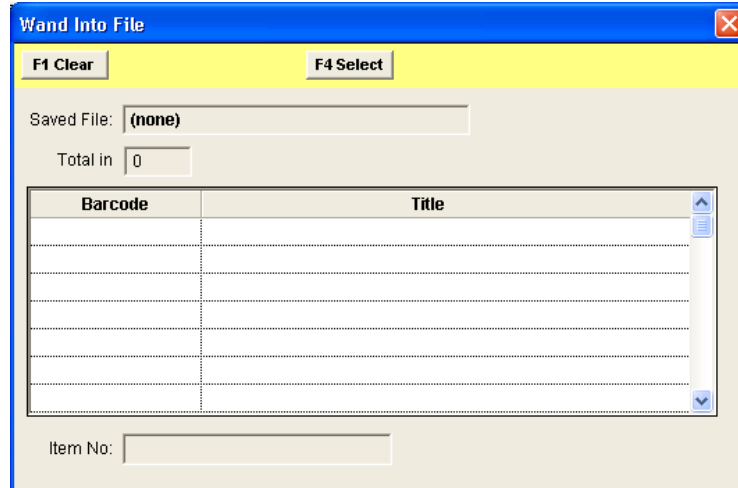
2. **F4Select** to choose a File. If a suitable File does not exist, select **[F1]**, type a description (eg. Mass Deletions) and Select **Save** using **[F3]**.
   If a suitable File does exist, but items are already in the File which need to be excluded, highlight the File and select Empty **[F2].**

3. Select the File by highlighting the File and pressing **[F9]** Select.
4. Wand the barcodes of the items to be included in the File. As you wand the items you will notice the number of items increase for the File on the taskbar of the Stockitem screen. Once you have wanded all the items, select **File**. You will see a tick next to the **WandIntoFile** menu item. To de-activate this click the **WandIntoFile** option again. The tick will disappear.

File creation alternative 2 -Conduct a Query in Stockitem

1. Perform a query to select the Stockitems to change, save the results into a File by selecting **File** > > **Save All** or **Save Marked** or **SaveNotMarked** (as appropriate).
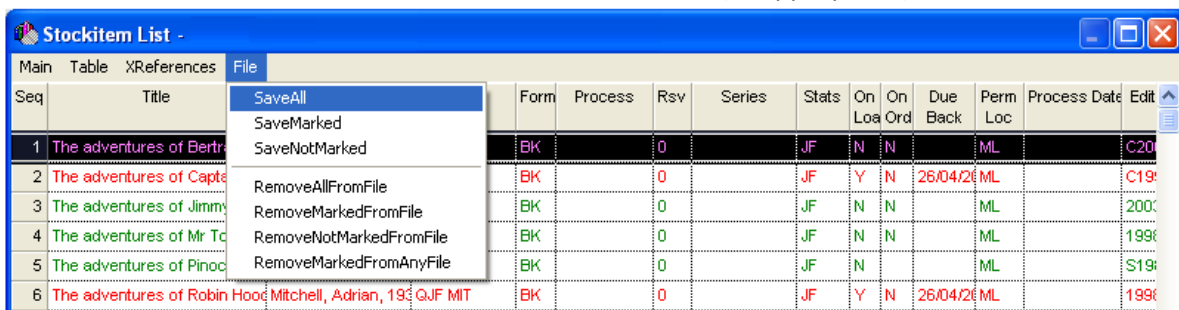
2. If a suitable File does not exist, select **[F1]**, type a description and Select Save**F3**.

If a suitable File does exist, but items are already in the File, which need to be excluded, highlight the File and select Empty **[F2].**

3. Once the File has been created or emptied, select the File by highlighting the File and pressing **[F9]** Select.
4. The items can then be mass changed as shown under the heading **Making the Changes**.

File creation alternative 3 - Where Search

1. Where Searches can be used for creating Files in Stockitem. Set the parameters as required. For example, those items not counted in a Stocktake that are DVDs.

2. Choose **Query into File [F7]**.
    If a suitable File does not exist, select **[F1]**, type a description and Select Save using **[F3]**.

    If a suitable File does exist, but items are already in the File, which need to be excluded, highlight the File and select Empty **[F2].**

3. Select the File by highlighting the File and pressing **[F9]** Select.

Deleting the Items

Mass Item Deletion

1. After saving the File, close the Table and go back to the Stockitem Details screen. Select **File** > **DisplayFile**. Highlight the appropriate File and select **[F9]**.
2. When the items display, highlight all the items in the table and choose **MassItemDeletion** from the **Table** menu.

The following message will appear asking if you want confirmation of delete messages. In most cases, you would press **No**, and this automatically deletes the **stockitem**, and the **catalogue** record if it is the last stockitem for the catalogue record.

If however, you want to be warned before the **catalogue** record is deleted when the last **stockitem** is deleted, you should press Yes.
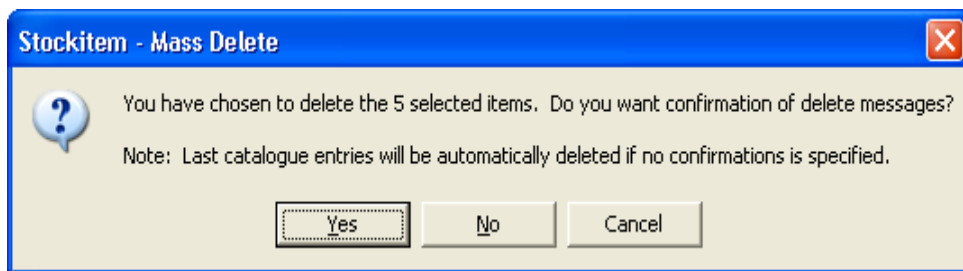
Pressing Yes *(and when an item in the table is the last stockitem for the catalogue)* will result in the message below, allowing you to choose to keep the catalogue record if needed.
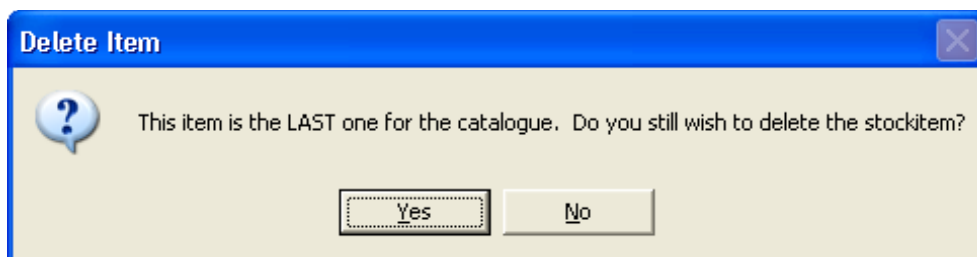
If an item has been reserved it cannot be deleted and will remain in the file. Once the reserve is removed the item can then be deleted.
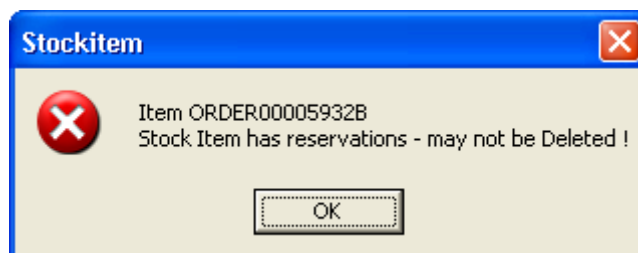
Stockitem Autolink

This facility allows a Global refresh of Stockitems according to the option chosen. The option is selected from the table. This can be done on selected items from a saved file or against the database by entering a Start and End of Unique numbers (e.g. 1 to 99999) entered.

Please Note: Ensure that you have recent Amlib backups prior to running Autolink. Many of these facilities, though useful, are powerful and make global changes. They should be run in consultation from Amlib Support and as directed. **During the following step all users should NOT be using the Stockitem Module for anything BUT searching.**

OPTION	EXPLANATION
*Rebuild keys using Stockitem data (uses Stock Stopwords)	This would only be used if the Stopword listing had been changed in Authority, Application, KeywordStopList. Enter a range of Unique numbers to Rebuild (e.g. 1 to 100000). You will then be asked to enter the Line Number (e.g. Line 1, Title, Line 4 Series) to Rebuild. Once this is selected, the Rebuild will commence. A message will display indicating the number of items Rebuilt.
*Non Catalogued items Only (Same as Rebuild Keys)	This would only be used for Stockitems with no Catalogue data, if the Stopword listing had been changed in Authority, Application, KeywordStopList. Enter a range of Unique numbers to Rebuild (e.g. 1 to 100000). You will then be asked to enter the Line Number (e.g. Line 1, Title, Line 4 Series) to Rebuild. Once this is selected, the Rebuild will

	commence. A message will display indicating the number of items Rebuilt.
*Refresh ALL items from catalogue using (excludes Periodicals and Orders)	Refreshes all Stockitems that are different to the Catalogue data. This needs to be used with caution, as there may be a reason behind making the Stockitems different (e.g. Primary Campus having different Call Nos. to Senior Campus but sharing the same Catalogue Number). Enter a range of Unique numbers to Rebuild (e.g. 1 to 100000). A message will display indicating the number of items refreshed. Note: Single items can be Refreshed from Catalogue from the Stockitem, Item menu
Remove Excess History	Can be set to delete history entries from Stockitem records based on Installation parameters. For large libraries from time to time it may be necessary to delete history records from the Borrower and Stockitem modules. The history records contained within the stockitem history are directly linked to the borrower history. Deleting the Stockitem 'RETURN' history also deletes the corresponding 'RETURN' entry in the borrower history. Borrower Types that have the 'Keep History' parameter set to 'Y' **do not** have their READING history deleted in this process. The Stockitem History Deletion Autolink function will only delete history records as determined in **Supervisor** > **Installation** > **Circulation** > *Keep the last ### History records*
Change of Stats Period – Issues, renewals, reserves by item	Creates a new Statistics Period so that the new statistics can be compared to the previous period. This history can be viewed in the Stockitem /Item/ History menu. ***This needs to be used with Caution as when run several times, the History can only be viewed for 2 periods - Current Period and Previous Period. The possibility of checking what has never been borrowed since System inception will be lost. Use only under guidance of Amlib Support.***
Get File	Enables the refresh to be restricted to a Saved File. When this is selected, a list of Stockitem Files display where the relevant File can be selected

Please Note: Facilities marked with an asterisk (*) will prompt for lines to be refreshed from Catalogue

Run the Stockitem Autolink

1. In *Amlib* navigate to **Main** > **Stockitems** > **Stockitem**
2. Select **Application** > **StockitemAutolink**

3. In the **Options** section tick the task to be completed

4. To perform the task against the entire database enter **1** next to **Start** and **99999** next to **End** **OR** to perform the task only on a saved file select the **GetFile** button

5. Select the **Start** button (note the and the **End** count will then refresh to the number of records to be affected)

6. Tick the lines that are to be refreshed.   These are the 6 lines of the Stockitem screen and/or Volume, Edition and Call Set fields. Only tick those Stockitem lines that are to be rebuilt from Catalogue (note that the **Remove Excess History** option does not display this screen, all others do)
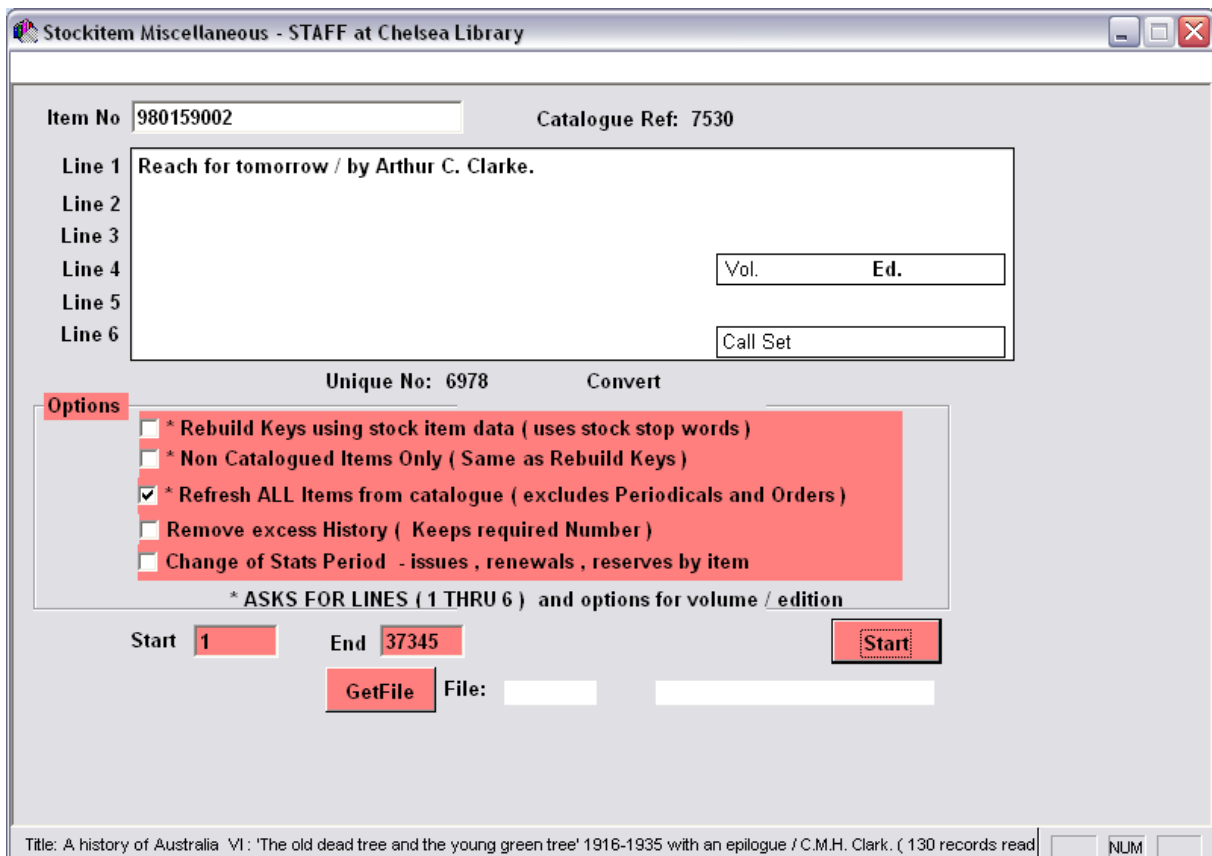
7. The process will then run, displaying the updates as it runs.   This is a system intensive process so avoid making any other demands on the system until it is complete

8. At the end of the process a message will display, indicating the number of items processed, select **OK**

Mass changes to Stockitem

There are 2 options for Mass Change of items:

- Stockwand Change
- File – Mass Change from the File e.g. After wanding into File

Stockwand Change

This facility is used to define a set of changes and apply those changes to all items:

1. Individually from the Barcode (select Start and begin wanding the Item Numbers) **[F6]**

2. From a File **[F7]**

3. From a Saved Where Search **[F8]**

Stockwand Change – setting Values to change

1. Launch the *Amlib* Client
2. Go to **Main** > **StockItems**> **StockWandChange** – the Stockitem Wand Change screen will display
3. Choose the Column to Change box 1: select a parameter – for example: **Process**

4. Type the new Value into box 2

Please Note: A list of codes can be accessed from box 2 by entering a full stop and pressing the **Tab** key on your keyboard. The **Special** button can be used for assigning Date ranges using the Current Date which can be very useful.

5. Click the **Paste** Button

6. The values to change will display in the <u>Columns</u> at the base of the screen

Using the Special Button

Useful for selecting the Current Date and perhaps minus (or Add) a number of days of Months.

7. Click the red **Special** button – the <u>Update</u> prompt will display:

8. Select/enter your date parameters
9. Click the **Paste** button

Executing the Changes

The Changes can be applied in one of 3 methods:

1. **Individually from the Barcode:**

   a) Click the **F6 Start** button – the Start prompt will display containing a confirmation message:
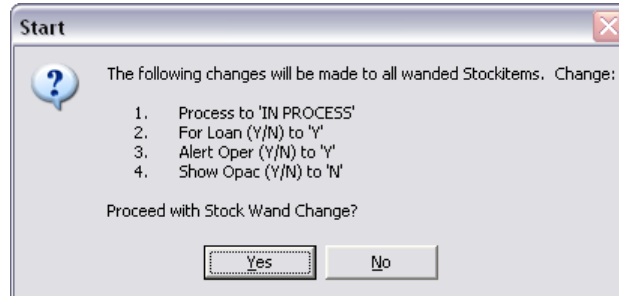
   b) To proceed, click the **Yes** button

   c) Begin wanding the Items into the Item No field for the changes to be applied

2. **From a Saved File:**

   a) Click the **F7 FrFile** button – the <u>Stockitem Saved Query Results</u> screen will display

   b) <u>Highlight</u> the relevant File (saved previously) and click the **F9 Select** button – the <u>Mass Change from file</u> prompt will display with the number of items to change defined as well as the File selected:

   c) Review the message and if the information is correct click the **Yes** button to proceed

   d) A prompt with the following message will display when complete:
      The XX Stockitems have been Updated.

3. **From a Saved Where Search:**

   a) Select the **F8 FrWhere** button – the <u>Saved Queries</u> screen will display

b) Highlight the relevant saved Where Search (Saved previously) and click the **F9 Execute** button – the Mass Change from Saved Where prompt will display with the number of items to change defined as well as the Where Search selected:
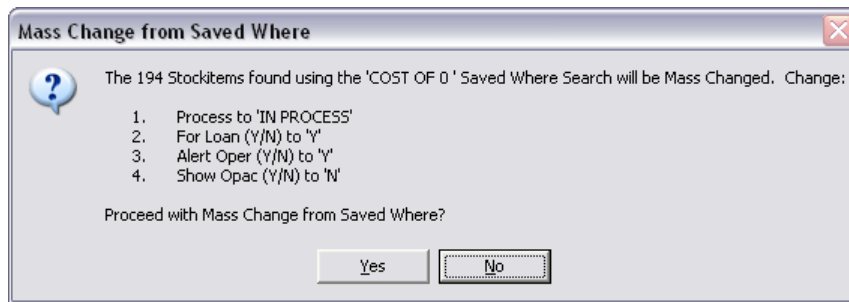
c) Review the message and if the information is correct click the **Yes** button to proceed
d) A prompt with the following message will display when complete:
   The XX Stockitems have been Updated.

Saving a StockWandChange

A Stockwand Change can be saved for future use:

1. With the Stockwand Change parameters displayed click the **F2 Insert** button – the Saved Stock Wand Changes screen will display:
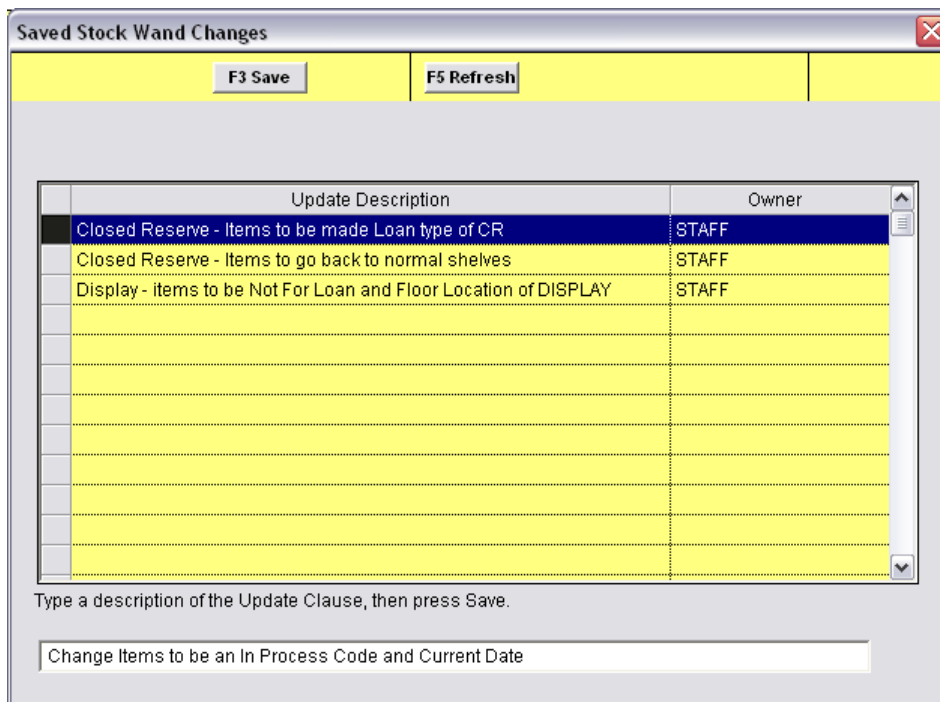
2. Type a Description in the field at the bottom of the screen

3. Click the **F3 Save** button

Reusing a StockWandChange set of Parameters

1. Go to **Main** > **StockItems**> **StockWandChange** – the Stockitem Wand Change screen will display
2. Click the **F4 Select** button – the Saved Stock Wand Changes screen will display
3. Highlight the required StockWand Change
4. Click the **F9 Select** button
5. The parameters will display where the items can be selected by wanding, from a File or from a Saved Where search
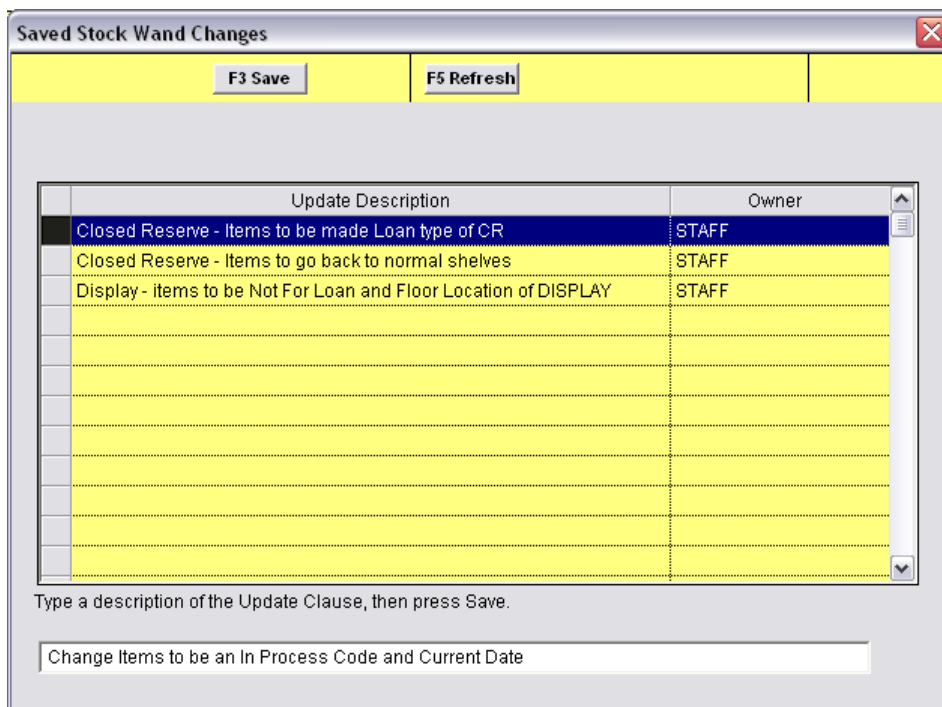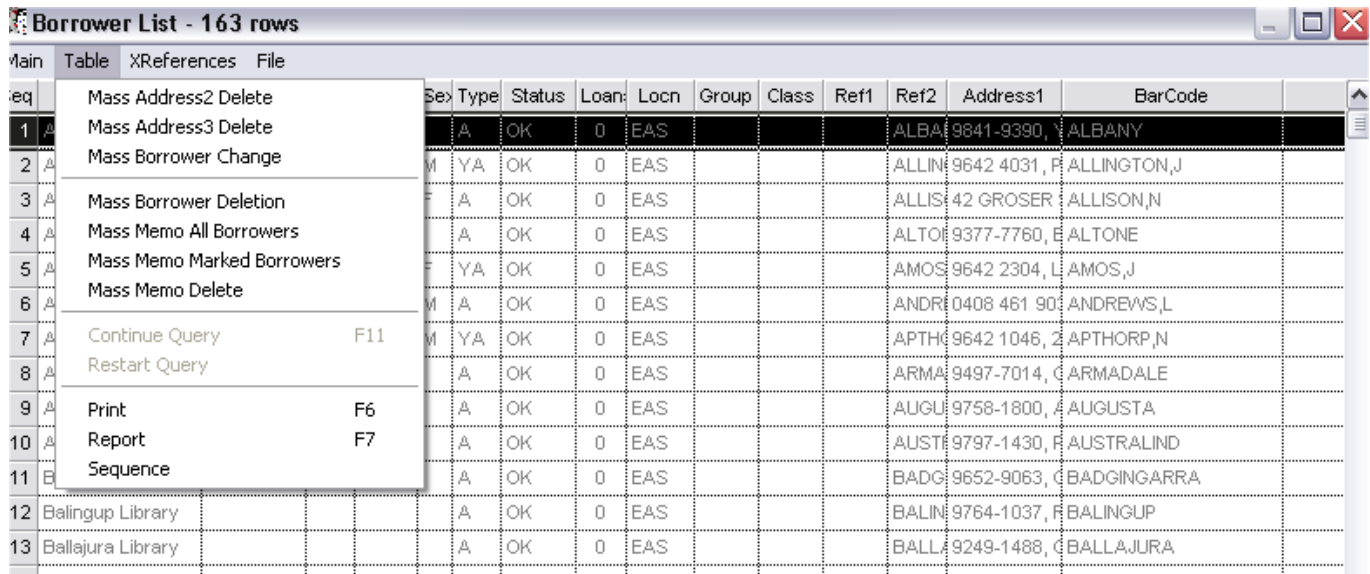
6. Type a Description in the field at the bottom of the screen
7. Click the **F3 Save** button

Borrower Maintenance

Borrower Table Menu

Contains maintenance tasks for Borrowers.

NOTE:	Mass Borrower Change, Mass Address2 Delete & Mass Address 3 Delete need a File for Processing. If a File is not chosen first, these Menu options will remain grey

Deletions

Single deletions of Borrowers can be done from the Borrower Details screen.

Mass deletions of Borrowers can be done from the **Borrower Table** menu. The Borrowers in the table need to be highlighted to make the deletions.

Borrowers with loans, reservations or Memos will **NOT** be deleted.

Mass Borrower Change

This process can be used to change Borrower <u>Group</u>, <u>Type</u>, <u>Class</u>, etc. The example used here is **Borrower Group**.

1. Launch the *Amlib* client

2. Go to **Main** > **Borrowers** > **BorrowerWhere** – the <u>Borrower Where</u> screen will display

3. Create a Where clause – for example: <u>Group</u> = **CHI** (this will search for all Borrowers who are in that particular group)

   a. Highlight the field to search on: **Group**

   b. Choose <u>Operator</u>: **=**

    c.   Enter the <u>Where</u> condition, or the exact data you want to find – for example: **CHI**

   d.   Click the **Paste** button to insert the clause into the table
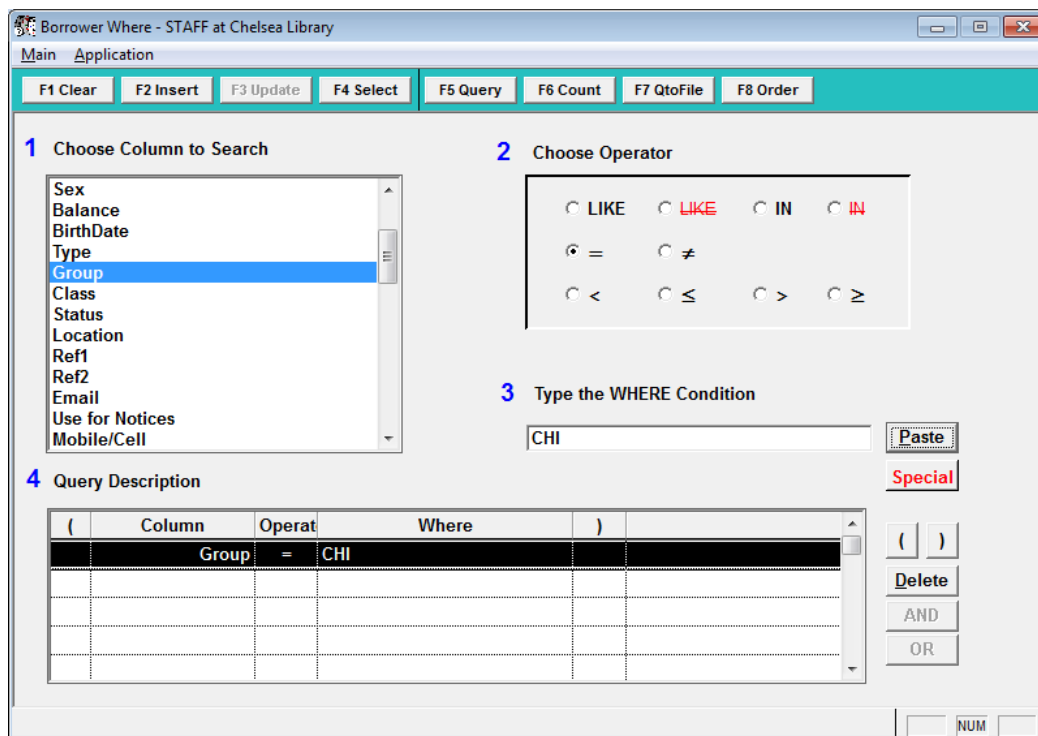
4.   Click on the **F7 QtoFile** button – the <u>Borrower Saved Query Results</u> screen will now display:

5.   Click on the **F1 New** button to create a new Saved File

6.   Type in a name for the file in the <u>Details</u> column – for example: **Groups to Change**

7.   Click on **F3 Save** button

8.   Highlight the new Saved File and click on the **F9 Select** button to save results to this file
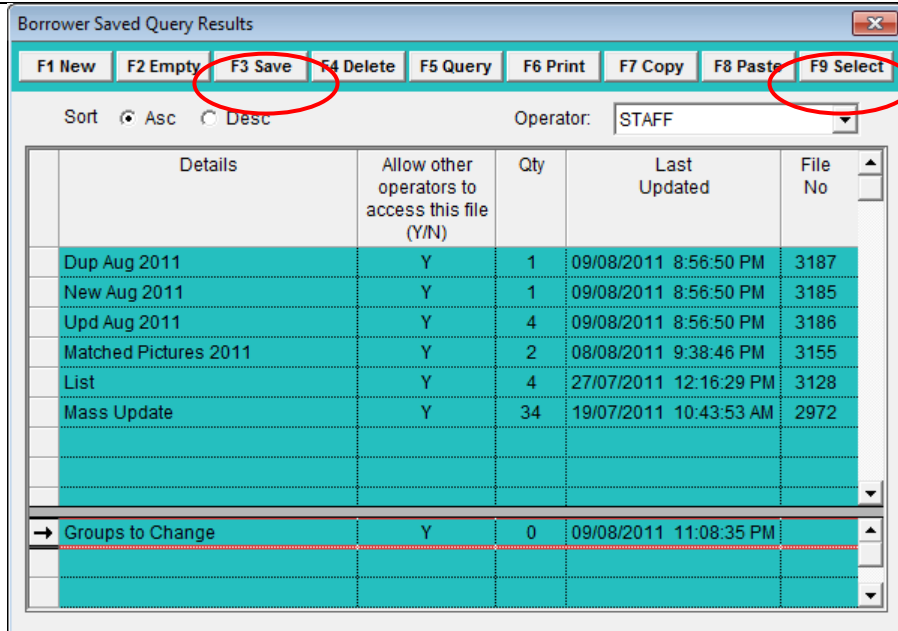
9. A prompt will display noting the number of borrowers contained in the file
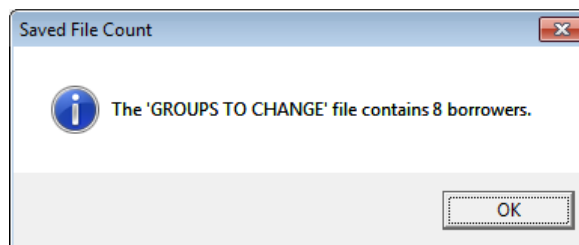
10. Click the **OK** button

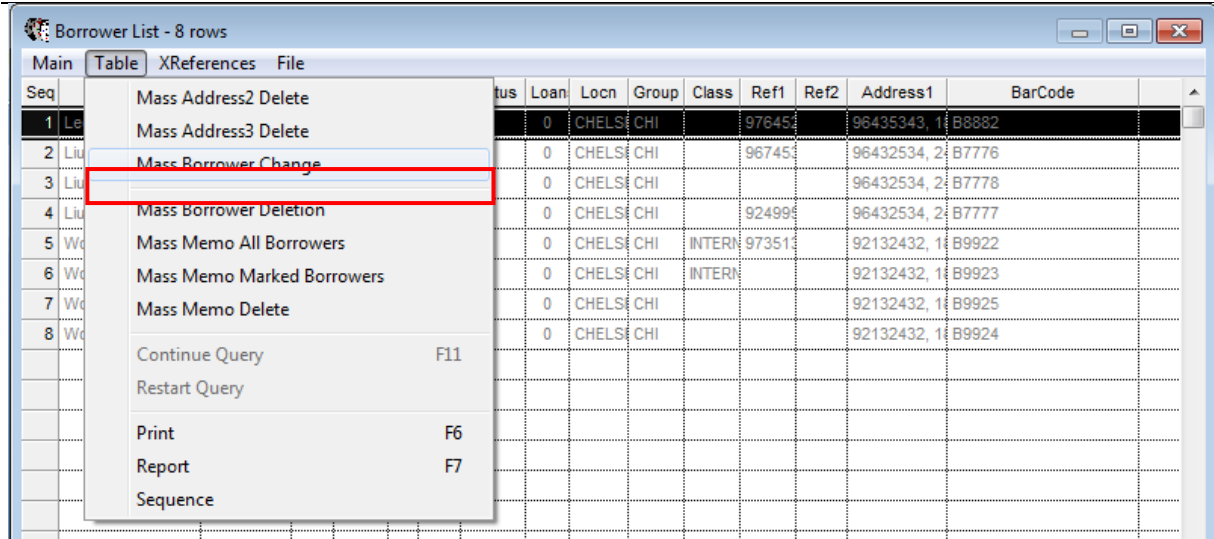11. Go to **Main** > **Borrowers** > **Borrower** – the Borrower screen will display

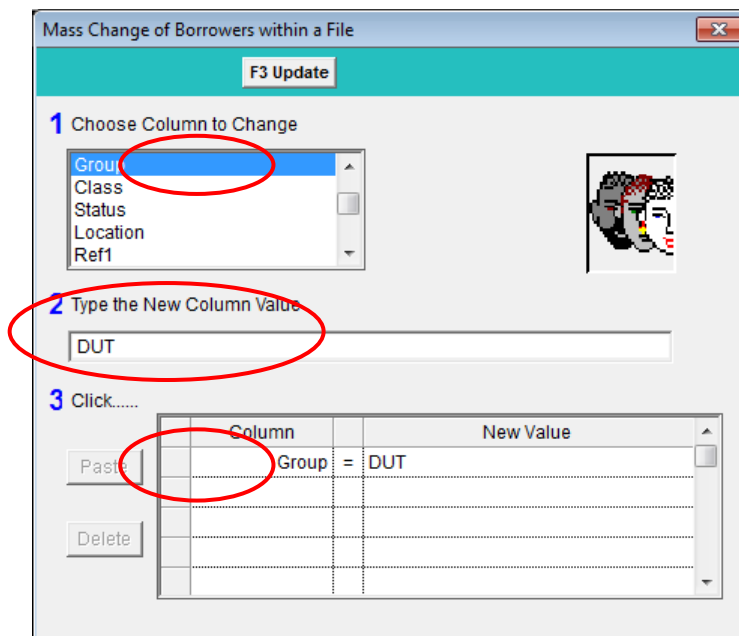12. Select **File** > DisplayFile – the Borrower Saved Query Results file screen will display
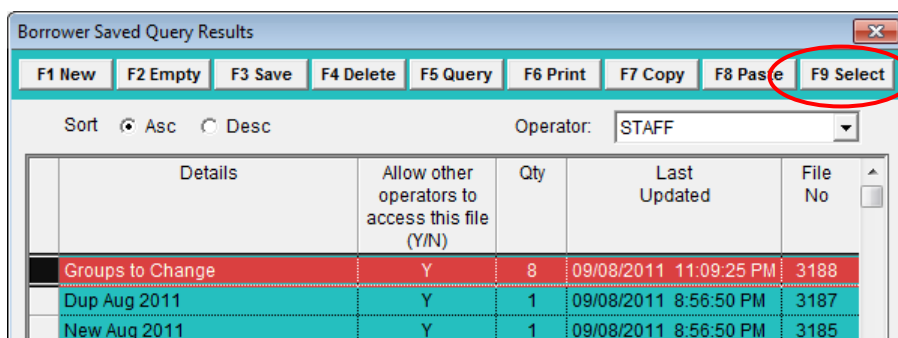
13. Highlight the required Saved File and click on the **F9 Select** button to display the file

14. From the Borrowers List screen, select **Table** > **Mass Borrower Change**

6. The <u>Mass Change of Borrowers within a File</u> screen will display:

7. Enter the following settings:

    a) Select the field you wish to change for all stockitems in the file example - **Group**

    b) Type in the new value example, which is what you are changing all stockitems to be – for example: **DUT**

    c) Click on the **Paste** button to insert the new criteria into the bottom table

    d) Click on the **F3 Update** button to start the mass change

    15. This will change all the Borrower Groups in this file so that they are now Dutch

Mass Memo Borrowers

It is possible to attach memos to Borrowers "en masse" by applying a Memo to a table of borrowers. Firstly, decide whether Memo Types will be included in the Memo, and if so ensure that the Memo Type to be selected is defined

Check Memo Types

1. In Amlib navigate to **Main** > **Supervisor** > **Supervisor** screen
2. Select **Library Menu** > **Memo Types**
3. To add a new Memo Type select **F1 New**

4. Type in a **Memo Type** code, and **Description**
5. Enter whether the memo is **Valid for Holdings** (to be applied to Stockitems), **Valid for Members** (to be applied to Patrons), **Show as Default** (to pop up in Circulation Y/N)
6. If you wish the memo to expire enter an **Expire in n days time** number, otherwise leave this column blank
7. Select **F3 Save** and log out of Amlib and back in

Mass Memo the Borrowers

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

2. Go to **Main** > **Borrowers** > **Borrower Where**

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

4. Select the **F5 Query** button

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

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

Step 3: The Mass Memo Data screen will display

Enter the details as required:

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

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

Show: Y/N/O

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

- **Date**: The date (in the format of dd/mm/yyyy) to begin showing the memo. This is defaulted to today's date but may be altered

- **End Date**: The date (in the format of dd/mm/yyyy) to finish showing the memo. This is defaulted to the date as calculated in Supervisor, Installation, Borrower, "Delete memo after xx days". This may be altered

- **Type**: Optional. A type of memo can be entered to assist with deletions, reporting, queries etc.

- **Message Details**: Text of up to 250 characters can be entered.

3. Select Save **[F3]**.

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

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

Borrower Update Reports

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

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

Template

1. Launch the *Amlib* client

2. Go to **Main** > **Reports** > **RepAddNew** – the Report Files screen will display:
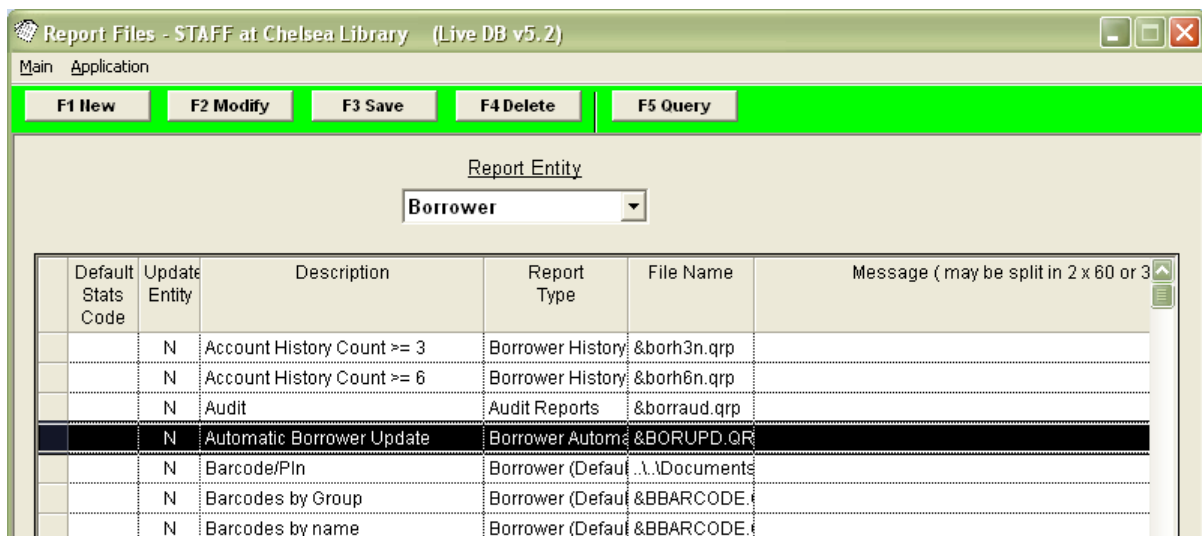
3. Locate and highlight the &BORUPD.QRP template

4. Click the **F2 Modify** button – the Borrower – Modify Report File screen will display:

5. Check the following settings:

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

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

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

Create the Report

1. Go to **Main** > **Reports** > **RepBorrower** – the Borrower Reports screen will display

2. Click the **F1 New** button – the Select Report Format list will display:

3. Highlight the **&BORUPD.QRP** template and click the **Select** button

4. A new report will be added to the list of reports

5. Type in a Description – for example: **Update Borrower Address 3**

6. The Update Entity (Y/N) column setting must be set to **Y**

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

Set Where Parameters

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

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

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

1. Highlight the Report

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

3. Enter the following details:

a. **BorType** – for example: **BorType = YA**

b. **BirthDate** – for example: **BirthDate <= Current Date – 18 Years** (use the **Special** button to insert Current Date – **216** months)

4. Click the **F3 Save** button when complete (the <u>Where</u> screen will close)

Update Parameters (F10 More)

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

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

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

1. Highlight the report

2. Click the **F10 More** button – the <u>More</u> screen will display

3. Click the **F1 New** or **F2 Insert** button

4. Enter the following Line 1 parameters (see Notes below):

    a. <u>Report Line Number</u> = **1**

    b. <u>Column</u> = **T**

    c. <u>New Value</u> = **A** (for **Adult**)

    d. <u>Send Memo</u> = **Y** (optional)

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

6. Enter the following Line 2 parameters (see Notes below):

    a. <u>Address 3</u> = **Y** (this will delete the Borrower's Guardian Address)

7. Click the **F3 Save** button when complete
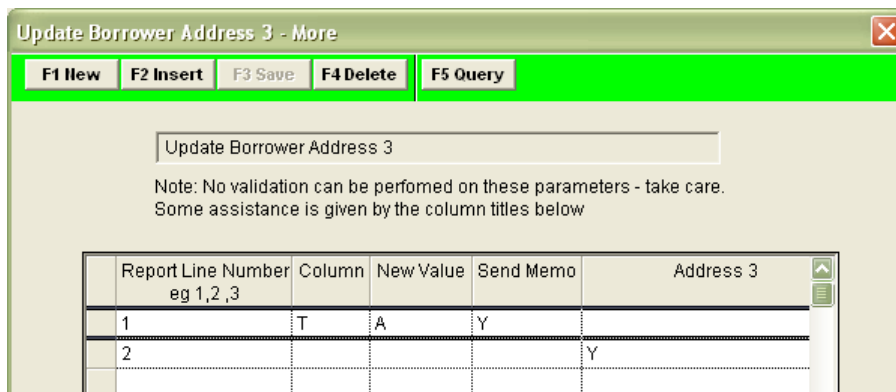
Notes

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

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

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

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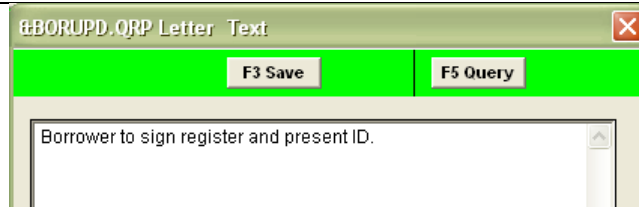
Memos

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

1. Highlight the report

2. Click the **Text for Letter** button – the Letter Text screen will display:
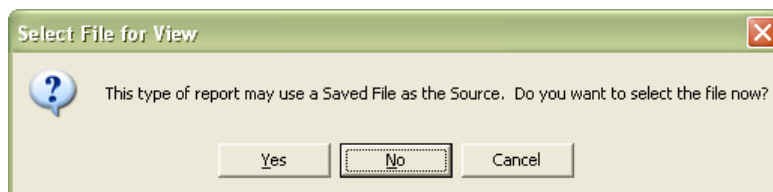
Last Updated: 26 February 2013

3. Type in the text that you would like to see in the Borrower Memo – for example: **Borrower to sign register and present ID**

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

View Report

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

1. Highlight the report and click the **F8 View** button

2. The Select File for View pop-up will appear:

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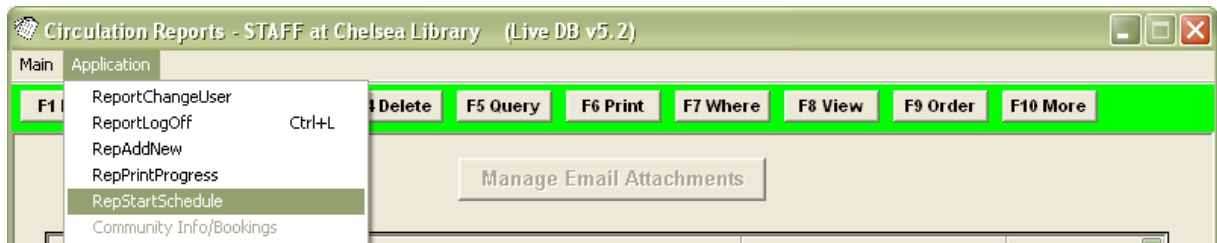
4. The report will open in the Report – View window:

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

Print Report (via Scheduler)

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

Start the Scheduler

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

2. The Report Scheduler screen will then open

3. Select your printing options: Ensure **Save to File** is ticked (you can tick all three if you intend on printing up multiple reports using multiple formats during a session)
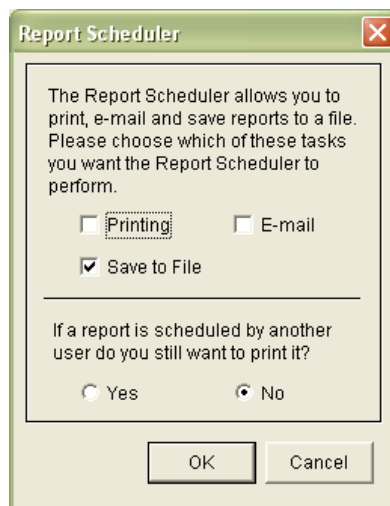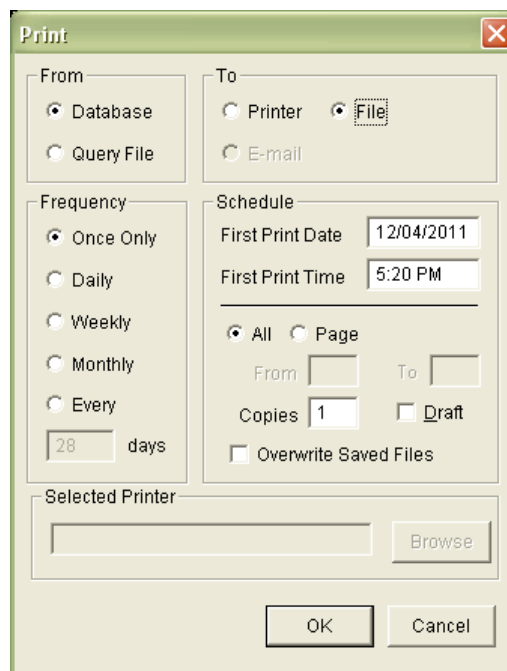

4. Then click the **OK** button

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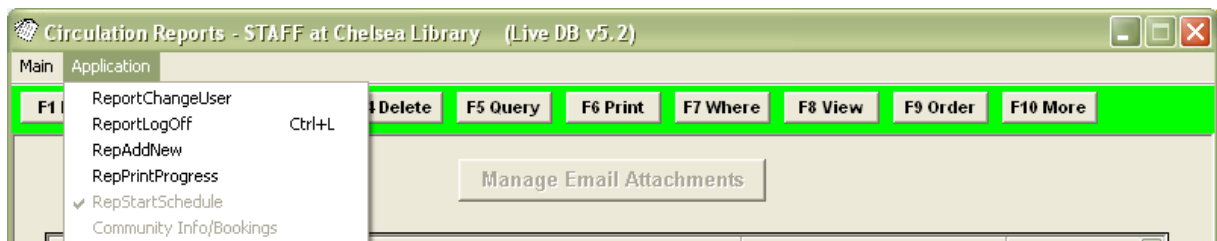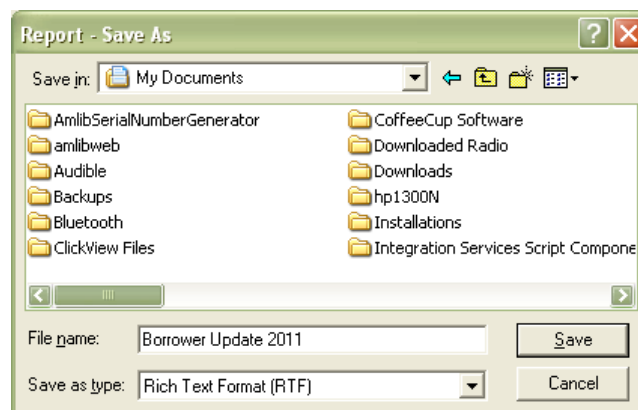
Scheduling the Report

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

2. Select from the following options:

    a. From:

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

    b. To:

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

    c. Frequency:

        • Once Only

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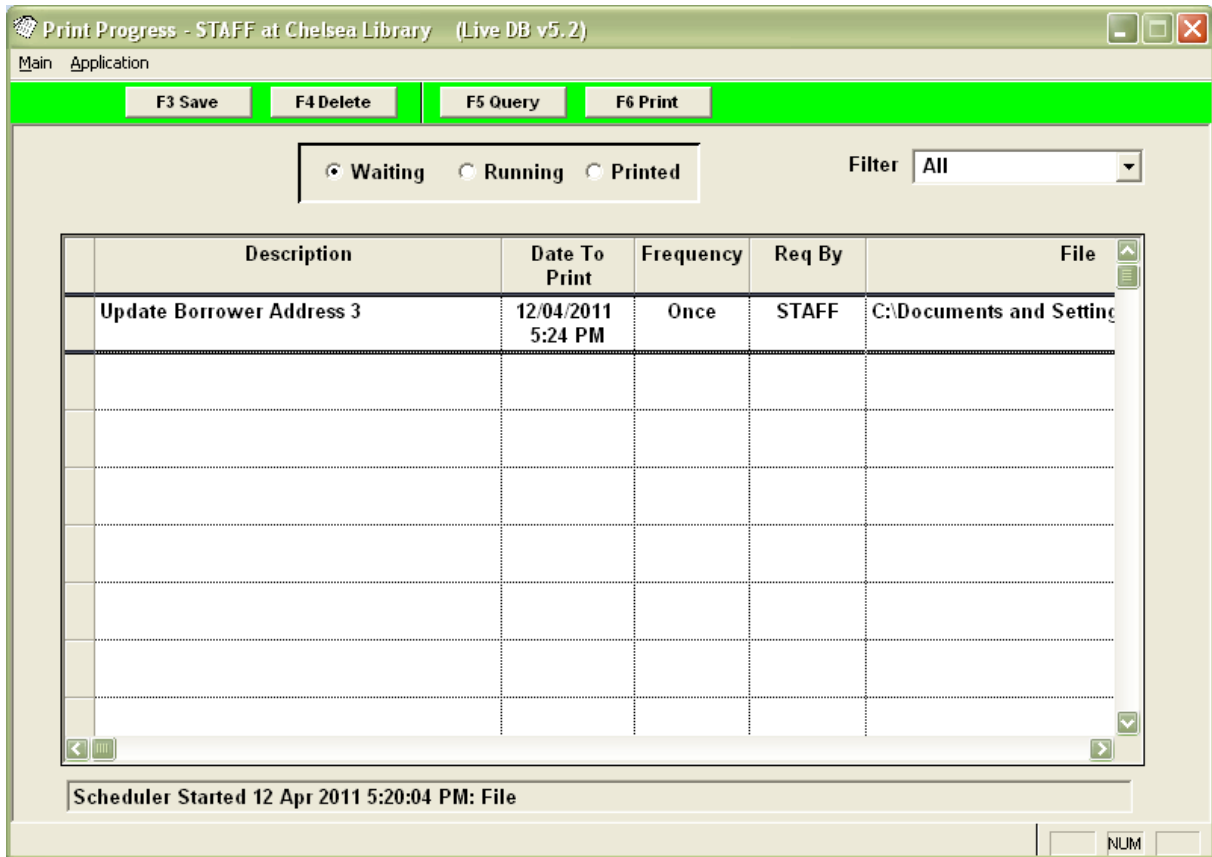

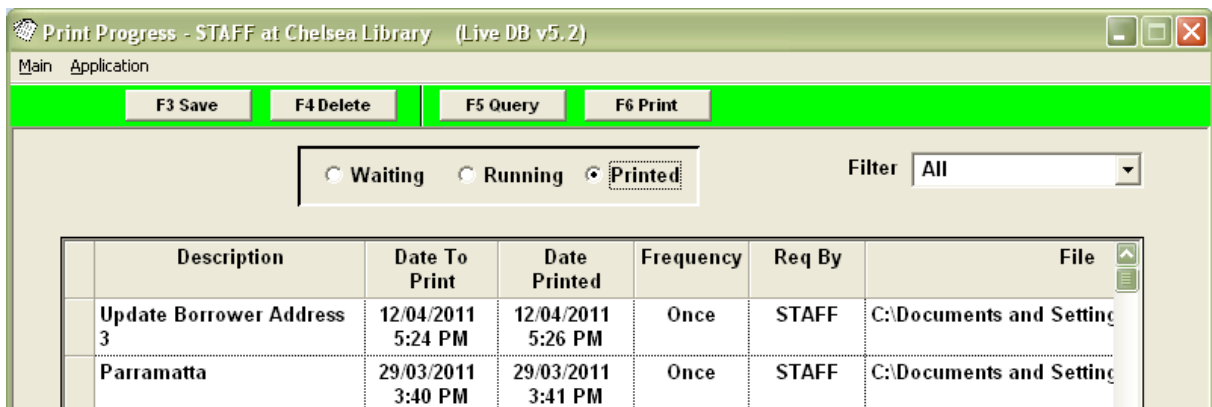4. Select a Save in: location and type in a File name:

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

Check Print Progress

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

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

3. Your report will show up in **Printed** when it is complete

The matching Borrower details should then be updated.

Updated Borrower Record:

Memo that appears in Circulation:

System Activity Trends

The system activity window gives a brief overview of the system for the following activities. The colours used in the graph are different for each activity.

- Issues (**Green**)
- Returns (**Red**)
- Reserves (**Blue**)
- Enquiry (**Yellow**)

This window may also be used to initiate spreadsheet data transfer.

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **System Activity** – the Circulation Activity screen will display:
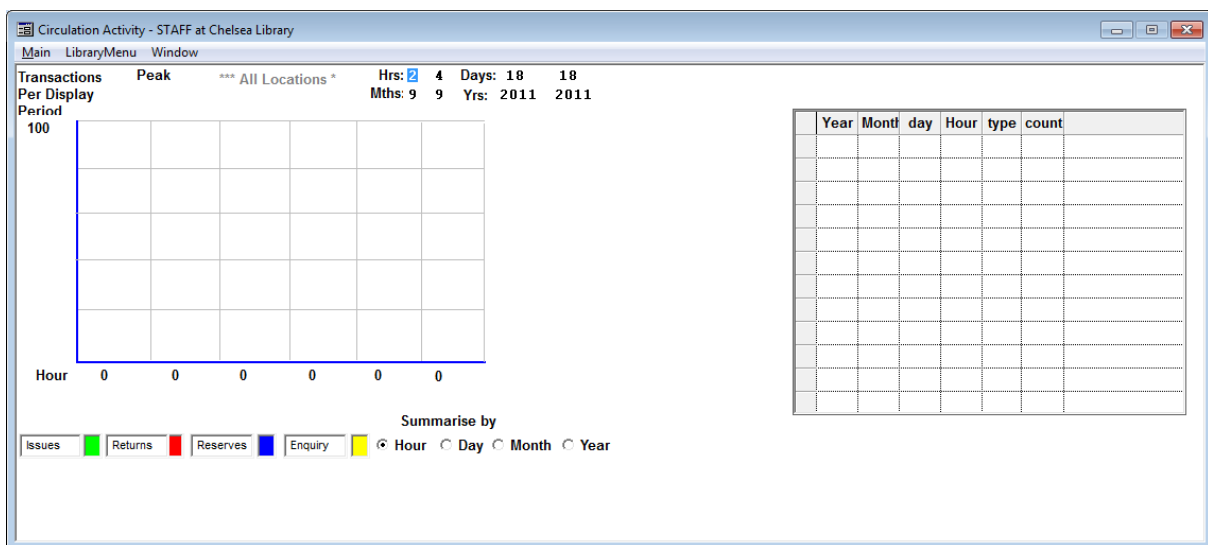

3. This window is actually using the collected statistics and may be used to view any period by changing the **from** and **to** values for Hrs, Days, Mths and Yrs fields from the top of the window (highlight the field with your mouse and overwrite it) and then selecting **Window** > **Refresh** from the menu – the following ranges apply:
    a. Hrs: **0 – 23** – for example: 8 – 18 (for stats between 8am and 6 pm)
    b. Days: **1 – 31** – for example: 1 – 12 (for the first 12 days of the month)
    c. Mths: **1 – 12** – for example: 1 – 3 (for the first quarter)
    d. Yrs: **2XXX – 2XXXX** – for example: 2009 – 2010 (for the 2009 and 210 stats)

Please Note: By default, the Hrs, Days, Mth and Yrs fields will default to the current date and time.

Please Note: When viewing statistics on the system activity window you may only view down to the level at which stats are being collected – for example: if you are not collecting by hour enter **0 - 23** in the hours fields.
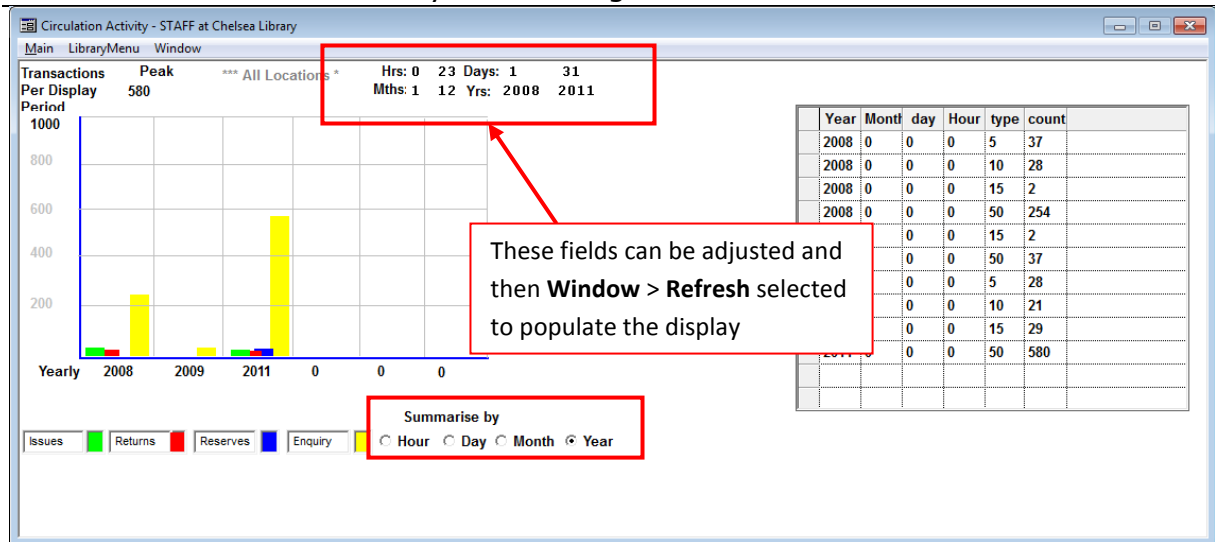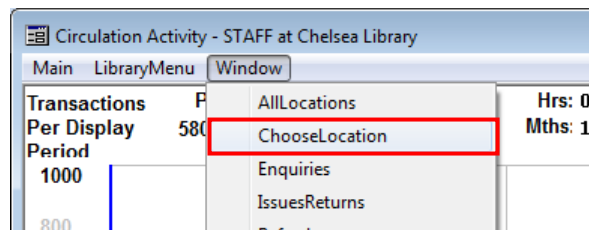
4. The display can be changed to be **Hour**, **Day**, **Month** or **Year** using the <u>Summarised by</u> radio button selections at the bottom of the screen

5. The default display is: **All Locations** – to view a particular location in isolation:

    e. Select **Window > ChooseLocation** from the menu

    f. The following prompt will display:
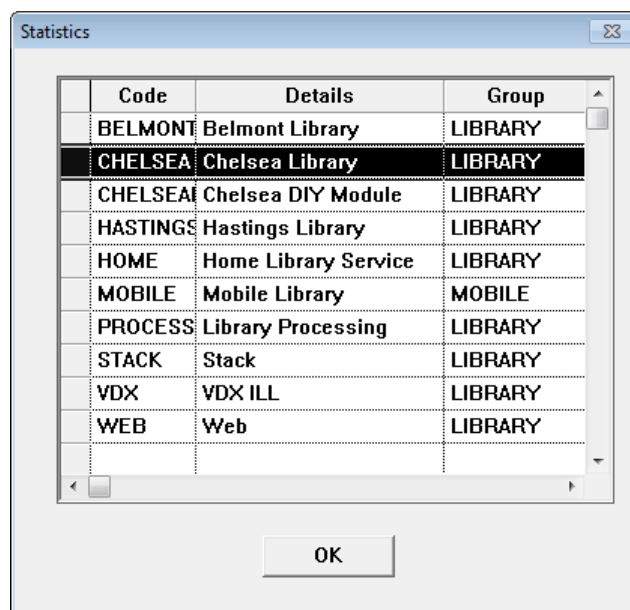
    g. **Highlight** the desired location and click the **OK** button – the Location at the top of the screen will change to match the selected Location

h. **Select Window > Refresh** to refresh the statistics displayed
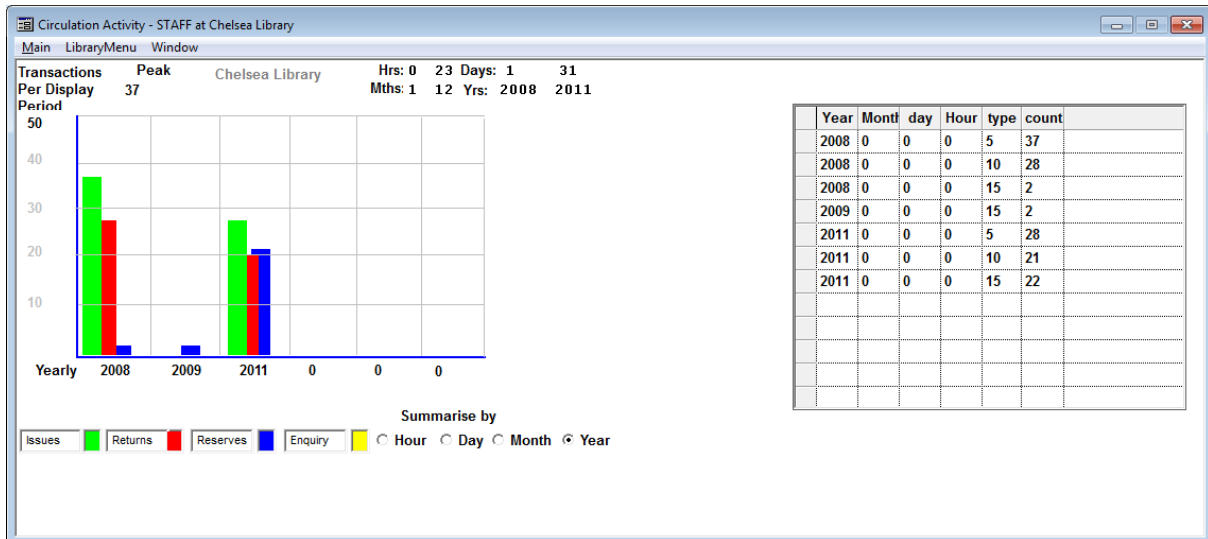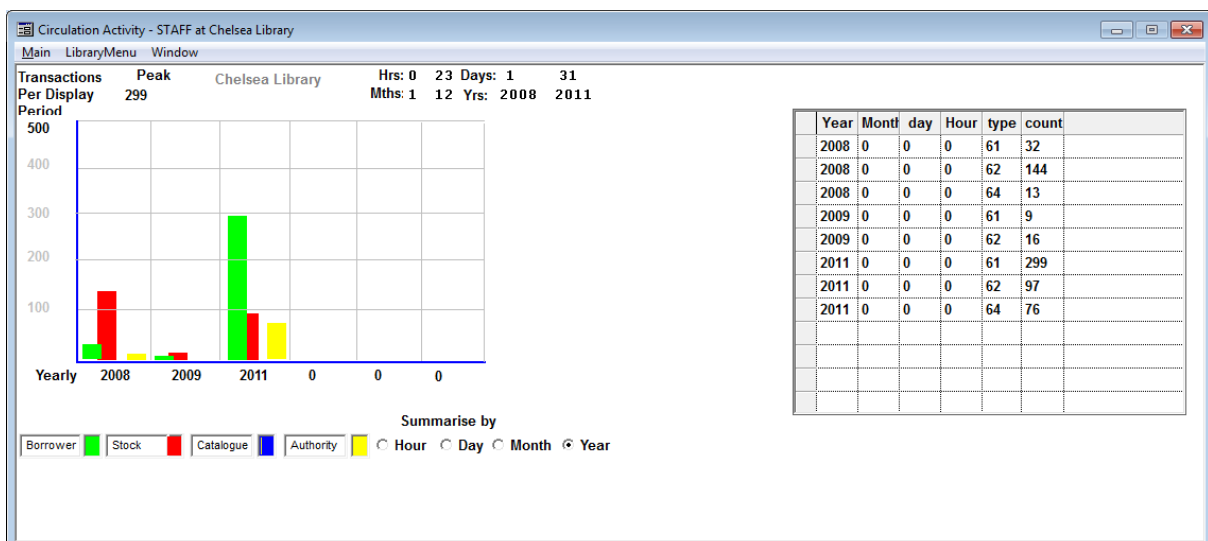

6. The default display is to show **IssuesReturns** – the system activity can be changed to be viewed by Borrower (**Green**), Stockitem (**Red**), Catalogue (**Blue**) and Authority (**Yellow**) by selecting **Window** > **Enquiries** and then **Window** > **Refresh**

As the population of statistics grows the data collection queries may take some time so this should not be activated when the system is busy.

Please Note: Use **Window** > **Refresh** whenever you have changed any of the selection fields.

Printing

If you have a colour printer, you can print the image. There is no Print button in the *Amlib* client but you can capture a screenshot by holding the **Alt** button while clicking the **PrtScn** button on your keyboard. You can then paste (**Ctrl + V**) the image into Word or WordPad for printing.

APPENDIX 1: BACKUP AMLIB SQL SERVER & CREATE TEST DATABASES:
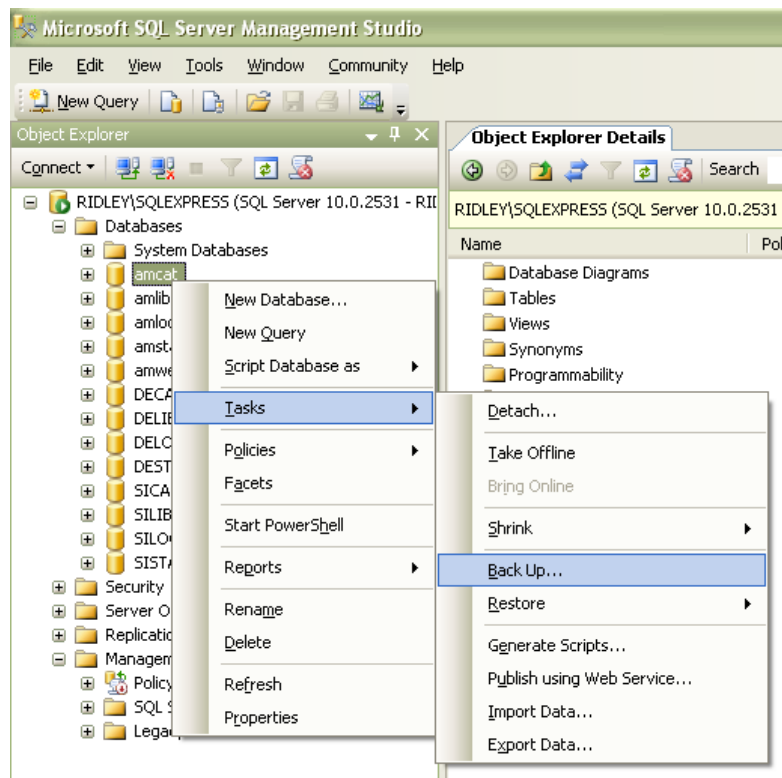**SQL SERVER MANAGEMENT STUDIO**

If you have any queries about backup do not hesitate to contact our OCLC Support office.

The following databases must be backed up:

- **AMCAT**
- **AMLIB**
- **AMLOCAL**
- **AMSTATS**
- **AMWEB**

Backup

1. Launch *Microsoft SQL Server Management Studio*

2. Expand the <u>Databases</u> selection tree [**+**]

3. Right-click on the **AMCAT** database and select **Tasks** > **Back Up...**

4. The <u>Back Up Database</u> window will open

5. Select the <u>General</u> page

6. Choose the following options:

- <u>Source</u>

    o Database: **AMCAT**

    o Backup type: **Full**
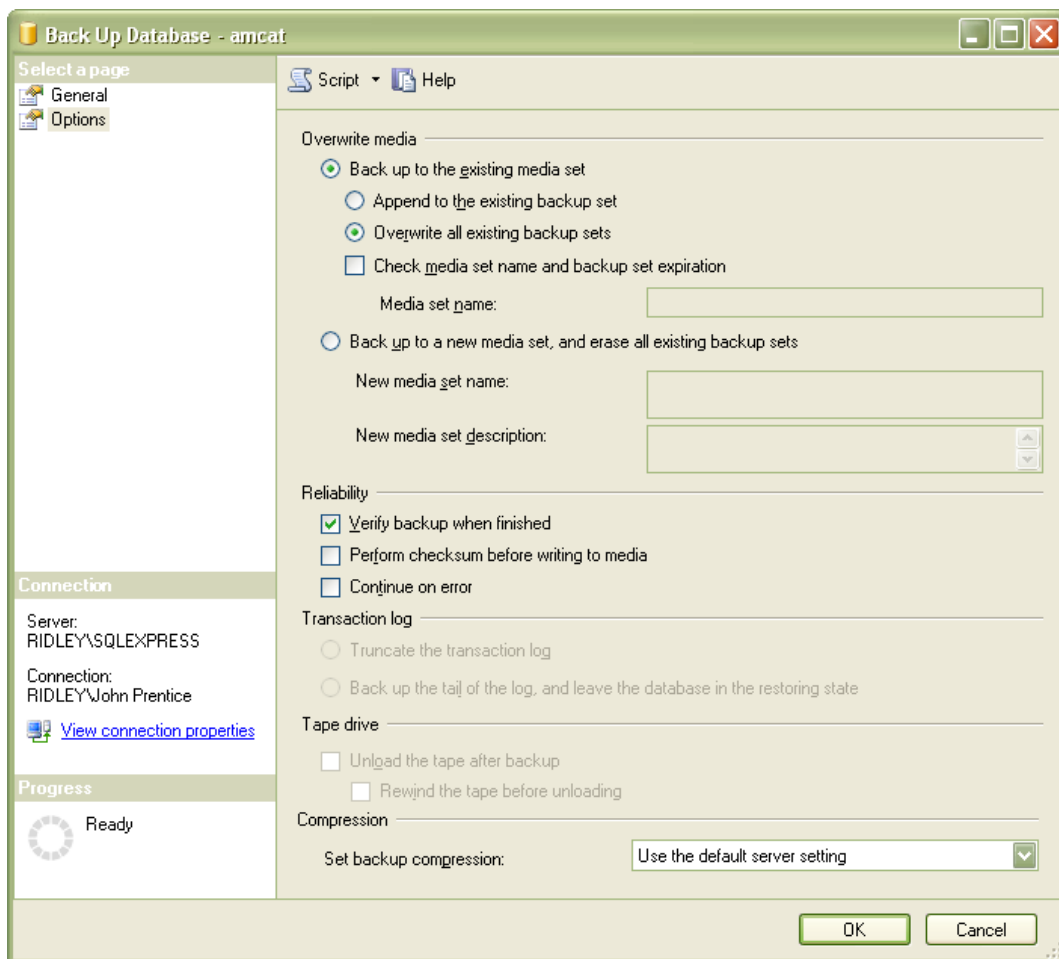
- Destination (can leave as default)

    o Click on the **Add** button to open the Select Backup Destination window

    o Click on the **...** button to browse to and select a destination

    o Click on the **OK** button
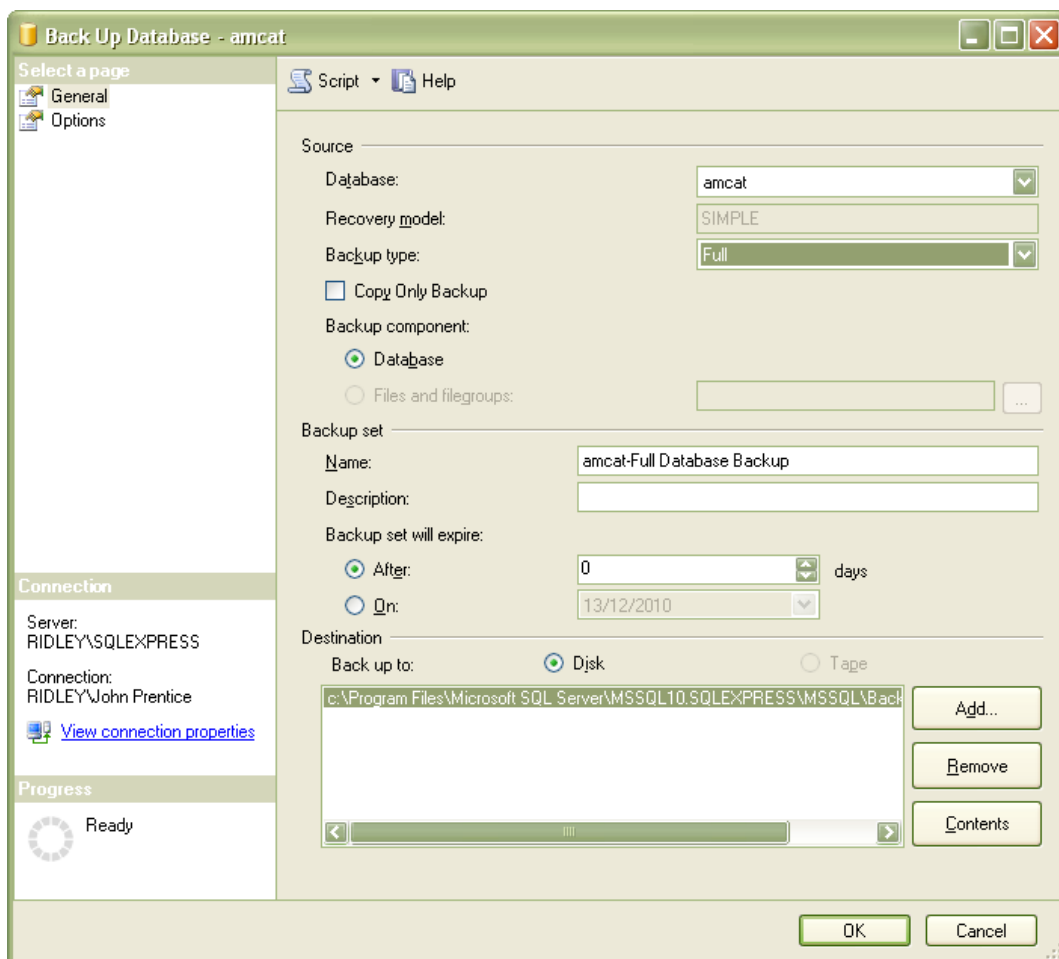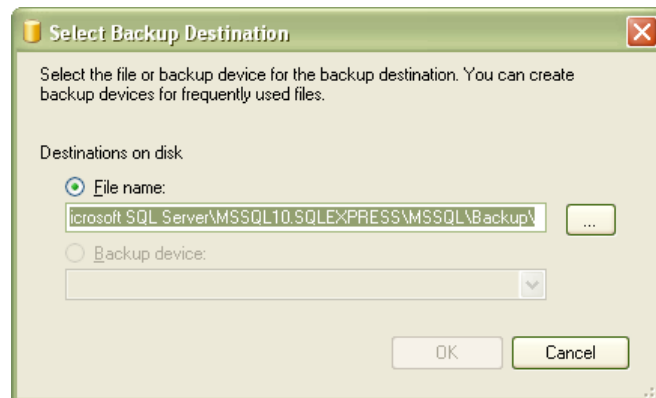
7. Select the Options page
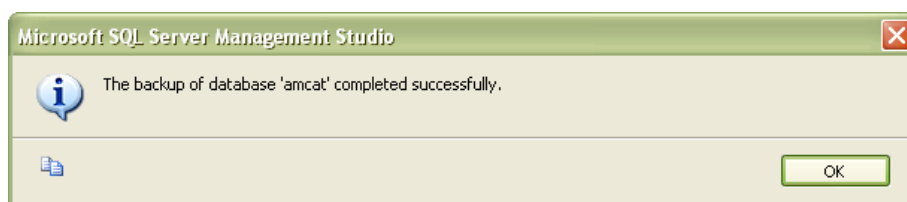
8. Choose the following options:

- Overwrite media

    o **Overwrite all existing backup sets**

- Reliability
  - o **Verify backup when finished**

9. Click the **OK** button

10. When complete the following message will appear: **The backup of database 'AMCAT' completed successfully.**

11. Repeat steps 3 – 10 for the **AMLIB**, **AMLOCAL**, **AMSTATS** and **AMWEB** databases
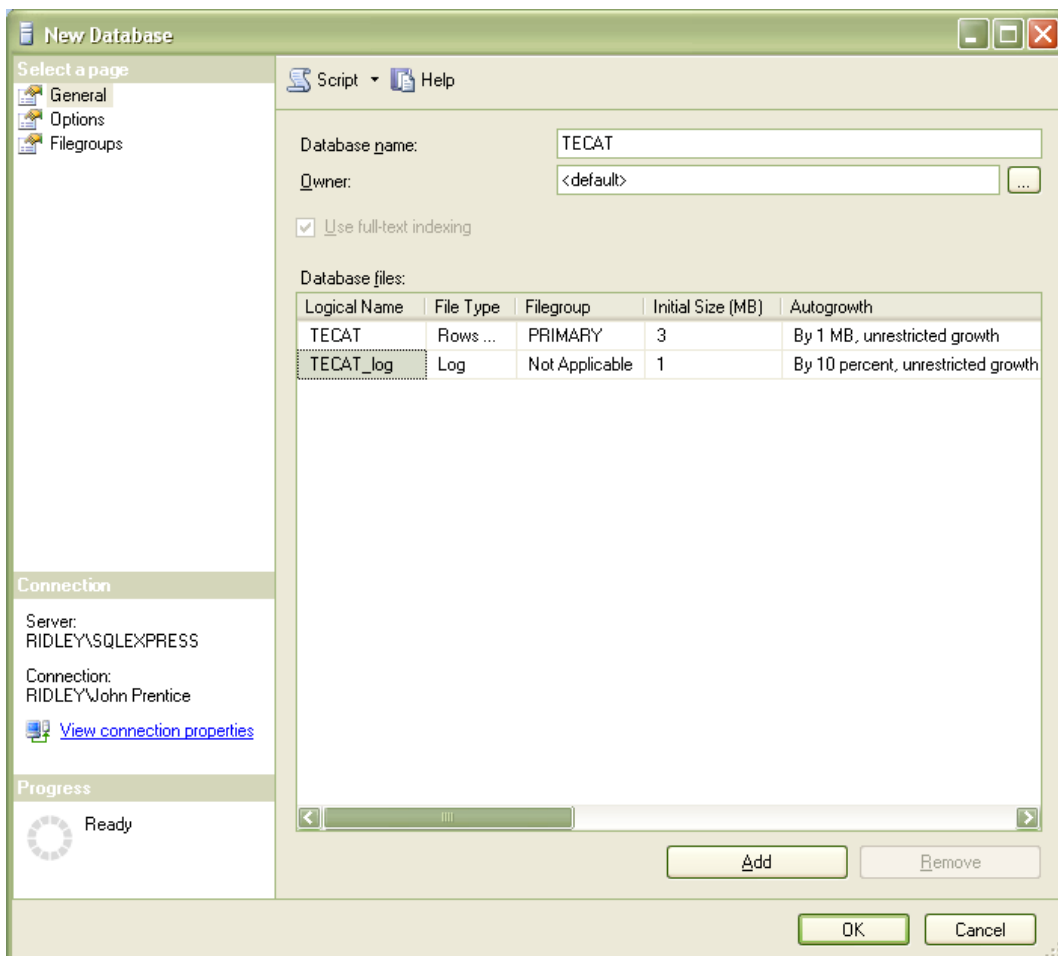
Create a Test Database

The following databases will be created:

- **TECAT**
- **TELIB**
- **TELOCAL**
- **TESTATS**
- **TEWEB**

Create Databases

1. Launch *Microsoft SQL Server Management Studio*

2. Right-click on Databases and select **New Database...** – the New Database window will open

3. Database Name = **TECAT**

4. Click the **OK** button to create the database

5. Repeat steps 2-4 to create the **TELIB**, **TELOCAL**, **TESTATS** and **TEWEB** databases

Restore Backed Up Databases to New Test Databases

1. Expand the Databases selection tree [**+**]

2. Right-click on the **TECAT** database and select **Tasks** > **Restore > Database...** – the Restore Database window will open
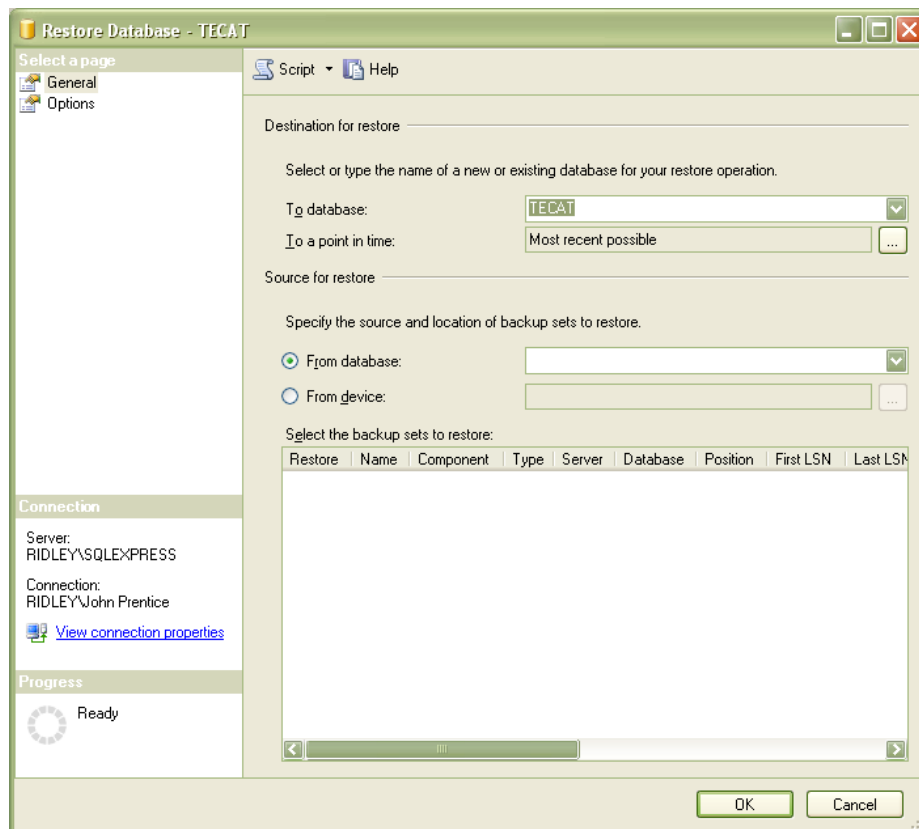
3. Select the From device: radio button

4. Click the **...** (Select Devices)button – the Specify Backup screen will open
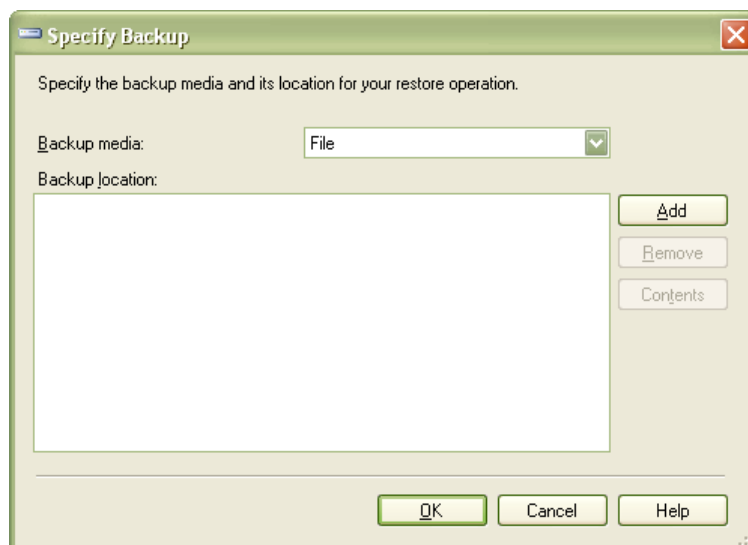
5. Click the **Add** button – the <u>Locate Backup File</u> window will open
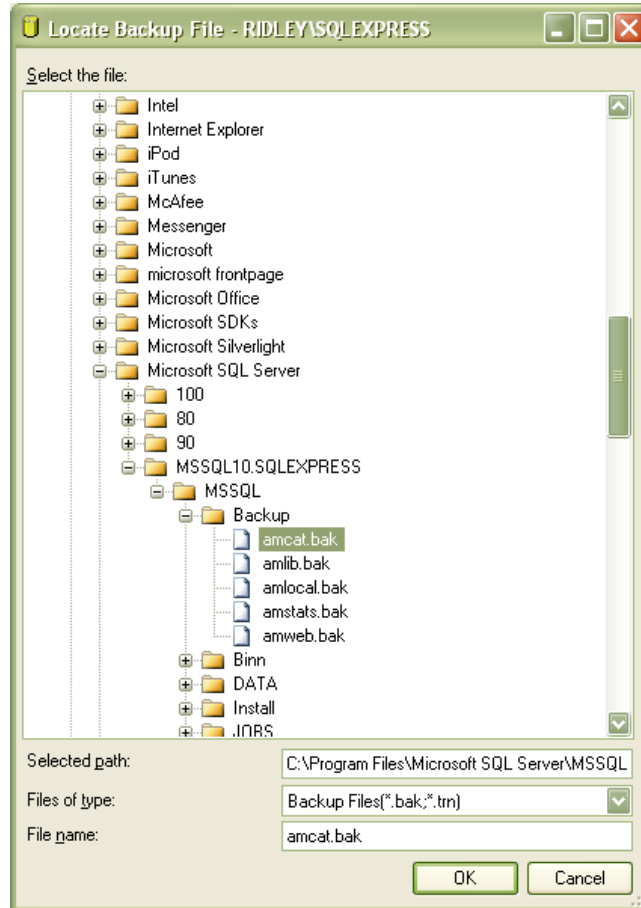

6. Select the corresponding **AMCAT.BAK** file

7. Click the **OK** button to return to the <u>Specify Backup</u> window

8. Click the **OK** button to return to the Restore database window

9. **Tick** the <u>Restore</u> box for the selected database

10. Select the <u>Options</u> page

11. <u>Restore options</u> – select **Overwrite the existing database (WITH REPLACE)**

12. Edit the paths of the Data and Log files in the Restore Database files as: table so that they reflect the path of the test database file name – for example: **TECAT.mdf** and **TECAT_log.ldf**

13. Click the **OK** button – the database will be restored

14. The following message will appear when complete: **The restore of the database XXXX completed successfully.**
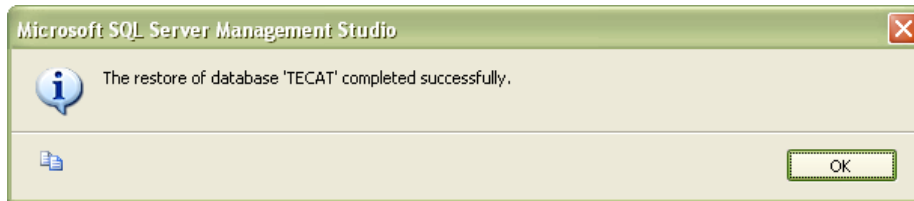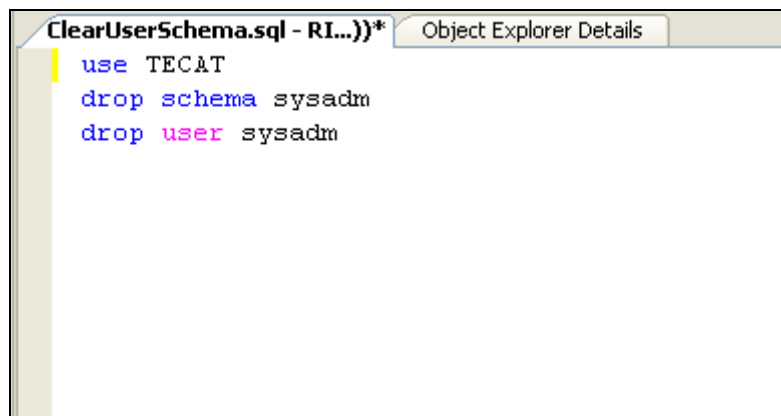

15. Repeat steps 2-14 for all the **TE** databases

Map User Schema

It may be necessary to clear the old user schema first.

1. Click the **New Query** button – this will open up the SQL Query screen

2. Type in the following:

   - **use TECAT**
   - **drop schema sysadm**
   - **drop user sysadm**

3. Click the **!Execute** button

4. Repeat for all **TE** databases

Map User Schema

1. Expand the Security selection tree [**+**]

2. Expand the Login selection tree [**+**]

3. Right-click on the **SYSADM** and select **Properties** – the Login Properties window will open

4. Select a page = **User Mapping**

5. Users mapped to this login: ensure there are ticks against ALL the **TE** databases

6. Database role membership for: ensure that **db_owner** is **ticked**

7. Click the **OK** button when complete
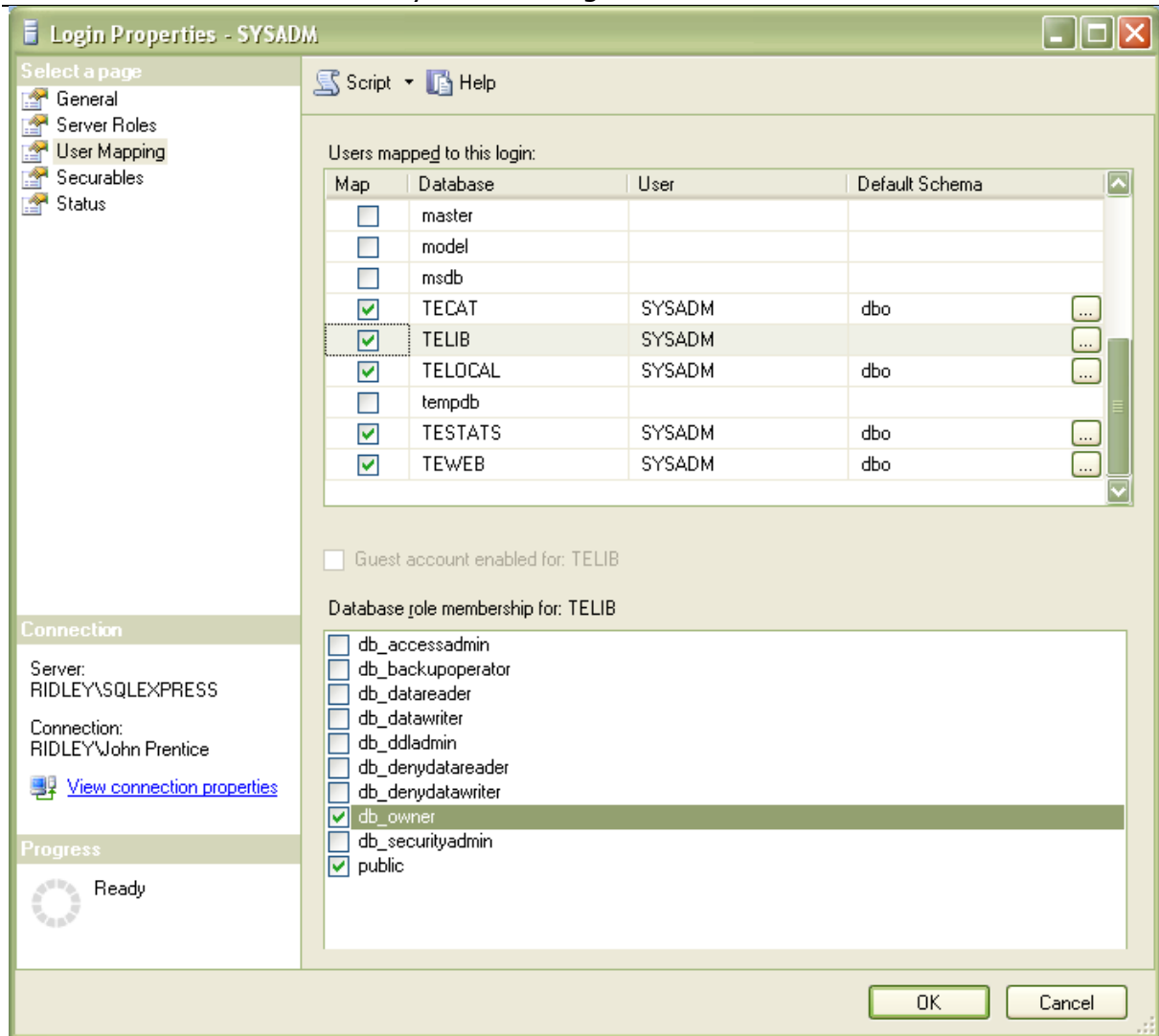
Link the Amlib Client to the Test Database

1. In the Amlib folder on the Amlib server, locate the **SQL.ini** file

2. Open the **SQL.ini** file in *Notepad*

3. Scroll down to the server paths section – you should see the existing server paths for the default (Live) SQL databases:

; This is the server paths used for the default SQL server

REMOTEDBNAME=AMCAT,DRIVER=SQL SERVER;SERVER=MYSERVERNAME\SQLEXPRESS;DATABASE=AMCAT
REMOTEDBNAME=AMLIB,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=AMLIB
REMOTEDBNAME=AMLOCAL,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=AMLOCAL
REMOTEDBNAME=AMSTATS,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=AMSTATS
REMOTEDBNAME=AMWEB,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=AMWEB

4. Copy the existing set and then paste underneath, then edit the new set to create the link to the **TE**

; This is the server paths used for the test SQL server

REMOTEDBNAME=**TECAT**,DRIVER=SQL SERVER;SERVER=MYSERVERNAME\SQLEXPRESS;DATABASE=**TECAT**
REMOTEDBNAME=**TELIB**,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=**TELIB**
REMOTEDBNAME=**TELOCAL**,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=**TELOCAL**
REMOTEDBNAME=**TESTATS**,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=**TESTATS**
REMOTEDBNAME=**TEWEB**,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=**TEWEB**

5. Save the changes

The test database is now linked to Amlib.

APPENDIX 2: Amlib SQL Server 2008 Maintenance Plans

This document applies to any purchased version of SQL Server 2008 or 2008R2. This does not apply to the Express version.

Your library has invested considerable time and effort in the creation of the library data, so it is vital to protect this investment and ensure that loan transactions and financial records are safe. The most important tool in this process is the Maintenance Plan.

A properly configured Maintenance Plan does more than just backup the databases. It also runs a number of important tweaking tasks which help to keep the system healthy and running as fast as possible.

Third party backup utilities are NOT a substitute for running an SQL Server Maintenance Plan, despite any claims made by their manufacturers.

Make sure that you check to see if any other Maintenance plans are being run on the server. They may be configured in a way that will affect the Amlib databases, certainly you will have to avoid scheduling conflicts.
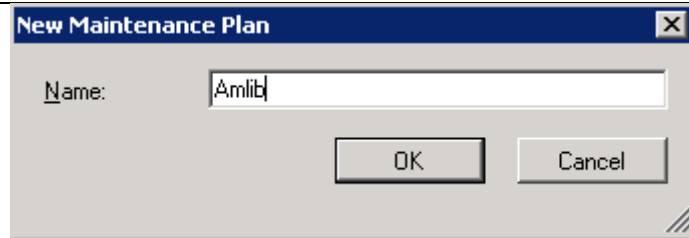
Step One:

In SQL Server Management Studio, expand "Management" and right-click on "Maintenance Plans", then select "New Maintenance Plan…":
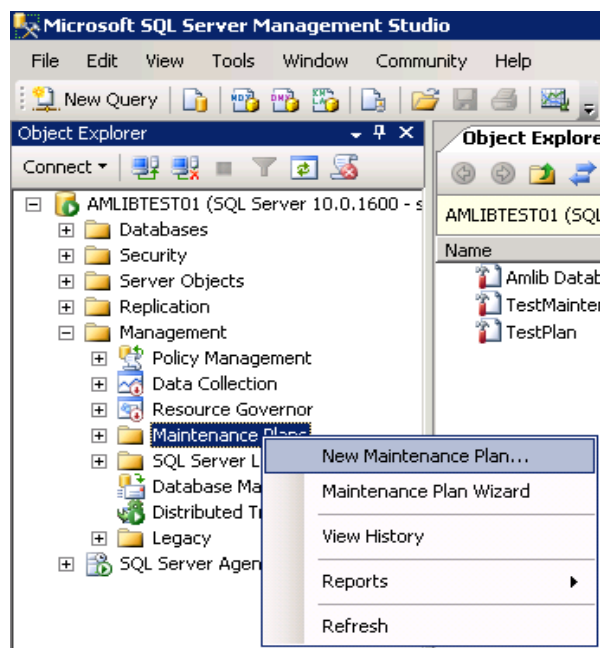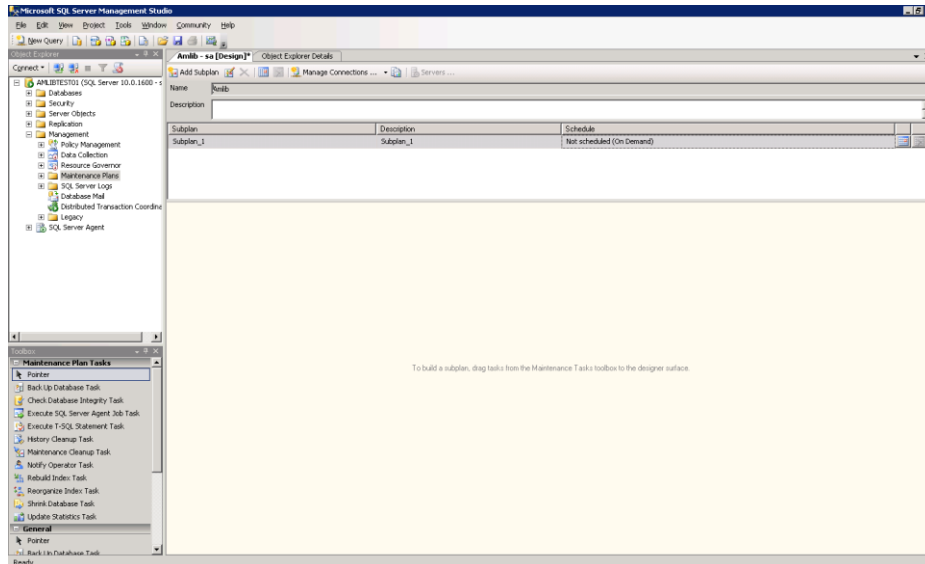

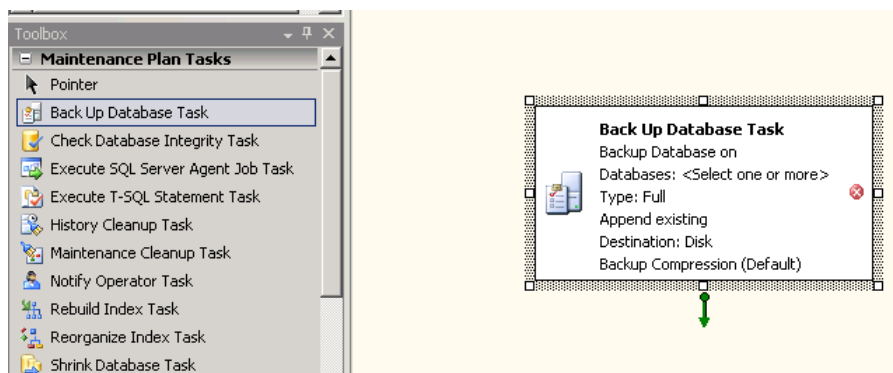Give the new plan a suitable name:

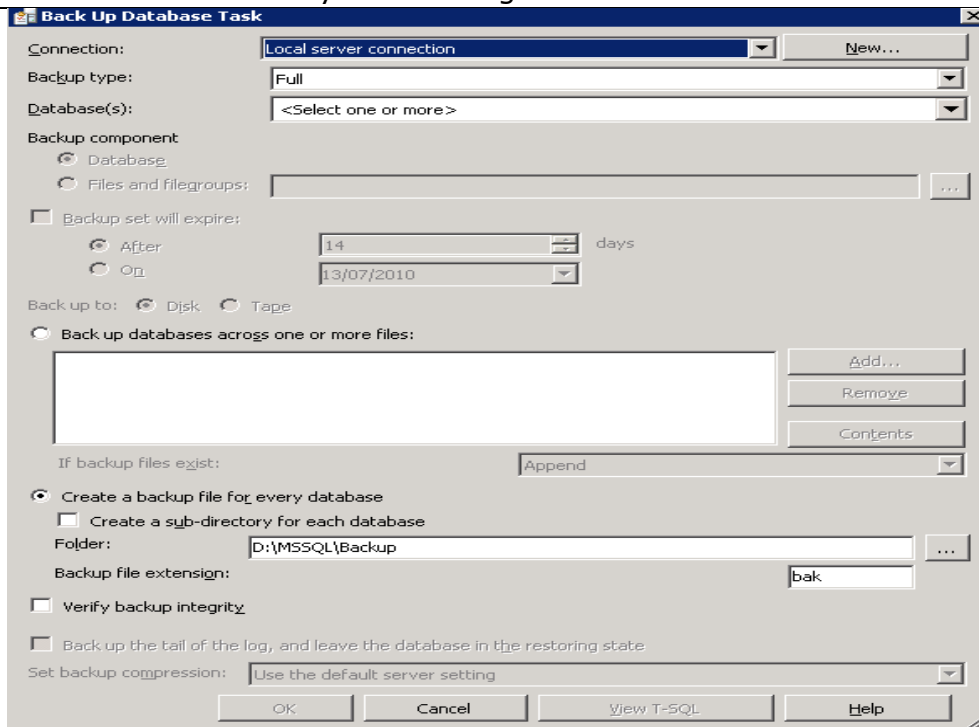One you have clicked on "OK", this screen will open:

Step Two:

From the "Toolbox" on the sidebar, select the "Back Up Database Task", then drag and drop it into the white area:
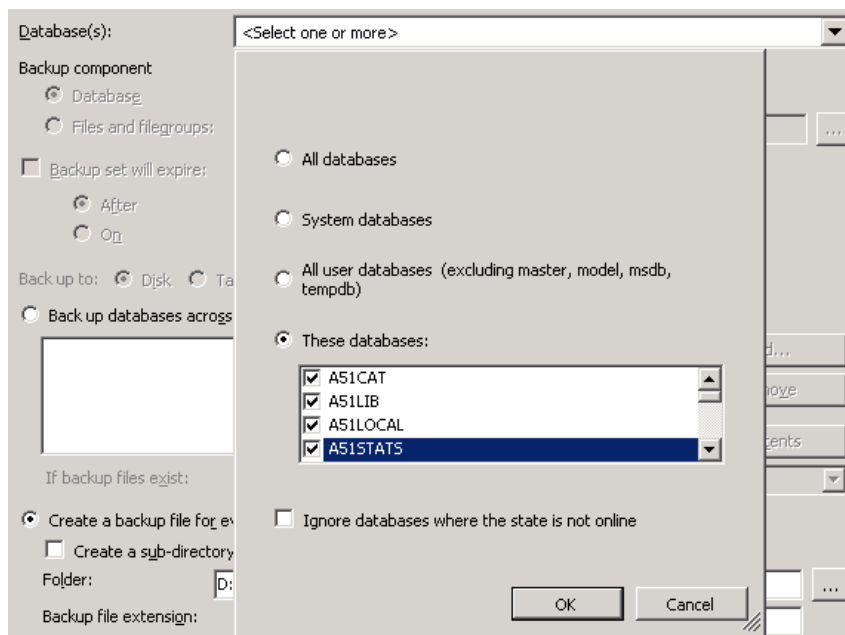

Double click on the task to open the configuration settings.

Click on the downward facing arrow on the dropdown box next to "Database(s)" and select the databases to be backed up (all Amlib databases, i.e. AMCAT, AMLIB, AMLOCAL, AMSTATS and AMWEB – yours may have prefixes other than "AM").

Tick the box next to "Backup set will expire" and set the expiration period based on your IT's backup policies. If your IT has no policy on how long the backups should be kept, you can leave it at the default 14 days:

Ensure that your Database Backup Task contains the same settings as the screenshot below, then select "OK":

Step Three:

In addition to backing up the entire databases, we will also want to make a backup of the transaction logs. Once again, drag and drop the "Back Up Database Task" from the Toolbox on the sidebar into the white space to create a second task.
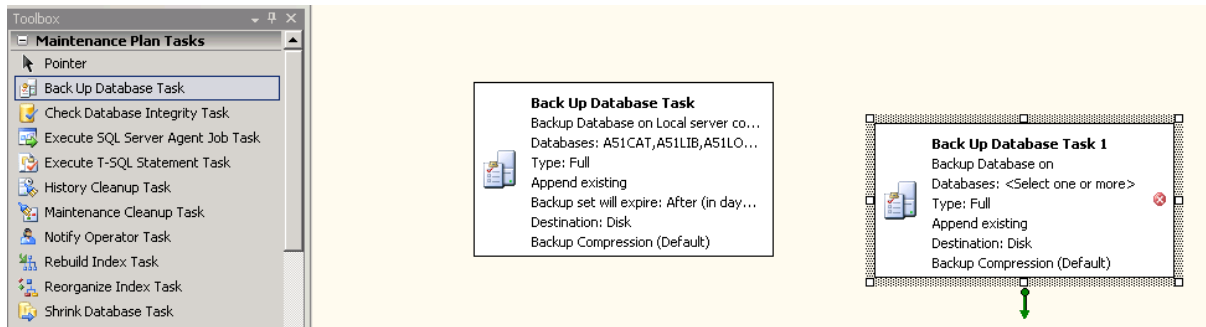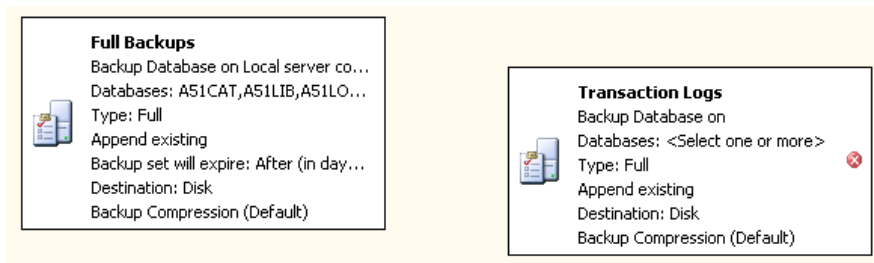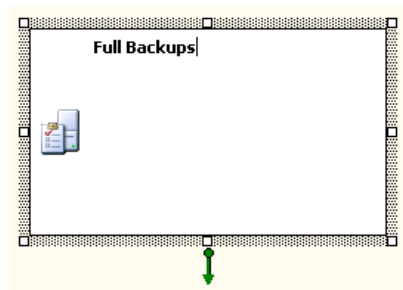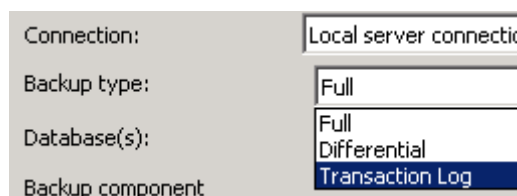

To avoid confusion, you can rename tasks by clicking once on the bolded text at the top and altering it:
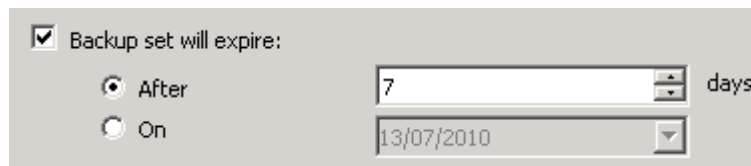
Double click on the second task to open its configuration settings.

Change the "Backup Type" to "Transaction Log" and again select your Amlib databases from the "Database(s)" drop down:
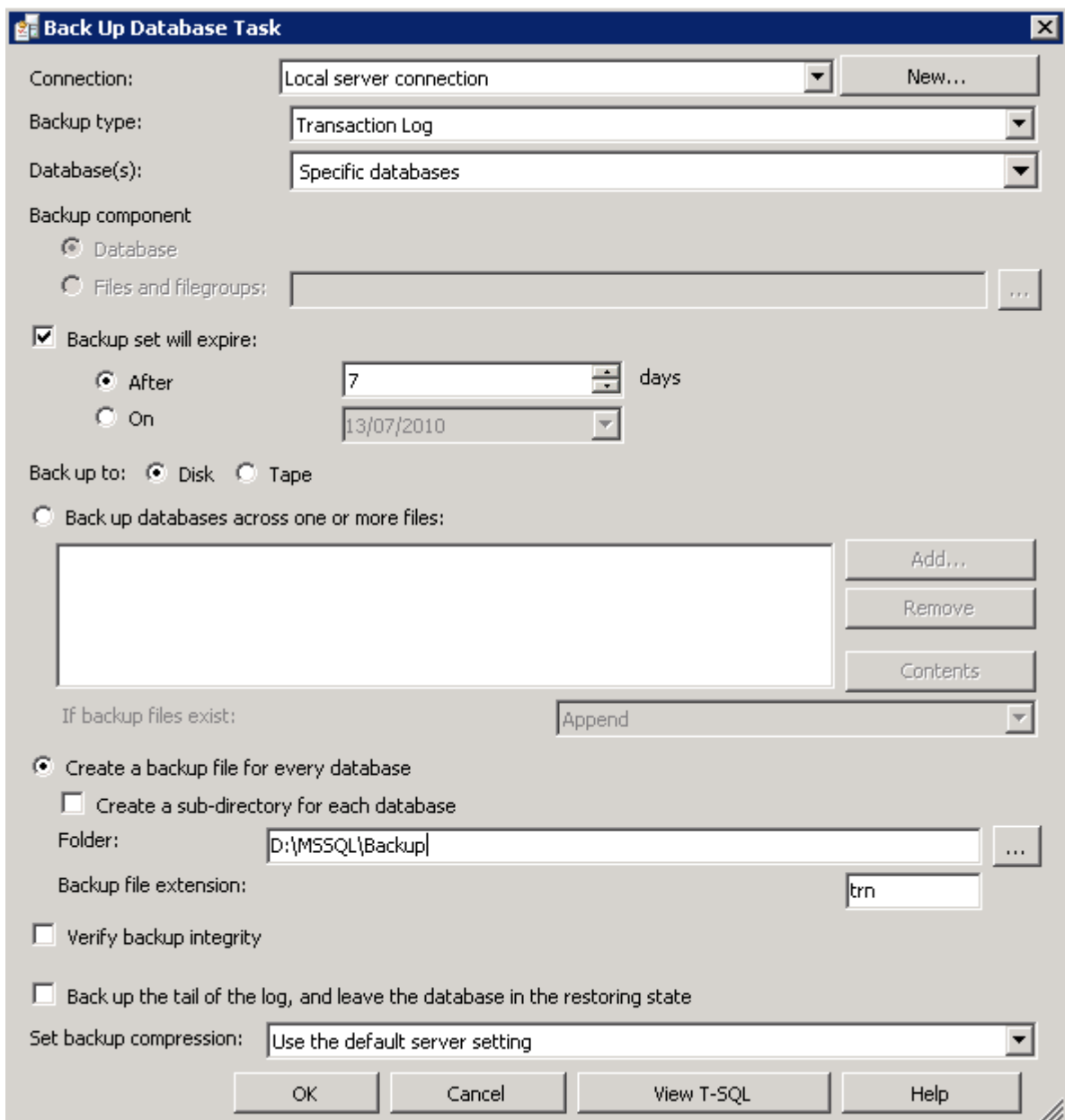
Like with the full backups, tick the box next to "Backup set will expire" and set the expiration period. Transaction logs can take up quite a lot of room, so OCLC recommend change this to expire every 7 days, but this is dependent on the size of your hard drive.

Ensure that all of your settings as the same as the screenshot below, then click on "OK":

Step Four:

From the Toolbox on the Sidebar, drag and drop the "Check Database Integrity Task" into the white space.
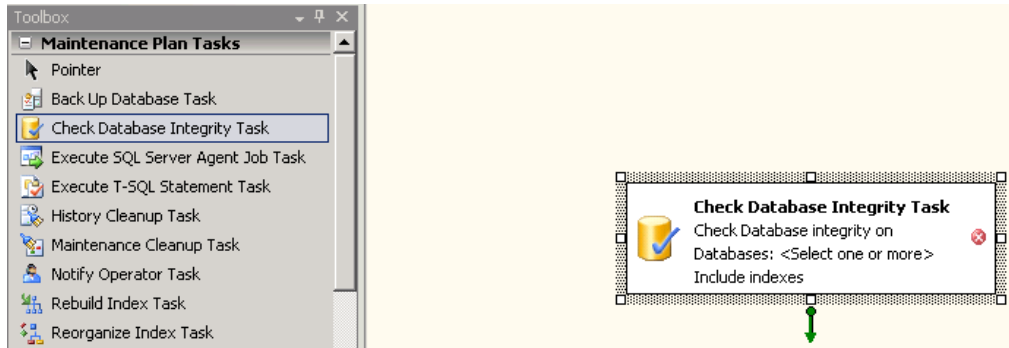
Double click on the task to open the configuration settings and select your Amlib databases.
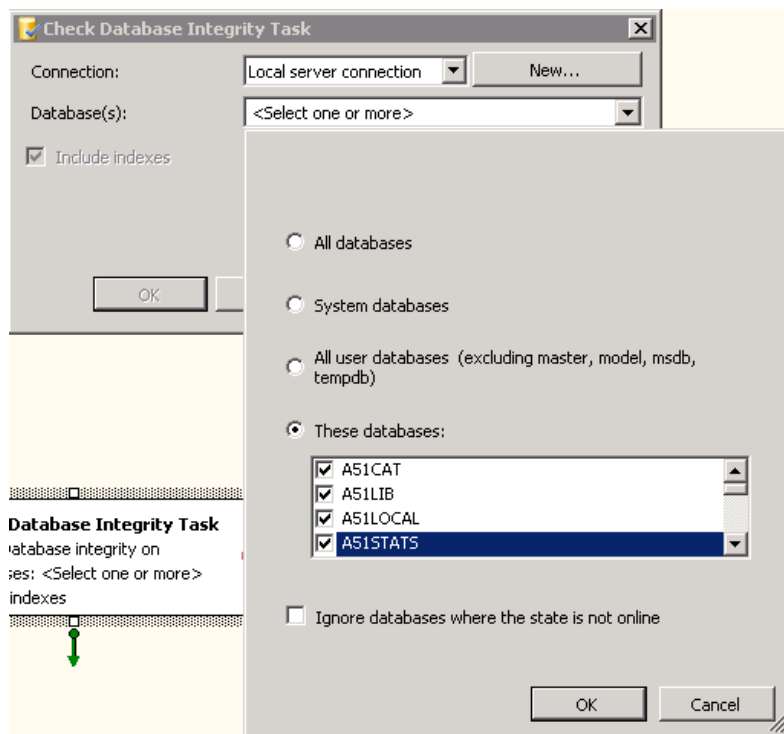
Ensure that "Include Indexes" is ticked and select "OK".
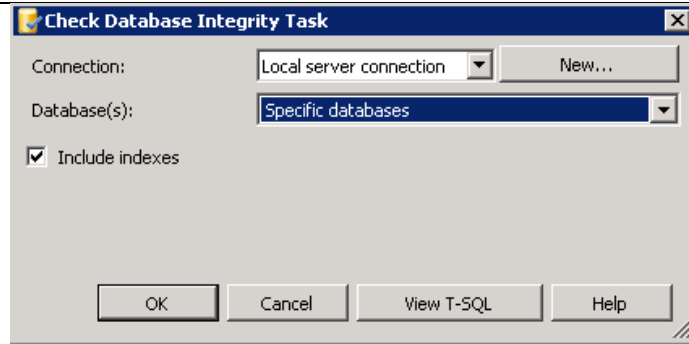
Step Five:

From the Toolbox on the Sidebar, drag and drop the "Update Statistics Task" into the white space.
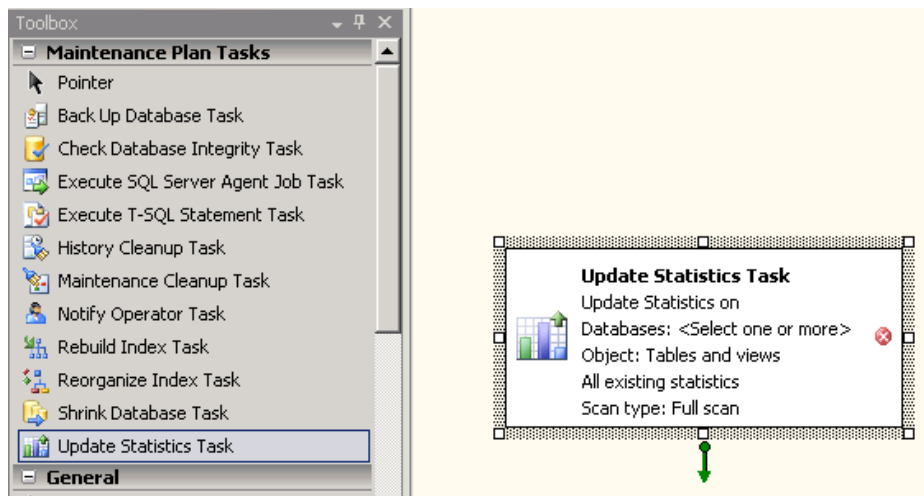
Double click on the task to open the configuration settings. Select your Amlib databases from the "Databases" drop down and select "OK".
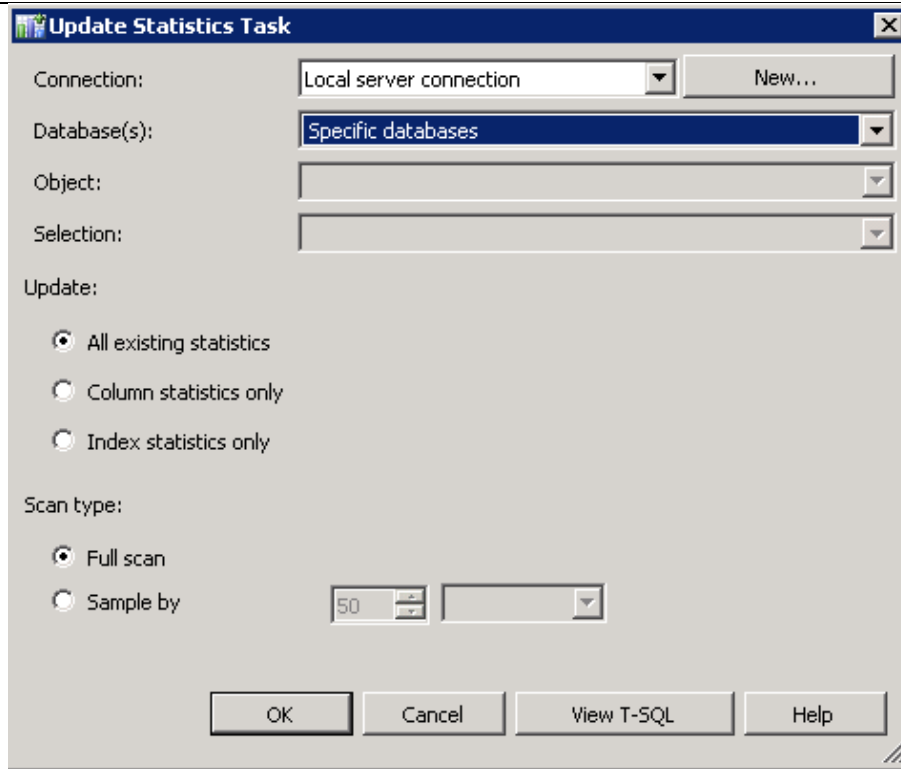
Leave the defaults: "All existing databases" and "Full scan".

Step Six:

Drag and drop the "History Cleanup Task" from the Toolbox on the Sidebar into the white space.
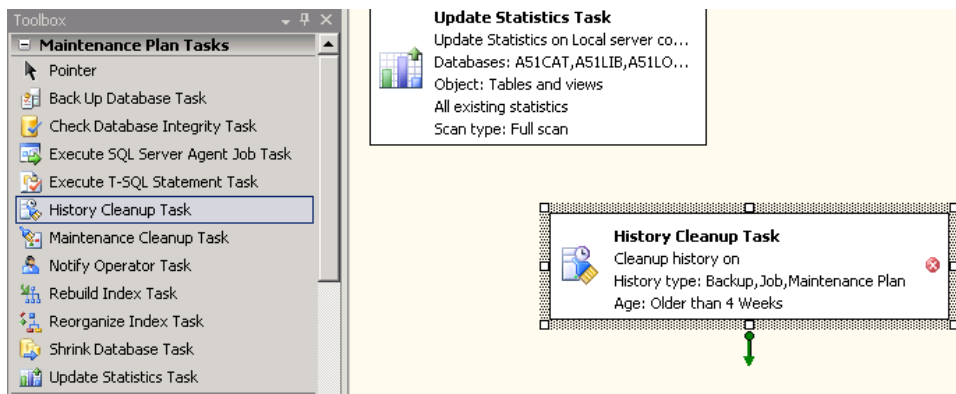
Double click on this task to view the configuration settings. Most of them should be left as the default, but you may wish to alter the expiration period.
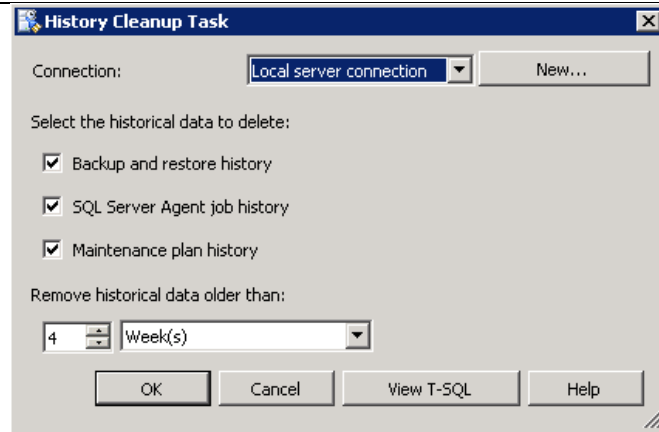
Step Seven:

Now that all of the tasks have been created, they need to be connected. When selected, each task will have a green arrow down the bottom:
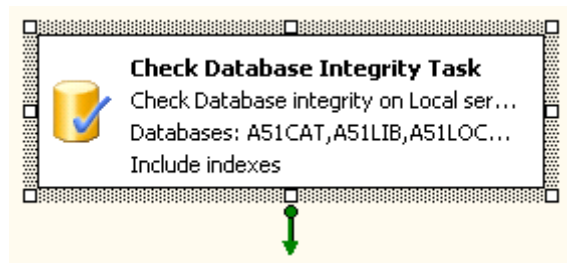
Click on this green arrow and drag it out to the next task in the list. Do this to all tasks so that they are pointing towards the next one that was created.

The final task will not be connected to a future task.
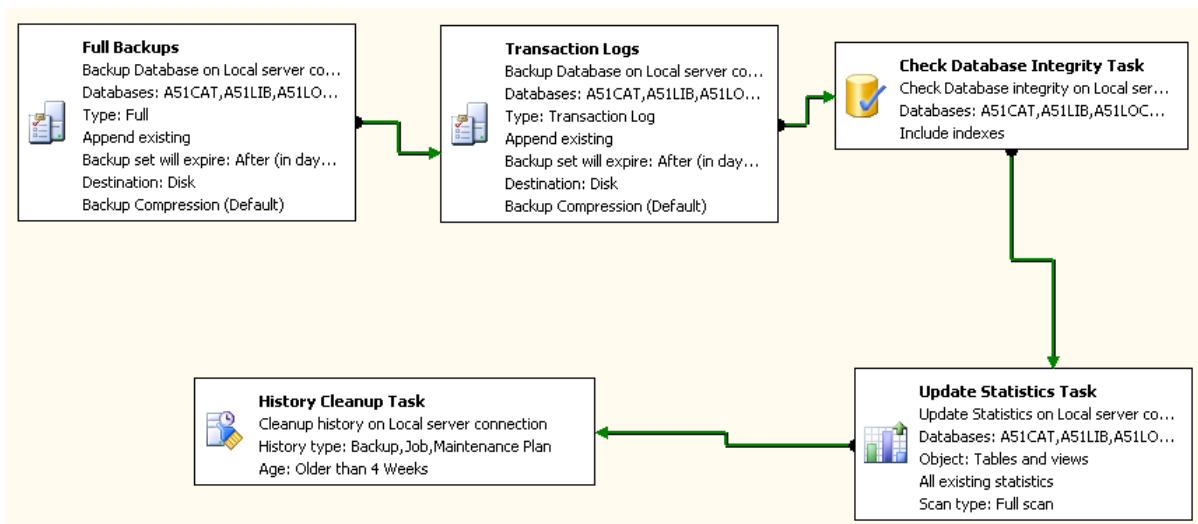
Step Eight:

The final step in settings up your maintenance plans is to create a schedule.

At the top of the white space, click on the calendar icon:
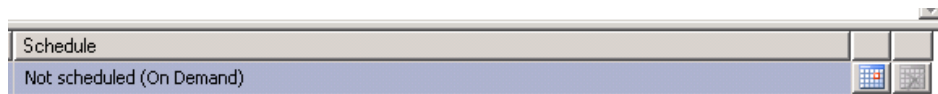
It is recommended that these tasks be run daily and set to occur outside of normal opening hours.

Some considerations to be made when scheduling your plan:

- Make sure any scheduled reports have occurred before your Maintenance Plan
- Allow sufficient time for scheduled reports to be completed
- Make sure other system tasks will happen after your Maintenance Plan
- Allow sufficient time for your Maintenance Plan to be completed

After your plan has been scheduled, you can save the plan and exit SQL Server Management Studio.

If you have any queries, please contact Amlib Support either via the Online Helpdesk (https://servicedesk.oclc.org) or via email (support-amlib@oclc.org).

APPENDIX 3: DISASTER RECOVERY PLANNING

Losing your library data is a frustrating, expensive and unnecessary experience; don't let it happen to you.

This document doesn't pretend to teach you everything that you need to know about disaster recovery, but it should get you thinking along the right lines. Many City and Shire Councils and some schools will already have disaster recovery plans; this document focuses on the elements of such a plan that relate to library management systems.

O'Toole's Commentary on Murphy's Law – "Murphy was an optimist"

There are a number of events that can bring your library management system to a complete halt, some are temporary, some are not.

1. **Equipment failure**

   - Hard Disk crash

   - Network failure

   - Virus attack

2. **Power Outage**

   - Anything between a momentary disk-frying surge and a couple of candle-lit days

3. **Operator/Administrator error**

   - Accidental deletion of files or data

   - Mistakes while editing configuration files (INI files)

   - Removal of User permissions

4. **Fire**

   - The most compelling reason for keeping off-site backups

   - Even if the whole building and collection is lost you will want to recover the data for your insurance claim

5. **Theft**

These things happen to school and community libraries regularly, if you don't have a good disaster recovery plan you will lose all your data, thousands of catalogue and holdings records, all your circulation information and any value added cataloguing that you have done. You will not be happy.

Make a Plan
Last Updated: 26 February 2013

There are three phases to a disaster recovery plan:

<u>Before:</u>

- **Preventative**

  Are there any actions you can take that might prevent the disaster from happening?

  - Replace aging hardware before it fails
  - Use power line filters and/or surge protectors, at least on the server
  - Keep your Operating System up-to-date by installing Service Packs
  - Use up-to-date virus protection software
  - Use only commonly available backup media, software and drives
  - Monitor the amount of free disk space on your database server to ensure that there is enough space for the backups and database growth
  - Follow the OCLC recommended procedures for backups
  - Document the backup and recovery procedures
    - Make sure that each action is assigned to a person

- **Preparedness**

  Are there any actions you can take that will ensure that you are properly prepared to respond to and recover from the disaster?

  - Maintain and check backup procedures
    - If the databases are backed up to disk, SQL Base always does, you also need a process to copy the backup files to some other location and or media for off-site backup
    - Copy the following folders onto the backup media as well as the database backups:
      - Folder containing Images linked to Catalogues
      - Folder containing Images linked to Borrowers
      - Folder containing NetOpac html files
      - Folders containing AmlibNet html files
    - Label backup media clearly
    - Rotate backup media so that you are not over-writing the most recent backup
  - Keep off-site backups of the backup data and recovery software
  - Check the backup logs – allow access for both Library and IT staff for this purpose

- Keep your Amlib installation CDs – they always contain everything you need to carry out a fresh installation of the client software and also the latest SQL Base Database Management System

- Carry out a test recovery onto a set of test databases at regular intervals

- Install and test Offline on more than one PC etc.

During

  o **Response**

What action should be taken when a disaster occurs?

- Use Offline for circulation during power outages and network or server failures.
- Power down machines running on UPS devices before the battery fails.

After

  o **Recovery**

What action must be taken to restore library services to normal or at least make data available for the insurance claim?

- Borrow, rent or buy a replacement server as soon as possible
- Install the required Operating System, Database Management Software and backup utilities.
- Restore the Amlib databases from the most recent backup
- Install the Amlib Client software from the Amlib Installation CD
- Make sure that the new system is working

Allocate Responsibility

Decide who is responsible for each action that is specified in the plan and make sure that the person acknowledges the responsibility.

Practice

At regular intervals, practice recovering you library's databases from the most recent backups. This is one good reason for having a set of test databases, you can practice restoring from a backup on them with no risk to your live data.

Put these regular practices into you plan.

Review

Over time software systems change, new utilities get installed, web pages are updated, new people move into important roles; this means that your plan may become out-of –date. To avoid this review you plan at regular intervals.

Staff changes are a big cause of problems in Backup and Recovery procedures. Review the whole process with each new person so that there is a clear understanding of what is being done, why it is being done and by whom.

References

National Library of Australia - Disaster Planning for Libraries and Archives: Understanding the Essential Issues Retrieved August 31, 2005, from: http://www.nla.gov.au/nla/staffpaper/lyall1.html