

# Introductory Training

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# Introductory Training

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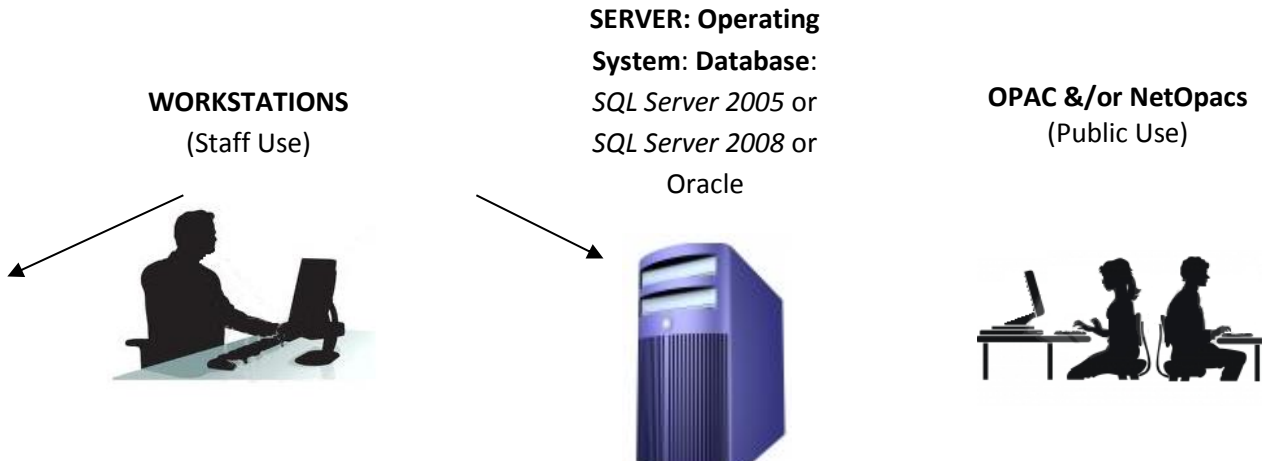
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## DATABASES

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### Welcome to Amlib



### Databases

On initial activation of *Amlib* you will be required to select the database to:

- **Live Database:** Shared database for **LIVE** operation of the Library
- **Test Database:** Test database for testing and training – this can be updated from time to time using a restore of the **LIVE** database

### Getting Started...

Introductory training is designed to “get you started”. Once you have used your system for a while, you may wish to consider further training on specific tasks or modules.



## NAVIGATION OVERVIEW

### Logging On

1. Double-select on the *Amlib* icon on the Desktop:



2. The Login screen will then display – for training purposes, use the following login (unless set up differently for you at installation) and select the **OK** button:

- User Name: **STAFF**
- Password: **AMLIB**

A dialog box titled 'Login' with the 'Amlib' logo. It contains a message: 'Please type a valid Amlib User Name and Password and then press OK.' Below the message are three input fields: 'User Name' with 'STAFF', 'Password' with '\*\*\*\*\*', and 'Database' with a dropdown menu showing 'Live Database'. At the bottom are 'OK' and 'Cancel' buttons.

Field	Value
User Name	STAFF
Password	*****
Database	Live Database

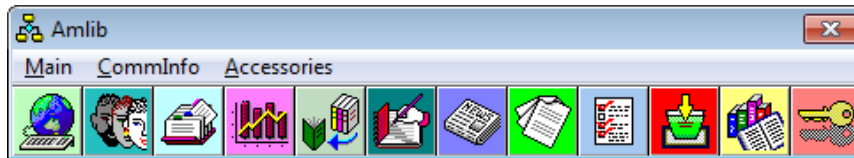
3. The Confirm your Working Location screen will then display:

A dialog box titled 'Confirm your Working Location' with a message: 'Please confirm your current working location or choose another.' Below the message is a table with two columns: 'Loc code' and 'Description'. The 'CHELSEA' row is highlighted. At the bottom is an 'OK' button.

Loc code	Description
BELMONT	Belmont Library
<b>CHELSEA</b>	<b>Chelsea Library</b>
CHELSEADIY	Chelsea DIY Module
HASTINGS	Hastings Library
HOME	Home Library Service
PROCESSING	Library Processing
STACK	Stack
WEB	Web
MOBILE	Mobile Library

# Introductory Training

- The screen defaults to the location set up against the Username – although it is entirely possible to select a different location if required – select the **OK** button to confirm the login location
- The Amlib toolbar will then display:



Login is now complete.

**Please Note:** After login, individual usernames and permissions (determining which menus and buttons are enabled for the user) can be set up in: **Main > Supervisor > User Names:**

- See: [Appendix 1: Setting Up Usernames and Permissions](#) for further information

## Logging Off

- Individual modules can be logged off by using the shortcut **Ctrl + L**
- The **[X]** at the top-right of the screen can be used to close sub-screens within a module/application but will only *minimize* the main screen (it cannot be used to close an entire module)



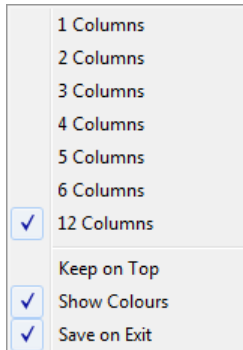
- The entire system can be *exited* by using the shortcut **Ctrl + E** (or **Ctrl + X\***) which closes all modules currently in use and logs out of the *Amlib* client

**\*Please Note:** This shortcut is controlled by the Use Windows keyboard shortcuts instead of Amlib shortcuts (Y/N) setting in **Main > Supervisor > Installation – Other** tab. **Ctrl + E** (*Windows*) and **Ctrl + X** (*Amlib*).

## Icon Toolbar

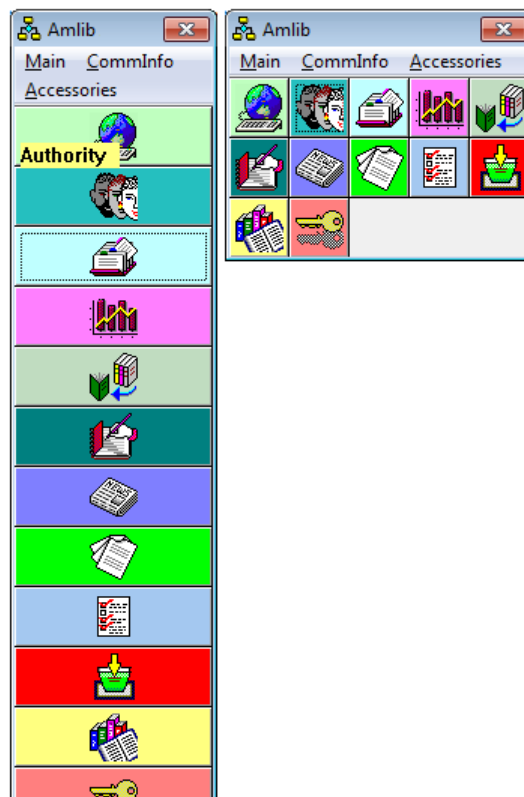
It is possible for the icon toolbar to display in **1, 2, 3, 4, 5, 6, or 12** columns:

1. Change the settings by right-selecting on any of the icons:



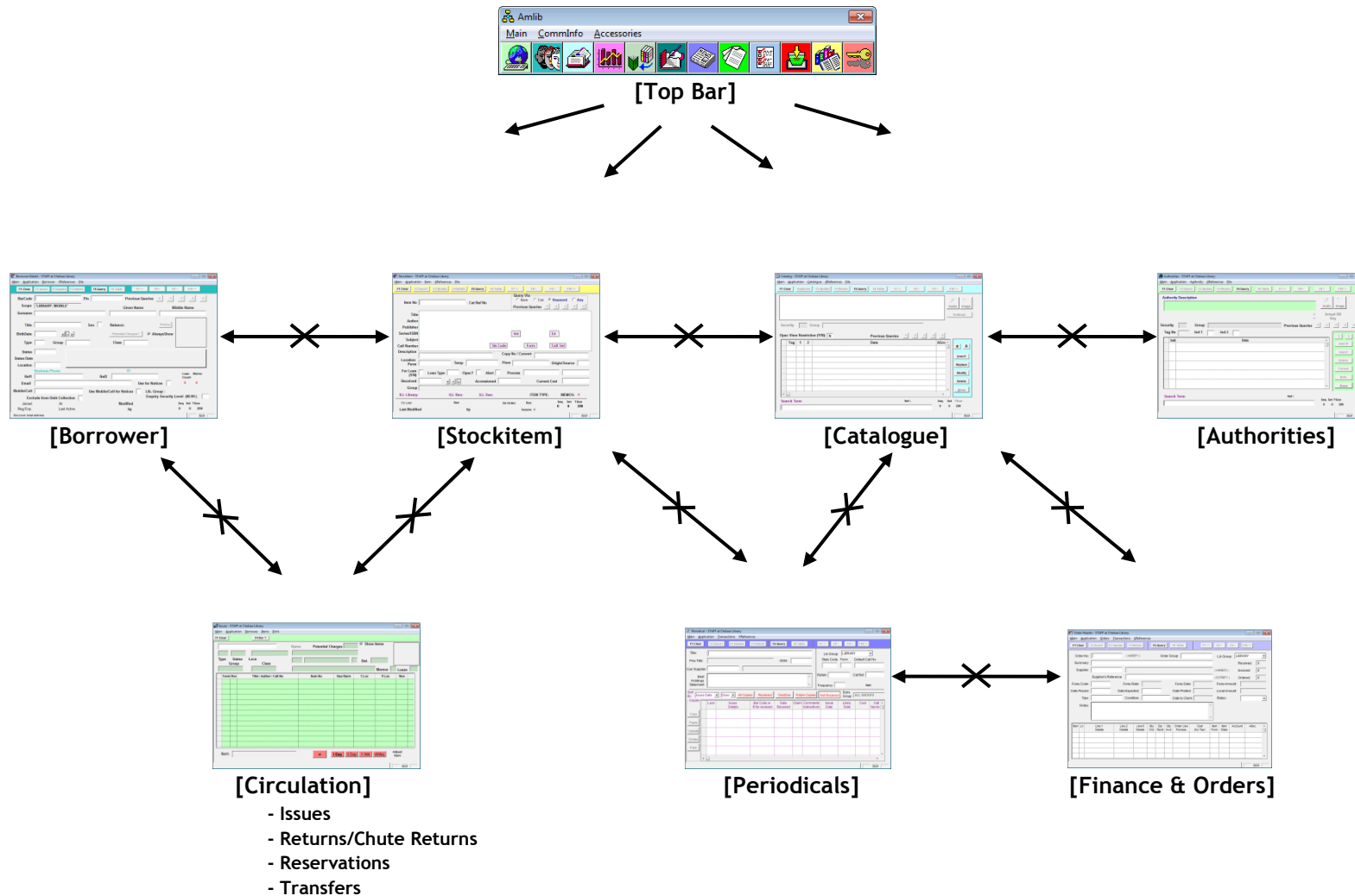
**Please Note:** Module names will display as the mouse is moved along the toolbar – example: **Catalog**.

2. The number of columns that the toolbar displays in and button colours (to match the module colours) can then be changed – to select/enable: scroll down to the desired selection and left-select with the mouse
3. The selected settings and screen position can be saved by ensuring that the **Save on Exit** is ticked



# Introductory Training

## Core System Orientation



# Introductory Training

## Standard Screens

- Modules colour-coded so you always know where you are!
- Consistent screen display
- Multiple display of applications – with multiple screens open simultaneously

Borrower Details - STAFF at Chelsea Library

Main Application Borrower XReferences File

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

BarCode B9988 Pin \*\*\*\* Previous Queries -1 -2 -3 -4 -5

Scope 'LIBRARY', 'MOBILE' Given Name Sarah Middle Name Jane

Surname Smith Title Ms Sex F Balance: \$0.00 Picture

BirthDate 16/05/1951 Potential Charges? AlwaysShow

Type H Group ENG Class

Status OK 13 Bannerman Road, Ealing

Status Date 27/07/2011

Location CHELSEA Business Phone ID

Ref1 Ref2 Loan Count Memo Count

Email sarah-jane.smith@oclc.org Use for Notices Y 2 9

Mobile/Cell Use Mobile/Cell for Notices Lib. Group : LIBRARY Enquiry Security Level (00-99) 00

Exclude from Debt Collection N

Joined 03/05/2011 At CHELSEA Modified 27/07/2011 11:02:18 AM Seq Set ? Size

Reg Exp. 04/10/2094 Last Active 15/07/2011 by STAFF 1 1 200

NUM

Stockitem - STAFF at Chelsea Library

Main Application Item XReferences File

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

Item No 16905 Cat Ref No 35307 Query Via Item Cat Keyword Any

Previous Queries -1 -2 -3 -4 -5

Title Harry Potter and the Goblet of Fire / J.K. Rowling .

Author Rowling, J.K.

Publisher London : Bloomsbury, 1999.

Series/ISBN Vol Ed 1999

Subject Witches and warlocks - Fiction.

Call Number F ROW Sts Code J Form BK Call Set

Description Copy No / Convert

Location Perm CHELSEA Temp CHELSEA Floor Origin/Source

For Loan (Y/N) Y Loan Type Opac? Y Alert N Process

Received 01/11/2000 Accessioned 01/11/2000 Current Cost 15.00

Group LIBRARY

ILL Library: ILL Ren: ILL Due: ITEM TYPE: N MEMOS: 0

On Loan N Due On Order N Res 0 Seq 2 Set 2 Size 200

Last Modified 22/05/2011 11:37:18 AM by STAFF Issues 0

Stockitem Bar Code Entry Field

NUM

## General Use of the Tool Bar and Function Keys

KEY	COMMAND	DESCRIPTION
[F1]	CLEAR	Clears all data in the window
[F2]	INSERT	Inserts a new field or record
[F3]	SAVE/UPDATE	Saves any new fields or modifications
[F4]	DELETE	Deletes the field or record
[F5]	QUERY	Either starts a search or refreshes the screen
[F6]	TABLE	Displays the table from the search query
[F7]	<<	Scrolls through the table, to the beginning
[F8]	<	Scrolls through the table, to the last item
[F9]	>	Scrolls through the table, to the next item
[F10]	>>	Scrolls through the table, to the end



## Fast Keys

**Fast keys** are available to access applications – for example: **Ctrl + B** to go to the *Borrower* Screen. These can be set to use *Amlib* shortcuts or *Windows* shortcuts.

SHORTCUT	WINDOWS
Ctrl + A	Authority
Ctrl + B	Borrower
Ctrl + C	Copy
Ctrl + G	Catalogue
Ctrl + E	<b>Exit from Amlib</b>
Ctrl + F	Finance
Ctrl + H	Help
Ctrl + I	Issues
Ctrl + K	Keyword Search Facility (Stockitem)
Ctrl + L	<b>Log Off Application</b>
Ctrl + M	Marc Take-Up
Ctrl + O	Orders
Ctrl + P	Periodicals
Ctrl + Q	Reservations

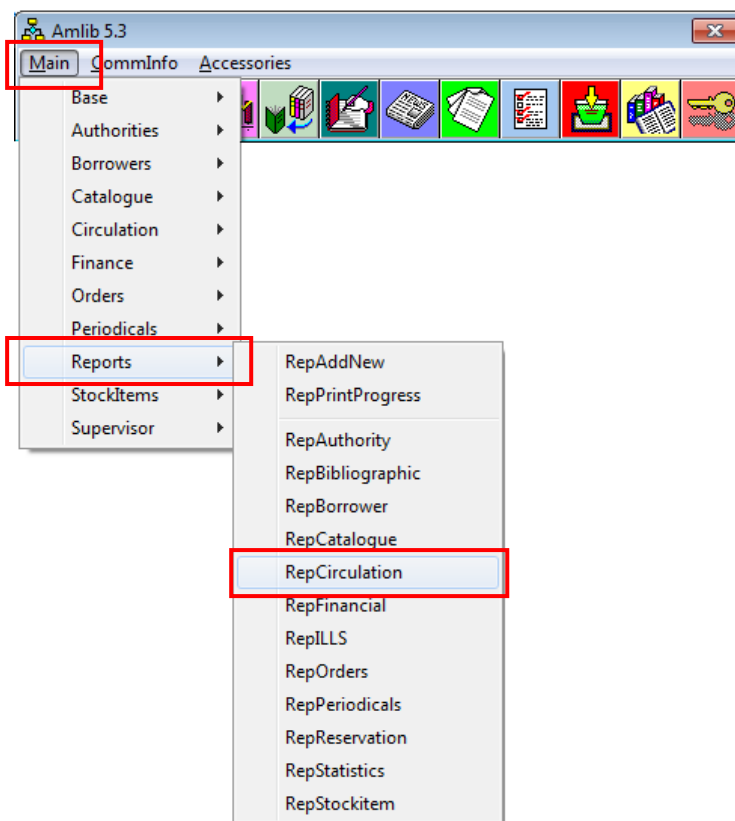
# Amlib Introductory Training

<b>Ctrl + R</b>	Returns
<b>Ctrl + S</b>	Stockitems
<b>Ctrl + T</b>	Transfers
<b>Ctrl + U</b>	Chute Returns
<b>Ctrl + V</b>	Paste
<b>Ctrl + W</b>	Where Search (Borrower/Stockitem only)
<b>Ctrl + X</b>	Cut

## Menus

Menus are always available for exploring in all modules.

The Main menu is available from most screens, and can be used for moving around the system – for example: **Main > Reports >** select individual Reports screen – for example: **RepCirculation** (Circulation Reports)



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## Moving Between Fields

- Use the **Tab** button to move between fields, use **Shift-Tab** buttons to move in reverse
- Use the **Alt-Tab** buttons to move between open modules

## Cut, Copy and Paste Commands

After highlighting, select these keys to:

	<b>Amlib shortcuts</b>	<b>Windows shortcuts</b>
<b>Copy:</b>	Ctrl + Insert	Ctrl + C
<b>Paste:</b>	Shift + Insert	Ctrl + V
<b>Cut:</b>	Shift + Delete	Ctrl + X

Alternatively, you can **right-select** and choose the appropriate option: **Cut, Copy** or **Paste**.

## Saved Files

The *Amlib* client allows the use of various Saved Files (a file containing a list of patrons, stockitems, catalogue records, etc.). [Also, see Appendix 2.](#)

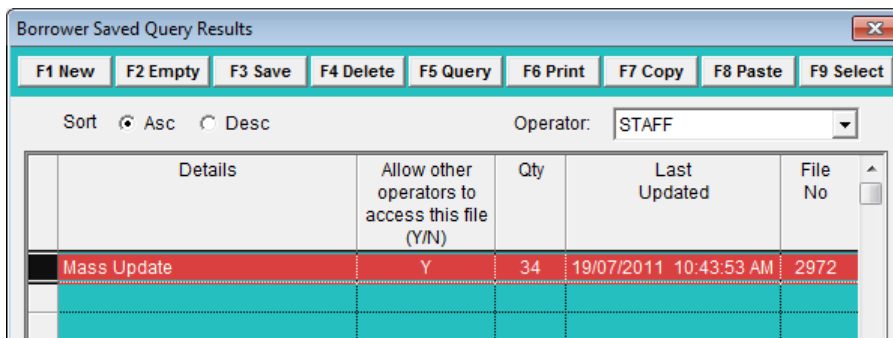
A File menu is available in many modules – for example: *Borrower, Stockitem* and *Catalogue*.

These Saved Files can be useful for global changes – for example: Altering Class and Types at the beginning of the year, changing **Juniors** to be **Young Adults**, etc. They can also be used to change items *en masse* to be Closed Reserve or to have a certain Process. Catalogue Files can be given a particular Authority – for example: **Subject Heading**. They can also be used to check or report on newly imported records for Borrowers or Stockitems.

Saved Files can also be used for reporting purposes. For example: return a file of books, (**General > ReturnFromFile**) or to print Spine Labels using a list of items contained in the Saved File, etc.

It is even possible to loan out a Saved File – for example: **The Environment File** which may contain 25 books, 3 DVDs and 5 flash drives all on the Environment theme.

They can also be used for Periodical Circulation Lists.





## Getting Help

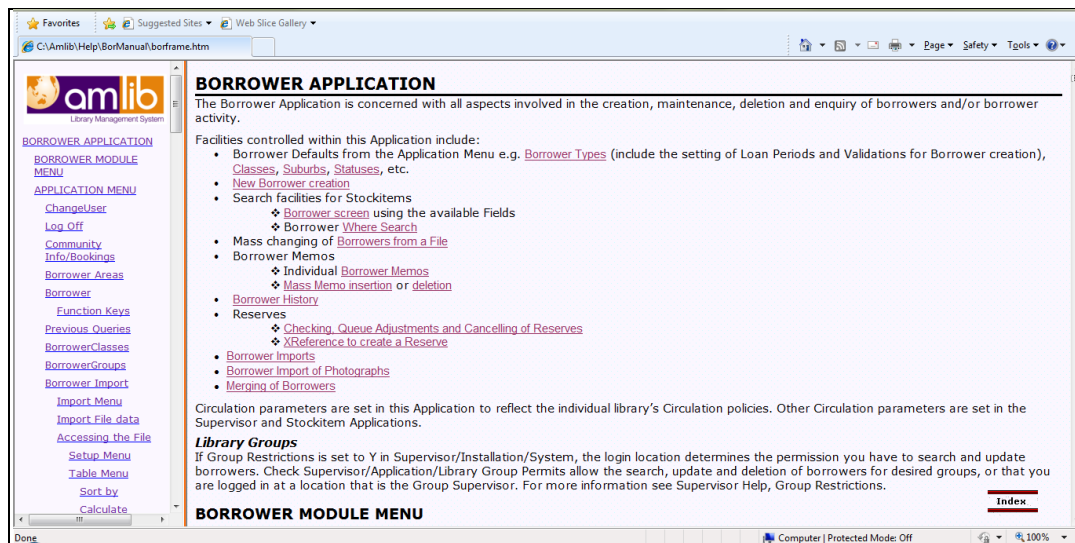
Help is available from the online manual.

### Word Version

- This can be accessed from any module screen by selecting **Ctrl + H**, if you have **MS Word** on your PC

### HTML Version

- You can also access a HTML-version of the Help file using your web browser (for example: *Internet Explorer* or *Mozilla Firefox*)
- Add the chapters as *Favourites* or *Bookmarks* by choosing the relevant **frame.htm** file – for example: **Borframe.htm**
- An index to the left of the *Help* screen contains headings which are hyperlinked to the relevant information (you are also able to use the Find facility of your web browser)



## SEARCHING WITHIN MODULES

There are comprehensive search facilities within the *Authority*, *Borrower*, *Stockitem* and *Catalogue* modules. You are also able to search for patrons and items within the *Circulation* module.

There are separate modules for *OPAC* and *NetOpac* (if purchased).

### Borrower

- Any field of the Borrower Details screen is searchable
- It is also possible to search using the grey box of the Address screen for a Street name, etc.
- **Previous Queries:** The last 5 searches are kept in case they need to be re-performed. Use the **-1** to **-5** buttons to select a previous search

The screenshot shows the 'Borrower Details' window for a staff member at Chelsea Library. The window has a menu bar with 'Main', 'Application', 'Borrower', 'XReferences', and 'File'. Below the menu is a toolbar with function keys: F1 Clear, F2 Insert, F3 Update, F4 Delete, F5 Query, F6 Table, F7 <<, F8 <, F9 >, and F10 >>. The main area contains various input fields and controls. At the top, there are 'BarCode', 'Pin', and 'Previous Queries' buttons (-1 to -5). Below these are 'Scope' (set to 'LIBRARY','MOBILE'), 'Surname' (set to 'smi'), 'Given Name', and 'Middle Name'. Further down are 'Title', 'Sex', 'Balance', 'Picture', 'BirthDate', 'Potential Charges?', and 'Always Show' (checked). There are also fields for 'Type', 'Group', and 'Class'. At the bottom, there are fields for 'Status', 'Status Date', 'Location', 'Business Phone', 'Ref1', 'Ref2', 'Email', 'Mobile/Cell', 'Use for Notices', 'Use Mobile/Cell for Notices', 'Lib. Group', 'Enquiry Security Level (00-99)', and a 'Borrower Bar Code Entry Field'.

1. Typing in a few letters (for example: **smi**) in the Surname field and selecting the **F5 Query** button will display all borrowers starting with those letters – for example: **Smith, Smithers, Smith-Lawrence**, etc. – the results will display in a Borrower List table

**HINT:** To access a list of codes in a field type: **.<Tab>** . For example: in the Borrower Type field, typing **.<Tab>** will display a list of your Borrower Type Codes and Descriptions. Double-select to make a selection.

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Seq	Surname	Name	Title	Middle	Sex	Type	Status	Loan	Locn	Group	Class	Ref1	Ref2	Address1	BarCode
1	Smith	Alan	Mr	A	M	A	OK	0	CHELSE					9878 7368, 7	000019
4	Smith	Jill	Miss	R	F	A	OK	0	CHELSE	ENG				93524132, 1	B4445
5	Smith	Jim	Mr	G	M	A	OK	0	CHELSE	ENG	INTER	94635		93524132, 1	B4442
6	Smith	John	Mr	D	M	A	OK	2	CHELSE	ENG	8B			9362 8517, 8	B9999
7	Smith	Sarah	Ms	Jane	F	A	OK	0	CHELSE	ENG				13 BANNER	B9988
8	Smith-Lawrence	Carmel	Ms	G	F	A	OK	4	CHELSE	ENG		94123		94352131, 9	B8888

2. Double-selecting on a line will show the details of that borrower:

Borrower Details - STAFF at Chelsea Library

Main Application Borrower XReferences **File**

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

BarCode: B9999 Pin: \*\*\*\* Previous Queries: -1, -2, -3, -4, -5

Scope: 'LIBRARY','MOBILE'

Surname: Smith Given Name: John Middle Name: D

Title: Mr Sex: M Balance: \$0.00

3. You are then able to move through the table using the arrow keys **F7 <<**, **F8 <**, **F9 >**, **F10 >>** or **F6 Table** to get back to the Borrower List table display
4. It is possible to save the records to file using the File menu, or go to other applications for the items – for example: **Issues**, **Stockitem** – by selecting **XReferences** from the menu

## Colour

Colour is used to indicate certain borrower statuses:

- **Red** Borrower owes money
- **Grey** Borrower has been *inactive for 12 months or more*
- **Black** Normal borrower

## Printing from a List (Table)

1. In the Borrower List (or Stockitem List) highlight the items to be included in the report, select: **Table > F6 Print**

Seq	Surname	Name	Title	Middle	Sex	Type	Status	Loan	Locn	Group	Class	Ref1	Ref2	Address1	BarCode
1	Smith	Alan	Mr	A	M	A	OK	0	CHELSE					9878 7368, 7	000019
4	Smith	Jill	Miss	R	F	A	OK	0	CHELSE	ENG				93524132, 1	B4445
5	Smith	Jim	Mr	G	M	A	OK	0	CHELSE	ENG	INTER	94635		93524132, 1	B4442
6	Smith	John	Mr	D	M	A	OK	2	CHELSE	ENG	8B			9362 8517, 8	B9999
7	Smith	Sarah	Ms	Jane	F	A	OK	0	CHELSE	ENG				13 BANNER	B9988
8	Smith-Lawrence	Carmel	Ms	G	F	A	OK	4	CHELSE	ENG		94123		94352131, 9	B8888

**HINT:** Highlight items by selecting with the mouse. To highlight a range, select the first item and find the last item in the range and hold down the **Shift** key and **select** with the mouse. To highlight several individual items from the list, hold down the **Ctrl** key and **select** with the mouse.

## Stockitem

- Most fields of the Stockitem screen are searchable

The screenshot shows the 'Stockitem - STAFF at Chelsea Library' application. At the top, there are function keys: F1 Clear, F2 Insert, F3 Update, F4 Delete, F5 Query, F6 Table, F7 <<, F8 <, F9 >, and F10 >>. Below these are input fields for 'Item No' and 'Cat Ref No'. A 'Query Via' box is highlighted with a red border, containing radio buttons for 'Item', 'Cat', 'Keyword' (selected), and 'Any', along with 'Previous Queries' buttons (-1 to -5). A red arrow points from the 'Bibliographic Information (from Catalogue record)' label to the search fields. The search fields include Title, Author, Publisher, Series/ISBN, Subject (containing 'sport'), and Call Number. Below these are buttons for 'Vol', 'Ed', 'Sts Code', 'Form', and 'Call Set'. The 'Description' field is empty. The 'Location' section includes 'Perm', 'Temp', 'Floor', and 'Origin/Source'. The 'For Loan' section includes 'Y/N', 'Loan Type', 'Opac?', 'Alert', and 'Process'. The 'Received' field shows '01/01/2011' with navigation buttons (<, =, >). The 'Accessioned' and 'Current Cost' fields are empty. At the bottom, there are status indicators: 'ILL Library:', 'ILL Ren:', 'ILL Due:', 'ITEM TYPE:', and 'MEMOS: 0'. A table at the bottom shows 'On Loan', 'Due', 'On Order', 'Res', 'Seq', 'Set', and '?Size' with values '0', '0', and '200' respectively. The 'Last Modified' field is empty, and the 'by' field is empty. The 'Issues' field shows '0'. The 'Title' field is empty, and the 'NUM' field is empty.

- Use the Query Via options to determine the type of search to be performed

### Query Via

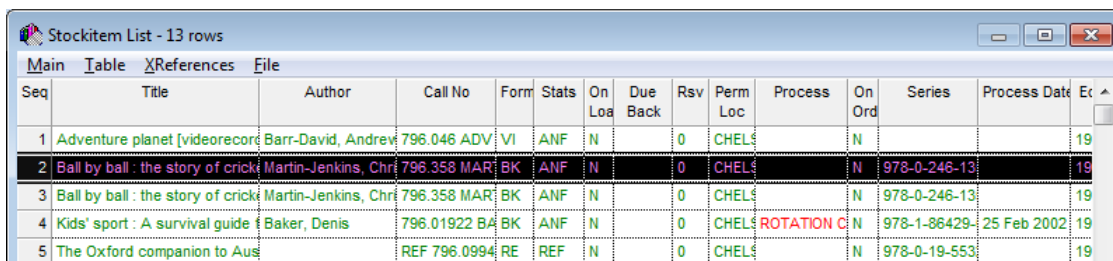
OPTION	DESCRIPTION
<b>Item</b>	<i>Browse</i> (phrase) search for data displayed within the Stockitem module
<b>Cat</b>	<i>Browse</i> (phrase) search for data displayed within the Catalogue module
<b>Keyword</b>	<i>Keyword</i> search <i>one</i> of the six bibliographic lines within the <u>Stockitem</u> screen ( <b>Title, Author, Subject, Publisher, Series</b> or <b>Call No</b> ) – for example: typing a keyword into the Subject line will perform a keyword search on just the Subject fields
<b>Any</b>	<i>Keyword</i> search <i>any</i> of the six bibliographic lines within the <u>Stockitem</u> screen ( <b>Title, Author, Subject, Publisher, Series</b> or <b>Call No</b> ) – for example: even if the keyword is typed into the <b>Title</b> line, all six fields ( <b>Title, Author, Subject, etc.</b> ) will be searched
<b>Previous Queries</b>	The last 5 searches are kept in case they need to be re-performed. Use the -1 to -5 buttons to select a previous search

# Amlib Introductory Training

## Keyword Search

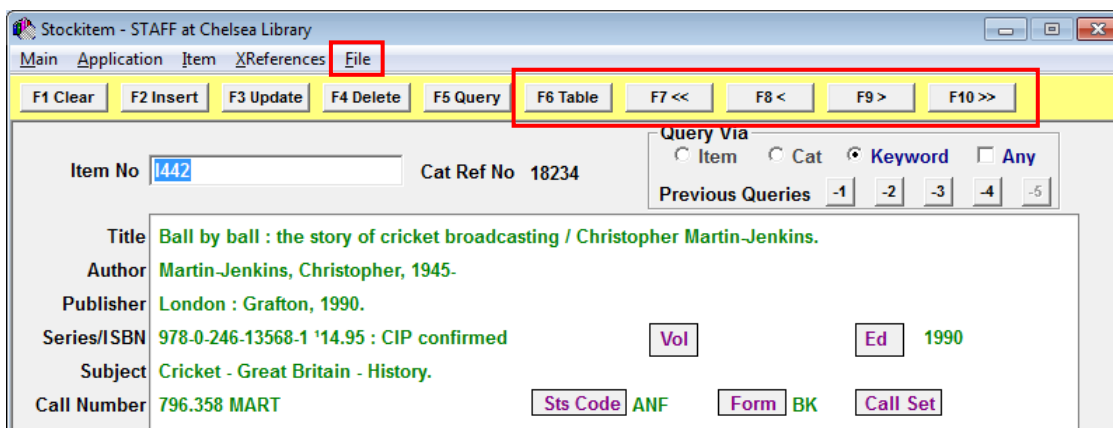
1. Ensure the Query Via option selected is **Keyword**
2. Type in a word (for example: **sport**) in the Subject field and select the **F5 Query** button – a Stockitem List table will display with all the items that include **sport** as part of the subject – for example: **Sport, Sports medicine, Sport - Australia**, etc.

**HINT:** To access a list of codes in a field type: **.<Tab>** . For example: in the Stockitem Sts Code field, typing **.<Tab>** will display a list of your Stockitem Stats Codes and Descriptions. Double-select to make a selection.



Seq	Title	Author	Call No	Form	Stats	On Lo	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Ec
1	Adventure planet [videorecord	Barr-David, Andrew	796.046 ADV	VI	ANF	N		0	CHEL		N			19
2	Ball by ball : the story of cricke	Martin-Jenkins, Chr	796.358 MAR	BK	ANF	N		0	CHEL		N	978-0-246-13		19
3	Ball by ball : the story of cricke	Martin-Jenkins, Chr	796.358 MAR	BK	ANF	N		0	CHEL		N	978-0-246-13		19
4	Kids' sport : A survival guide	Baker, Denis	796.01922 BA	BK	ANF	N		0	CHEL	ROTATION C	N	978-1-86429-	25 Feb 2002	19
5	The Oxford companion to Aus		REF 796.0994	RE	REF	N		0	CHEL		N	978-0-19-553		19

3. Double-select on a line to show the full details of that item:



Stockitem - STAFF at Chelsea Library

Main Application Item XReferences **File**

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

Query Via  
 Item  Cat  Keyword  Any

Previous Queries -1 -2 -3 -4 -5

Item No **1442** Cat Ref No 18234

Title **Ball by ball : the story of cricket broadcasting / Christopher Martin-Jenkins.**

Author **Martin-Jenkins, Christopher, 1945-**

Publisher **London : Grafton, 1990.**

Series/ISBN **978-0-246-13568-1 '14.95 : CIP confirmed** Vol Ed 1990

Subject **Cricket - Great Britain - History.**

Call Number **796.358 MART** Sts Code ANF Form BK Call Set

4. You are then able to move through the table using the arrow keys **F7 <<**, **F8 <**, **F9 >**, **F10 >>** or **F6 Table** to get back to the Stockitem List table display
5. It is possible to save the records to file using the File menu, or go to other applications for the items – for example: **Catalogues, Authorities, Periodicals** – by selecting **XReferences** from the menu

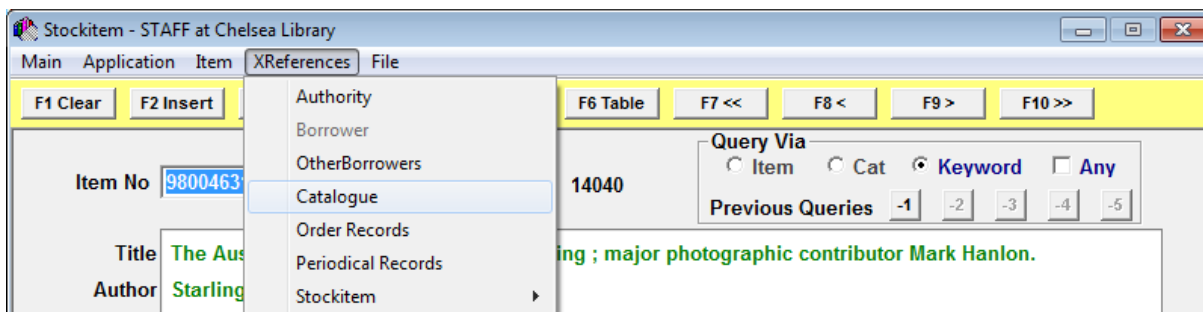
## Colour

Colour is used in certain modules to assist in browsing the list:

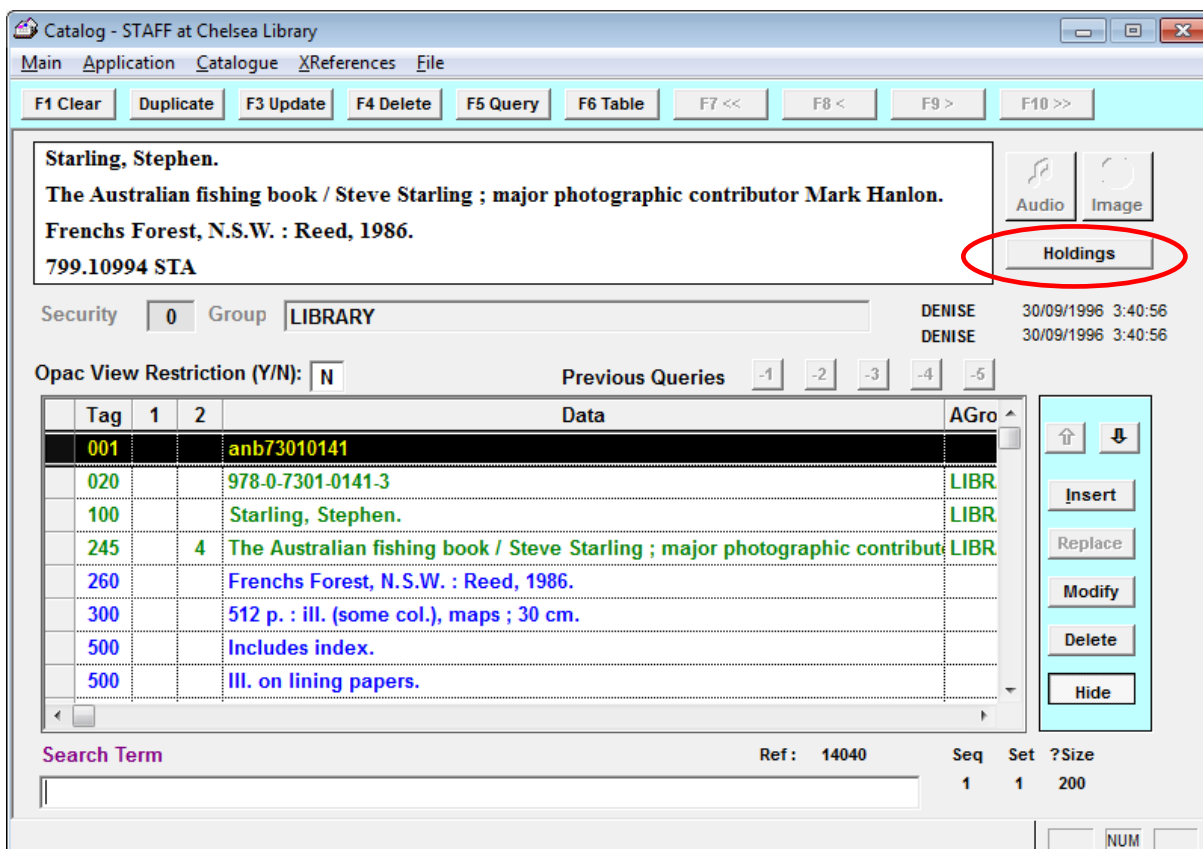
- **Red** Items are *overdue*
- **Black** Items are *on loan*
- **Green** Items are *available for loan*
- **Grey** Items are *on order*
- **Magenta** Items are *on reserve*

## Catalogue

1. It is possible to **XReference** from a Stockitem record to the Catalog record to see the complete Bibliographic details for an item (including all Subject Headings, Notes, Added Authors, etc.) : select **XReferences > Catalogue**



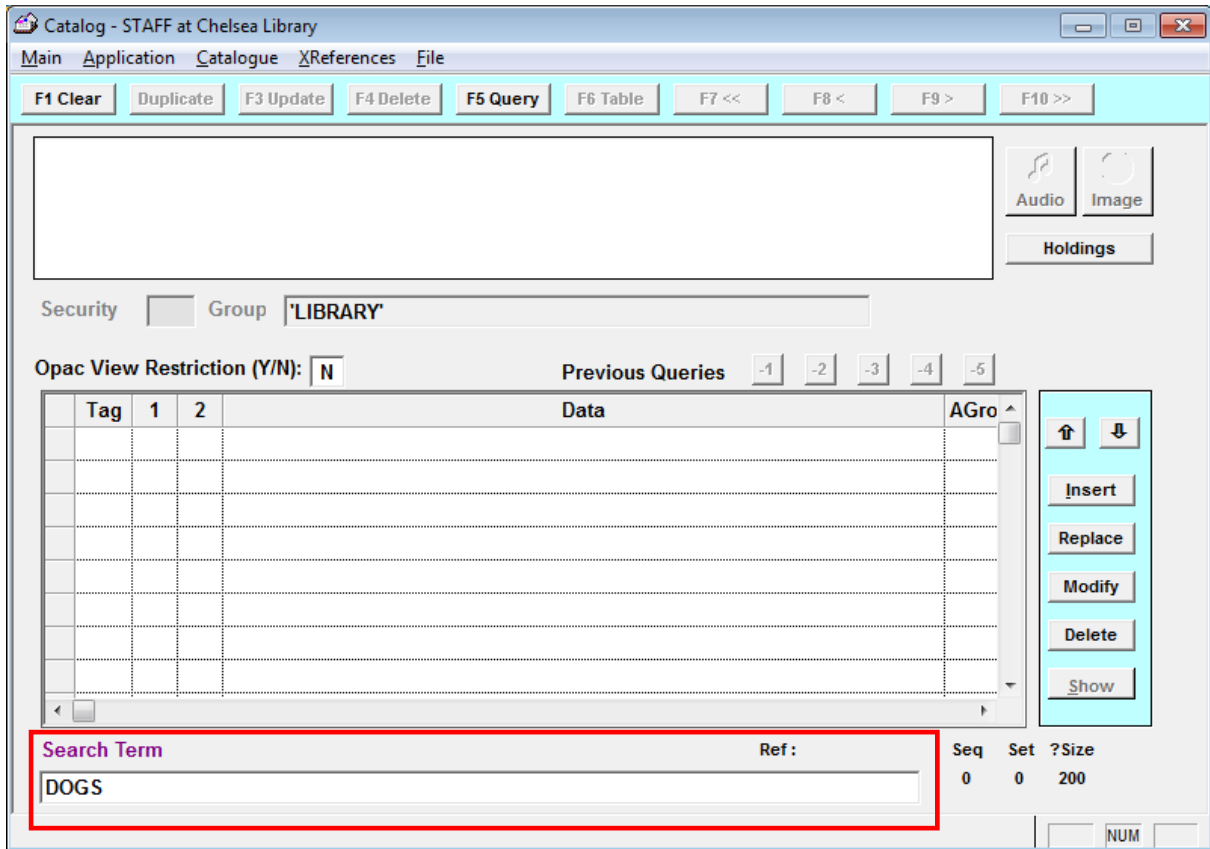
2. It is also possible to **XReference** from the Catalog record: use the **Holdings** button or from the menu, select **XReferences > Stockitems**



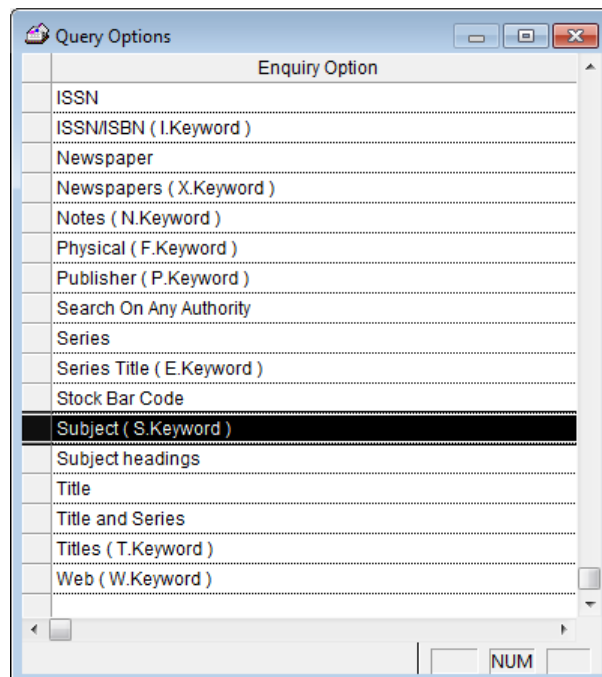
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## Searching

1. Type the search phrase into the Search Term box at the bottom of the screen:

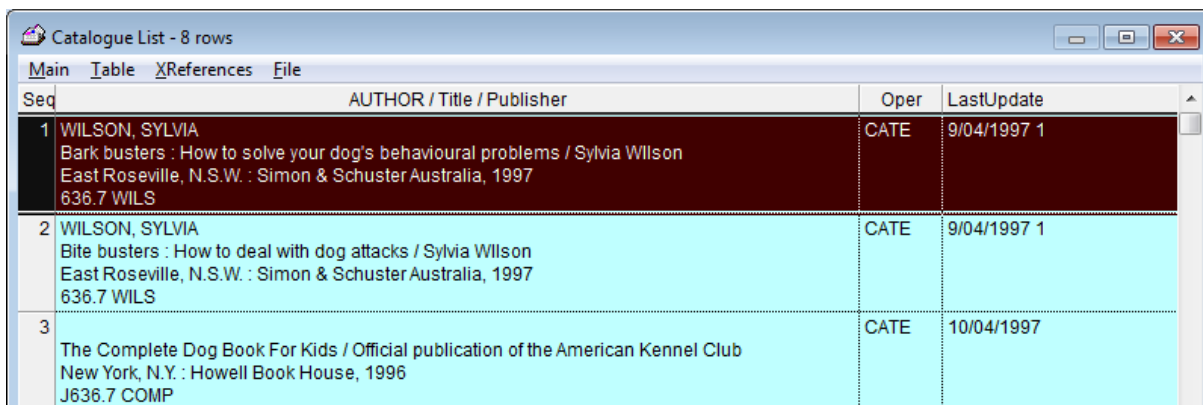


2. Select the **F5 Query** button – the Query Options prompt will display:



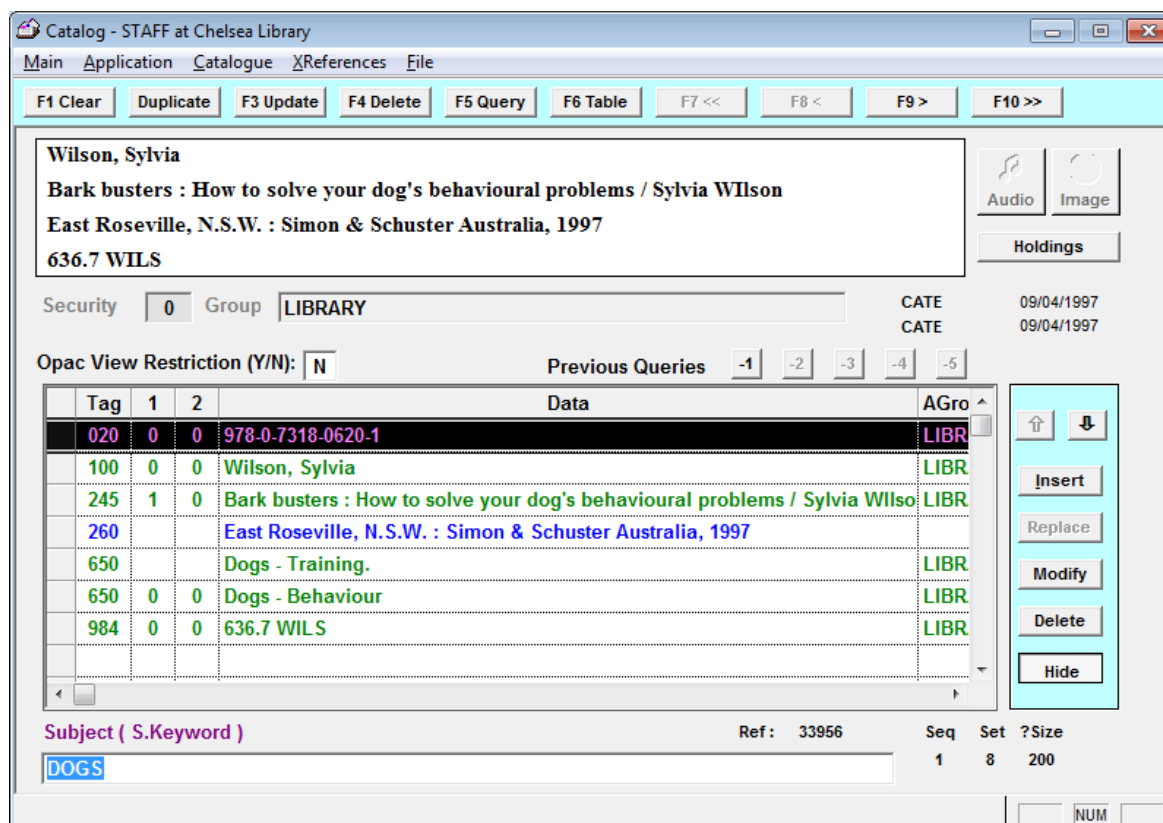
# Amlib Introductory Training

3. Double-select on the Enquiry Option you would like to use (for example: **Subject**) – the results will display in a Catalogue List table:



Seq	AUTHOR / Title / Publisher	Oper	LastUpdate
1	WILSON, SYLVIA Bark busters : How to solve your dog's behavioural problems / Sylvia Wilson East Roseville, N.S.W. : Simon & Schuster Australia, 1997 636.7 WILS	CATE	9/04/1997 1
2	WILSON, SYLVIA Bite busters : How to deal with dog attacks / Sylvia Wilson East Roseville, N.S.W. : Simon & Schuster Australia, 1997 636.7 WILS	CATE	9/04/1997 1
3	The Complete Dog Book For Kids / Official publication of the American Kennel Club New York, N.Y. : Howell Book House, 1996 J636.7 COMP	CATE	10/04/1997

4. Double-select (or select and select **<enter>**) to display the full catalogue record:



Wilson, Sylvia  
Bark busters : How to solve your dog's behavioural problems / Sylvia Wilson  
East Roseville, N.S.W. : Simon & Schuster Australia, 1997  
636.7 WILS

Security 0 Group LIBRARY CATE 09/04/1997  
CATE 09/04/1997

Opac View Restriction (Y/N): N Previous Queries -1 -2 -3 -4 -5

Tag	1	2	Data	AGro
020	0	0	978-0-7318-0620-1	LIBR
100	0	0	Wilson, Sylvia	LIBR
245	1	0	Bark busters : How to solve your dog's behavioural problems / Sylvia Wilson	LIBR
260			East Roseville, N.S.W. : Simon & Schuster Australia, 1997	
650			Dogs - Training.	LIBR
650	0	0	Dogs - Behaviour	LIBR
984	0	0	636.7 WILS	LIBR

Subject ( S.Keyword ) Ref: 33956 Seq Set ?Size  
DOGS 1 8 200

**Please Note:** Typing in more than one word invokes a Boolean “AND” search.

## Query Options

It is possible to alter the query options (once set) for subsequent searches:

- From the menu, select **Catalogue > Query Options** – the Query Options prompt will then redisplay
- Double-select on the Enquiry Option you would like to use

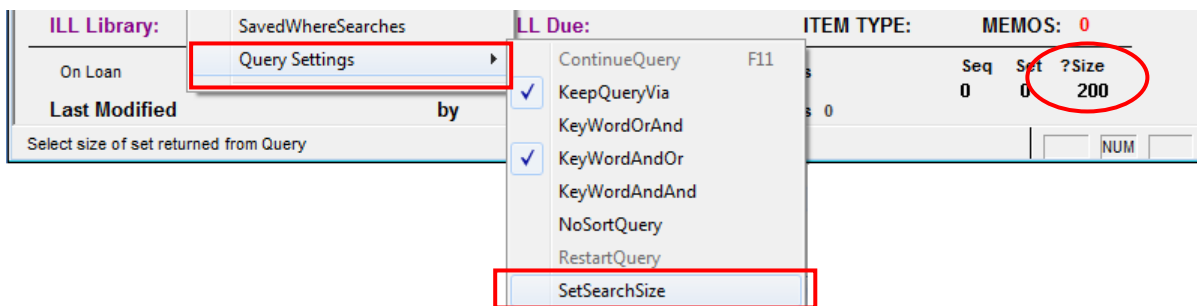
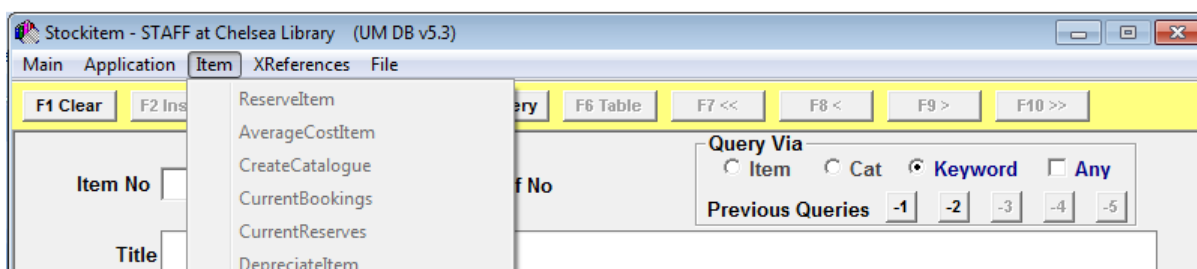


## Search Sizes

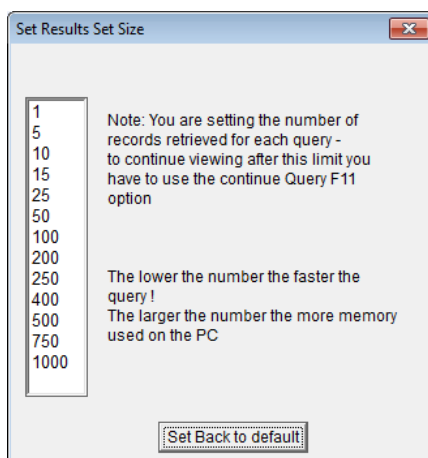
- The results of the Table from a search will display in a set (for example: 250 items) and the next set can be viewed by selecting the **F11** button or **Table > ContinueQuery**
- The set size can be altered if required – for example: from **250** items to **1000** items
- The default settings can be changed in the **Main > Supervisor > Installation – System** tab Default search cache size setting

### Set the Search Size

1. From the Stockitem menu, select **Item > Query Settings > SetSearchSize**, from the Borrower Details menu, select **Borrower > SetSearchSize** or from the Catalogue menu, select **Catalogue > SetSearchSize**



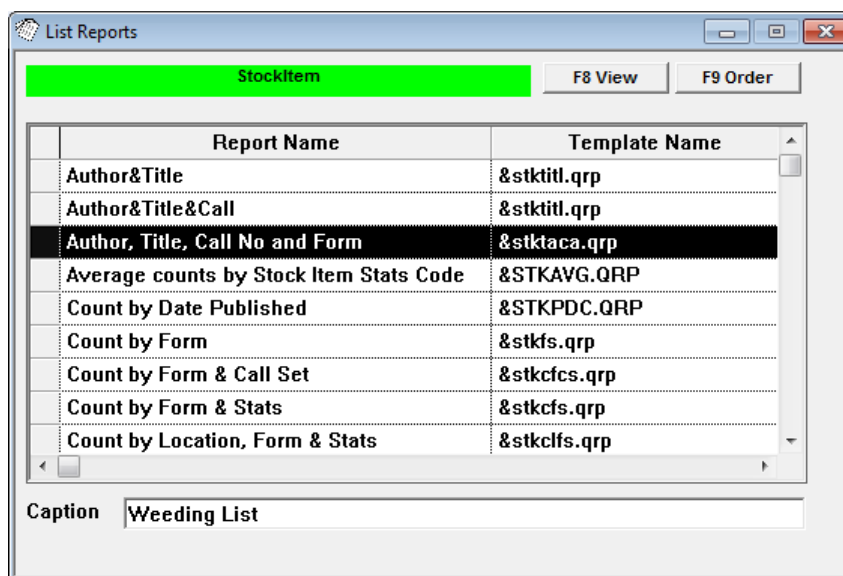
2. The Set Results Search Size screen will display:



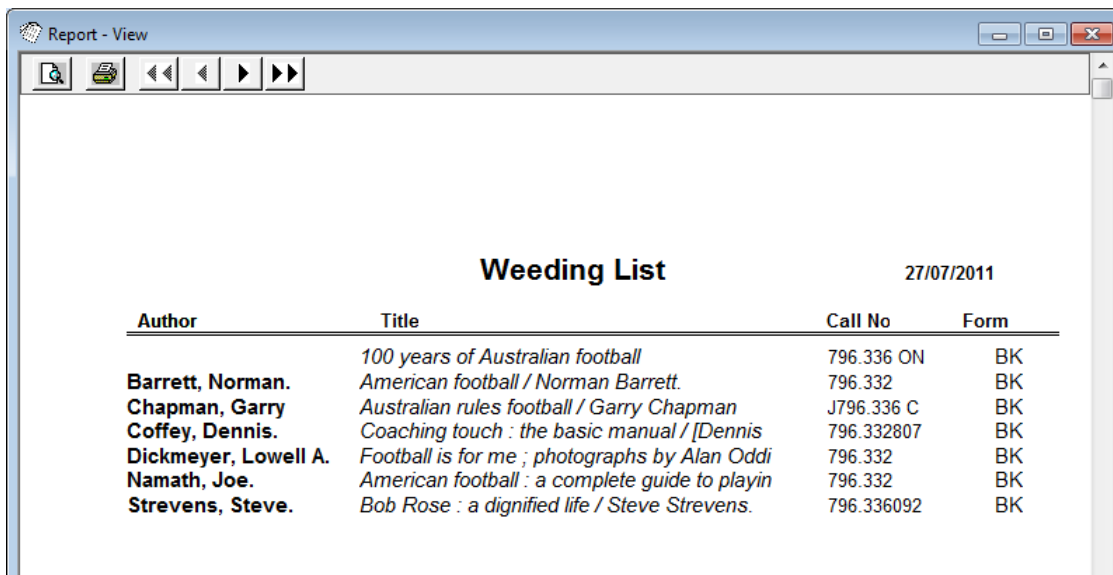
3. Select a search size from the list

## Print using a Report

1. In the Stockitem List (or Borrower List), select: **Table > Report F7** – the List Reports screen will display:



2. Select a specific style – for example: **Author, Title, Call No and Form**
3. Select the **F9 Order** button to select the sequence in which the items display – for example: **Title, Call No.** etc.
4. Use the Caption box to add a heading to your report – for example: **Weeding List**
5. Select the **F8 View** button to display the report



6. The *print* button can then be used to print the report

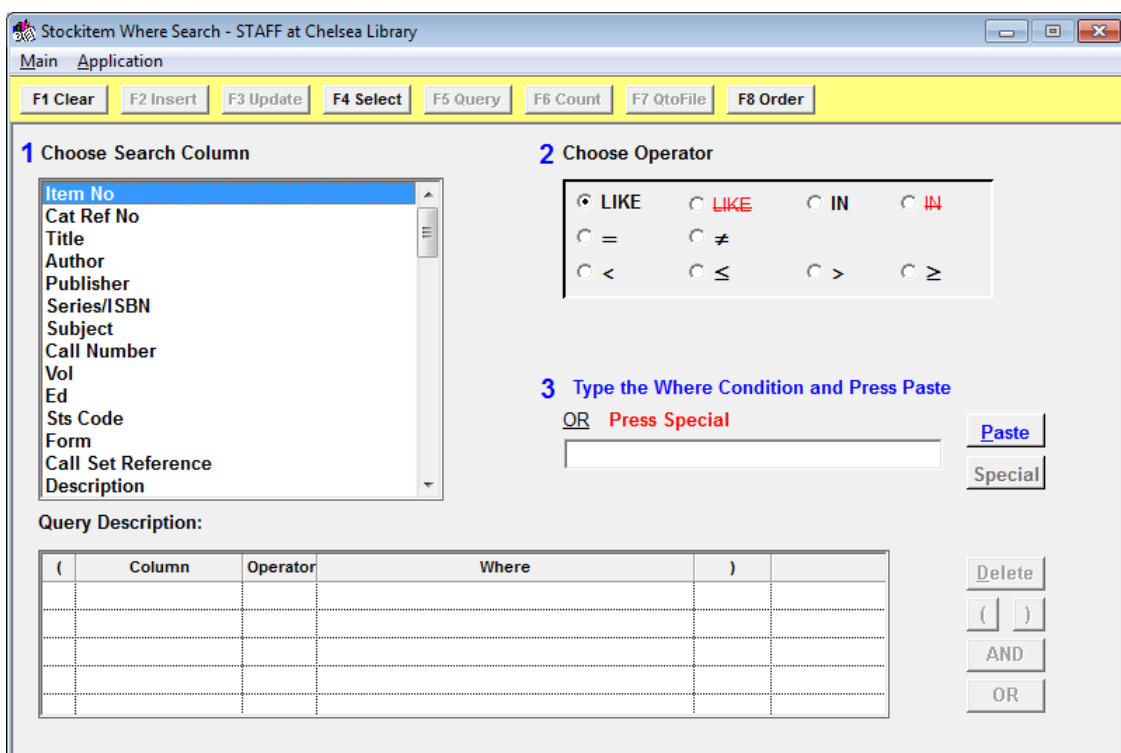
## Where Searching

This function is available in the *Stockitem* and *Borrower* modules only. It is possible to search for items or borrowers using a range of fields and operators. This is a great way to get simple Counts – for example: for *State Government Library* statistics, which the Public Libraries need to report on a yearly basis.

The Where search query results can be displayed in a List or saved to a File.

The Where search itself can also be saved.

1. You can access Where searches in the *Stockitem* and *Borrower* modules by selecting **Application > Where...** (in the *Stockitem* module) or **Application > BorrowerWhere** (in the *Borrower* module) – the Where Search screen will display:



2. **Choose Search column:** it can be helpful to have a look at the main Stockitem (or Borrower) screen if you're confused about which fields contain what information
3. **Choose Operator:** these are the same as in the *Reports* module

OPERATOR	DESCRIPTION	EXAMPLE
LIKE	Where the required data in this field begins with the text entered	LIKE ELD (for Eldorado)
<del>LIKE</del>	Where the required data in this field does not begin with the text entered	<del>LIKE</del> ELD (for all except Eldorado)
IN	Useful for selecting multiple codes	IN A,J,YA (for all of these types)

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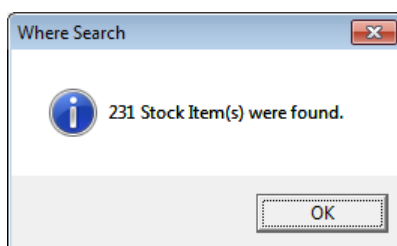
<b>IN</b>	Useful for multiple codes not to be included	<b>IN ILL,LS</b> (to exclude these types)
<b>=</b>	Where the text entered is exactly equal to the data required	<b>= A</b> (borrowers with a code of <b>A</b> for Adult)
<b>≠</b>	Where the text entered is not equal to the data required  Useful for <b>NOT EQUAL TO NULL</b> – choose this operator, do not enter any data and select the <b>Paste</b> button	<b>≠ J</b> (borrowers who do not have a code of <b>J</b> )
<b>&lt;</b>	Where the text entered is less than the data required	<b>&lt; 01/10/10</b> (less than 1 Oct 2010)
<b>≤</b>	Where the text entered is equal or less than the data required	<b>≤ 01/10/10</b> (less than or equal to 1 Oct 2010)
<b>&gt;</b>	Greater than	<b>&gt;01/10/10</b> (greater than 1 Oct 2010)
<b>≥</b>	Equal or greater than the text entered	<b>≥ 01/10/10</b> (greater than or equal to 1 Oct 2010)

4. **Type the Where condition:** this can be a date, a code, letters, numbers, etc.

BUTTON	DESCRIPTION
<b>Paste</b>	Adds the Where condition to the <u>Query Description</u> table
<b>Special</b>	This button contains useful fields that can be used for any mathematical operand (i.e. =, ≠, <, ≤, >, ≥) – for example: <b>Current Date</b>
<b>Delete</b>	Deletes the highlighted Where condition from the <u>Query Description</u> table
<b>AND</b>	Includes the AND separator to the Where conditions in the <u>Query Description</u> table (this is the default)
<b>OR</b>	Includes the OR separator to the Where conditions in the <u>Query Description</u> table
<b>(</b>	Adds a beginning bracket to the Where condition in the <u>Query Description</u> table
<b>)</b>	Adds a closing bracket to the Where condition in the <u>Query Description</u> table

5. Once your Where condition is set up you can either:

a. Count the number of results by selecting the **F6 Count** button:



b. Get the list of results by selecting the **F5 Query** button:

# Amlib Introductory Training

Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Ext
1	The adventures of the muddle	Park, Ruth.	J PARK	BK	J	N		0	CHEL		N	978-0-207-14		19
2	The adventures of Tom Sawyer	Twain, Mark, 1835-	J TWAI	BK	J	N		0	CHEL		N	978-0-7064-0		19
3	Alice's adventures in wonder	Carroll, Lewis, 1832	JF CARR	BK	J	N		0	CHEL		N			19
4	Alice's adventures in wonder	Carroll, Lewis, 1832	J CARR	BK	J	N		0	BELM		N	978-0-575-03		19
5	Alice's adventures in wonder	Carroll, Lewis, 1832	J CARR	BK	J	N		0	CHEL		N			19
6	And now for something exact	Jennings, Paul, 191	AF JENN	BK	J	N		1	CHEL		N	978-0-575-02		19
7	And now for something exact	Jennings, Paul, 191	AF JENN	BK	J	N		1	CHEL		N	978-0-575-02		19

6. If you wanted to find ALL of something (for example: Borrower, StockItems, items on loan) then you could run a query such as:

- c. **BarCode IS NOT NULL** (all Borrowers)
- d. **ItemNo IS NOT NULL** (all StockItems)
- e. **Issue Due Date Back IS NOT NULL** (all items on loan)

Query Description:

(	Column	Operator	Where
	Item No	IS NOT	NULL

The NULL value is achieved by simply leaving a blank space in the field 3 Type the Where Condition and Select Paste – as soon as the **Paste** button is selected a **NULL** value is entered into the Query Description table.

Special Button

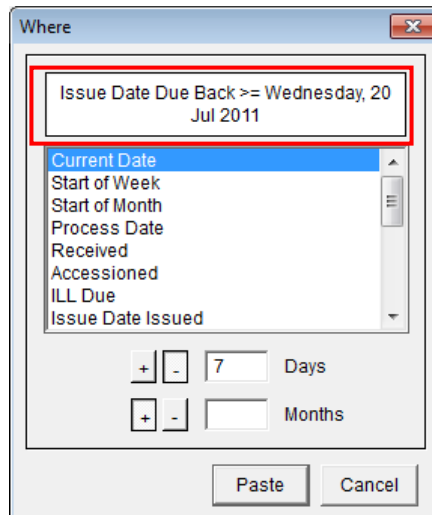
The **Special** button can be used for a number of things including the creation of relational dates (dates that aren't fixed but operate from the concept of a **Current Date** or the **Start of Month**).

For example: if you would like to look at dates from a week ago, or further back, you could enter the following Where condition:

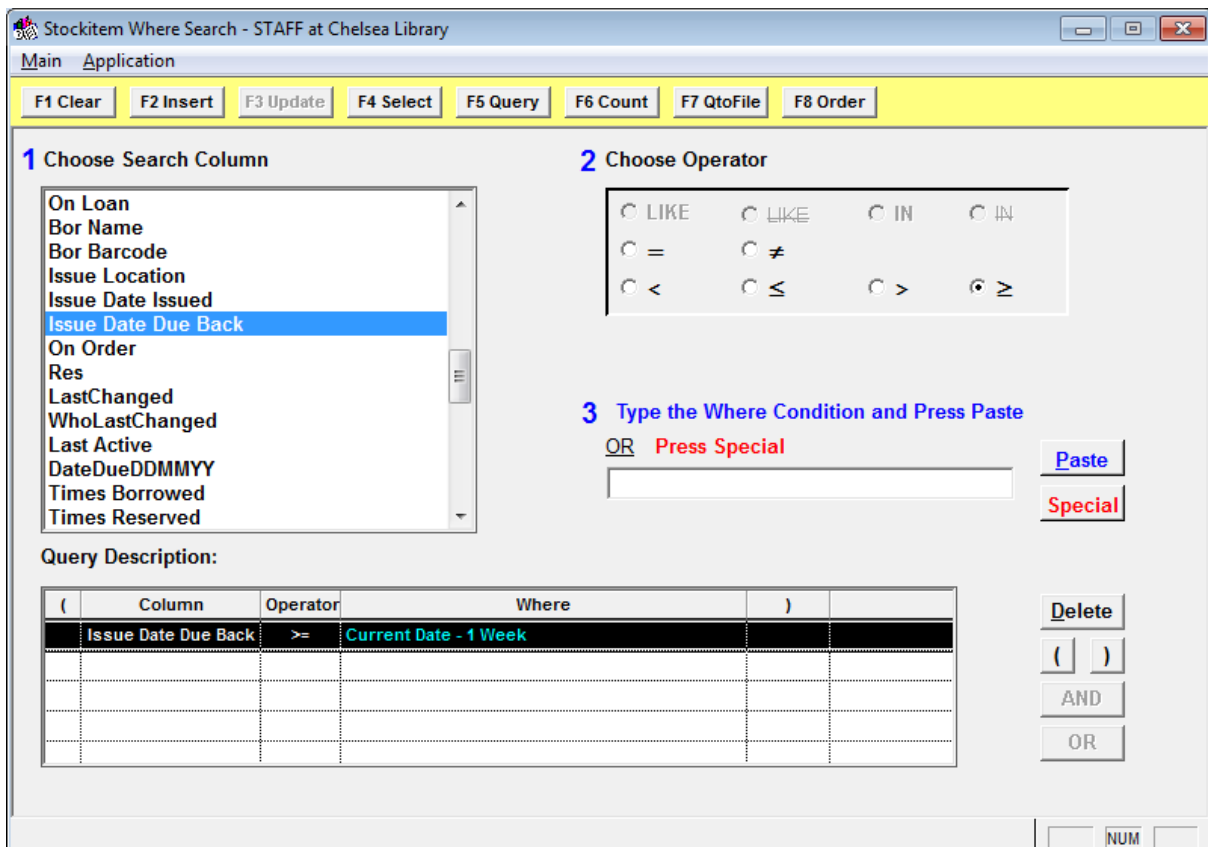
- **Issue Date Due Back <= Current date – 7 Days**
  1. Select **Issue Date Due Back** from the 1 Choose Search Column box
  2. Select the **<=** operand from the 2 Choose Operator box
  3. Select the **Special** button – another Where screen will display
  4. Select the Special operand from the table – for example: **Current Date**
  5. Adjust the relational value of the selected operand by using the **+** or **-** buttons and the **Days** or **Months** boxes – for example: **- 7 Days**

# Amlib Introductory Training

6. An example of the selected condition will be visible in the box at the top of the screen:



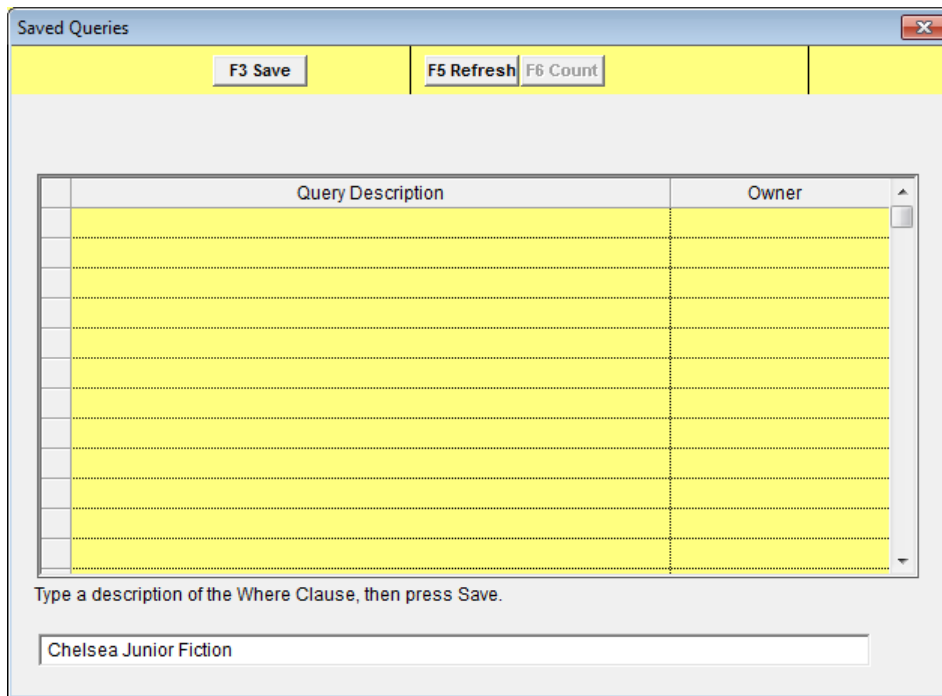
7. Select the **Paste** button when complete – the where condition will then appear in the Query Description section at the bottom of the screen:



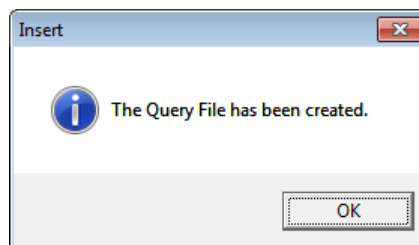
## Saving a Where Search

It is possible to save a Where search:

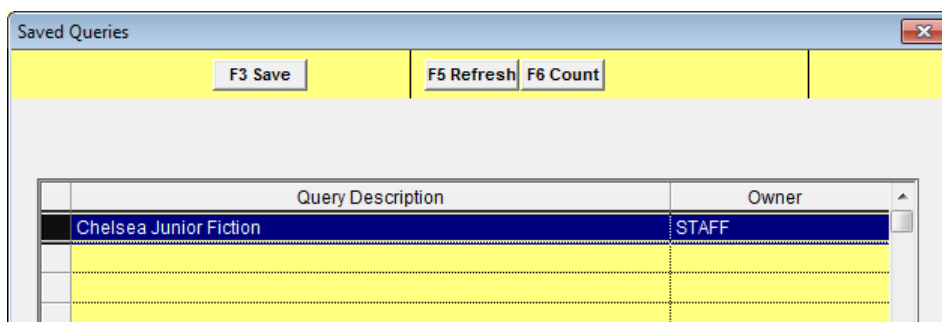
1. Select the **F2 Insert** button – the Saved Queries table will display:



2. Type in a Description and select the **F3 Save** button – a prompt will display with the following message: **The Query File has been created.**



3. Select the **OK** button
4. Once saved, you can access saved Where searches by selecting the **F4 Select** button in the Where screen, selecting the **Saved Query** from the list and then selecting the **F9 Select** button



## Query to File

It is possible to save the Where search results to a file, which can then be used in other operations (including reports).

1. After choosing your Where parameters, select the **F7 QtoFile** button – the Saved Query Results table will display:

Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
Harry Potter Books	Y	15	08/07/2011 12:59:59 PM	3079
Chelsea Fiction	Y	0	27/07/2011 1:45:46 PM	

2. You can either use a pre-existing list file or create a new list file:
  - a. To use a pre-existing file: select a list entry from the table and select **F9 Select** (select **F2 Empty** first if you would like to clear any pre-existing list items – look at the Qty column to ascertain this.).
  - b. Alternatively, a new file can be added by: selecting on the **F1 New** button, typing in the Details (for example: **Chelsea Fiction**) and then selecting on the **F3 Save** button. Then highlight the file and select on the **F9 Select** button.

This Saved File can now be used as part of a report or procedure.

- See: [Appendix 2: Saved Files](#) for further information



Some Where search examples are:

## **Borrowers who have joined in the last 3 months**

- Joined > Current Date – 3 Months

## **All Stockitems**

- Item No IS NOT NULL

## **All Junior Items**

- Sts Code LIKE J  
or
- Call Number LIKE J (if you put J at the beginning of your call numbers for Junior items)

## **Stockitems with a Specific Form Code**

- Form = BK

## **Items with Cost over \$500**

- Current Cost > 500

## **Items Never Borrowed**

- Times Borrowed = 0

## **Dusty items – Items not used within a certain period of time (for example: Items not used in the last 12 months)**

- For Loan = Y                   **AND**
- Last Active < Current Date – 12 Months

## **Items available for loan from a Specific Collection (for example: DVDs)**

- For Loan (Y/N) = Y           **AND**
- On Loan = N                   **AND**
- Form = DVD (substitute your own code here, or use Sts Code or Floor)

## **Items with More than 3 Reserves**

- Res > 3

## **Items Received within a Specific Period**

- Received < 1/7/2009   **AND**
- Received ≥ 1/06/2009

## **Items Received Since the Beginning of the Month**

- Received ≥ Start of Month

## **Stocktake – Missing items (minimum statements required)**

- Stock Take Date IS NULL **AND**
- On Loan = N

## BORROWER INFORMATION

### Menu Options

The menu is broken up into five areas:

- Main – giving you access to all the other modules and many of the sub-screens
- Application – most the codes/settings used within the Borrower module are set up here (for example: Borrower Types and Borrower Titles)
- Borrower – which contains additional Borrower-related functionality (for example: Borrower Addresses, History and Memos)
- XReferences – links to other modules and associated functionality
- File – access to Saved Files and associated functionality

From the Borrower menu within this screen it is possible to:

- Add/edit borrower information, including addresses
- Check reservations
- Check financial details
- Check/print loan history
- Add memos
- Load photographs in digital formats
- Re-register borrowers

Set up/check your pre-set codes and descriptions for the relevant groups in the *Borrower* Module Application menu. These can be classified specifically by the site but generally:

<b>TYPES</b>	The Category to which Loan privileges are set – for example: <b>Staff, Adult, Year 8, ILL Libraries, House Bound</b> , etc. ( <b>Application &gt; BorrowerTypes</b> )
<b>GROUPS</b>	Usually the house, faction for students or other category (not often used in Public Libraries) ( <b>Application &gt; BorrowerGroups</b> )
<b>CLASSES</b>	Class or room names for students – usually where overdues are sent for Schools (not often used in Public Libraries) ( <b>Application &gt; BorrowerClasses</b> )
<b>TITLE</b>	Can be used to automatically generate default Sex ( <b>Application &gt; BorrowerTitle</b> )
<b>REF1 / REF2</b>	Free-text fields: Often is used in schools for a Student's ID or Shortname (for example: comes from Admin system). Public Libraries use them for extra information
<b>LOCATION</b>	Branch, Library, Campus or Department name ( <b>Main &gt; Supervisor &gt; Locations</b> )
<b>STATUS</b>	Most statuses would be set to no restrictions ( <b>OK</b> ) but can be changed – for example: <b>Lost card, Restricted borrower, Blacklisted</b> ( <b>Application &gt; BorrowerStatus</b> )

## Amlib Introductory Training

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<b>SUBURB</b>	Used to populate the Suburb name and Postcode when entering Addresses (to save time and provide Statistics) ( <b>Application &gt; BorrowerSuburb/Streets/Wards</b> )
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# Amlib Introductory Training

## Borrower Screen

**BarCode:** Usually Student ID No (Schools). Validation checks are made

**PIN:** The PIN is an alphanumeric field (not case sensitive). It can be used for security reasons when borrowers are checking their own information in the OPAC screen

**Scope:** Library Group(s) a query will search over

**Surname:** Family name

**Give Name:** First name

**Middle Name:** Usually only first initial (if from import)

**Title:** Mr, Ms, Mrs, Dr, Professor, etc

**Sex:** Gender will be **M** or **F** – will be automatically generated from **Title** if Default Sex is entered

**BirthDate:** Enter dates in dd/mm/yyyy format. You do not need to type the / symbol.

**Location:** Registration points for Borrowers

**Ref1 and Ref2:** Free text fields. Can be used for matching purposes during Borrower and Borrower Picture Import. It is possible to customise the labels for these fields.

**Email:** To Store email address. Can also be used as address for Circulation notices sent by e-mail. On entering a Valid email address, Use for Notice changes to **Y**. Validation rules apply.

**Use for Notices:** Use Email for Circulation notices (**Y/N**)

**Mobile/Cell:** To store mobile phone number. Can also be used as number for circulation notices sent by SMS

**Use Mobile/Cell for Notices:** Use Mobile/Cell for Circulation notices (**Y/N**)

**Exclude from Debt Collection:** Excludes borrower from Debt Collection processes (where applicable)

Seq	Set	?Size
1	1	200

**Balance:** Any money owing will display. It is not a data entry field.

**Potential Charges:** Links to Issues where the Potential Charges display for the current Borrower. This is the amount of Overdue Charges due if the item/s were to be returned on the current date

**Picture:** Display of Borrower picture if loaded

**Type:** The main category of borrower at a particular library. Loan rules are applied against Borrower Types.

**Group:** Optional category for borrower.

**Class:** Optional category for borrower.

**Address:** Three addresses may be supplied for each borrower with 4 lines available for each Address – includes telephone number

**Loan Count and Memo count:** Number of items on loan and number of Borrower memos

**Enquiry Security Level:** Not used in current Release

**Search Size** (for example: **200**) and Table Information –for example: Sequence No 6 in Set of 41

**Lib Group:** Displays the Library Group for the location for this borrower record

**Status:** Special process associated with the Borrower – for example: **BANNED**, **LOST CARD**. Allows a borrower to be banned. A nominal status is set in **Main > Supervisor > Installation – Borrower** tab

**Reg Expiry:** The date at which this borrower will expire

**Last Active:** The date the borrower was last active in Circulation for an Issue, Renewal or Reservation

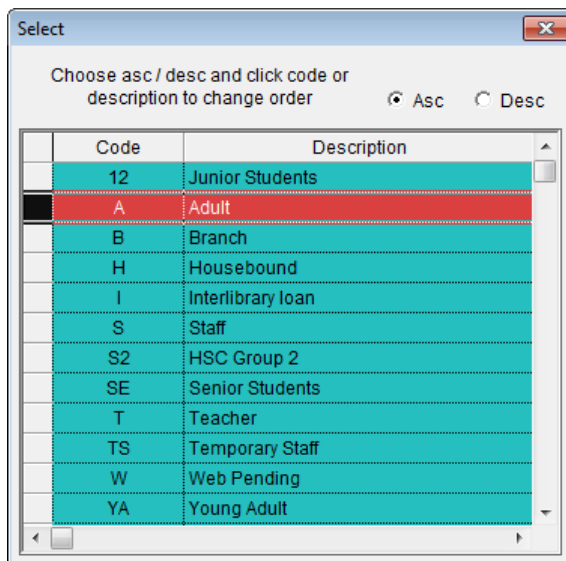
## Entering New Borrowers

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

3. From the menu, select **Borrower > EnterNewBorrower** – the Borrower Details screen will enter creation mode (the **F2 Insert** button will become bolded)

# Amlib Introductory Training

- To access a list of codes in a field select . (full stop) and <Tab> on your keyboard – for example: in the borrower Type field, type . and then select the <Tab> key – a list of Borrower Type Codes and Descriptions will display:



- Double-select on an entry to make a selection
- After entering all necessary details select the **F2 Insert** button – the Borrower Address screen will automatically display


Borrower Details - STAFF at Chelsea Library

Main Application Borrower XReferences File

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

BarCode: B9988 Pin: \*\*\*\*\* Previous Queries: -1 -2 -3 -4 -5

Scope: 'LIBRARY','MOBILE' Given Name: Sarah Middle Name: J

Surname: Smith Title: Ms Sex: F Balance: \$0.00 Picture: 

BirthDate: 16/05/1951 Potential Charges?:  AlwaysShow:

Type: A Group: ENG Class: 2A

Status: OK Status Date: 27/07/2011 Location: CHELSEA

Business Phone: ID: Ref1: R45787 Ref2: DW12 Loan Count: 3 Memo Count: 0

Email: sarah-jane.smith@oclc.org Use for Notices: Y

Mobile/Cell: 400446272 Use Mobile/Cell for Notices:  Lib. Group: LIBRARY Enquiry Security Level (00-99): 00

Exclude from Debt Collection:  N

Joined: 03/05/2011 At: CHELSEA Modified: 11/08/2011 3:42:34 PM Seq: 1 Set: 1 ?Size: 200

Reg Exp: 04/10/2094 Last Active: 16/08/2011 by: MAZEUPD

Borrower Security Level: NUM

## Addresses

- From the menu, select **Borrower > Address** – the Borrower Address screen will automatically display:

The screenshot shows the 'Borrower Address' window with the following details:

- Header:** Borrower Address (with F1 Clear, F3 Update, F4 Delete, F5 Query, F6 LinkTo, F7 Links buttons)
- Name:** Smith, Sarah J
- Postal Address (checked):**
  - Tel: 0399290817
  - Level 10, 310 King St
  - Melbourne
  - Vic
  - Wand From: 1
  - Area Suburb: MEL
  - P/Z Code: 3000
  - plus: N
  - Popup? Type: N
- Residential Address (unchecked):**
  - Tel: 0399290800
  - Level 10, 310 King Street
  - Melbourne
  - Vic
  - Wand From: 2
  - PostCode /Zip Code: 3000
  - plus: N
  - Popup? Type: N
- Guardian Address (unchecked):**
  - Tel: 0861047200
  - Mr & Mrs Smith
  - 2/298 Selby St North
  - Osborne WA
  - Wand From: 1
  - PostCode /Zip Code: 6017
  - plus: Y
  - Popup? Type: N

- Enter the Postal address details as required
- If Suburb Codes (**Application > BorrowerSuburbs** from the Borrower Details screen) are being used, enter just the Street Address details and go to the Suburb field and identify the Suburb: this will then populate the rest of the Address details and the P/Z Code (Postcode) field
- Enter the Residential and Guardian address details (if applicable)
- Select the **F3 Update** button when complete

It is possible to link to other addresses (Schools do not usually use this facility as they download the Addresses from the Admin system). It is also possible to Wand in another Students card, enter the details of the borrower to which the link is to be made and select the **F5 Query** button.

- See: [Appendix 3: Linking Addresses](#) for more details
- See: [Appendix 4: Import of Borrowers into Amlib](#) for more details of the borrower import function

## XReferences Menu

- Show Linked Borrowers for Addresses1, 2 and 3
- Show Items or Reservations
- Go directly to Issues (it is possible to then loan items etc.) or go directly to reservations (it is possible then to reserve/delete reservations, etc.)
- Go directly to subject interests (it is possible to view items received by the library a certain amount of time – for example: the last month for prescribed areas of interest. It is possible to send letters or email detailing of new items that include Subject Interests registered)

Borrower Special Interest Authority Headings

F1 Clear F2 Insert F3 Update F4 Delete F5 Query F6 Refresh F7 Cats F8 Items F9 File

B9988

Type	Current Interests
650	Cookery (Chocolate)
650	Cookery (Herbs)
650	Cookery (Pasta)
650	Cricket - Australia.
100	Heyer, Georgette, 1902-1974.

New In last

1 Wk  
 2 wks  
 1 mth  
 3 mths  
 6 mths  
 Year

Tag	Browse List

Search Term ( any type of authority will be located )



## STOCKITEM INFORMATION

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### Menu Options

The menu is broken up into five areas:

- Main – giving you access to all the other modules and many of the sub-screens
- Application – most the codes/settings used within the Stockitem module are set up here (for example: Stockitem Form Codes and Stockitem Process Codes)
- Item – which contains additional Stockitem-related functionality (for example: Reserve Item, History and Memos)
- XReferences – links to other modules and associated functionality
- File – access to Saved Files and associated functionality

From the Item menu within this screen it is possible to:

- Create reservations and shuffle reservation queues
- Check/print loan history
- Add memos
- Create inter-library loans
- Create standalone item records or catalogue records

Set up/check your codes, descriptions and labelling for the relevant groups in the *Stockitem* module Application menu. These can be classified specifically by the site but generally:

<b>FORM</b>	Usually a physical description or General Material Designation (GMD) of the Stockitem – for example: <b>Book, Periodical, Video, Map, Online</b> , etc. Can be used to set Loan parameters ( <b>Application &gt; StockitemForms</b> )
<b>STS CODE</b>	Used to identify particular collections (or parts of the collections) for Statistical reasons. Usually more specific than <u>Form</u> . Can be used to set Loan parameters ( <b>Application &gt; StockitemStats</b> )
<b>CALL SET</b>	Allow you to search or print reports by the Call number set rather than a call number range ( <b>Application &gt; StockCallSets</b> )
<b>DESCRIPTION</b>	+ <u>Convert Val</u> : Free-text fields: Often used to indicate copy number and conversion values
<b>LOCATION</b>	Branch, Library, Campus or Department name ( <b>Main &gt; Supervisor &gt; Locations</b> )
<b>FLOOR</b>	An extra location field. Can show in <i>NetOpacs</i> – for example: Closed Reserve, New Items, etc.
<b>PROCESS</b>	Useful for Process such as <b>Missing, Withdrawn</b> , etc. A date that the Process was created displays in the adjacent to the <u>Process Date</u> box. Links can also be made to show in <u>Opac?</u> and <u>Alert</u> fields ( <b>Application &gt; StockProcess</b> )

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<b>LOAN TYPE</b>	Allows a loan restriction to be placed on the item – for example: Overnight Borrowing only, which overrides the normal Loan Borrowing permissions. Mainly used for temporary collections. ( <b>Application &gt; StockLoanTypes</b> )
------------------	--

### Stockitem Form/Field Labels

This is bibliographic data originating from the Catalogue record.

Usually set as:

Line 1: <b>Title</b>	Line 4: <b>Series</b> or <b>ISBN</b>
Line 2: <b>Author</b>	Line 5: <b>Publisher</b>
Line 3: <b>Subject</b>	Line 6: <b>Call Number</b>

The labelling of Lines and Tags used to populate the fields can be adjusted to suit Form type (**Application > StockitemForms – F9 Display** button).

- See [Appendix 5: Stockitem Field Labels](#) for more information

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## Stockitem Screen

**Item No:** Usually the Barcode. Able to enter a system generated barcode. Validation checks are made.

**Catalogue** information: Originates from the Catalogue data. Line displays set in Stockitem Form – **F9 Display**. Usually set as:  
 Line 1: TITLE                      Line 4: SERIES  
 Line 2: AUTHOR                      Line 5: PUBLISHER  
 Line 3: SUBJECT                      Line 6: CALL NO

**Stats Code:** The code may be alphabetic (up to 6 characters) with description (up to 50 characters). Used mainly in the statistics gathering process but may also be used as enquiry points

**Description:** Free text. Label can be changed

**Location:** Permanent/Temporary Locations for Stockitems

**Dates:** Format is DD/MM/YYYY – for example: 07/10/1998. No need to type the / symbol. In Received date < = > symbols can be used for queries – for example: item before a certain date

**For Loan:** (Y/N) Default is Y.  
**Loan Type:** Parameters set according to type e.g. Overnight only  
**Opac?:** Show this item in Opac (Y/N)  
**Alert:** Message generated in circulation regarding the item (Y/N)

**Library Group:** Associated with Login Location – determines privileges within Group security if used by your Site e.g. if Multi Campus School. Able to apply security to View, Update, Insert, Delete, Batch, Attach, Hold, Loan, Check-in and/or Transfer

**Circulation** details: If on loan, current borrower, No. of reserves, order

**Volume:** Free text. Allows up to 8 characters. Can be set up so that Marc tag is inserted – for example: 300a

**Form:** Physical description of the Stockitem. Typical Forms codes could be **CD, BK, VID**. The actual code (up to 3 characters) with description (up to 25 characters). Plays a vital role within Circulation and may also be used in Statistics

**Edition:** Free text. Allows up to 8 characters. Can be set up so that Marc tag is inserted – for example: 260c

**Call Set:** If used enable Call numbers to be categorised into groups e.g. Chemistry, Physics, Biology etc.

**Convert Value:** Usually ref for conversion data. Label can be changed

**Current Cost:** Do not enter \$ symbol

**Floor Location:** Names of floor locations in your Library – for example: CASSETTES, VIDEOS etc. Optional but can appear in the Opac under the Permanent Location

**Search Size** (for example: 200) and Table Information –for example: Sequence No 6 in Set of 41

**Process:** Special process associated with the item – for example: **MISSING, DAMAGED**. Linked to Opac? And Alert fields –for example: Alert = Y but Opac = N. A Date displayed once a process has been included. This is useful for Reporting purposes – for example: Report Missing items entered as Missing 2 years ago

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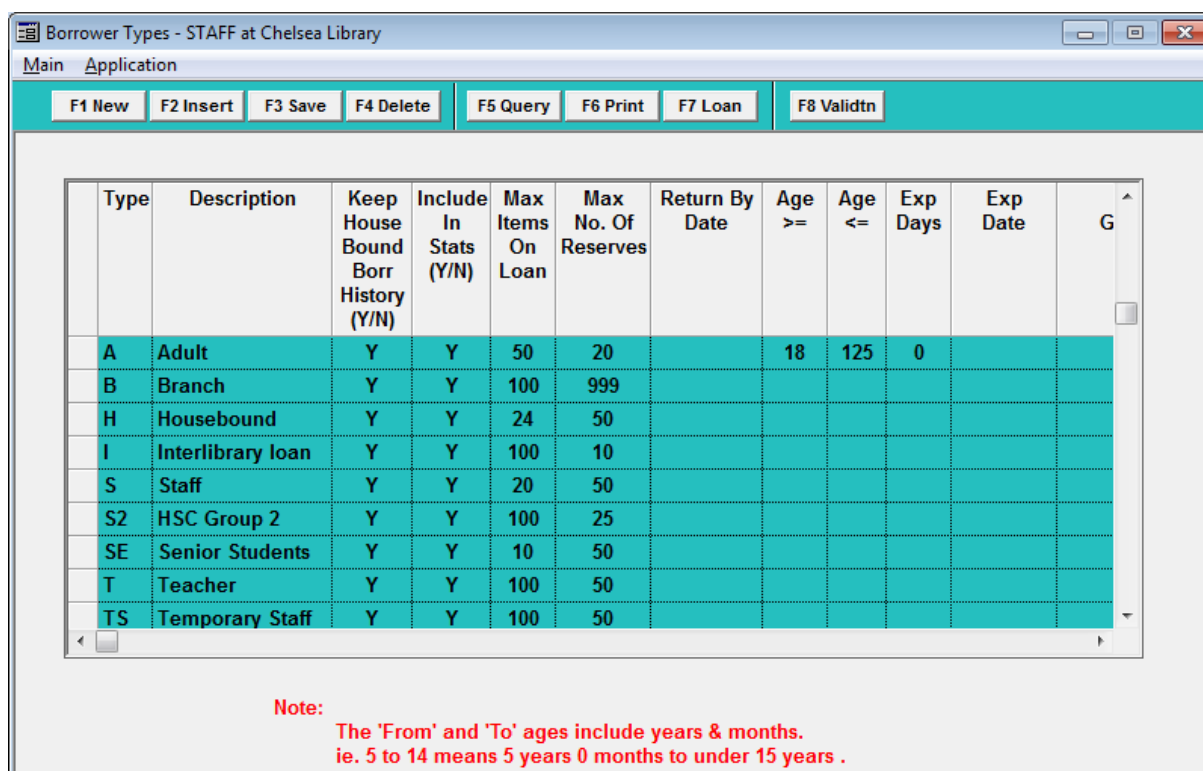
## LOAN RULES

Your system is set to control loan periods by Borrower Type and Item Form Code. Alternatively loan settings can be controlled by Borrower Type and Item Stats Code. This is an installation parameter setting: **Main > Supervisor > Installation – Circulation** tab: Loan by STATS (Y) or FORM (N).

- See also: [Appendix 6: Setting Default Dates and Holidays](#) for more information

### Borrower Types

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



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

**Note:** The 'From' and 'To' ages include years & months. ie. 5 to 14 means 5 years 0 months to under 15 years .

3. Alter the settings as per the following table:

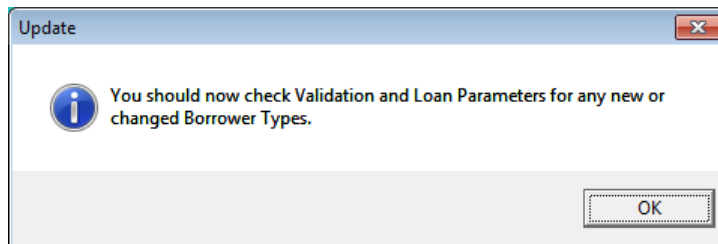
COLUMN NAME	EXPLANATION	OPTIONS
<b>Type</b>	The <u>Type</u> of Borrower (usually a 1-3 digit code – for example: <b>A</b> )	
<b>Description</b>	A description of the Borrower <u>Type</u> – for example: <b>Adult</b>	
<b>Keep House Bound Borr History (Y/N)</b>	History of past reading records is kept for borrowers until deleted, if a <b>Y</b> is entered in this column. The system will notify the operator if an item has been borrowed previously and how many days ago. If the Borrower history is not kept, the system still keeps Stockitem history so the items that a person has borrowed can still be checked	<b>Y/N</b>
<b>Include In Stats (Y/N)</b>	Statistics can be recorded to the hour, day, month or year depending upon the settings in <b>Main &gt; Supervisor&gt;</b>	<b>Y/N</b>

## Amlib Introductory Training

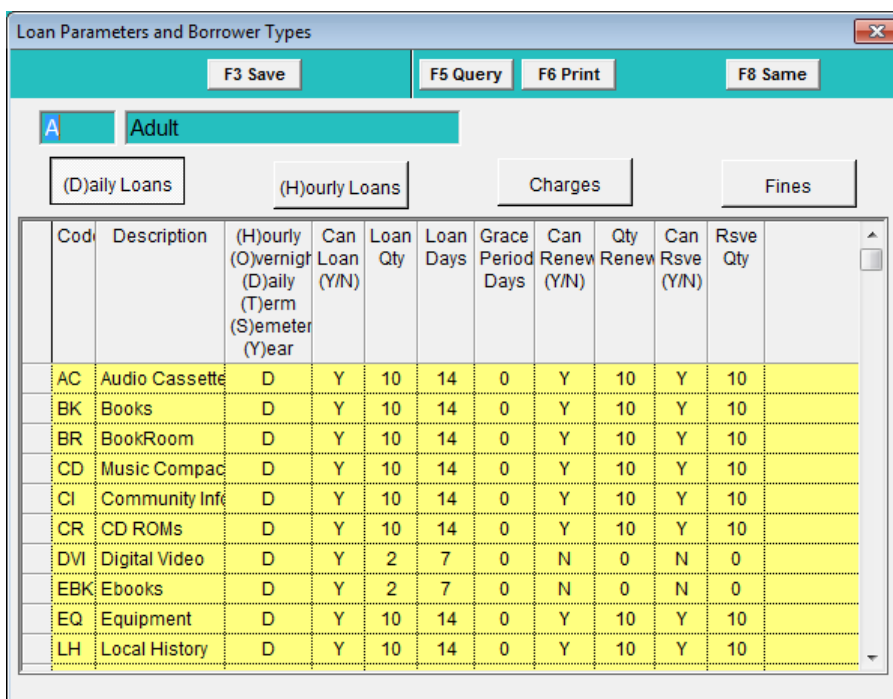
	<b>StatsParams</b> for the <u>Borrower Types</u> that have a <b>Y</b> set in this column	
<b>Max Items On Loan</b>	Sets the total number of items that a patron with this <u>Borrower Type</u> can loan at any one time. Specific limitations/privileges based on <u>Form</u> (or <u>Stats</u> ) codes of the items can be set by selecting the <b>F7 Loan</b> button	nn
<b>Max No. of Reserves</b>	Sets the total number of reservations that a patron with this <u>Borrower Type</u> is allowed at any one time. Specific limitations/privileges based on <u>Form</u> (or <u>Stats</u> ) codes of the items can be set by selecting the <b>F7 Loan</b> button	nn
<b>Return By Date</b>	A return date (earlier than those set in the <b>Main &gt; Supervisor &gt; Installation – Borrower</b> tab) can be imposed on particular <u>Borrower Types</u> – for example: Year 12 students	<b>dd/mm/yyyy</b>
<b>Age</b> >=  <b>Age</b> <=	When a new borrower is created the system can assign the appropriate Borrower Type parameter depending on age if an entry is added within these fields. This is useful for creating Junior members in Public Libraries.  <ul style="list-style-type: none"> <li>• ≥ = Greater or equal to a certain age</li> <li>• ≤ = Less or equal a certain age</li> </ul>	≥  ≤
<b>Exp Days</b>	The number of days before the <u>Borrower Type</u> expires. Once a borrower has expired they would need to re-register before allowing activity on the system. The <b>Main &gt; Supervisor &gt; Installation – Borrower</b> tab <u>A Borrower is re-registered by (D)ates, (M)onths, (N)o re-register</u> parameter would need to be set to <b>M</b> or <b>D</b> for the above to be effective	nn
<b>Exp Date</b>	The actual expiry date for a patron with this <u>Borrower Type</u> . Once a borrower has expired they would need to re-register before allowing activity on the system. The <b>Main &gt; Supervisor &gt; Installation – Borrower</b> tab <u>A Borrower is re-registered by (D)ates, (M)onths, (N)o re-register</u> parameter would need to be set to <b>M</b> or <b>D</b> for the above to be effective	<b>dd/mm/yyyy</b>
<b>Bor Group</b>	A <u>Borrower Type</u> parameter may be assigned a default Borrower Group (which will then be automatically entered in the <u>Group</u> field when the Borrower Type is entered). The relevant Group code needs to exist in the Borrower Group ( <b>Main &gt; Borrowers &gt; BorrowerGroups</b> ) table.  For example: all Teachers could be assigned a group of Staff, all Students be assigned a group of Students, all differing categories of staff (for example: Library Staff, Council Staff could be assigned a group of <b>S</b> for Staff). It can assist in defining groups of borrowers for searching or reporting purposes.	Enter a <u>Group</u> code – for example: <b>STA</b> , <b>STU</b> , etc.

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- Select the **F3 Save** button when complete – a prompt with the following message will display: **You should now check Validation and Loan Parameters for any new or changed Borrower Types.**



- Select the **OK** button
- Highlight the Borrower Type you would like to alter (for example: **Adult**) and select the **F7 Loan** button – the Loan Parameters and Borrower Types screen will display:



- Alter the settings as per the following table:

COLUMN NAME	EXPLANATION	OPTIONS
<b>Code</b>	Displays the <u>Form</u> or <u>Stats</u> code for each corresponding Stockitem <u>Form</u> or <u>Stats</u> code	
<b>Description</b>	Displays the <u>Form</u> or <u>Stats</u> Description for each corresponding Stockitem <u>Form</u> or <u>Stats</u> code	
<b>Type of Loan</b>	Displays whether the Loan is a <b>Daily, Hourly, Overnight, Semester, Term</b> or <b>Yearly</b> type Loan*	<b>D/H/O / S/T/Y</b>
<b>Can Loan (Y/N)</b>	Is this form available for the particular <u>Borrower Type</u> – for example: <u>Borrower Type</u> of <b>Junior</b> may not be available to loan items with a <u>Form</u> code of <b>CD</b>	<b>Y/N</b>

## Amlib Introductory Training

<b>Loan Qty</b>	The number of Items with this <u>Form</u> code that may be on loan to a patron with this <u>Borrower Type</u> at any one time – for example: a <u>Borrower Type</u> may be allowed a maximum of <b>8</b> items but only <b>1</b> item with a <u>Form</u> code of <b>Video</b>  <b>Please Note:</b> Maximum number allowed is set on <u>Borrower Types</u> screen – <u>Max Items On Loan</u> column	nn
<b>Loan Days</b>	The usual loan period in days (can be overridden during issuing).	nn
<b>Grace Period Days</b>	Number of days overdue before fines are applied to an item of this type. Whether the charge itself is calculated from the actual due date or the due date plus the grace period is determined in the <b>Main &gt; Supervisor &gt; Installation – Circulation</b> tab <u>Calculate all overdue fines from the grace (Y) or overdue (N) date</u> setting	nn
<b>Can Renew (Y/N)</b>	Determines whether borrowers can renew items of this type	Y/N
<b>Qty Renew</b>	Controls the number of times borrower can renew an item of this type	nn
<b>Can Rsve (Y/N)</b>	Determines whether borrowers can make or request reservations for items of this type	Y/N
<b>Rsve Qty</b>	Controls the number of reservations allowed by a borrower for items of this type  <b>Please Note:</b> Maximum number allowed is set on <u>Borrower Types</u> screen – <u>Max No. of Reserves</u> column	nn

\*End of **(T) Term**, **(S) Semester** and **(Y) Year** can be set in **Main > Supervisor > Installation –Borrower** tab. The dates will need to be changed manually for a new period once the dates have expired. If the date has expired the loan will revert to a same day loan period.

CODE	DESCRIPTION
<b>H</b>	Hourly Loans
<b>O</b>	Overnight Loans
<b>D</b>	Daily
<b>T</b>	Term
<b>S</b>	Semester
<b>Y</b>	Year

8. Select the **F3 Save** button when complete – the Loan Parameters and Borrower Types screen will close

# Amlib Introductory Training

- To determine which fields are compulsory when entering borrower information, select the **F8 Validtn** button – the Validation Rules for Borrower Types screen will display:

Type	Title	Status	Sex	Locn	Group	Class	Ref1	Ref2	Given Name	Birth Date	Ward	Suburb	Post/Zip code	Area	Addr 1	Addr 2	Addr 3	PIN Y/N
12	Y	Y	N	Y	N	N	N	N	Y	Y	N	N	N	N	Y	N	N	N
A	Y	Y	N	Y	N	N	N	N	Y	N	N	N	N	N	Y	N	N	N
B	N	Y	N	Y	N	N	N	N	N	N	N	N	N	N	N	N	N	N
H	N	Y	N	Y	Y	N	N	N	N	N	N	N	N	N	Y	N	N	N
I	N	Y	N	Y	N	N	N	N	N	N	N	N	N	N	Y	N	N	N
S	Y	Y	N	Y	N	N	N	N	Y	N	N	N	N	N	Y	N	N	N

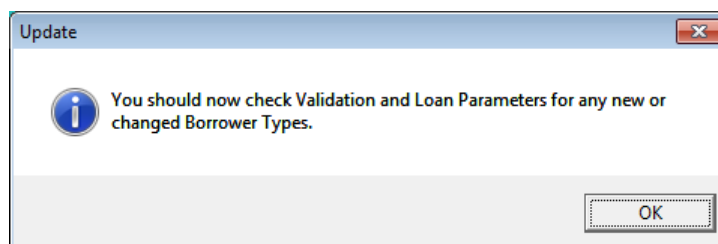
- Simply enter a **Y** or **N** into the corresponding column for each Borrower Type/Borrower Field combination
- Select the **F3 Save** button when complete

**Please Note:** It is also possible to access the Loan rules table from the Stockitem module:

- In the Stockitem screen, select **Application > StockitemForms (or StockitemStats)** – the Form Codes (or Stats Codes) screen will display
- Select a Form (for example: **BK – Books**) or Stats Code (For example: **AF – Adult Fiction**) and select the **F7 Loan** button – the Loan Parameters and Borrower Types screen will display
- This screen displays in a Code/Bor Type matrix (rather than the Bor Type / Code shown in the *Borrower* module)

## Enter a New Borrower Type

- Launch the *Amlib* client
- Go to **Main > Borrowers > BorrowerTypes** – the Borrower Types screen will display:
- Select the **F1 New** or **F2 Insert** button
- Enter the parameters in the table
- Select the **F3 Save** button when complete – a prompt with the following message will display: **You should now check Validation and Loan Parameters for any new or changed Borrower Types.**



- Select the **OK** button



# Amlib Introductory Training

## CIRCULATION

The *Circulation* module controls the movement of stockitems within the system.

### Issues

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

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

The screenshot shows the 'Issues - STAFF at Chelsea Library' window. The title bar indicates the date and time: Thursday, 25 August 2011 7.22 PM. The menu bar includes 'Main', 'Application', 'Borrower', 'Items', and 'Print'. Below the menu bar are two buttons: 'F1 Clear' and 'F4 Bor ?'. The main form area contains several input fields and labels: 'Name', 'Potential Charges', 'Show Items' (checked), 'Type', 'Status', 'Locn', 'Class', 'Bal.', 'Memos', and 'Loans'. At the bottom, there is a table with columns: 'Form Rsv', 'Title / Author / Call No', 'Item No', 'Due Back', 'T.Loc', 'P.Loc', and 'Ren'.

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

The screenshot shows the 'Issues - STAFF at Chelsea Library' window. The title bar indicates the date and time: Thursday, 25 August 2011 7.25 PM. The menu bar includes 'Main', 'Application', 'Borrower', 'Items', and 'Print'. Below the menu bar are several buttons: 'F1 Clear', 'F3 Renew All', 'F4 Bor ?', 'F5 Item ?', 'F6 A4Style', 'F7 BookMark', 'F8 NewIssues', 'F9 Issues', and 'F10 Statement'. The main form area contains several input fields and labels: 'Name', 'Potential Charges' (\$0.30), 'Show Items' (checked), 'Type', 'Status', 'Locn', 'Class', 'Bal.' (\$0.00), 'Memos', and 'Loans' (3). A small photo of Sarah Smith is visible. Below the form is a table with columns: 'Form Rsv', 'Title / Author / Call No', 'Item No', 'Due Back', 'T.Loc', 'P.Loc', and 'Ren'. At the bottom, there is an 'Item' input field, an '=' button, and buttons for '1 Day', '3 Day', '1 Wk', and '4Wks'. An 'Adjust Item' button is also present. The bottom left corner has a 'Borrower Bar Code Entry Field' and a 'NUM' input field.

Form Rsv	Title / Author / Call No	Item No	Due Back	T.Loc	P.Loc	Ren
BK 0	Doctor Who and the auton invasion / Terr	980387259	16/08/2011	CHEL SEA	CHEL SEA	2
BK 0	Harry Potter and the Goblet of Fire / J. / RC	16905	25/08/2011	CHEL SEA	CHEL SEA	0
BK 0	4.50 from Paddington / Agatha Christie / C	980215342	30/08/2011	CHEL SEA	CHEL SEA	2

4. If the borrower barcode is not known,:

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- a. Select the **F4 Bor ?** button to display the Borrower Enquiry screen:

Surname	Name	Ini	Title	Type	Class	Group	Status	Locn	Address1
Smith	Alan	A	Mr	A			OK	CHELSEA	9878 7368, 72 Fredrick Street, B1000
Smith	Debbie	P	Mrs	A	TERN	ENG	OK	CHELSEA	93524132, 101 Power Street, B44
Smith	Jack	L	Mr	A		ENG	OK	CHELSEA	93524132, 101 Power Street, B44
Smith	Jill	R	Mrs	A		ENG	OK	CHELSEA	93524132, 101 Power Street, B44
Smith	Jim	G	Mr	A	TERN	ENG	OK	CHELSEA	93524132, 101 Power Street, B44
Smith	John	D	Mr	A		ENG	DC	CHELSEA	399290817, Level 10, 310 Kin, B99
Smith	Sarah	J	Ms	A	2A	ENG	OK	CHELSEA	399290818, Level 10, 310 Kin, B99
Smith-Lawrence	Carmel	G	Ms	A		ENG	OK	CHELSEA	94352131, 91 Rose Avenue, B88

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

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

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

Form	Rsv	Title / Author / Call No	Item No	Due Back	T.Loc	P.Loc	Ren
BK	0	Doctor Who and the auton invasion / Terr	980387259	16/08/2011	CHELSEA	CHELSEA	2
BK	0	Harry Potter and the Goblet of Fire / J. / RC	16905	25/08/2011	CHELSEA	CHELSEA	0
BK	0	4.50 from Paddington / Agatha Christie / C	980215342	30/08/2011	CHELSEA	CHELSEA	2
→ BK	0	Travels in Nepal : The sequested kingdom /	980362318	08/09/2011	CHELSEA	CHELSEA	0

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

Form	Rsv	Title / Author / Call No	Item No	Due Back	T.Loc	P.Loc	Ren
BK	0	Doctor Who and the auton invasion / Terr	980387259	16/08/2011	CHELSEA	CHELSEA	2
BK	0	Harry Potter and the Goblet of Fire / J. / RC	16905	25/08/2011	CHELSEA	CHELSEA	0
BK	0	4.50 from Paddington / Agatha Christie / C	980215342	30/08/2011	CHELSEA	CHELSEA	2
BK	0	Travels in Nepal : The sequested kingdom / PYE-SMITH, CHARLIE / 915.496 PYE	0362318	08/09/2011	CHELSEA	CHELSEA	0

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

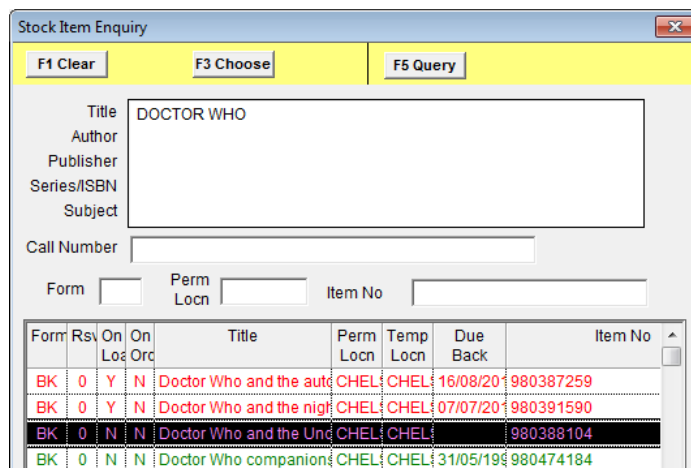
Form	Rsv	Title / Author / Call No	Item No	Due Back
BK	0	Doctor Who and the auton invasion / Terr / 0426112954 DICKS, TERRANCE / JPB	980387259	16/08/2011
BK	0	Harry Potter and the Goblet of Fire / J. / ROWLING, J.K. / F ROW	16905	25/08/2011
BK	0	4.50 from Paddington / Agatha Christie / CHRISTIE, AGATHA, 1890-1976. / PB CHR	980215342	30/08/2011
BK	0	Travels in Nepal : The sequested kingdom / PYE-SMITH, CHARLIE / 915.496 PYE	980362318	08/09/2011

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

9. If the item barcode is not known:

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

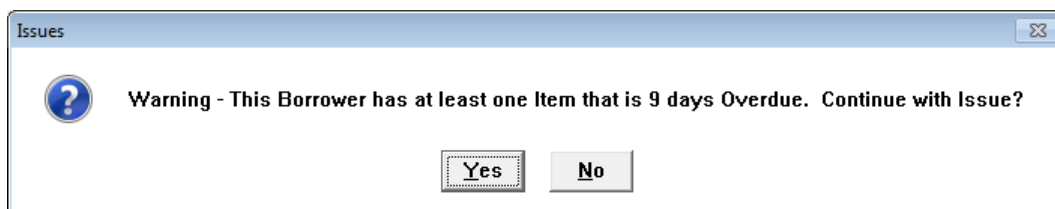
# Amlib Introductory Training



- b. You can then perform an item search: type in the item details and select the **F5 Query** button
- c. If there are multiple matches, select the item and select the **F3 Choose** button

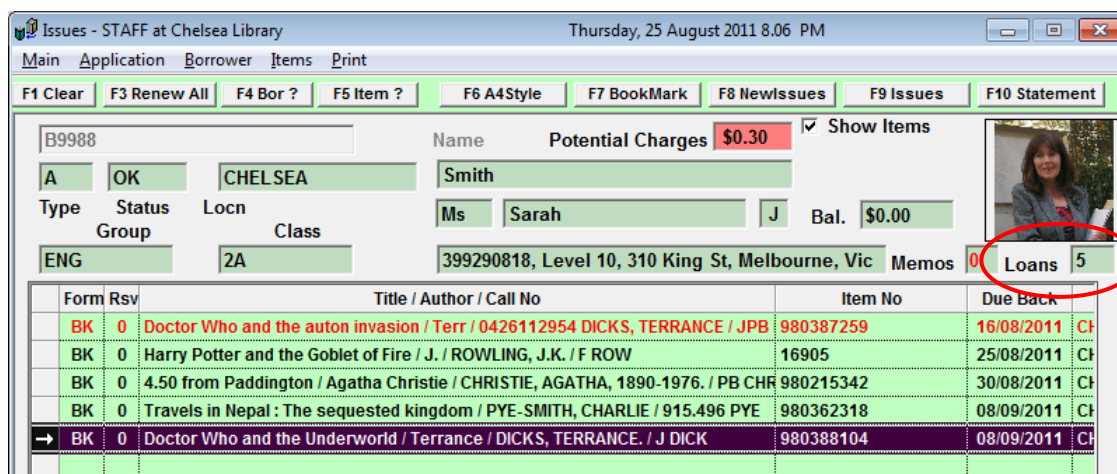
10. If the Borrower has an item overdue when attempting to issue a new item:

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



- b. Select the **Yes** button to proceed with the issue (otherwise select the **No** button)

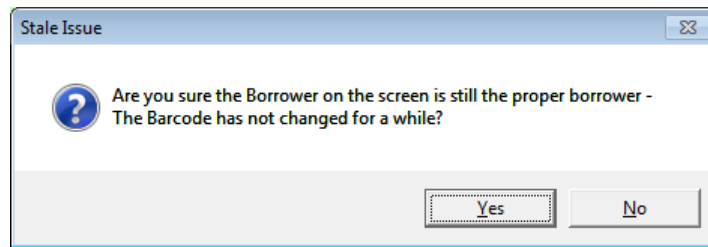
11. The number of items on Loan is shown as a count in the top right corner (the actual loans display if Show Items box is checked):



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

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

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



- b. Select the **Yes** button to proceed with the issue (otherwise select the **No** button)
14. Once the transaction is complete, select the **F8 NewIssues** button to print a receipt of the new items issued (alternatively, select the **F9 Issues** button to print a list of all items the borrower currently has out on loan)
15. To issue items to another borrower, simply wand in the borrower barcode – this will automatically clear the current borrower details (there is no need to clear the screen first)

## Colour

Colour is used to indicate certain loan statuses:

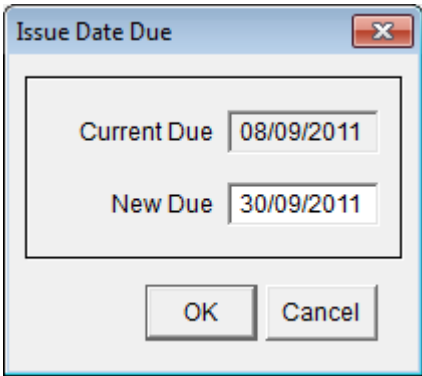
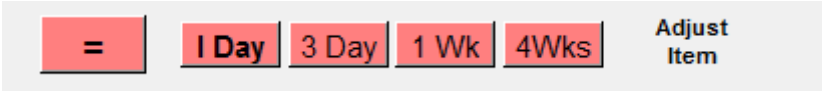
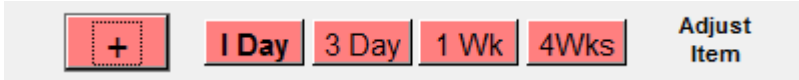
- **Red** Overdues
- **Magenta** Reserved items
- **Black** Normal issues (not overdue)

## **Messages**

Messages appear if an operator attempts to:

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

## Loan Options

OPTION		ACTION
<b>Renew</b>	Renew an item	Double-select on the Date Due for the item: If the Item is <i>reserved</i> a message will display (alternatively select the <b>Items &gt; Renew Item</b> option from the menu).
	Renew All	Select the <b>F3 Renew All</b> button; alternatively select the <b>Items &gt; Renew All</b> option from the menu.
<b>Adjust Loan Date Dues</b>	Specific Date (for example: the Borrower is going on holidays)	<ol style="list-style-type: none"> <li>Highlight the item and select <b>Items &gt; Alter Selected Due Date</b> from the menu – the <u>Issue Due Date</u> prompt will display:                             <div style="text-align: center; margin: 10px 0;">  </div> </li> <li>Type in the <u>New Due</u> date in <b>dd/mm/yyyy</b> format and select the <b>OK</b> button</li> <li>To alter all the due dates for items on loan to the borrower, select <b>Items &gt; Alter All Due Dates In Table</b> from the menu</li> </ol>
	Alter Due Date (for example: to set a 1 day or 1 week loan)	<ol style="list-style-type: none"> <li>Highlight the item and select the <b>1 Day, 3 Day, 1 Wk</b> or <b>4Wks</b> button                             <div style="text-align: center; margin: 10px 0;">  </div> </li> <li>To add days onto the existing due date, highlight the item and select the = button (it will become a +) and then select the <b>1 Day, 3 Day, 1 Wk</b> or <b>4Wks</b> button                             <div style="text-align: center; margin: 10px 0;">  </div> </li> </ol>
<b>Return</b>	From <u>Issues</u> screen	<ol style="list-style-type: none"> <li>Highlight the item and select <b>Items &gt; Return Item</b> from the menu – this will take you to the <i>Returns</i> screen</li> <li>The item is now returned (it will appear with an <b>X</b> in front of it)</li> <li>Select the <b>&lt;Esc&gt;</b> key to close the <i>Returns</i> screen</li> </ol>

## Amlib Introductory Training

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<b>Item Details</b>	XRef to the Item	Highlight the item and select <b>Items &gt; Item Details</b> from the menu – this will take you to the <i>Stockitem</i> module with full details of item
<b>Borrower Details</b>	XRef to the Borrower	Select <b>Borrower &gt; Borrower Details</b> from the menu – this will take you to the <i>Borrower</i> module and show full details of the borrower
<b>Check Privileges</b>	To see Borrower allowances	Select <b>Borrower &gt; Privileges</b> from the menu: this shows how many items may be borrowed, how often they can be renewed (if at all) and the due date if a particular form type is issued to the borrower

### Print Options

From the **Print** menu option, it is possible to report in various formats – for example: to list items on loan and reserved (using the **F10 Statement** button) or **Print Overdues Only** as required

### Off Line Circulation

Off-line Circulation allows you to import your issues, returns or reservations from a dos file, created with the Offline Module. This is useful when the Server can't be accessed (for example: there is a power failure where the server is, the IT dept. are "doing things" to the server). The *Offline* module is only available on PCs that have had the relevant programs installed (see separate guide)

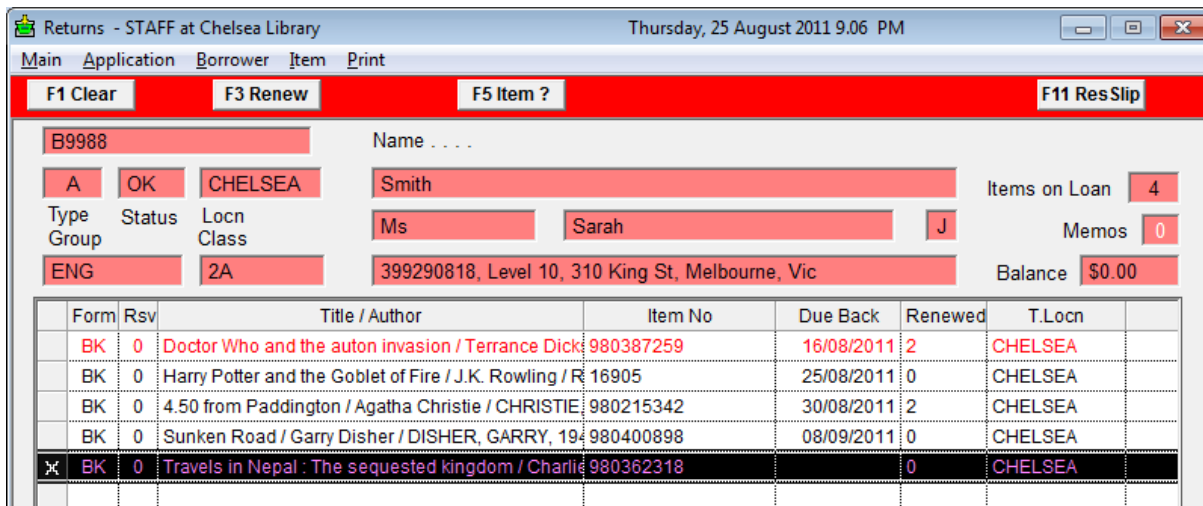
# Amlib Introductory Training

## Returns

### Issues

Returns are available from the issue screen.

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

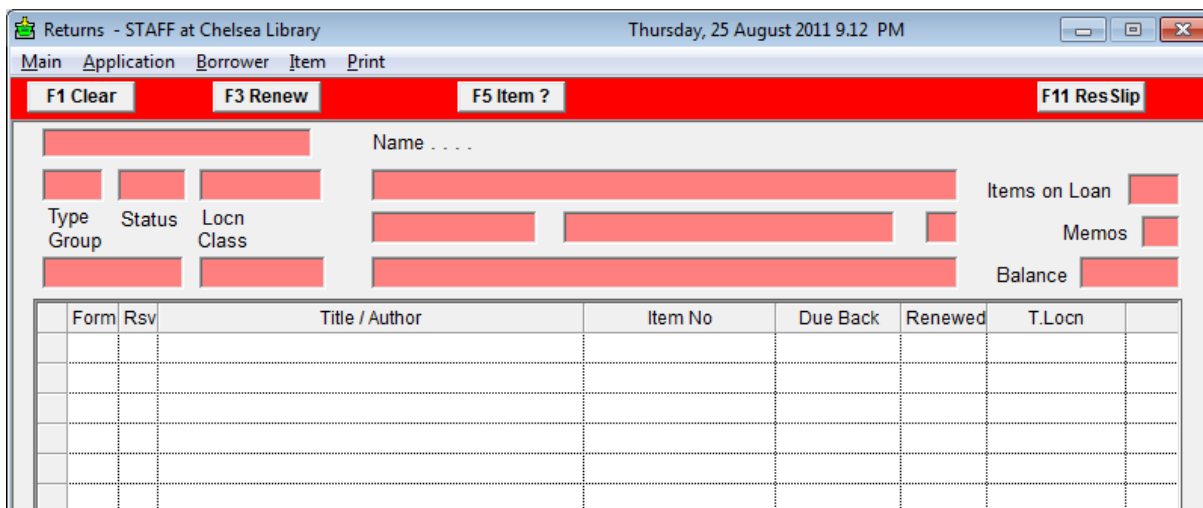


2. The item is now returned (it will appear with an X in front of it)
3. Select the <Esc> key to close the *Returns* screen

### Returns

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

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



# Amlib Introductory Training

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

Item: 980400898

Form	Rsv	Title / Author	Item No	Due Back	Renewed	T.Loan
BK	0	Doctor Who and the auton invasion / Terrance Dicks	980387259	16/08/2011	2	CHELSEA
BK	0	Harry Potter and the Goblet of Fire / J.K. Rowling / R	16905	25/08/2011	0	CHELSEA
BK	0	4.50 from Paddington / Agatha Christie / CHRISTIE	980215342	30/08/2011	2	CHELSEA
X BK	0	Sunken Road / Garry Disher / DISHER, GARRY, 19	980400898		0	CHELSEA

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

Form	Rsv	On Loc	On Ord	Title	Perm Locn	Temp Locn	Due Back	Item No
BK	0	Y	N	Doctor Who and the auton invasion	CHELSEA	CHELSEA	16/08/2011	980387259
BK	0	Y	N	Doctor Who and the night of the witch	CHELSEA	CHELSEA	07/07/2011	980391590
BK	0	N	N	Doctor Who and the Unicorn	CHELSEA	CHELSEA		980388104
BK	0	N	N	Doctor Who companions	CHELSEA	CHELSEA	31/05/1999	980474184

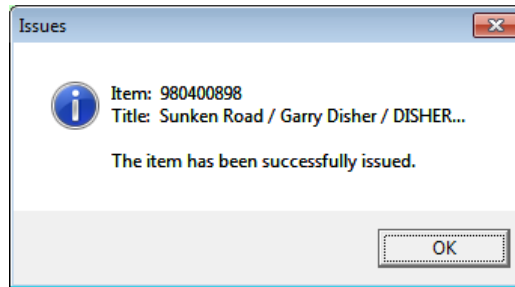
- You can then perform an item search: type in the item details and select the **F5 Query** button
  - If there are multiple matches, select the item and select the **F3 Choose** button
- If you would like to reissue the returned item:



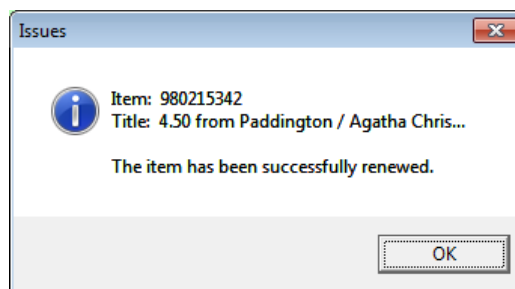
## Amlib Introductory Training

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- a. Simply double-select the returned item – the Issue screen will display
- b. The item will be reissued and then a prompt with the following message will display:  
**The item has been successfully issued.**



- c. Select the **OK** button, the Returns screen will display
  - d. The item is now reissued (it will appear with a ✓ in front of it)
7. If you would like to renew an item:
- a. Simply double-select the returned item – the Issue screen will display
  - b. The item will be reissued and then a prompt with the following message will display:  
**The item has been successfully renewed.**



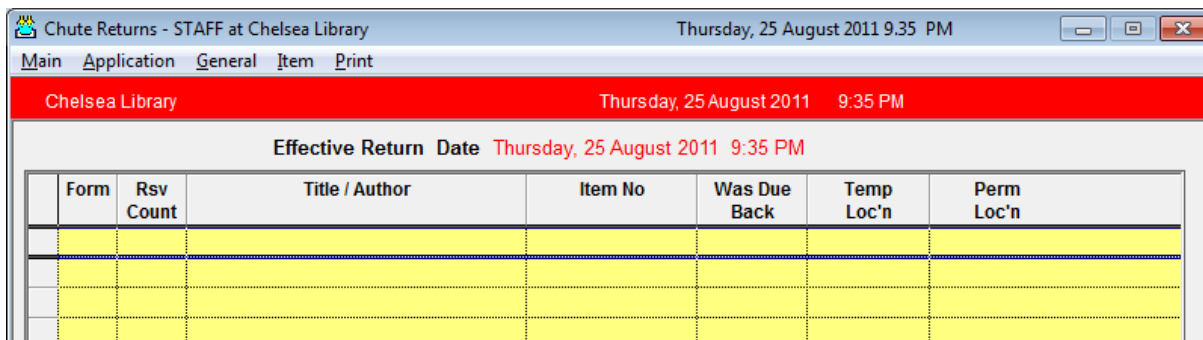
- c. Select the **OK** button, the Returns screen will display
  - d. The item is now reissued (it will appear with a ✓ in front of it)
8. To return items for another borrower, simply wand in the item barcode – this will automatically clear the current borrower details (there is no need to clear the screen first)

# Amlib Introductory Training

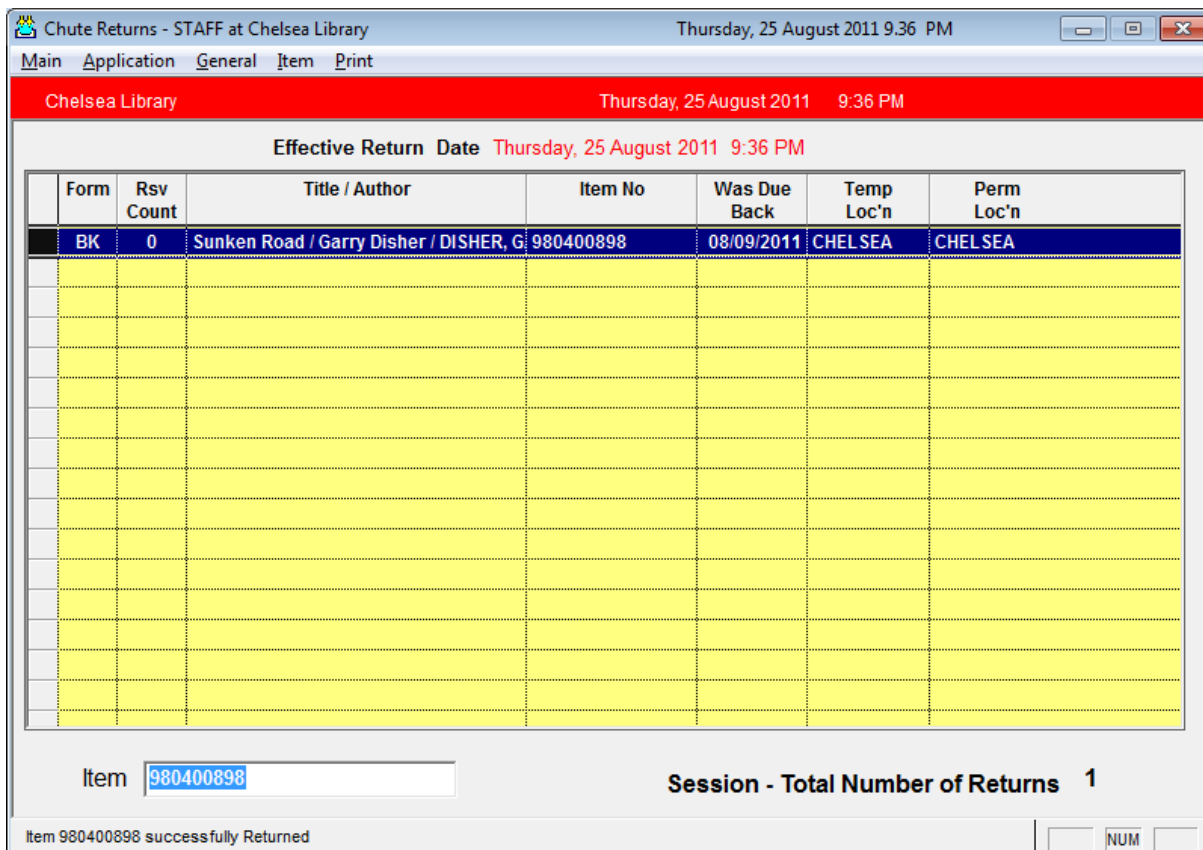
## Chute Returns

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

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



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



4. The item is now returned

# Amlib Introductory Training

5. If the item barcode is not known:
  - a. Select the **F5** key on your keyboard to display the Stock Item Enquiry screen:

Form	Rsv	On Loc	On Ord	Title	Perm Locn	Temp Locn	Due Back	Item No
BK	0	Y	N	Doctor Who and the aut	CHEL	CHEL	16/08/20	980387259
BK	0	Y	N	Doctor Who and the nig	CHEL	CHEL	07/07/20	980391590
BK	0	N	N	Doctor Who and the Unc	CHEL	CHEL		980388104
BK	0	N	N	Doctor Who companion	CHEL	CHEL	31/05/19	980474184

- b. You can then perform an item search: type in the item details and select the **F5 Query** button
    - c. If there are multiple matches, select the item and select the **F3 Choose** button

## Main Menu Returns Button

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

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

## Reservations

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

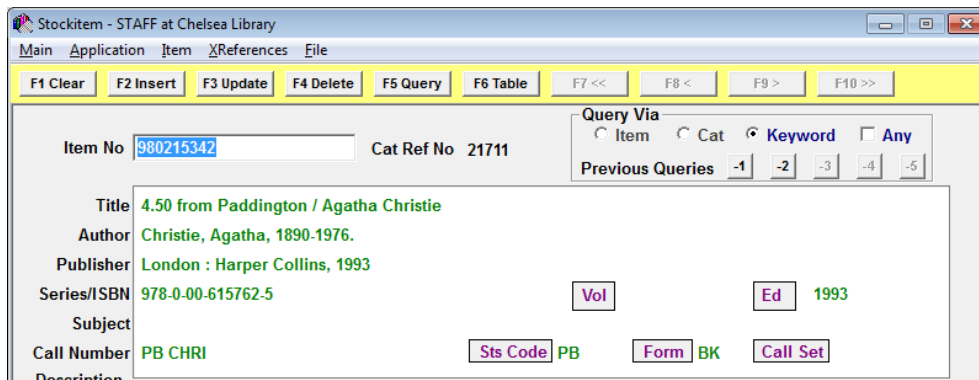
- The number of items that may be reserved by any given borrower are defined in the [Loan Rules](#) screens

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

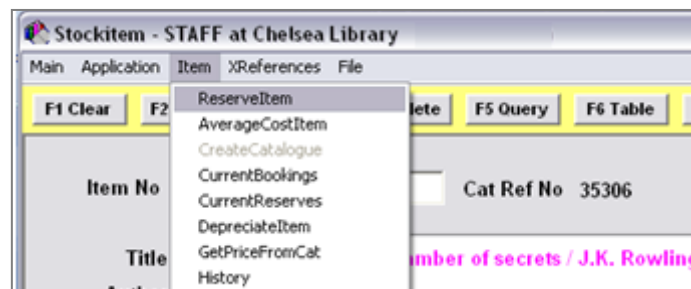
### Reserving from Stockitem

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

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



4. Once the full item details are displayed, Select **Item > Reserve Item**



# Amlib Introductory Training

- On the Borrower Enquiry window enter borrower surname, given name or barcode and F5 Query

The screenshot shows the 'Borrower Enquiry' window. At the top, there are three buttons: 'F1 Clear', 'F3 Choose', and 'F5 Query'. Below these are input fields for 'Surname' (containing 'Christensen'), 'Given', and 'Bar Code'. There is also a 'Pin' field. Below the input fields is a table with the following columns: Surname, Name, Ini, Title, Type, Class, Group, Status, Locn, and Address1. The table is currently empty.

- Double select on the exact borrower if you have performed a general search

The screenshot shows the 'Borrower Enquiry' window with search results. The 'Surname' field contains 'Christensen'. The table below has the following data:

Surname	Name	Ini	Title	Type	Class	Group	Status	Locn	Address1
Christensen	Jemma	G	Ms	A	1A	DUT	OK	CHELSE	9755 6200, 2/899 Wellington F B30
Christensen	Jordan	B	Mis	A	1A	ENG	OK	CHELSE	9755 6200, 2/899 Wellington F B30
Christensen	Melissa	F	Mrs	A			OK	CHELSE	9755 6200, 2/899 Wellington F B30
Christensen	Taylor	A	Ms	A	2A		OK	CHELSE	9755 6200, 2/899 Wellington F B30
Christensen	Trevor	A	Mr	A	TERN		OK	BELMOH	9755 6200, 2/899 Wellington F B30

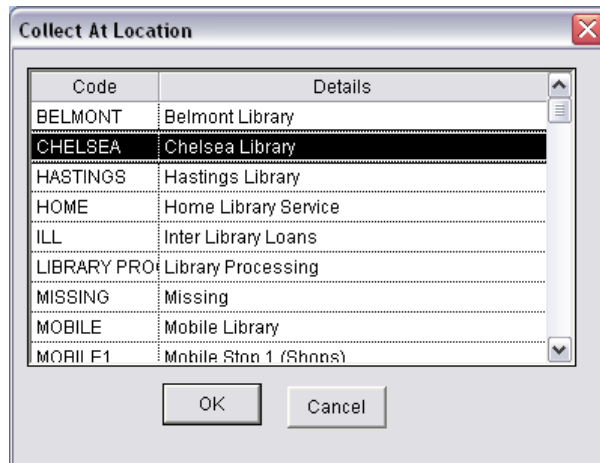
- You may see a Borrower memo screen appear if memos exist for this borrower, which you close

The screenshot shows the 'Memos for this Borrower' window. At the top, there are buttons: 'F1 New', 'F2 Insert', 'F3 Save', 'F4 Delete', 'F5 Query', and 'F7 Print'. Below these are input fields for 'Barcode' (containing 'B209'), 'Name' (containing 'NORMAN, Robyn'), and 'Number of Memos' (containing '3'). Below the input fields is a table with the following columns: Show, Date, End Date, Type, Memo Details, and stk Item no if applic.

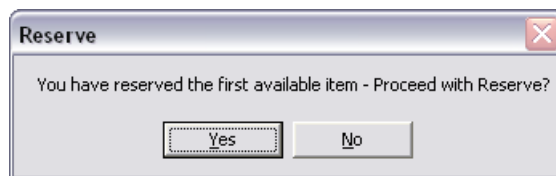
Show	Date	End Date	Type	Memo Details	stk Item no if applic
Y	17/11/2014	03/04/2042	RESRET	Item Has Been Returned That Is Reserved (Auto)	
Y	17/11/2014	03/04/2042	LOSTCARD	Borrower Lost Card	

# Amlib Introductory Training

8. Collect at location option displays - Select the preferred Collect At location and **OK**



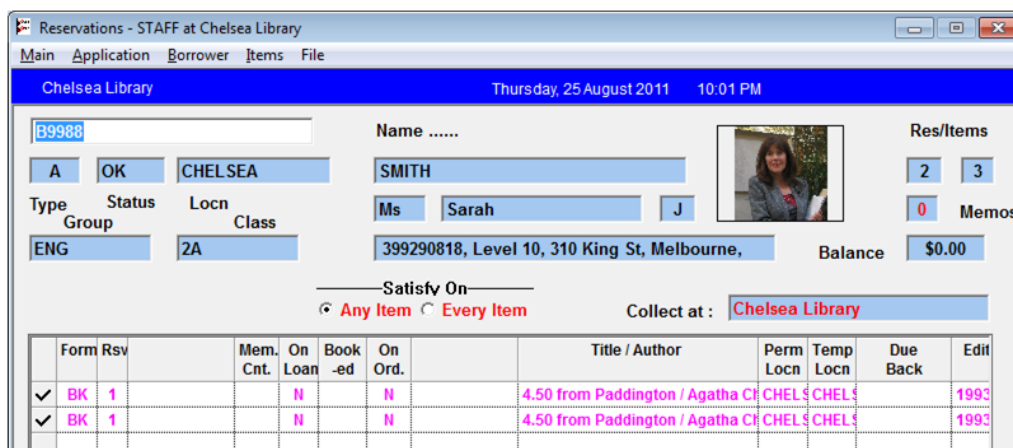
9. A popup will allow you to select if you reserve the first available copy or a specific copy. To select the first available (recommended) select **Yes** to the popup (see note below to reserve a single copy)



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



11. Select the **OK** button – reserved items will appear with a ✓ in front of them



# Amlib Introductory Training

## From the Reservations Module

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

Form	Rsv	Mem. Cnt.	On Loan	Book-ed	On Ord.	Title / Author	Perm Locn	Temp Locn	Due Back	Edit

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

Form	Rsv	Mem. Cnt.	On Loan	Book-ed	On Ord.	Title / Author	Perm Locn	Temp Locn	Due Back	Edit

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

Note: Searches on this window default to your group settings

Stockitem Bar Code Entry Field

# Amlib Introductory Training

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

Reservations - STAFF at Chelsea Library  
 Thursday, 25 August 2011 10:21 PM

Chelsea Library

B9988 Name ..... Res/Items  
 A OK CHELSEA SMITH 2 3  
 Type Status Locn Class Ms Sarah J 0 Memos  
 ENG 2A 399290818, Level 10, 310 King St, Melbourne, Balance \$0.00

Satisfy On  
 Any Item  Every Item Collect at : Chelsea Library

Form	Rsv	Mem. Cnt.	On Loan	Book -ed	On Ord.	Title / Author	Perm Locn	Temp Locn	Due Back	Edit
BK	0		Y		N	Doctor Who and the auton invasie	CHEL	CHEL	16/08/2011	1984
BK	0		Y		N	Doctor Who and the nightmare of	CHEL	CHEL	07/07/2011	1980
BK	0		N		N	Doctor Who and the Underworld	CHEL	CHEL		1980
BK	0		N		N	Doctor Who companions / David	CHEL	CHEL	31/05/1997	1995
BK	1		N		N	Doctor Who - Fury from the Deep	ANL	CHEL		

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

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

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

Reservations - STAFF at Chelsea Library  
 Thursday, 25 August 2011 10:27 PM

Chelsea Library

B9988 Name ..... Res/Items  
 A OK CHELSEA SMITH 3 4  
 Type Status Locn Class Ms Sarah J 0 Memos  
 ENG 2A 399290818, Level 10, 310 King St, Melbourne, Balance \$0.00

Satisfy On  
 Any Item  Every Item Collect at : Chelsea Library

Form	Rsv	Mem. Cnt.	On Loan	Book -ed	On Ord.	Title / Author	Perm Locn	Temp Locn	Due Back	Edit
BK	0		Y		N	Doctor Who and the auton invasie	CHEL	CHEL	16/08/2011	1984
BK	0		Y		N	Doctor Who and the nightmare of	CHEL	CHEL	07/07/2011	1980
✓ BK	1		N		N	Doctor Who and the Underworld	CHEL	CHEL		1980
BK	0		N		N	Doctor Who companions / David	CHEL	CHEL	31/05/1997	1995

## From Circulation

- Launch the *Amlib* client



# Amlib Introductory Training

- Go to **Main > Circulation > Issues** – the Issues screen will display
- Wand in the borrower barcode or select the **F4** key on your keyboard (or select **Borrower > Borrower Search** from the menu) to perform a Borrower Enquiry search – the borrower details will display:

Issues - STAFF at Chelsea Library Thursday, 25 August 2011 10:36 PM

Main Application Borrower Items Print

F1 Clear F3 Renew All F4 Bor ? F5 Item ? F6 A4Style F7 BookMark F8 NewIssues F9 Issues F10 Statement

B9988 Name Potential Charges \$0.30 Show Items

A OK CHELSEA Smith

Type Status Locn Ms Sarah J Bal. \$0.00

Group Class ENG 2A 399290818, Level 10, 310 King St, Melbourne, Vic Memos 0 Loans 2

Form Rsv	Title / Author / Call No	Item No	Due Back	T.Loc	P.Loc	Ren
BK 0	Doctor Who and the auton invasion / Terr	980387259	16/08/2011	CHELSEA	CHELSEA	2
BK 0	Harry Potter and the Goblet of Fire / J. / RC	16905	25/08/2011	CHELSEA	CHELSEA	0

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

Reservations - STAFF at Chelsea Library Thursday, 25 August 2011 10:39 PM

Main Application Borrower Items File

Chelsea Library

B9988 Name ..... Res/Items

A OK CHELSEA SMITH 3 4

Type Status Locn Ms Sarah J 0 Memos

Group Class ENG 2A 399290818, Level 10, 310 King St, Melbourne, Balance \$0.00

Satisfy On

Any Item  Every Item Collect at : Chelsea Library

Form Rsv	Mem. Cnt.	On Loan	Book-ed	On Ord.	Title / Author	Perm Locn	Temp Locn	Due Back	Edit

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

Stock Item Enquiry

F1 Clear F5 Query

Title DOCTOR WHO

Author

Publisher

Series/ISBN

Subject

Call Number

Form Perm Item

Locn Locn No

Note: Searches on this window default to your group settings

Stockitem Bar Code Entry Field

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

# Amlib Introductory Training

Form	Rsv	Mem. Cnt.	On Loan	Book -ed	On Ord.	Title / Author	Perm Locn	Temp Locn	Due Back	Edit
BK	0		Y		N	Doctor Who and the auton invasi	CHEL	CHEL	16/08/2011	1984
BK	0		Y		N	Doctor Who and the nightmare of	CHEL	CHEL	07/07/2011	1980
BK	0		N		N	Doctor Who and the Underworld	CHEL	CHEL		1980
BK	0		N		N	Doctor Who companions / David	CHEL	CHEL	31/05/1997	1995
BK	1		N		N	Doctor Who - Fury from the Deep	ANL	CHEL		

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

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

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

Form	Rsv	Mem. Cnt.	On Loan	Book -ed	On Ord.	Title / Author	Perm Locn	Temp Locn	Due Back	Edit
BK	0		Y		N	Doctor Who and the auton invasi	CHEL	CHEL	16/08/2011	1984
BK	0		Y		N	Doctor Who and the nightmare of	CHEL	CHEL	07/07/2011	1980
✓ BK	1		N		N	Doctor Who and the Underworld	CHEL	CHEL		1980
BK	0		N		N	Doctor Who companions / David	CHEL	CHEL	31/05/1997	1995

## Checking or Cancelling Reservations

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

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

# Amlib Introductory Training

Stockitem Reservations

980215342

Q Pos	Borrower	Collect At	Status	Status Date	Date Placed	Location Placed	All / First	No of Other Items In Reserve
5	B9988 Ms Sarah Smith	CHELSEA	SHELF		25/08/201	CHELSEA	F	1
10	B9999 Mr John Smith	CHELSEA	SHELF		25/08/201	CHELSEA	F	1
15	B344 Mr Brendan Jones	BELMONT	SHELF		25/08/201	CHELSEA	F	1
20	B2451 Miss Lauren Clarke	HASTINGS	SHELF		25/08/201	CHELSEA	F	1

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

Existing Reservations for Selected Borrower

Borrower No: B9988 Reservations: 3

Q Pos.	Title	Collect At	Form	Ref.	Status	Status Date	Item	Placed	Perm. Locn	Temp. Locn
1	4.50 from Paddington /	CHELSEA	BK	4592	SHELF		98020447	5/08/201	CHELSEA	CHELSEA
2	4.50 from Paddington /	CHELSEA	BK	4592	SHELF	25/08/201	98021534	5/08/201	CHELSEA	CHELSEA
1	Doctor Who and the Un	CHELSEA	BK	4597	SHELF		98038810	5/08/201	CHELSEA	CHELSEA

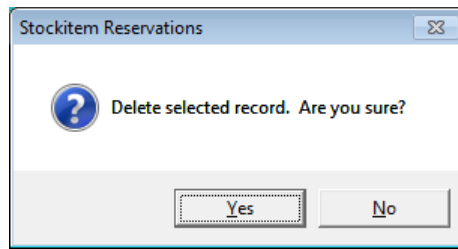
- The Stockitem Reservations list can be amended by changing the Queue (Q Pos) position – to jump someone in front of someone else, simply type in a number in the Q Pos field that places them before that person:

Stockitem Reservations

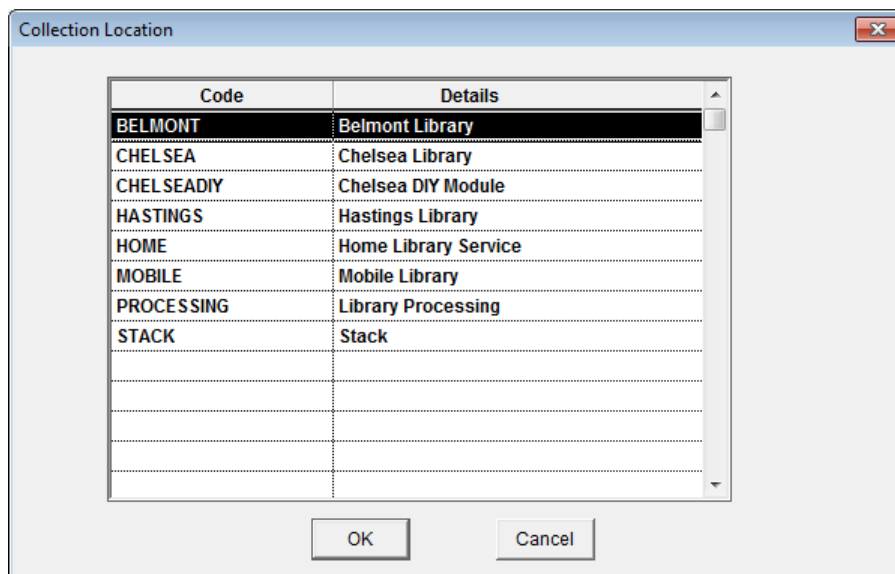
980215342

Q Pos	Borrower	Collect At	Status	Status Date	Date Placed	Location Placed	All / First	No of Other Items In Reserve
5	B9988 Ms Sarah Smith	CHELSEA	SHELF		25/08/201	CHELSEA	F	1
10	B9999 Mr John Smith	CHELSEA	SHELF		25/08/201	CHELSEA	F	1
15	B344 Mr Brendan Jones	BELMONT	SHELF		25/08/201	CHELSEA	F	1
4	B2451 Miss Lauren Clarke	HASTINGS	SHELF		25/08/201	CHELSEA	F	1

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



- b. Select the **Yes** button (to delete the reservation) or select the **No** button (to retain it)
5. Change the Location pickup point:
  - a. Highlight the reservation and select the **F7 CollLoc** button – a Collection Location prompt will display:

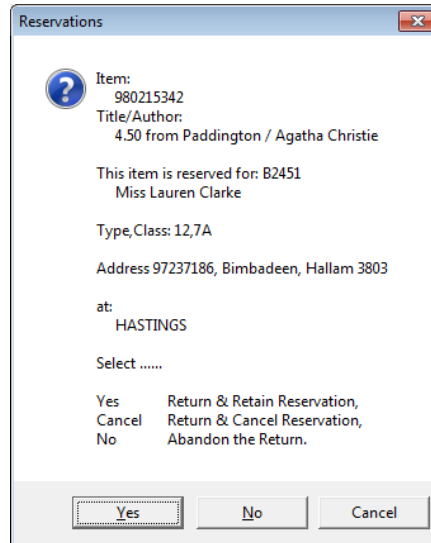


- b. Select the new pickup location and select the **OK** button
6. Select the **F3 Save** button when complete

## Checking in an Item on Return

1. Launch the *Amlib* client
2. Go to **Main > Circulation > Returns** or **Chute Returns** – the (Chute) Returns screen will display
3. Wand in the item

4. If the item has a reservation on it, a Reservations prompt will display:

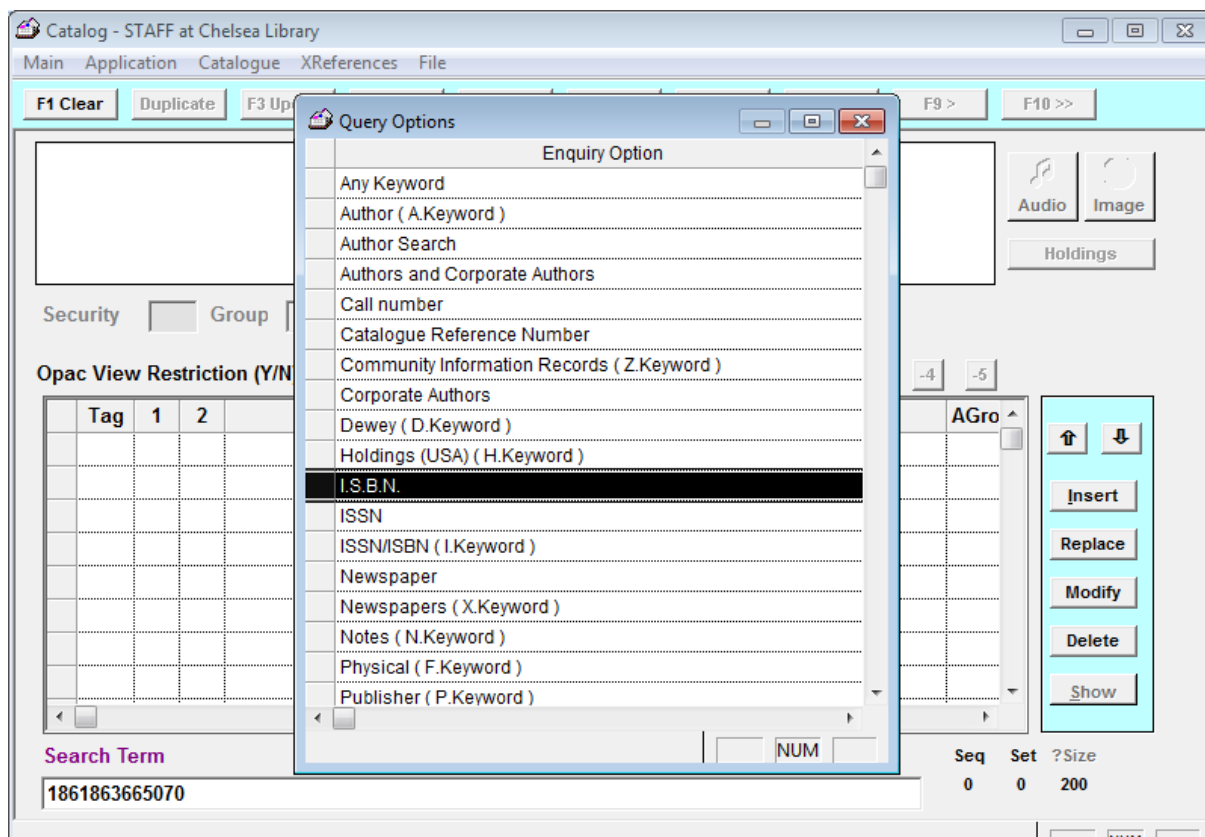


5. The following options are available:
- Select the **Yes** button to return the item (and *Retain* the reservation)
  - Select the **No** button to return the item (and *Cancel* the reservation)
  - Select the **Cancel** button to not return the item (and *Retain* the reservation)
6. If you select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

See the *Reservations* guide for full details of running reservation reports.

## MANUAL CATALOGUING

It is a good idea to search for a Catalogue to see if the item has been entered already, and just needs an Item attached. Searching for an Item can be done in Catalogue using the ISBN or in Stockitem (for example: Author or Title Search). The ISBN can even be wanded if the Barcode reader has been ISBN enabled.



It is preferable to create a catalogue first and then create the holding record (Stockitem). If the Stockitem is processed first, not all the Tags are made when the Catalogue is created from the Item menu. For example: Subject Headings are not transferred across.

Keywords are created through association with MARC tags – for example: a Subject keyword would apply to all tags defined from **600** through to **699**: e.g. **Topical term (650)**, **Personal name (600)**, **Geographic (651)** etc. Therefore, when creating your entry, it is important to have a Catalogue record as well as a Stockitem because keyword searching will be important.

There are three manual entry methods available:

### 1. Work Sheet Method

After choosing a template related to the form of the data (for example: fiction/non-fiction etc.) the required fields can be filled in. Authority listings can be accessed when appropriate (for example: for standard entry of Authors, Subjects, Publishers etc.).

## 2. Editing existing records


It is possible to duplicate an existing record and alter the relevant data.

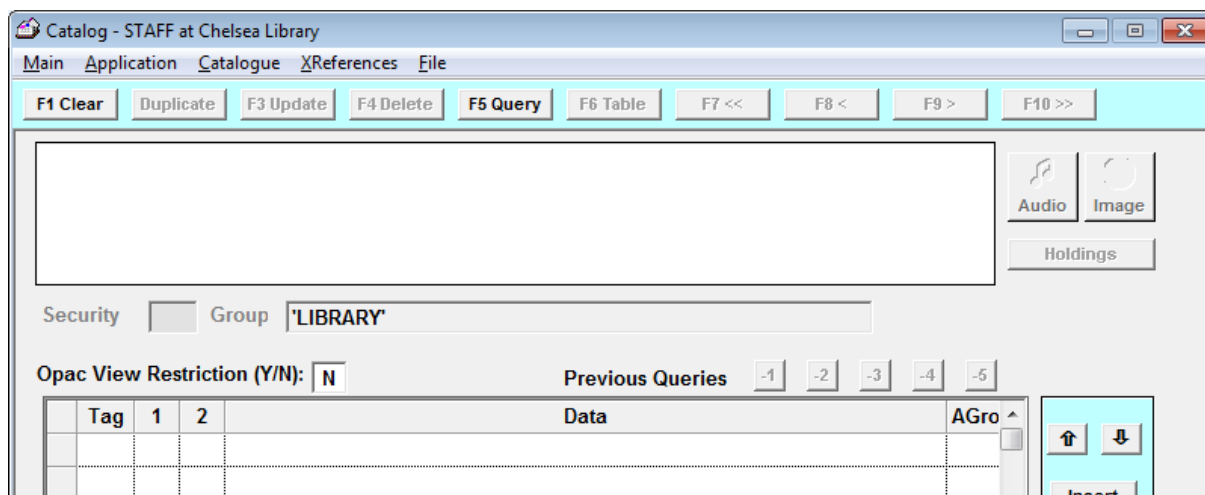
## 3. New record from scratch

No Lead Through method. Tags can be inserted and built up to create a full record.

**Please Note:** Before beginning to use the Worksheet manual entry, you need to check the tags that will be automatically displayed. This is done in **Main > Catalogue > CatLeadThruSets**.

## Work Sheet Method

1. Launch the *Amlib* client
2. Go to **Main > Catalogue > Catalogue** (or the  icon) – the Catalog screen will display:



3. From the menu, select **Catalogue > Catalog Create** – the Select Template prompt will display:



4. Select on the button for an appropriate Lead Thru set – for example: **Fiction** – the Work Sheet will open with a number of pre-set MARC tags already displayed:

# Amlib Introductory Training

Work Sheet - STAFF at Chelsea Library

Main Application Catalogue

F1 Check F2 Insert F3 Save F4 Delete F6 SF Ins F8 SF Del  KeepAfterSave

ISBN Opac View Restriction (Y/N): N

Tag No	1	2	1 - a ISBN	2 - b Terms of availability	3 - c Cancelled/invalid ISBN				
020									
082									
100	0								

- An item's bibliographic details can now be entered – as you move through the Work Sheet, the headings (descriptors) change, so it is possible to observe the type of data required in the subfield of the tag
  - See: [Appendix 7: USMARC: Some Common Tags](#) for more information
- Where the data is, Authority based (for example: Author, Subject Heading, Series, etc.) a listing of Authorities can be viewed and selected – for example: to search for a particular Author, type the first few letters of the surname, highlight the row and double-select the row or select the **F1 Check** button

Work Sheet - STAFF at Chelsea Library

Main Application Catalogue

F1 Check F2 Insert F3 Save F4 Delete F6 SF Ins F8 SF Del  KeepAfterSave

Subject - Topical term Opac View Restriction (Y/N): N

Tag No	1	2	1 - a Topical term	2 - x General subdivision	3 - y Chronological subdivision	4 - z Geogra subdivis			
			0099276941						
✓ 082			F Hol						
✓ 100	0		Hollinghurst, Alan						
✓ 245	0		Spell, The						
✓ 260			London :	Chatto and Windus Ltd ,	1998				
→ 650			Crime						
→ 700	0								

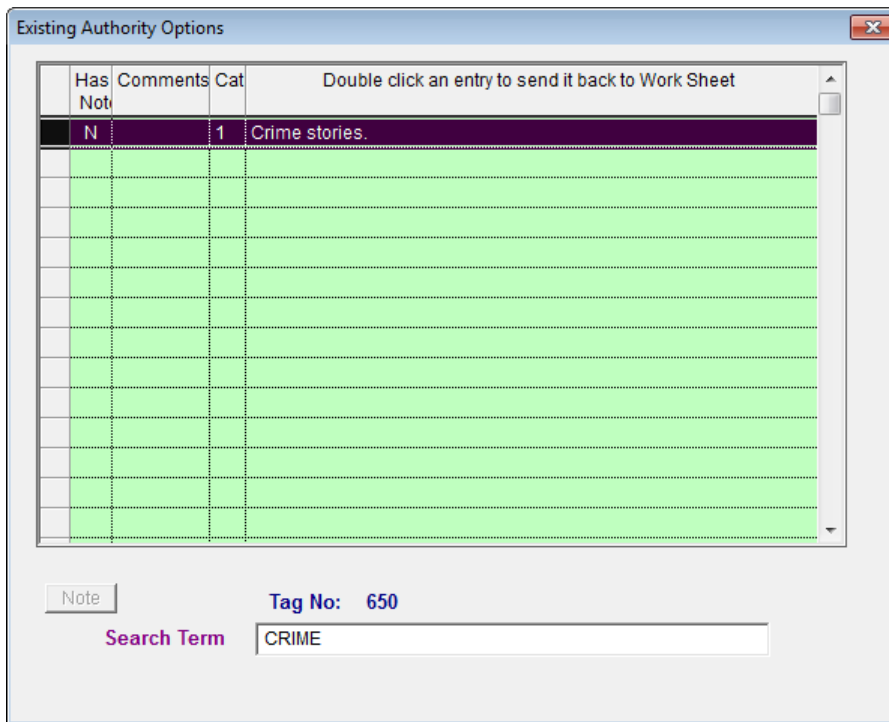
\* Double Click a row for validation ( or Press F1 ) Amlib Catalogue Ref: 0

NUM

- The Existing Authority Options screen will open displaying all matching Authorities and the number of Catalogue records which use each Authority:



# Amlib Introductory Training



8. To select an Authority in the table, simply double-select on it: the contents of the tag being checked will then change to match the selected Authority (the text will also change colour from black to **green**)

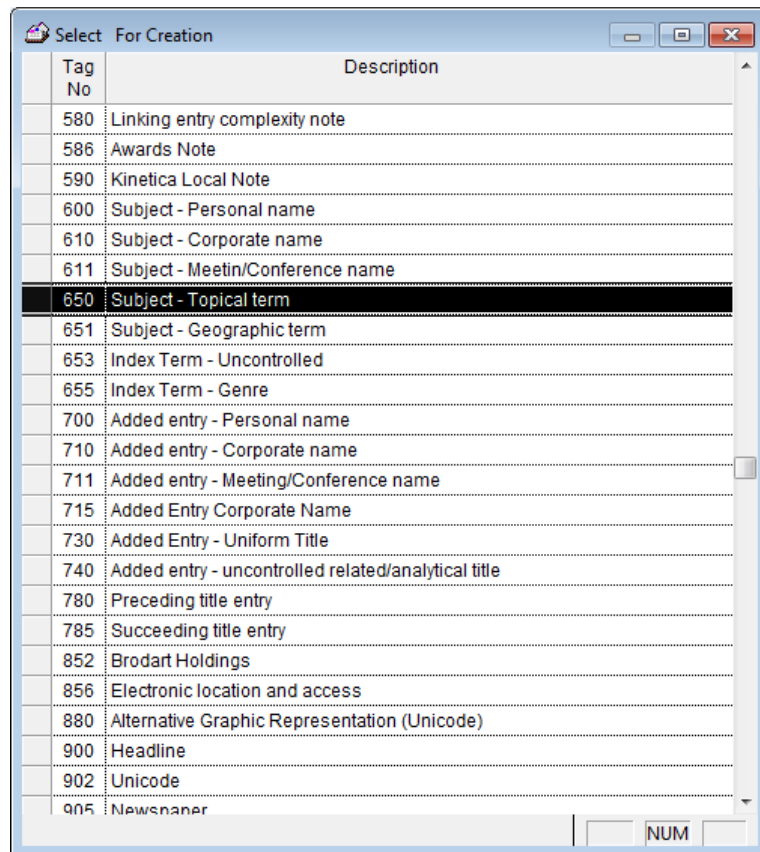
	490	0											
✓	650		Crime										
	700	0											



	490	0											
✓	650	7	Crime stories.										
	700	0											

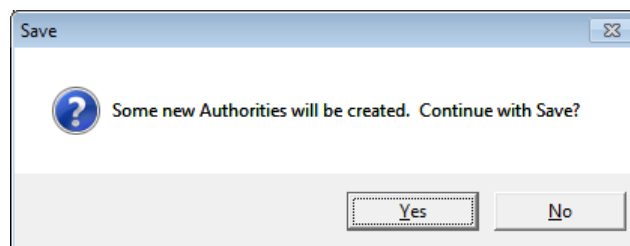
9. Once selected (or if there is no matching Authority), select on the red [ X ] to close the selection table (if there were no Authorities found the contents of the tag being checked will turn **red**, if there were Authorities found but none were selected the contents will turn **pink**)

10. To enter additional tags, select the **F2 Insert** button – the Select For Creation table will open (the pre-set tags allow for up to 40 entries):

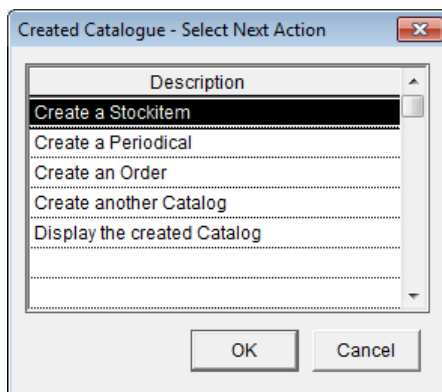


Tag No	Description
580	Linking entry complexity note
586	Awards Note
590	Kinetica Local Note
600	Subject - Personal name
610	Subject - Corporate name
611	Subject - Meetin/Conference name
650	Subject - Topical term
651	Subject - Geographic term
653	Index Term - Uncontrolled
655	Index Term - Genre
700	Added entry - Personal name
710	Added entry - Corporate name
711	Added entry - Meeting/Conference name
715	Added Entry Corporate Name
730	Added Entry - Uniform Title
740	Added entry - uncontrolled related/analytical title
780	Preceding title entry
785	Succeeding title entry
852	Brodart Holdings
856	Electronic location and access
880	Alternative Graphic Representation (Unicode)
900	Headline
902	Unicode
905	Newspaper

11. Find the required tag and double-select it to select it – a new entry with the selected Tag No will appear in the Work Sheet
12. When the record is complete, select the **F3 Save** button
13. If new Authorities are to be created, a prompt with the following message will display: **Some new Authorities will be created. Continue with Save?** (the new Authorities will be highlighted in **red**, so you can check them)



14. Select the **Yes** button – the Created Catalogue – Select Next Action prompt will display:

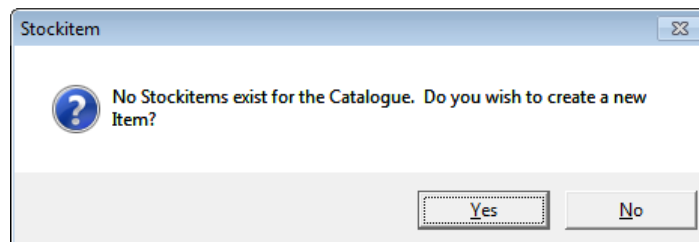


15. If you intend to create your holdings immediately, then highlight the **Create a Stockitem** and select the **OK** button (alternatively you can select the **Display the created Catalogue** if you wish to review the actual Catalogue record)

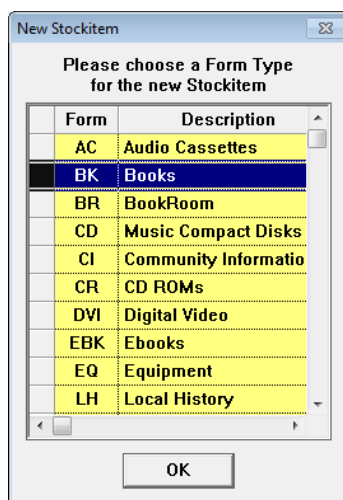
## Adding Stockitems

This section continues from the section above. If you don't immediately choose to create a stockitem record, you can select **XReferences > StockItems** from the Catalog menu to initiate the process.

1. A prompt with the following message will display: **No Stockitems exist for the Catalogue. Do you wish to create a new Item?**



2. Select on the **Yes** button – a New Stockitem prompt will display with the following message: **Please choose a Form Type for the new Stockitem**



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- Choose the appropriate **Form** type and select on the **OK** button – the **Stockitem** main screen will enter creation mode (the **F2 Insert** button will appear bolded) and several fields will be pre-populated:

Stockitem - STAFF at Chelsea Library

Main Application Item References File

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

Item No [ ] Cat Ref No 36614

Query Via  
 Item  Cat  Keyword  Any  
 Previous Queries [-1] [-2] [-3] [-4] [-5]

Title Spell, The  
 Author Hollinghurst, Alan  
 Publisher London : Chatto and Windus Ltd , 1998  
 Series/ISBN 978-0-09-927694-4 Vol Ed 1998  
 Subject Crime stories.  
 Call Number F HOL Sts Code Form BK Call Set

Description [ ] Copy No / Convert [ ]

Location Perm CHELSEA Temp CHELSEA Floor [ ] Origin/Source [ ]

For Loan (Y/N) [Y] Loan Type [ ] Opac? [Y] Alert [N] Process [ ] [ ]

Received 25/08/2011 [ ] [ ] [ ] Accessioned [ ] Current Cost 0.00

Group [ ]

ILL Library: ILL Ren: ILL Due: ITEM TYPE: N MEMOS: 0

On Loan	Due	On Order	Res	Seq	Set	?Size
				0	0	200

Last Modified by Issues 0

Date item due back at lending library [ ] NUM [ ]

- Complete the other fields as required – for example: **Stats Code**, **Current Cost**, **Floor** location, etc. – to access a list of codes in a field select **<Tab>**

For example: in the **Stats Code** field, selecting **<Tab>** will display a list of your **Stats Codes** and **Descriptions** – double-select on an entry to select it:

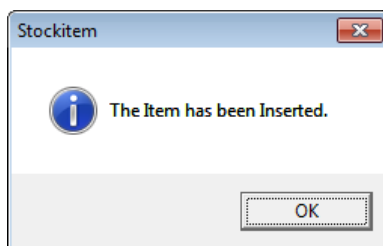
Select

Choose asc / desc and click code or description to change  Asc  Desc

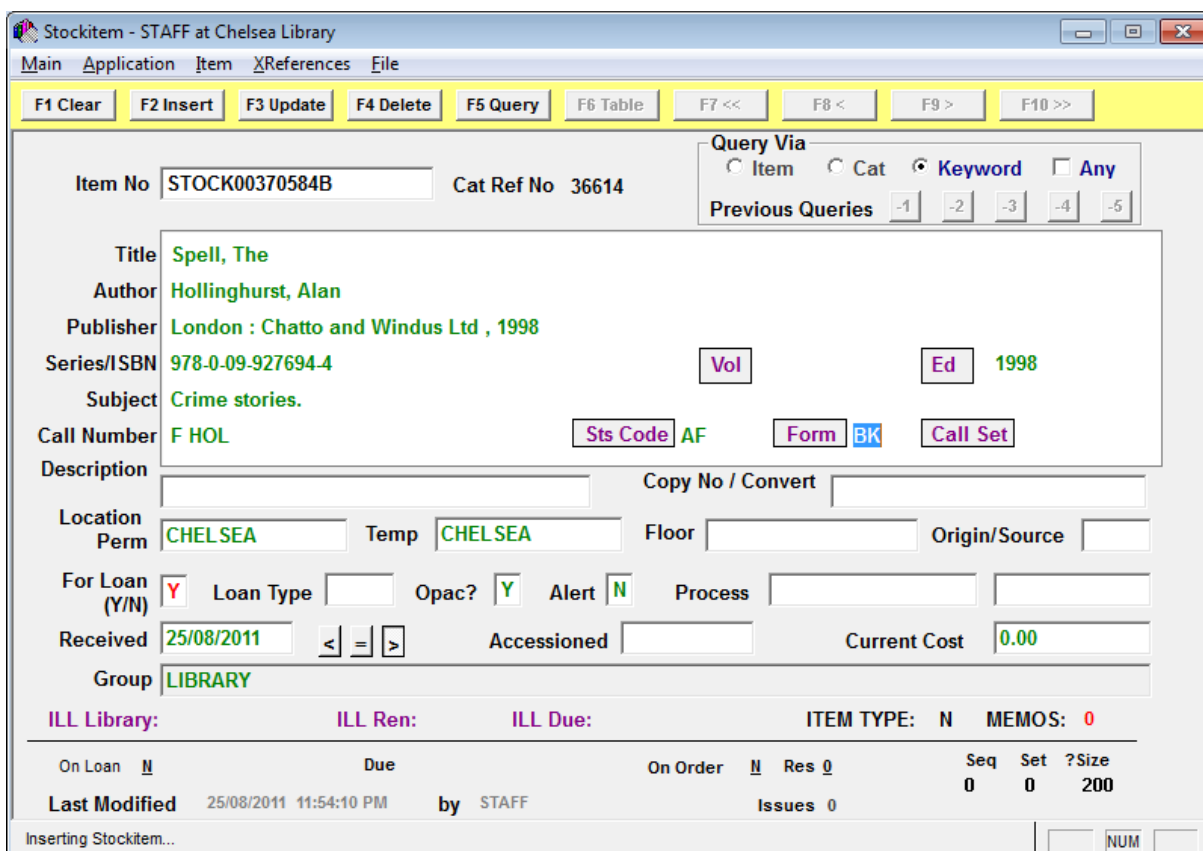
Code	Description
AF	Adult Fiction
AFSTA	Adult Fiction Stack
ANF	Adult Nonfiction
ANFSTA	Adult Nonfiction Stack
AVNF	Audio Visual Nonfiction
CAS	Music Cassette
CD	Music CD
CDR	CD Rom
CI	Community Information
CL	ClickView On Demand Video
DF	Digital Files

# Amlib Introductory Training

5. Scan in **barcode** in the Item No field (if you wish to create a system-generated barcode, leave this field blank)
6. Select on the **F2 Insert** button when complete – a prompt with the following message will display: **The Item has been Inserted.**



7. Select the **OK** button

A screenshot of the 'Stockitem - STAFF at Chelsea Library' application window. The window has a menu bar (Main, Application, Item, References, File) and a toolbar with function keys (F1-F10). The main area contains a form for item entry. Fields include: Item No (STOCK00370584B), Cat Ref No (36614), Title (Spell, The), Author (Hollinghurst, Alan), Publisher (London : Chatto and Windus Ltd , 1998), Series/ISBN (978-0-09-927694-4), Subject (Crime stories), Call Number (F HOL), Location Perm (CHELSEA), Temp (CHELSEA), Floor, Origin/Source, For Loan (Y/N) (Y), Loan Type, Opac? (Y), Alert (N), Process, Received (25/08/2011), Accessioned, Current Cost (0.00), and Group (LIBRARY). There are also buttons for 'Vol', 'Ed', 'Sts Code', 'Form', and 'Call Set'. At the bottom, there is a status bar with 'Inserting Stockitem...' and a 'NUM' button.

## Multiple Copies

To enter multiple copies of the same catalogue item:

1. Scan in a new barcode into the Item No field – the **F2 Insert** button will once again become active (**bolded**)
2. Change any other details as required – for example: Stats Code, Copy No and Floor location
3. Select the **F2 Insert** button when complete

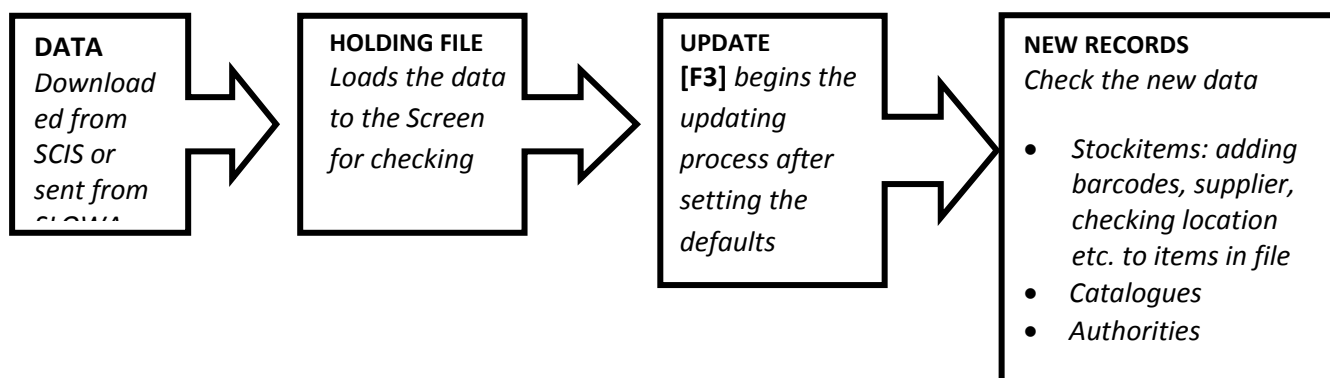
## IMPORTING NEW ITEMS

Most sites download their Catalogue data (from places like *SLOWA* and *SCIS*). *Amlib* stores the data in **USMARC** format, which is now the international standard. This is made up of hundreds of MARC Tags, which identify data. In the same way that Dewey numbers become familiar, common tags become known.

SOME COMMON TAGS	DESCRIPTION
020	ISBN
082	Dewey classification number
100	Personal name main entry (usually author)
245	Main title
260	Publication information
300	Physical description
440	Series
500	General notes
520	Summary
650	Subject headings (Topical)
700	Personal name (Added entry)
856	Electronic location and access (URL)

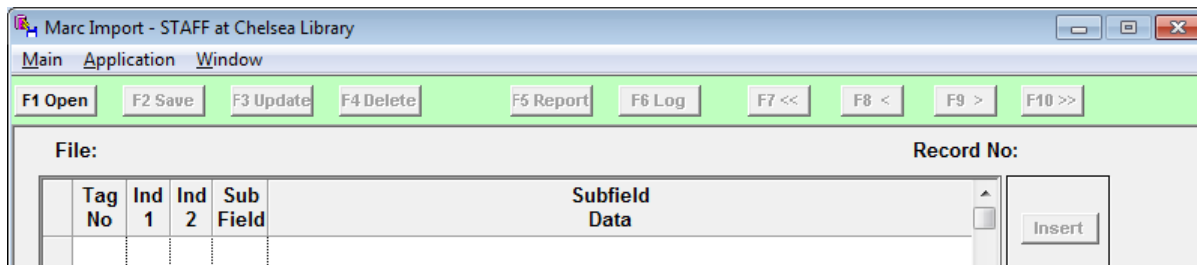
### Import MARC Catalogue Data

There are generally four main stages in the download process.



## Accessing the Data for the Download

1. Launch the *Amlib* client
2. Go to **Main > Authorities > MarcTakeUp** (alternatively use **Ctrl + M**) – the Marc Import screen will display:



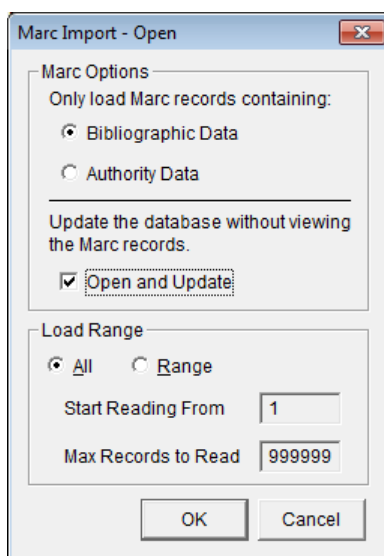
3. Select the **F1 Open** button to display the Open dialogue box
4. Locate the file to be processed by using the Look in: drop-down box – for example: if the file is on the C: drive, the Look in: box may say **Local Disk (C:)**
5. Once the file name has been located, use your mouse to select it and select on the **Open** button

***There are two processing options: Bibliographic Data or Authority Data – this guide covers the import of Bibliographic Data.***

### Bibliographic Data

This option is to load records which are Bibliographic Data in machine readable format which can be imported into *Catalogue*, *Authority* and *Stockitem* (where appropriate) applications of *Amlib*.

1. The Marc Import – Open screen will display:



**Please Note:** If the Import file (*Bibliographic* or *Authority*) contains more than 9999 records, it is recommended that Open and Update is selected (ticked) so that all records can be loaded into the

## Amlib Introductory Training

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database. This eliminates the need to load in sections. The maximum records that can be viewed in the Holding file is 9999 records.

HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE
<b>Marc Options</b>	Bibliographic Data	Bibliographic data to be created for the Catalogue.	Data from external source (for example: <i>SCIS, SLOWA, Kinetica</i> etc. with USMARC Tags)
	Authority Data	Authority data for creation or updating of Authority Headings and/or cross references.	<b>See</b> and <b>See Also</b> Update from SCIS or other source
<b>Update the database without viewing the Marc records</b>	Open and Update	If checked ( <b>ticked</b> ), the imported items will not display in the Holding file.	The <i>Catalogue</i> will be <b>Updated</b> immediately
		If unchecked ( <b>unticked</b> ), the imported items will display in the Holding file.	Review records  The <i>Catalogue</i> will not be updated until the <b>F3 Update</b> button is selected
<b>Load Range</b>	All	All records from the file are downloaded into a holding file.	All
	Range	Selected records from the file are downloaded into a holding file. If Range is selected, the next 2 fields must be updated.	For example, 1 to 50

2. Complete the options using the above table:

- a. Marc Options = **Bibliographic Data**
- b. Open and Update = **ticked**, unless you want to review each individual MARC record
- c. Load Range = **All** (unless the file sizes are quite large)

3. Select on the **OK** button



## Bibliographic Options

1. The Bibliographic Options screen will display:

HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE
Marc Details	We think the file contains	The data type is displayed  Standard format	SCIS  ABN
	Total Bibliographic records	The number of Bibliographic records will display	32
	Total Authority records (this will only display if the import is for Authority headings)	The number of Authority headings with See/See Also references will display	0

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2. Select the appropriate Each bibliographic record contains setting:

<b>Each Bibliographic record contains:</b>	Catalogue data only	The system will determine the contents of the import file. If only Catalogue data exists in the file, this will be the Default option.	SCIS Data
	Full Catalogue & Stockitem data	The system will determine the contents of the import file. If both Catalogue and Stockitem data exists in the file, this will be the Default option.  Please Note: This item can be selected to create “Dummy” Stockitems even though only Catalogue Data exists in the Import file.	SL OF WA Data
	Brief Catalogue and Order data	The system will determine the contents of the import file. If only brief Catalogue data and Order data exists in the file, this will be the default option.	AOL Data
<b>When displaying, the records show:</b>	All tags in the file	All tags from the Import file will display in the Holding file for viewing. However, tags not defined in Amlib will not load into the Amlib Catalogue unless the Marc tag is defined.	If Tag 650v is not used in Amlib it WILL still display in the Holding file.
	Only tags defined in Amlib	Only tags used in Amlib will display in the Holding file.	If Tag 650v is not used in Amlib it will NOT display in the Holding file.

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3. If the Marc Details are set to import **Full Catalogue & Stockitem data**, the Item Default and Item Prices sections will also display:

HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE
<b>Item Defaults</b>  Please specify default values for each item in the fields below	Form	The default values set in the <b>Main &gt; Supervisor &gt; Installation &gt; Stockitem</b> tab will display if defined.	If during the Import, Cat definitions cannot be created, each Stockitem will have a default <u>Form</u> of <b>BK</b> (for example)
	Location	If these fields are not yet defined, codes which will apply to the items can be entered. Rules for automatic entries of Form and Stats codes depending on the Tags that are imported, and be set in <u>Cat Defs</u> in the Stockitem Form and Stats codes.	<b>CHELSEA</b>
	Lib Group		<b>LIBRARY</b>
	Stats Code		<b>ANF</b>
	Floor Loc (optional)		<b>DISPLAY</b>
	Process (optional)		<b>IN PROCESS</b>
<b>Item Prices</b>	Minimum price of an item	If the item price in the Import file is less than the price set here, enter the Minimum price	The Import price is <b>\$8.00</b> but the Minimum price set here is <b>\$10.00</b> , the price in the Stockitem will be <b>\$10.00</b>
	Appreciate items by %	Items can be appreciated by a percentage – for example: GST of 10%	<b>10%</b>
	Depreciate old stockitems	Items to be depreciated will be dependent on the table set in <b>Stockitem &gt; Application &gt; Stats Group</b>	
	Use average prices if no price	Items will be given an average price, set in <b>Stockitem &gt; Application &gt; Stats Group</b> . If no price is entered in the Import File	

4. Select the **OK** button once you have completed modifying your settings

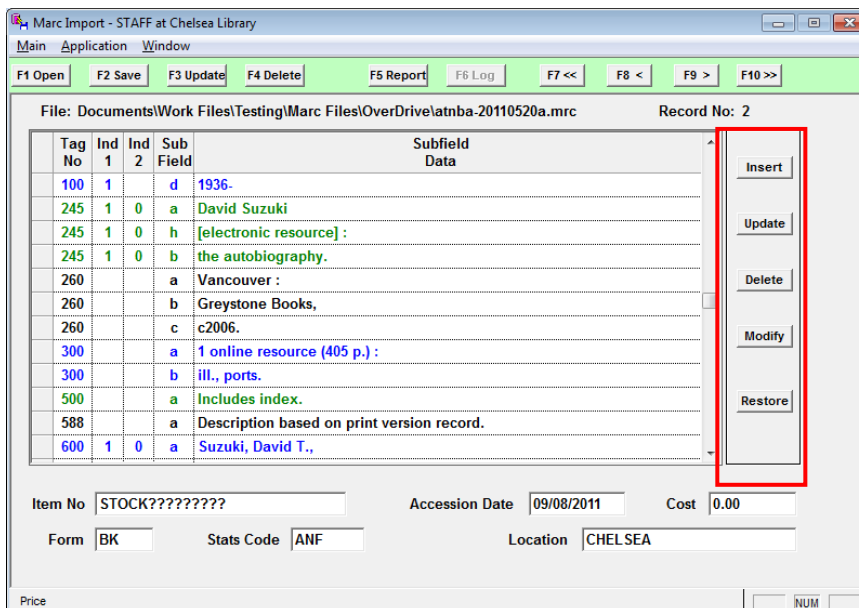
**Please Note:** Form and Stats Code defaults from the **Main > Supervisor > Installation > Stockitem** tab display automatically in the fields. If there are no defaults entered, the field will be blank. Location displays as the Login Location. Entry of these fields is optional. As the import of data is processed, the Stockitems will be given the default values if there are no catalogue definitions for the Form or Stats codes of the items. Form and Stats Code Cat definitions are found in **Main > StockItems > StockitemForms** or **StockitemStatsCodes** table for the particular code.

### Reviewing Records to be Imported (Optional)

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It is possible for the importer to review (and edit) the MARC data being imported.

1. If the importer has decided to review the records being imported (see [Bibliographic Data](#) step above), the Marc Import screen will display:



2. If you do wish to edit the data (prior to import), use the editing buttons on the right to change or delete the individual tags

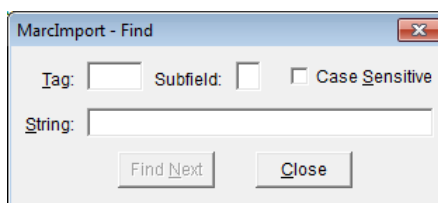
**Please Note:** Editing of the data prior to import is not essential. Changes can be made after the data has been imported into the Catalogue. Remember that not all the tags will necessarily be Imported, so if editing is considered necessary, change only the tags you know will be imported!

3. Use the **F7**, **F8**, **F9** and **F10** buttons to move between records
4. Once the data has been reviewed, select the **F3 Update** button

## Find

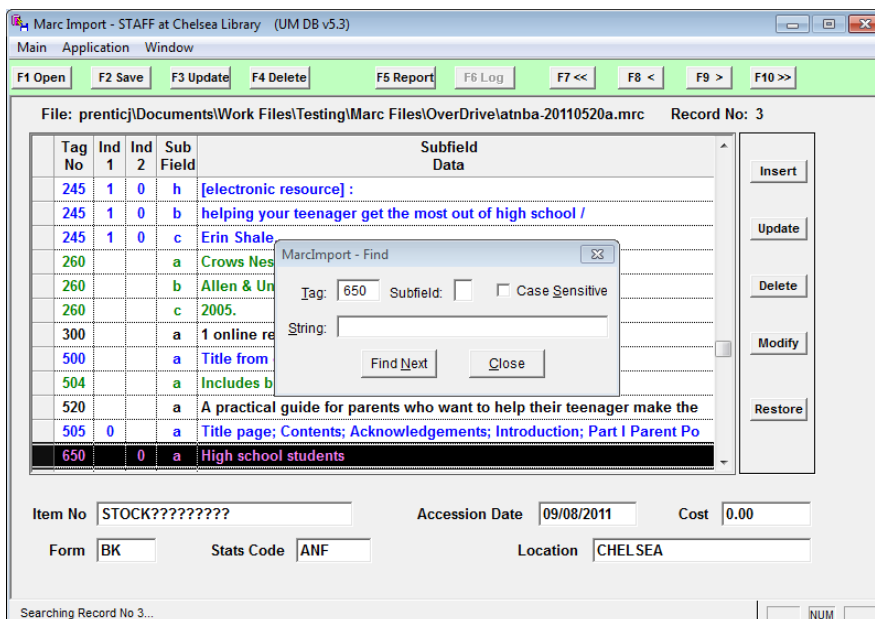
It is possible to use the find function to locate any matching text, tag number or specific Subfield in the Holding File data being displayed. For example: use this facility to check all Author entries or Subject headings.

1. From the main menu, select **Window > Find** – the MarcImport - Find screen will display:



2. Type in the Tag, Subfield or String to find and select the **Find Next** button
3. It will then find any matching data in the record currently being displayed:

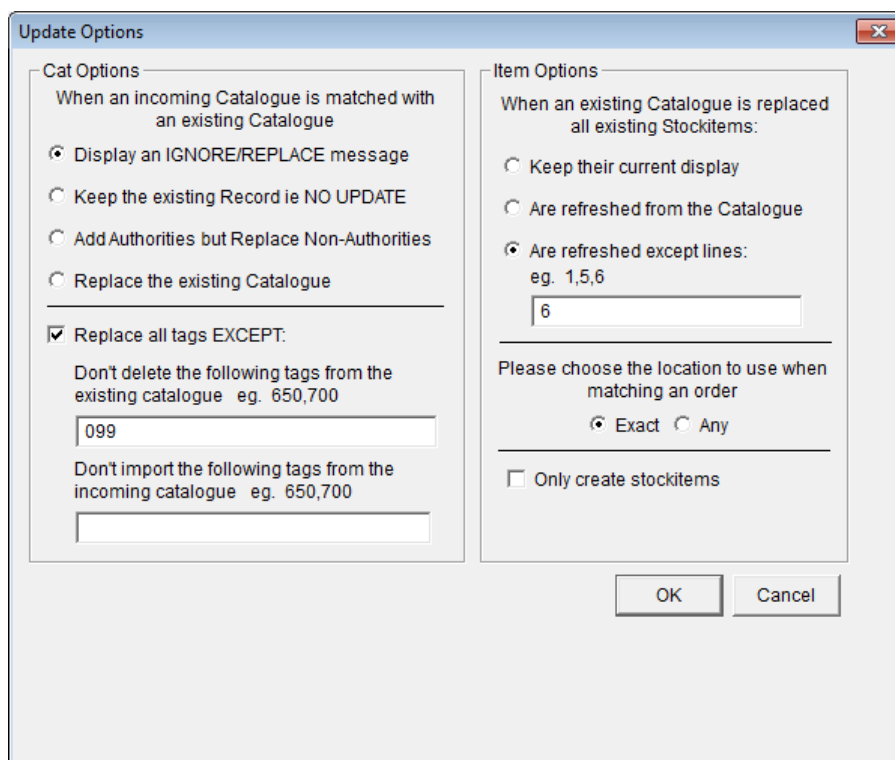
# Amlib Introductory Training



## Catalogue Update Options

1. The Update Options screen will then display, allowing you to select the **Cat(alogue)** and **(Stock)Item Options**:

- Cat Options: When an incoming Catalogue is match with an existing Catalogue
- Item Options: When an existing Catalogue is replaced all existing items



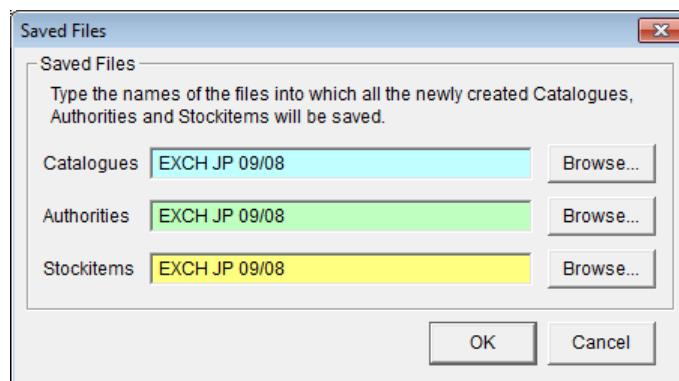
# Amlib Introductory Training

PARAMETER	FIELD		EXPLANATION
<b>Cat Options</b>  <b>When an incoming Catalogue is matched with an existing Catalogue:</b>	Display an IGNORE/REPLACE message		A message will display at each match occurs. At each match, the operator will get a choice to create a new catalog, replace the existing or to keep the existing details.
	Keep the existing Record ie NO UPDATE		No Update occurs for the Catalogue
	Add Authorities but Replace Non-Authorities		Does not replace existing Authorities but adds new Authorities to the record. However, it replaces any Non-Authority data from the Import
	Replace the existing Catalogue ENTIRELY		All tags from the Import are used, overwriting any existing data
	FIELD	OPTION	EXPLANATION
Replace all tags EXCEPT:	Don't delete the following tags from the existing catalogue e.g. 650,700	This will vary according to the setting in <b>Main &gt; Supervisor &gt; Installation &gt; Catalogue</b> tab: <ul style="list-style-type: none"> <li>• <u>MARCImport Replace: don't delete these tags from the existing cat</u></li> <li>• <u>MARCImport Replace: don't import these tags from the existing cat</u></li> </ul> Adds non-identical tags when importing all but specified Tags. Existing data in the specified Tags remains unchanged <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <input checked="" type="checkbox"/> Replace all tags EXCEPT:              Don't delete the following tags from the existing catalogue eg. 650,700  <input style="width: 100px;" type="text" value="082"/>              Don't import the following tags from the incoming catalogue eg. 650,700  <input style="width: 100px;" type="text"/> </div>	
	Don't import the following tags from the incoming catalogue e.g. 650,700	Adds non-identical tags when importing. Does NOT import the new data in the specified Tags. Existing data in the specified Tags remains unchanged <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <input checked="" type="checkbox"/> Replace all tags EXCEPT:              Don't delete the following tags from the existing catalogue eg. 650,700  <input style="width: 100px;" type="text" value="082"/>              Don't import the following tags from the incoming catalogue eg. 650,700  <input style="width: 100px;" type="text" value="082"/> </div>	

# Amlib Introductory Training

PARAMETER	FIELD		EXPLANATION
<b>Item Options</b>  <b>When an existing Catalogue is replaced, all existing Stockitems:</b>	Keep their current display		No existing Stockitems are refreshed – they remain the same
	Are refreshed from the Catalogue		All existing Stockitems are replaced by the new Catalogue details
	Are refreshed except lines: e.g. 1,5,6		Enter the line numbers to be retained – for example: <b>6</b> (Line 6, which is usually Call Number). Line numbers correspond to the 6 lines of Stockitem display (for example: Line 1 is usually Title, Line 2 Author etc.)
	FIELD	OPTION	EXPLANATION
	Please choose the location to use when matching an order	<b>Exact</b>	Only order items where location is the same as the current Amlib location will be candidates for replacement
		<b>Any</b>	Stockitems on the file may replace any order item on the database
Only create stockitems	<b>Checked</b>	The import of data will result in <b>no</b> Catalogue records being created. Only Stockitems will be created.	
	<b>Unchecked</b> (Default)	Create Catalogue records as well as Stockitems	

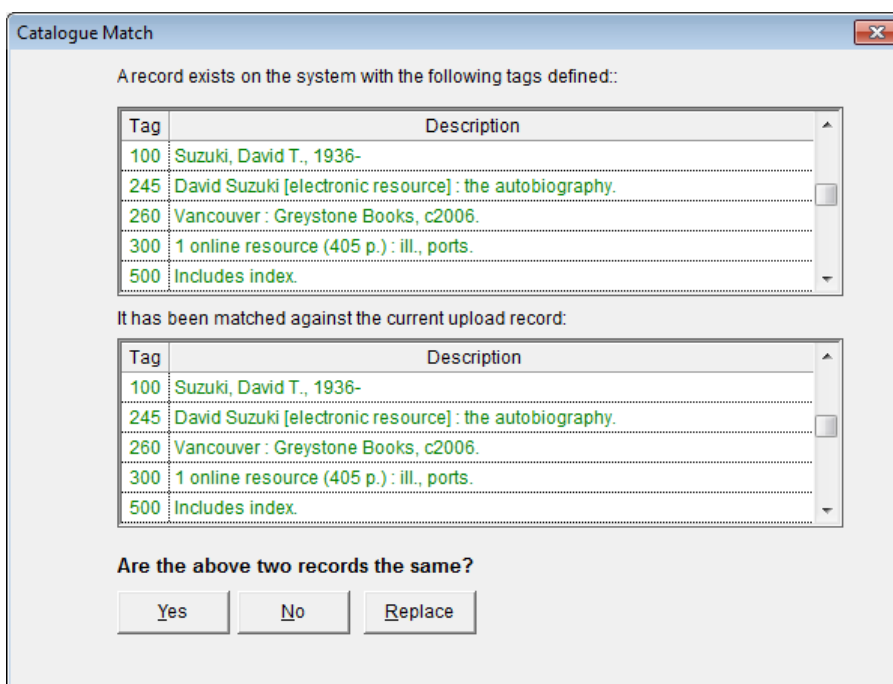
- Enter the options you would like, then select the **OK** button – the Saved Files screen will display:



- Type the names of the files into which all the newly created **Catalogues, Authorities** and/or **Stockitems** will be saved (if you do not want to check new items – for example: **Authorities**, do not enter a filename)
- Select the **OK** button

**HINT:** These files assist in finding the newly created Catalogues, Authorities and/or Stockitems after the import. The Filenames are created so that you can identify the file later. A suggested Filename could be the type of data – for example: **SCIS** or **EXCHANGE**, the date and the initials of the staff member processing the data.

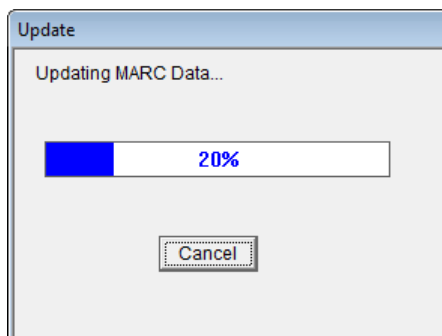
5. If confirmation of duplicate items has been requested in the parameters, a Catalogue Match screen will display every time a duplicate item is found:



6. **Are the above two records the same?** Select the **Yes**, **No** or **Replace** button

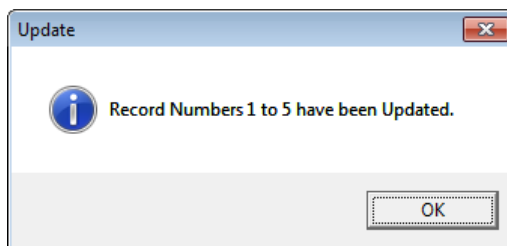
OPTION	EXPLANATION
<b>Yes</b>	The catalogue entry that exists on the database will remain as displayed in the top box. A new Stockitem would need to be added if appropriate. The imported record will not be included in the New File created for Catalogue or Authorities
<b>No</b>	A new catalogue will be created with the data from the Imported data being used for the new catalogue record. The imported record will be included in the New File created for Catalogues or Authorities
<b>Replace</b>	The existing catalogue entry will remain but the data will be replaced with the data from the imported recorded. The imported record will not be included in the New File created for Catalogue but there may be some additions to the Authorities file

7. An Update prompt will display, indicating the progress of the import:



8. When the update is finished an Update, prompt will display, showing the number of records Updated:





9. Select the **OK** button
10. You will be able to view the log by selecting the **F6 Log** button

## F6 Marc Log

This log lists any errors that were experienced in the process of importing the file and also what action was taken with certain items. Most of the errors that display in the log are caused by the tag numbers not being defined on the Amlib database. This may be because we did not wish to use them in the Catalogue data but were present in the data file.

## Checking New Stockitems

1. Launch the *Amlib* client
2. Go to **Main > StockItems > Stockitem** – the Stockitem screen will display
3. From the menu, select **File > DisplayFile** – the Stockitem Saved Query Results screen will display:

Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
SCIS JP 25/8	Y	6	26/08/2011 12:00:03 AM	3220
EXCH JP 09/08	Y	10	09/08/2011 4:25:39 PM	3157
Premiers Reading Challenge	Y	5238	08/08/2011 10:43:28 PM	3156
CLICKVIEW JP 2/8	Y	6	02/08/2011 6:46:37 PM	3130
Chelsea Fiction	Y	0	27/07/2011 1:46:40 PM	3129
Harry Potter Books	Y	15	08/07/2011 12:59:59 PM	3079

# Amlib Introductory Training

- Highlight the file you wish to access and select the **F9 Select** button – a Stockitem List of the imported items will display:

Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Ec
1	The black madonna / Traci Harding, Traci.	F HAR	BK	NF	N	0	CHELSEA	AWAITING PROCESS	N	The mystique	18 Aug 2011	20		
2	The dragon queens / Traci Harding, Traci.	F HAR	BK	NF	N	0	CHELSEA	AWAITING PROCESS	N	The mystique	18 Aug 2011	20		
3	The dragon queens / Traci Harding, Traci.	F HAR	BK	NF	N	0	CHELSEA	AWAITING PROCESS	N	The mystique	18 Aug 2011	20		

- You can now check to ensure that the item details are correct
- Double-select the first entry – the selected item will display in the Stockitem screen
- Add the correct Item No (barcode), Current Cost, Sts Code, Form code, Origin/Source (if required) and generally check other details

**1. Add Barcode** (points to Item No: STOCK00370a01B)

**2. Check Form and Stats codes** (points to Form BK, Stats NF)

**3. Check Location** (points to Location Perm: CHELSEA)

**4. Add Origin/Source (supplier) if required** (points to Origin/Source field)

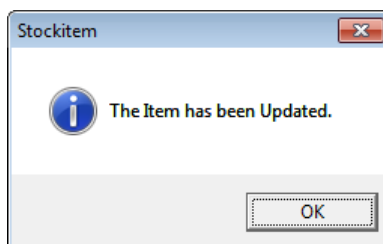
**5. Add correct price (do not add \$ sign)** (points to Current Cost: 0.00)

**6. Add/remove any other relevant information** (points to Process: AWAITING PROCESS)

- To access a list of codes in a field select **.<Tab>**


For example: in the Stats Code field, selecting **.<TAB>** will display a list of your Stats Codes and Descriptions – double-select on an entry to select it

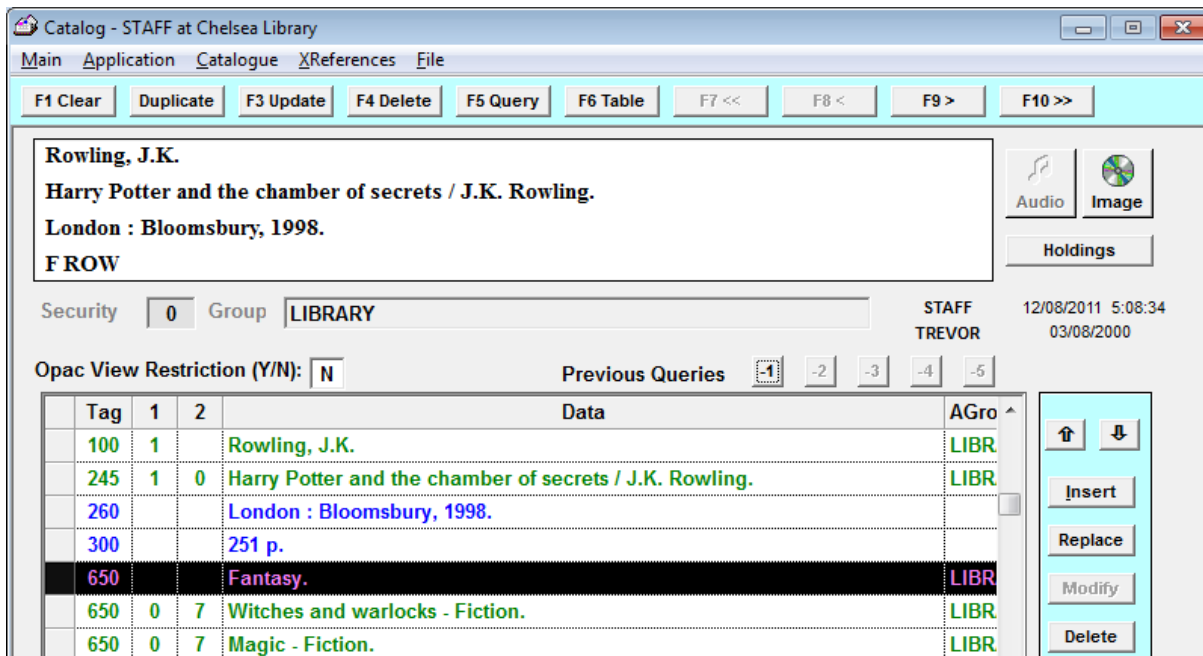
- Select on the **F3 Update** button when complete – a prompt with the following message will display: **The Item has been Updated.**



- Select on the **OK** button

## MODIFYING CATALOGUE DETAILS

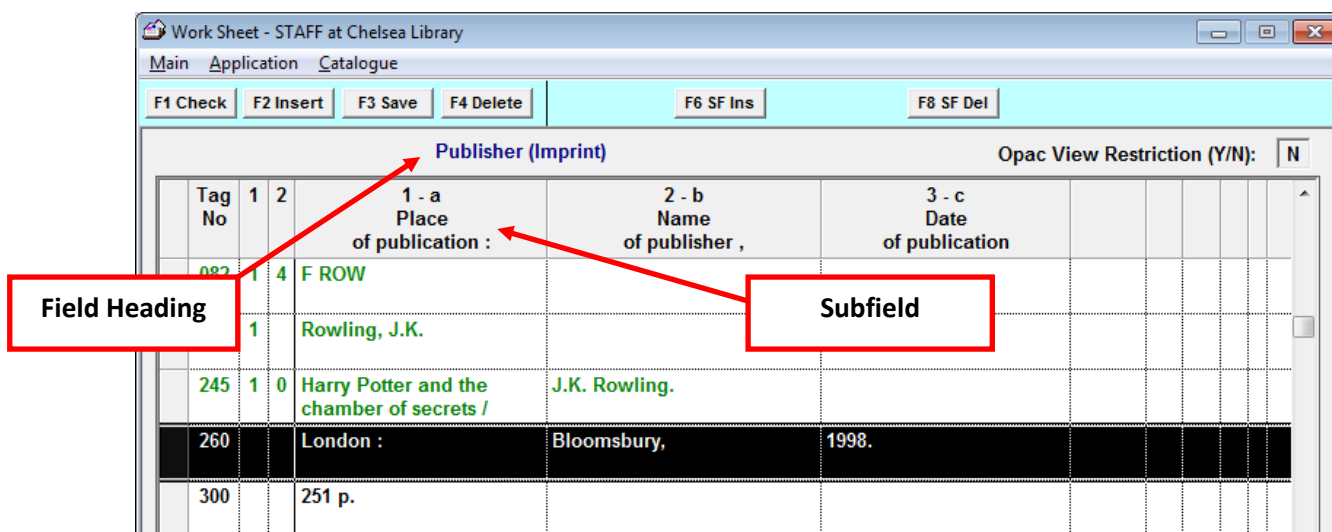
1. Launch the *Amlib* client
2. Go to **Main > Catalogue > Catalogue** (or the  icon) – the Catalog screen will display:
3. Initiate a **F5 Query** to locate the Catalogue record that requires editing (alternatively, if the item record is open in the Stockitem module, select **XReferences > Catalogue**)



### Modify Using the Work Sheet

It is now possible to edit an existing catalogue record using the Catalogue Work Sheet.

1. From the menu, select **Catalogue > Catalog Modify using Worksheet** – the Work Sheet screen will display:



2. The catalogue record can then be edited/modified in the same manner as a new Catalogue record

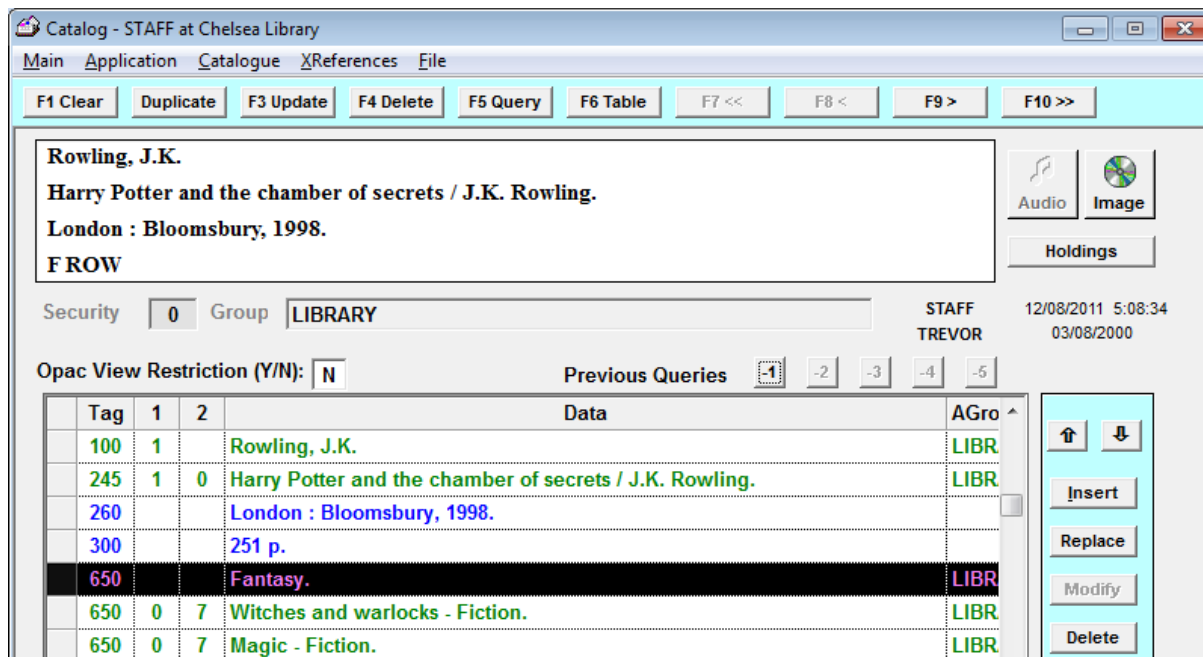
# Amlib Introductory Training

- Existing Authorities cannot be altered in the Work Sheet – if a new Authority is to be created (for example: one with a different subdivision), then the **F2 Insert** button should be used to enter it on a new line to that of the existing heading (the existing heading can be retained or removed using the **F4 Delete** button)

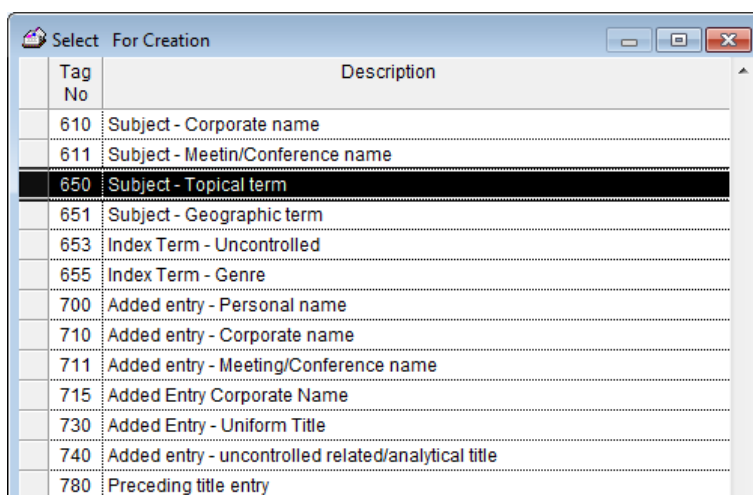
## Insert

Inserts a new Tag for the Bibliographic record.

This process will be different depending on whether the Tag chosen from the list is an Authority or Non-Authority Tag.



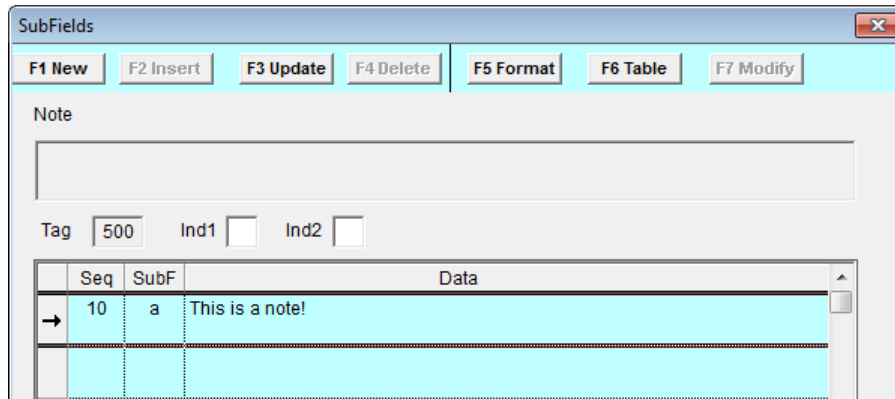
- Select the **Insert** button on the right-hand side of the screen – the Select For Creation table with a list of Tag Nos will display:



- Double-select on the desired Tag

## Insert Non Authority Tag

1. If the selected Tag is a Non-Authority – the SubFields window will display:



2. Please ensure you enter the correct data into the correct subfield – selecting the **F6 Table** button gives the Valid SubFields/Parts table available for that Tag:

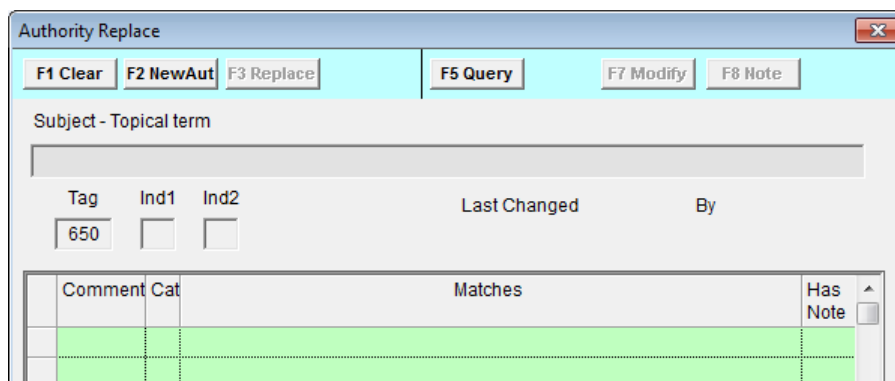
The screenshot shows the 'Valid SubFields / Parts' window with a table containing the following data:

SubF	Description	Rpt
a	General note	N

3. Once the data has been correctly entered select the **F3 Update** button

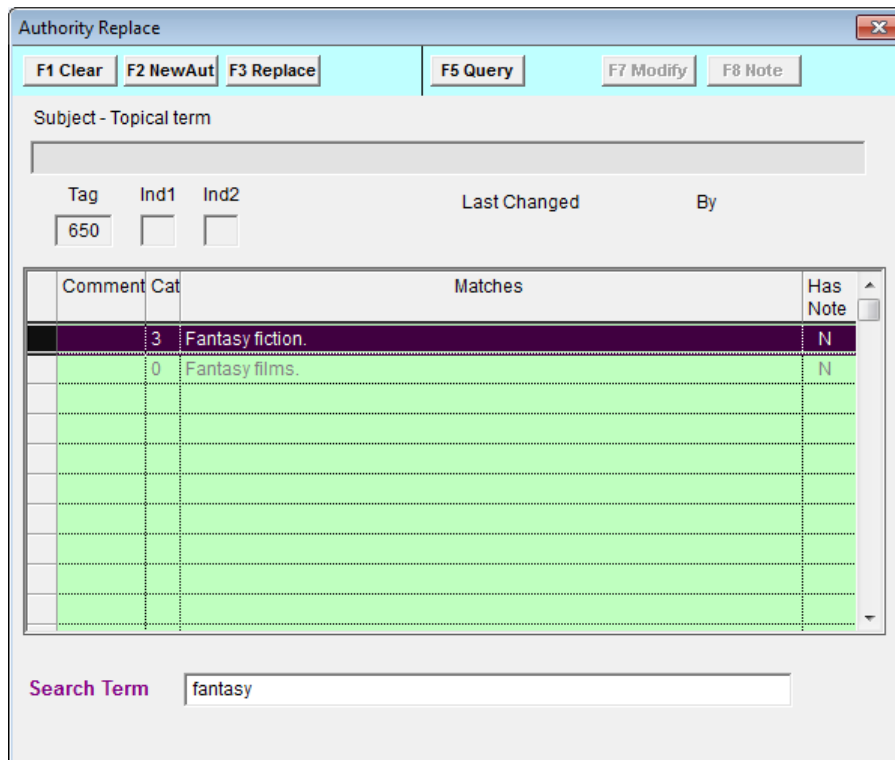
## Insert an Authority Tag

1. If the selected Tag is an Authority – the Authority Replace screen will display:

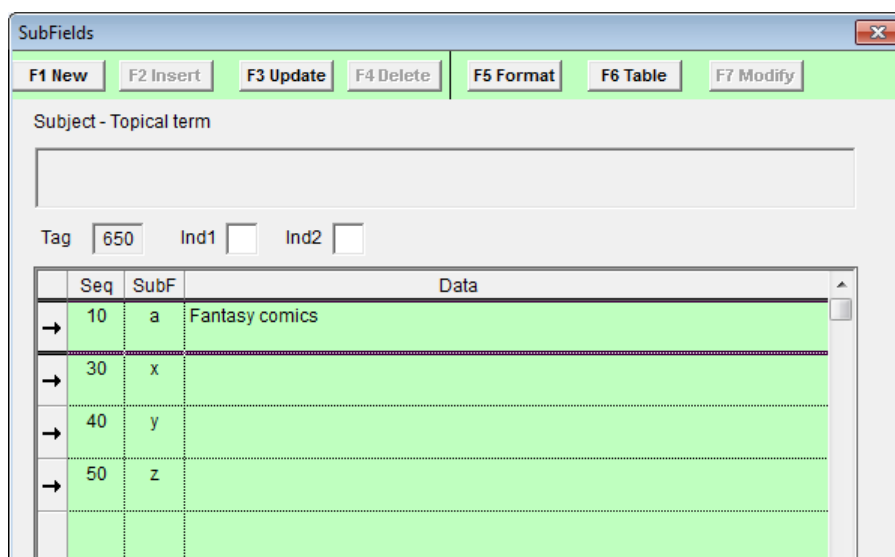


- Notice the Green colour of the list (in this example: a **650 - Subject Heading**)? This is because the headings shown come from the *Authority* module

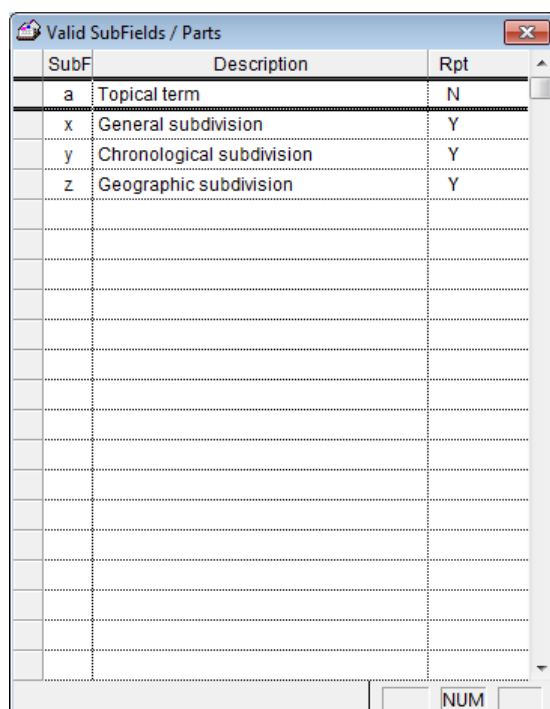
2. Type in a Search Term (for example: **Fantasy**) and select the **F5 Query** button – a list of matching terms will display:



3. If the correct term is in the list:
  - a. Highlight the term and select the **F3 Replace** button
  - b. The Authority Replace window will close and the selected Authority will appear in the catalogue record
4. If the correct term is NOT in the list or your search gives no results:
  - a. Select the **F2 NewAut** button – the SubFields table will display:



- b. Please ensure you enter the correct data into the correct subfield – selecting the **F6 Table** button gives the Valid SubFields/Parts table available for that Tag:

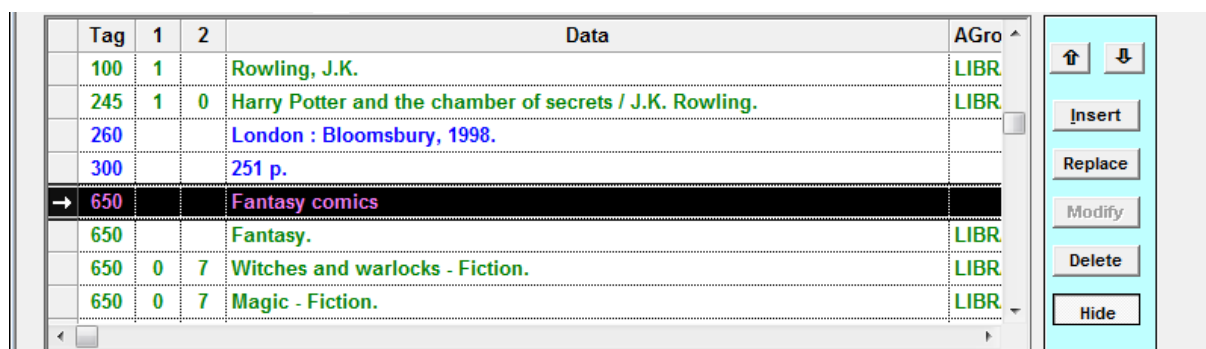


The dialog box titled "Valid SubFields / Parts" displays a table with three columns: SubF, Description, and Rpt. The data is as follows:

SubF	Description	Rpt
a	Topical term	N
x	General subdivision	Y
y	Chronological subdivision	Y
z	Geographic subdivision	Y

At the bottom right of the dialog box, there is a "NUM" button.

- c. Once the data has been correctly entered select the **F3 Update** button  
d. Select on the red **X** in top-tight corner to close the Authority Replace screen – the new Authority will have been added to the catalogue record:



The Authority Replace screen shows a table of authority records with columns for Tag, 1, 2, Data, and AGro. The records are as follows:

Tag	1	2	Data	AGro
100	1		Rowling, J.K.	LIBR
245	1	0	Harry Potter and the chamber of secrets / J.K. Rowling.	LIBR
260			London : Bloomsbury, 1998.	
300			251 p.	
650			Fantasy comics	
650			Fantasy.	LIBR
650	0	7	Witches and warlocks - Fiction.	LIBR
650	0	7	Magic - Fiction.	LIBR

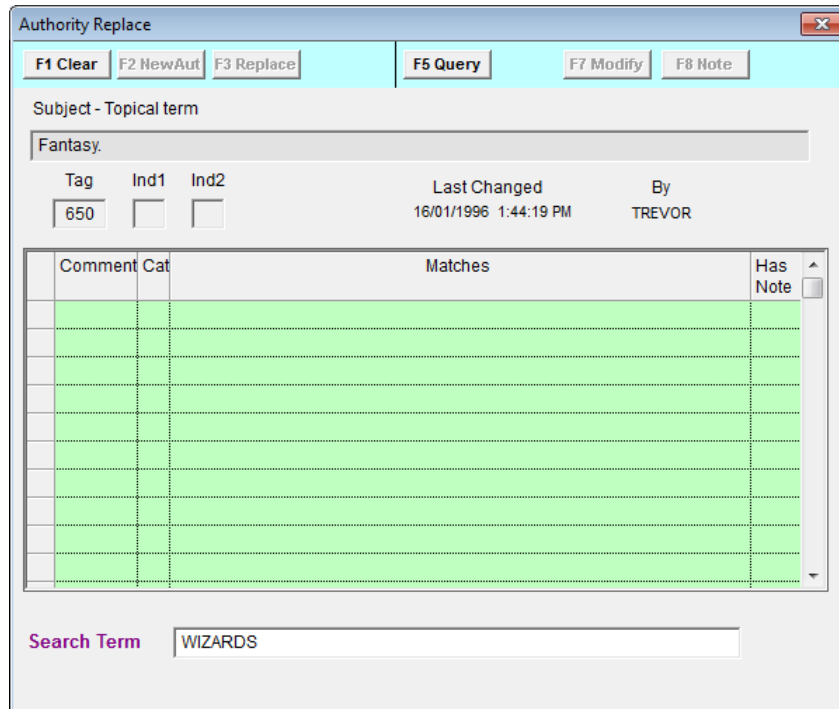
On the right side of the screen, there is a control panel with buttons: Insert, Replace, Modify, Delete, and Hide. At the top right of this panel are up and down arrow buttons.

Once the Authority has been entered, it is available for use in subsequent catalogue records.

## Replace

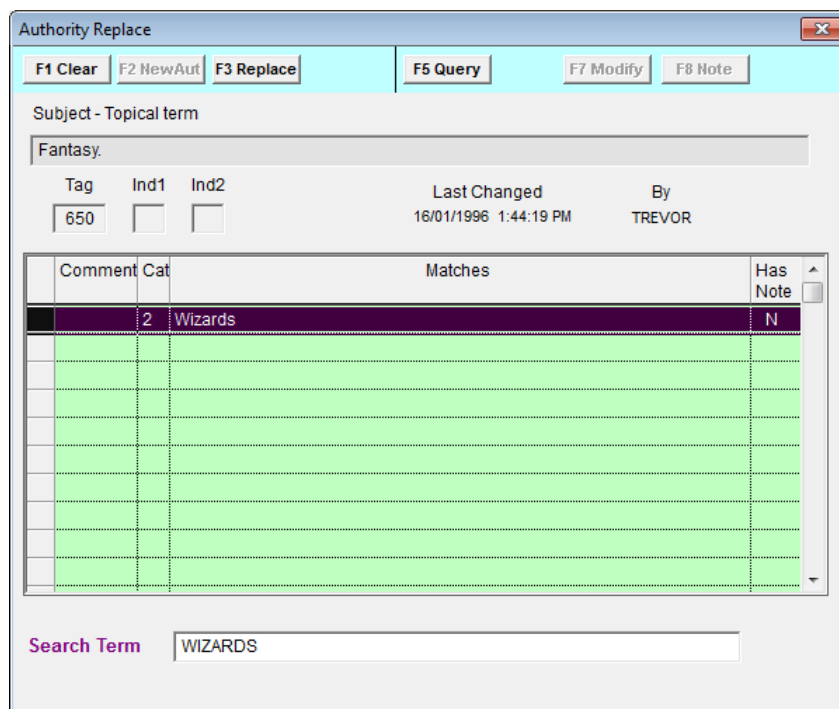
Replaces the Tag data with an alternative heading.

1. Highlight an Authority to be replaced
2. Select the **Replace** button on the right-hand side of the screen – the Authority Replace table will display with highlighted Authority:



The screenshot shows the 'Authority Replace' window. At the top, there are buttons for 'F1 Clear', 'F2 NewAut', 'F3 Replace', 'F5 Query', 'F7 Modify', and 'F8 Note'. Below these is a 'Subject - Topical term' field containing 'Fantasy.'. Underneath, there are fields for 'Tag' (650), 'Ind1', and 'Ind2'. To the right, 'Last Changed' is '16/01/1996 1:44:19 PM' and 'By' is 'TREVOR'. A table with columns 'Comment', 'Cat', 'Matches', and 'Has Note' is shown, with all rows highlighted in green. At the bottom, a 'Search Term' field contains 'WIZARDS'.

3. Type in a Search Term (for example: **Wizards**) and select the **F5 Query** button – a list of matching terms will display:



The screenshot shows the 'Authority Replace' window after a search. The 'Search Term' field still contains 'WIZARDS'. The table now has one row highlighted in purple: '2 Wizards' with 'N' in the 'Has Note' column. The other rows remain highlighted in green.

4. If the correct term is in the list:

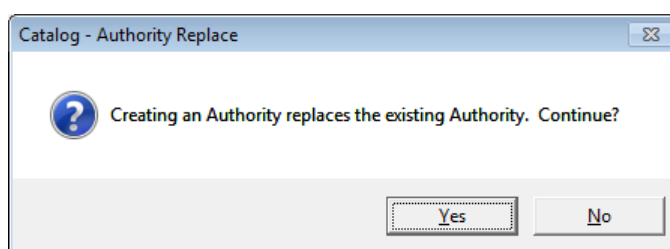


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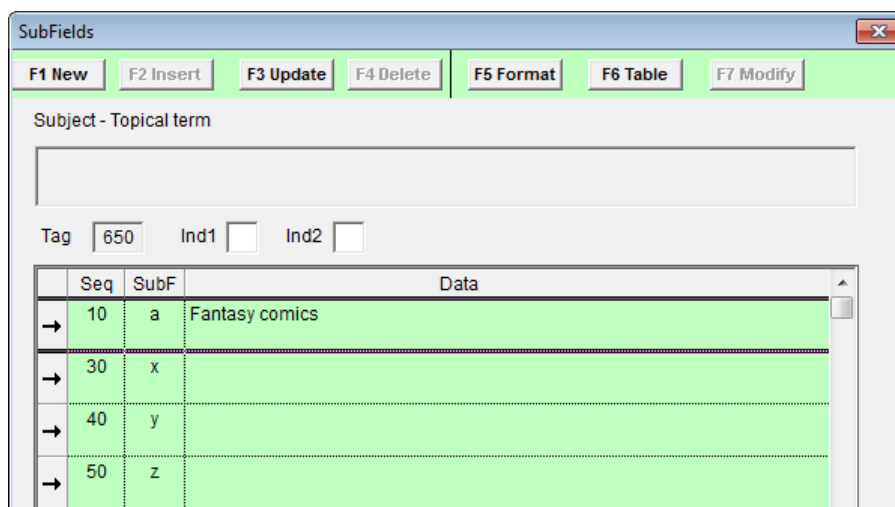
- a. Highlight the term and select the **F3 Replace** button
  - b. The Authority Replace window will close and the selected Authority will appear in the catalogue record
5. If the correct term is NOT in the list or your search gives no results:

**(Please Note:** this option **NOT** available if User settings have been set to DISABLE modification of Authorities in the catalogue screen – the **Insert** button should be used to create a new Authority and the existing Authority removed from the record using the **Delete** button)

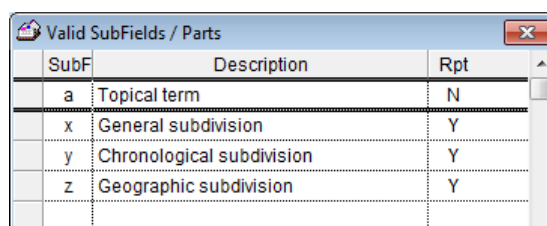
- a. Select the **F2 NewAut** button – a prompt with the following message may display:  
**Creating an Authority replaces the existing Authority. Continue?**



- b. Select on the **Yes** button – the SubFields table will display:



- c. Please ensure you enter the correct data into the correct subfield – selecting the **F6 Table** button gives the Valid SubFields/Parts table available for that Tag:



SubF	Description	Rpt
a	Topical term	N
x	General subdivision	Y
y	Chronological subdivision	Y
z	Geographic subdivision	Y

- d. Once the data has been correctly entered select the **F3 Update** button

# Amlib Introductory Training

- e. Select on the red **X** in top-tight corner to close the Authority Replace screen – the new Authority will have been added to the catalogue record:

Tag	1	2	Data	AGro
100	1		Rowling, J.K.	LIBR
245	1	0	Harry Potter and the chamber of secrets / J.K. Rowling.	LIBR
260			London : Bloomsbury, 1998.	
300			251 p.	
→ 650			Fantasy comics	
650			Fantasy.	LIBR
650	0	7	Witches and warlocks - Fiction.	LIBR
650	0	7	Magic - Fiction.	LIBR

If the heading to be replaced is not found, a new Authority can be created. This only replaces the existing Authority in this particular item.

## Modify

**Please Note:** It is possible to update [User Name security](#) so as to DISALLOW the editing of Shared Authorities using the **Modify** button. This helps ensure the integrity of the Shared Authorities (which may be in use in other Catalogue records). Authorities can then be modified by XReferencing to the [Authorities](#) module.

1. Highlight the Tag to be modified and select the **Modify** button on the right-hand side of the screen – the Tag will open in the SubFields screen

**WARNING: If the tag is an Authority, changes will be made to ALL Catalogue records using this Authority. BEWARE!**

SubFields

F1 New F2 Insert F3 Update F4 Delete F5 Format F6 Table F7 Modify

Physical description

251 p.

Tag 300 Ind1  Ind2  08/08/2011 11:51:06 PM STAFF

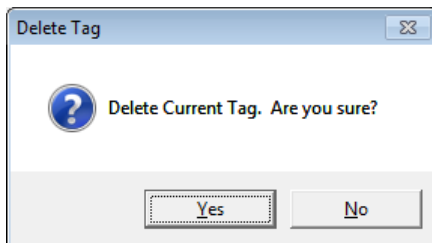
Seq	SubF	Data
10	a	251 p.

2. Make the changes
3. Select the **F3 Update** button when complete

## Delete

Deletes a highlight tag (for this record only – does not affect other Catalogue records or any Authorities previously created).

1. Highlight the Tag to be deleted and select the **Delete** button on the right-hand side of the screen – a prompt will appear with the following message: **Delete Current tag. Are you sure?**



2. Select the **Yes** button
3. The Tag will be deleted

## Hide/Show

Alternates between hiding/showing tags for this record.

1. Select on the **Hide** button on the right-hand side of the screen to hide the Tags in the displayed record (**Hide** will then be replaced by **Show**)
2. Select on the **Show** button on the right-hand side of the screen to show the Tags in the displayed record (**Show** will then be replaced by **Hide**)

**Please Note:** Show must be selected to enable the Duplicate Button.

## Movement of Tags

1. Highlight the Tag to move and use the arrow keys to move the Tags up or down

Tag	1	2	Data	AGro
300			251 p.	
→ 650			Fantasy comics	
650	1		Wizards	LIBR
650	0	7	Witches and warlocks - Fiction.	LIBR
650	0	7	Magic - Fiction.	LIBR
856			<a href="http://harrypotter.com">http://harrypotter.com</a> Click here for alternative link	LIBR
856			<a href="http://localhost/amlib/mmedia/web/harrypotter.htm">Http://localhost/amlib/mmedia/web/harrypotter.htm</a> Click here for further in	LIBR
945			STOCK00368849B	LIBR

↑ ↓

Insert

Replace

Modify

Delete

Hide

**Please Note:** This sequencing possible within the record depends on what is set in the **Main > Supervisor > Installation - Catalogue** tab: **Allow tags to be sequenced anywhere within a catalogue (Y/N)** parameter.

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- If it is left at the default **Y**, staff will be able to use the up and down arrows on the Catalogue record to reposition any MARC Tag within that record
- If it is changed to **N**, this will then restrict the ability for adjusting the sequence of a MARC tag in a specific record to its specific range only. This means that if there is only one MARC tag to that record it cannot be moved, but if there is more than one MARC tag, for example subject headings, then these can be moved within this group only

## Catalogue Record Created / Last Edited Information

For newly created (and imported) Catalogue records it is now possible to tell which user created a record, and who it was last edited by. The top line shows when the record was last edited, and the bottom line remains the same, showing when the record was created. This information is not retrospective so that for all existing records, only the user, date and time for the last update will be shown.

The screenshot shows the Amlib Catalogue interface for a record titled "Harry Potter and the chamber of secrets" by J.K. Rowling. The record is currently selected, and the MARC tag table is visible. A red box highlights the user and date information in the top right corner of the record details area.

**Record Details:**  
 Rowling, J.K.  
 Harry Potter and the chamber of secrets / J.K. Rowling.  
 London : Bloomsbury, 1998.  
 F ROW

**User and Date Information (highlighted in red box):**  
 STAFF: TREVOR  
 26/08/2011 1:07:30 (Last Edited)  
 03/08/2000 (Created)

**MARC Tag Table:**

Tag	1	2	Data	AGro
300			251 p.	
→ 650			Fantasy comics	
650	1		Wizards	LIBR
650	0	7	Witches and warlocks - Fiction.	LIBR
650	0	7	Magic - Fiction.	LIBR
856			<a href="http://harrypotter.com">http://harrypotter.com</a> Click here for alternative link	LIBR
856			<a href="http://localhost/amlib/mmedia/web/harrypotter.htm">Http://localhost/amlib/mmedia/web/harrypotter.htm</a> Click here for further in	LIBR
945			STOCK00368849B	LIBR

**Search and Reference Information:**  
 Any Keyword: HARRY POTTER CHAMBER OF SECRETS  
 Ref: 35306  
 Seq: 1, Set: 2, ?Size: 200

## MASS DELETION OF STOCKITEMS/SAVING TO FILE

Items can be deleted easily from a Saved File. These items can be wanded into the File. This is useful for Public Libraries who must return items to SLWA, and who want to delete them from their catalogue. It is also useful for schools when a weed of resources is performed (for example: after a Stocktake).

This can be done individually within the *Stockitem* module by calling up the item and selecting the F4 Delete button. If it is the last copy for the Catalogue, you will be prompted to delete the Catalogue entry as well.

Items can be deleted en masse from a Stockitem List (each item that is to be deleted needs to be highlighted) or alternatively from a Saved File.

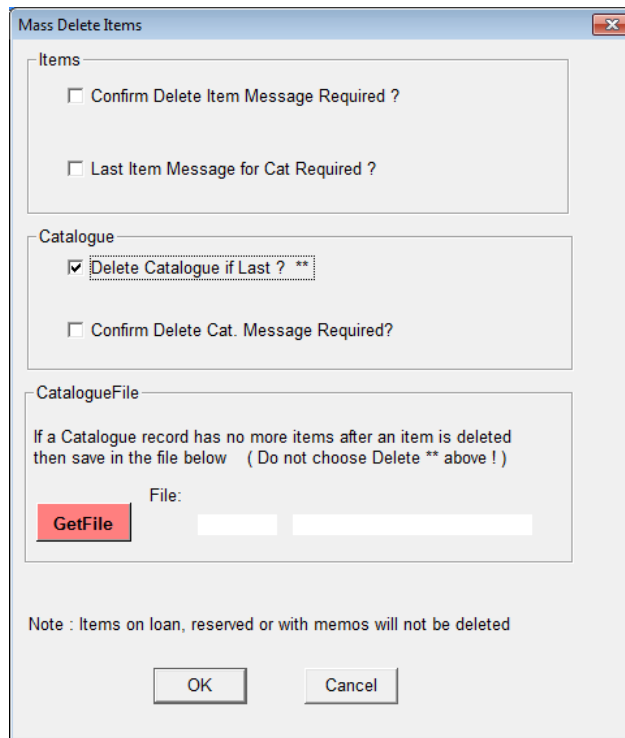
- See: [Appendix 2: Saved Files](#) for more information

### Stockitem List

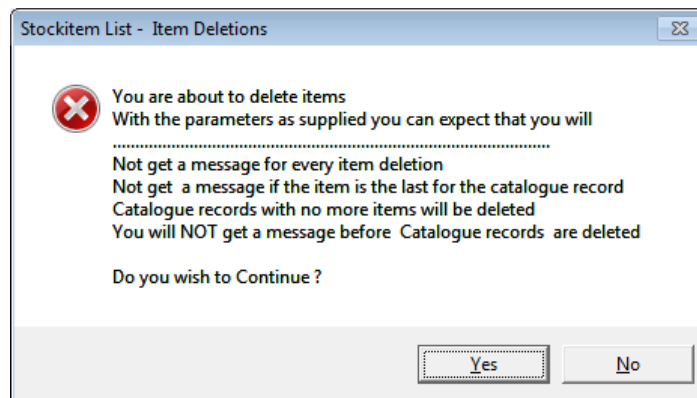
1. Launch the *Amlib* client
2. Go to **Main > Stockitem > Stockitem** – the Stockitem screen will display
3. Initiate a **F5 Query** or Stockitem Where search to bring up a list of items to be deleted (alternatively, you may decide to use a Saved File as the basis of your deletions – select **File > Display File > select a saved File > F9 Select**)

Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Ec
1	Doctor Who and the auton inv	0426112954 Dicks	JPB DICK	BK	JPB	Y	16/08/2	0	CHEL		N	Doctor Who		19
2	Doctor Who and the nightmare	Dicks, Terrance.	J DICK	BK	JF	Y	07/07/2	0	CHEL		N	978-0-491-02		19
3	Doctor Who and the Underwe	Dicks, Terrance.	J DICK	BK	JF	N		1	CHEL		N	978-0-491-02		19
4	Doctor Who companions / Da	Howe, David J	YA HOWE	BK	ANF	N		0	CHEL		N	978-0-86369-		19
5	Doctor Who Galaxy Four / Wil	Emms, William	J EMMS	BK	JF	N		1	CHEL		N	Doctor Who		19
6	Doctor Who the twin dilemma	Saward, Eric.	J SAWA	BK	JF	N		0	CHEL		N	978-0-491-03		19
7	Doctor Who Timelash / Glen M	McCoy, Glen	J MCCO	BK	JF	N		0	CHEL	RETURNED	N	Doctor Who	22 Jun 2011	19
8	Doctor Who warriors of the de	Dicks, Terrance.	J DICK	BK	JF	Y	04/05/2	0	CHEL		N	Doctor Who		19

4. Highlight the items to be deleted
5. From the Stockitem List main menu, select **Table > Mass Item Deletion** – the Mass Delete Items screen will display:



6. Add a **tick** in the Catalogue: Delete Catalogue if Last? box
7. Select the **OK** button – the following prompt will appear:



8. Select the **Yes** button
9. The items (and any associated Issue Catalogue records) will be deleted

## Z39.50 SEARCHING

Z39.50 is an international information retrieval standard that enables communication between computer systems, including those that operate on different hardware and use different library software (for example: *Amlib*, *Spydus*, *Symphony*, etc.). Searching of other libraries and databases is performed simultaneously in a single search (parallel searching).

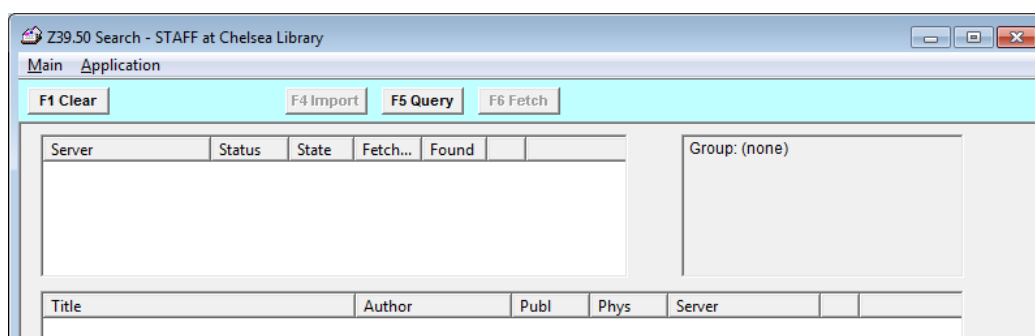
Schools can use the Z39.50 facility link to *SCIS*. You will need to contact *SCIS* directly to get your IP address authorised and they will supply the *SCIS* z39.50 details so that you can set them up as a Z39.50 Server.

- See the *Catalogue* manual for details on how to set up new Servers and new Groups

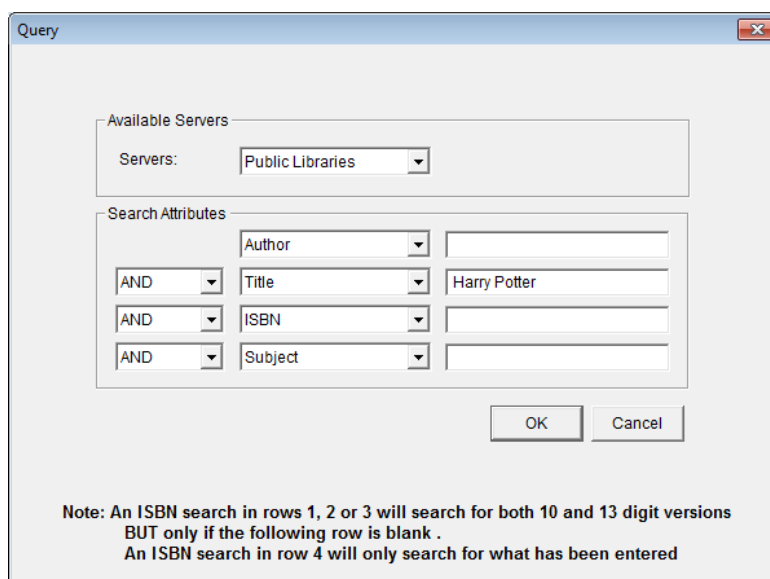
**Please Note:** Use of the bibliographic records via Z39.50 is subject to the terms and conditions of the source library.

### Amlib Z39.50 Client

1. Launch the *Amlib* client
2. Go to **Main > Catalogue > CatZSearch** – the Z39.50 Search screen will display:

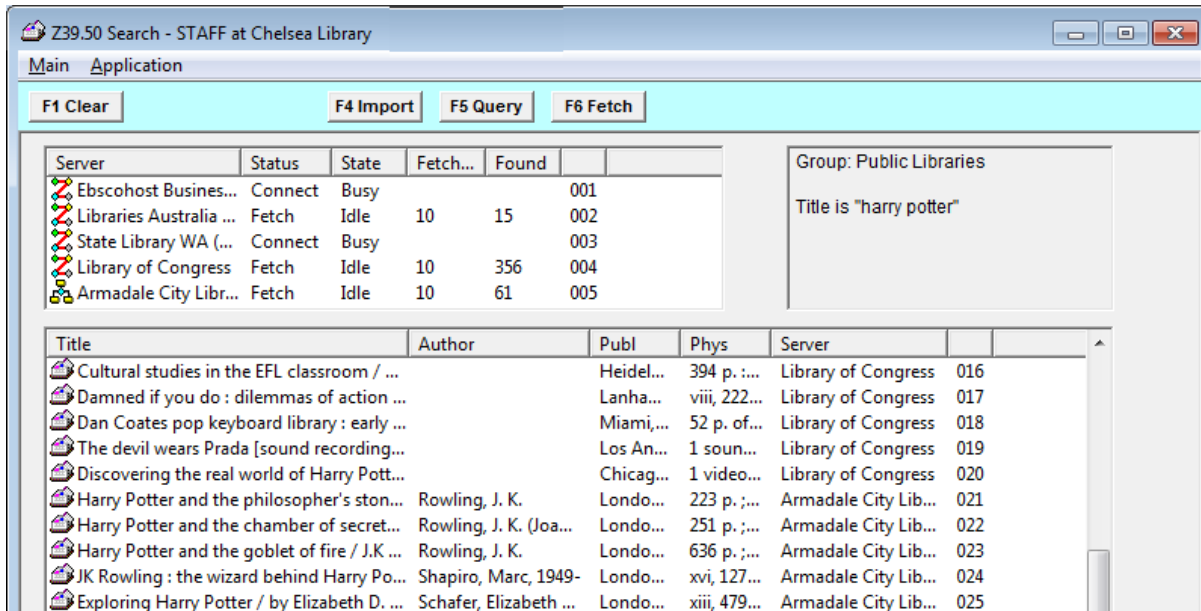


3. Select the **F5 Query** button – Query screen will display:

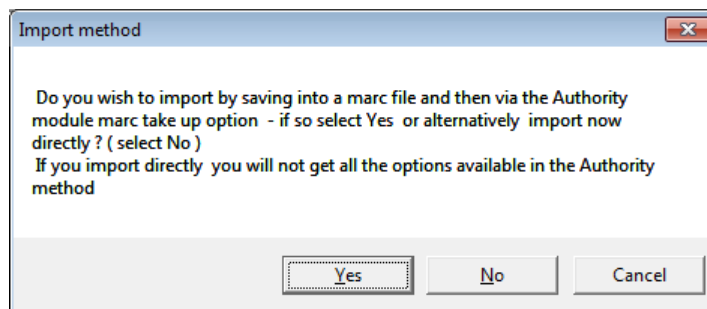


# Amlib Introductory Training

4. Select the Server or Server Group from the Available Servers drop-down box – for example: **Public Libraries**
5. Type in the Search Attributes – for example: **ISBN, Title, Author, Subject** or combination of these
6. Select the **OK** button – the results will display in the main Z39.50 screen:

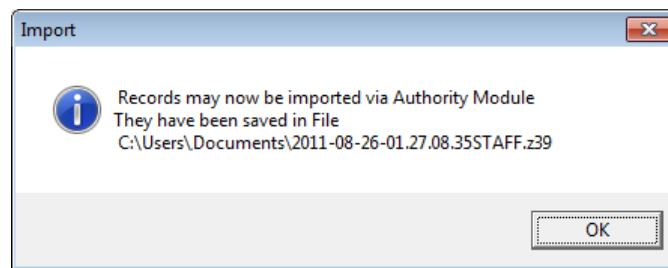


7. The columns can be sorted by selecting any of the column headings
8. Save selected records to a MARC file for import:
  - a. Highlight the records (hold the **Ctrl** key and select on records to highlight more than one record)
  - b. Select the **F4 Import** button – the Import method screen will display:



- c. Select your import option:
  - Select the **Yes** button: Save the Marc file and then import it
  - Select the **No** button: import directly (not all import options will be available)
  - Select the **Cancel** button: Cancel the import
- d. The highlighted records will be saved to a MARC File shown in the dialogue box, to be imported into *Amlib* via MARC Takeup






- e. The MARC Takeup process will begin automatically – ensure the folder is the correct folder – for example: **My Documents**

**Please Note:** Please refer to [Import MARC Catalogue Data: Bibliographic Data](#) for details of the remainder of this process.

## REPORTS

Reporting and printing can be performed from:

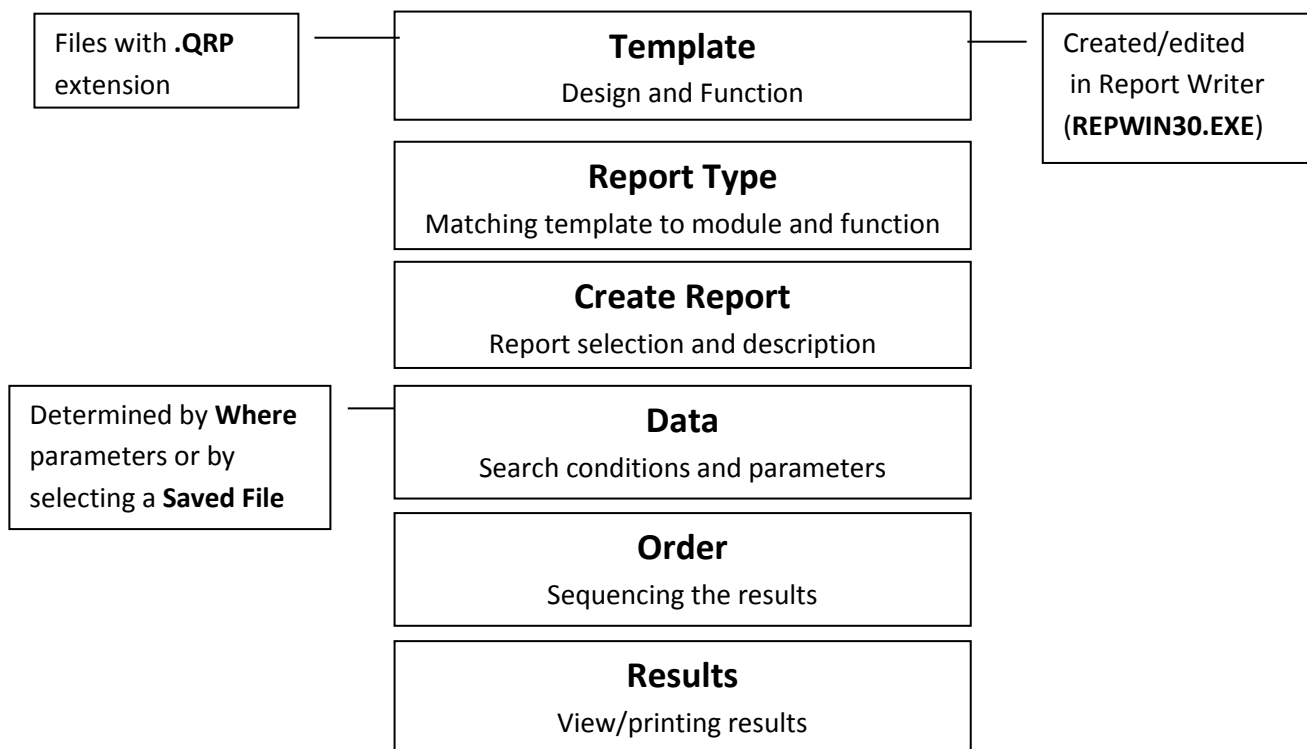
- Report module is accessed from the icon  or main menu
- Report/Print buttons on most screens
- Selecting the **[F12]** function key at any time can access screen prints.
- Capture the current window/dialogue box by using **Alt + PrtScn**. This can later be pasted into another application – for example: *MS Word*
- Print an entire screen by using **PrtScn**. This can later be pasted into another application – for example: *MS Word*
- Selecting a Table report for a file accessed in for example, Stockitem or Borrower. This is useful for getting reports for New Accession Lists, A print out of holdings for a particular Form code or Stats code (for example: All videos, All Big Books etc.) or Class Lists, etc.

### Reports Module

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

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

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



## Templates

Whenever *Amlib* prints, emails or saves a file, it uses a template to determine what should and how it should be printed. What is “printed” by the template is determined by a number of factors:

- Fields in Template – for example: **Name, Address, Item No, Title**
- Report Module Category – for example: **Circulation Reports**
- Template Type – for example: **Email**
- Where Statement – for example: **Borrower Type = A** (for Adult)

### Standard System Report Templates

These are the templates with an ampersand (&) at the beginning of the file name – for example: **&ODEMAIL.QRP (Overdue Email Notice)**. They are loaded into the *Amlib Reports* module and may be renamed – without the ampersand (&) – if you alter the content/format of the report template.

- **Please Note:** *It's a good idea to note any templates that you have customised (but not renamed) and keep them backed up as they will be overwritten during an upgrade.*

### Table Report Templates

These are the templates with a dollar sign (\$) at the beginning of the file name – for example: **\$BOTYPES.QRP (List of Borrower Types)** They are generally hard-coded into individual *Amlib* modules and cannot be renamed. You may, however, alter the content/format of the report template.

- **Please Note:** *It's a good idea to note any templates that you have customised and keep them backed up as they will be overwritten during an upgrade.*

## Report Types

REPORT ENTITY TYPES
Account
Authority
Bibliographic
Borrower
Catalogue
Circulation
Financial
Inter-Library Loan
Periodical
Reservation
Statistics
Stockitem

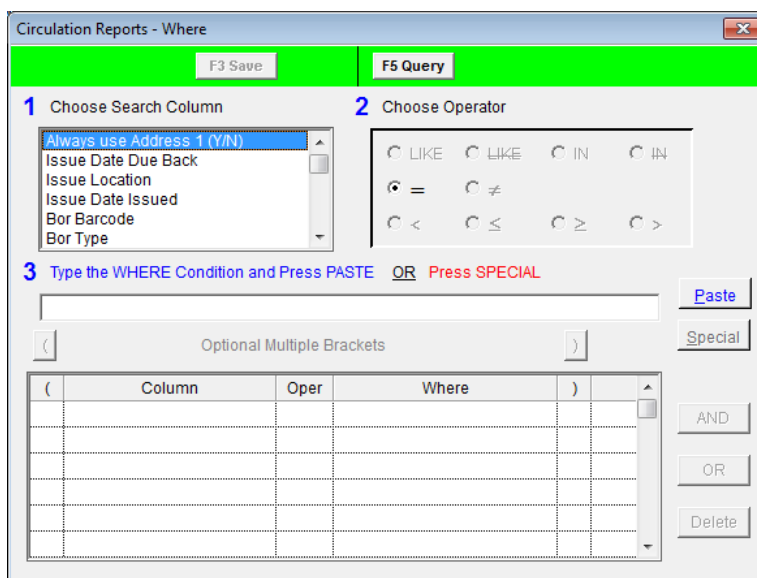
## Where Statements

# Amlib Introductory Training

These are the set conditions that the report uses to determine the data to be sent from the database to the report template. In general, they are just search terms – for example: All borrowers, all borrowers except library staff, members at particular locations, etc

A good way of getting familiar with Where statements is to perform Where searches in the Borrower and Stockitem modules (see below).

1. Highlight the report in the Reports table and select on the **F7 Where** button – the Reports - Where window will open



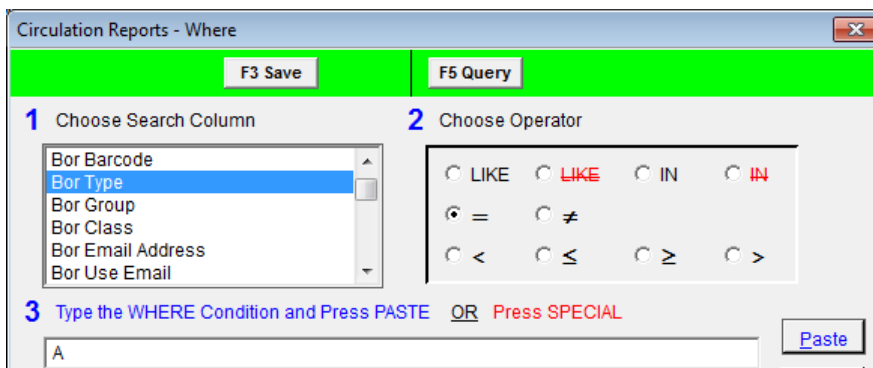
2. You can then enter one or more search conditions:
  - a. Choose Search column: The options differ between [Report Categories](#) and [Report Types](#). If you're not sure which of these is the correct one, it can help to have a look at the corresponding module screen you want to get information from – for example: The Borrower screen
  - b. Choose operator – select from the following list:

OPERATOR	DESCRIPTION	EXAMPLE
LIKE	Where the required data in this field begins with the text entered	LIKE ELD (for Eldorado)
<del>LIKE</del>	Where the required data in this field does not begin with the text entered	<del>LIKE</del> ELD (for all except Eldorado)
IN	Useful for selecting multiple codes	IN A,J,YA (for all of these types)
<del>IN</del>	Useful for multiple codes not to be included	<del>IN</del> ILL,LS (to exclude these types)
=	Where the text entered is exactly equal to the data required	= A (borrowers with a code of A for Adult)
≠	Where the text entered is not equal to the data required	≠ J (borrowers who do not have a code of J)

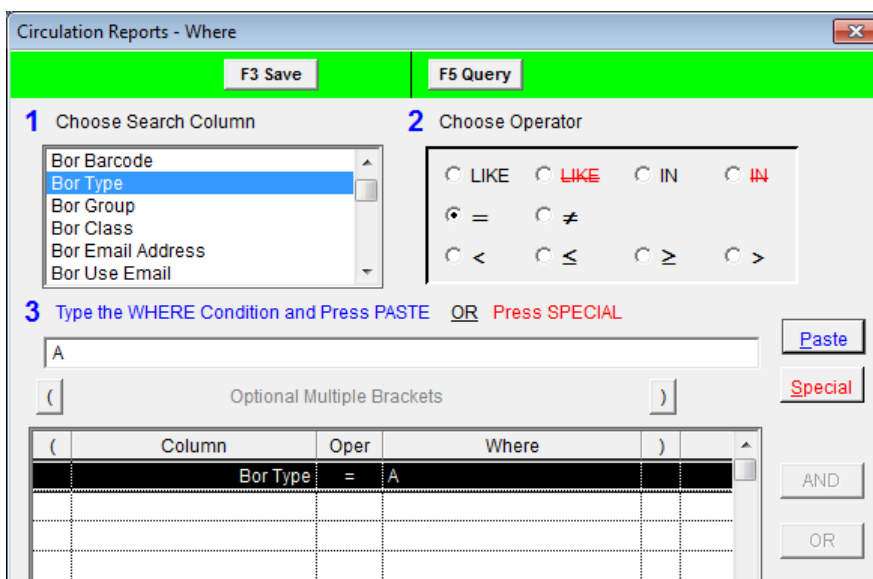
# Amlib Introductory Training

	Useful for <b>NOT EQUAL TO NULL</b> – choose this operator, do not enter any data and select the <b>Paste</b> button	
<	Where the text entered is less than the data required	< <b>01/10/10</b> (less than 1 Oct 2010)
≤	Where the text entered is equal or less than the data required	≤ <b>01/10/10</b> (less than or equal to 1 Oct 2010)
>	Greater than	> <b>01/10/10</b> (greater than 1 Oct 2010)
≥	Equal or greater than the text entered	≥ <b>01/10/10</b> (greater than or equal to 1 Oct 2010)

- c. Type the WHERE condition - this could be letters, numbers, dates, codes, etc. (see also the **Special** button below)



- d. Once you have entered the Where (or Search) condition, select the **Paste** button – the condition will be added to the table at the bottom of the window



3. You can then add in further conditions:

- Join conditions together using the **AND** and **OR** Boolean operands buttons

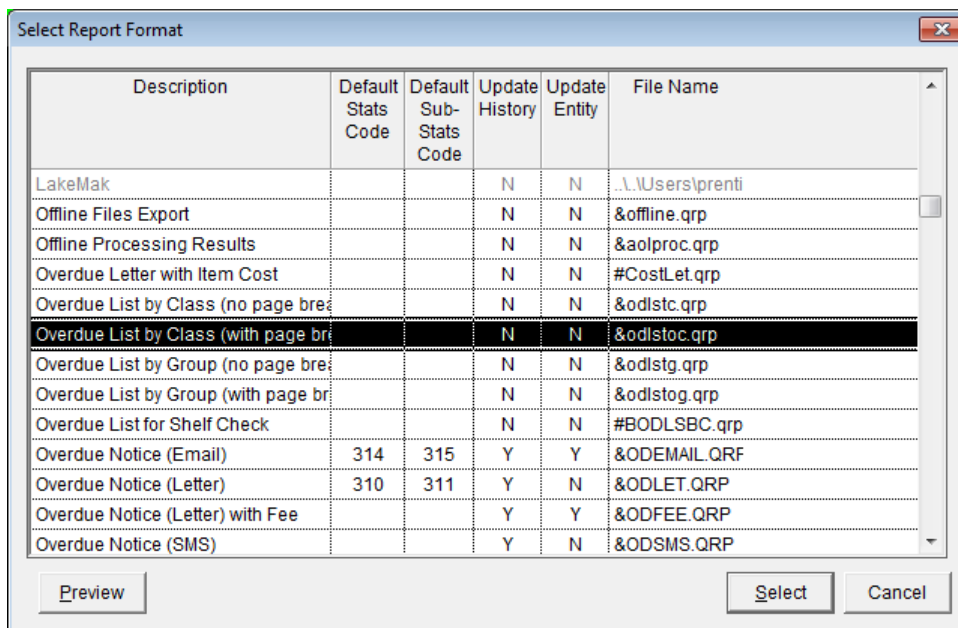
# Amlib Introductory Training

- Delete unwanted items by **highlighting** the line and selecting the **Delete** button

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

## Sample Circulation (Overdue) Report

1. Go to **Main > Reports > RepCirculation** – the Circulation Reports screen will display
2. Select the **F1 New** button – the Select Report Format screen will display
3. Highlight an overdue template (for example: **Overdue List by Class (with page break) – &ODLSTOC.QRP**) and select the **Select** button



4. Type in a Report Description – for example: **Class Overdue List**
5. If you would like the borrower record to retain a record of any notice sent, then ensure that Create Hist (Y/N) = Y
6. If there are replacement costs involved, ensure that the Create Acct (Y/N) = Y
7. Select the **F3 Save** button

			<b>Y</b>	<b>N</b>	<b>Class Overdue List</b>	<b>Overdue List by Class (with &amp;odlstoc.qrp)</b>
--	--	--	----------	----------	---------------------------	--

## Where Statement

5. Highlight the report in the list and select on the **F7 Where** button – the Circulation Reports – Where screen will display
6. The statement must include the following settings:
  - a. **Issue Date Back < Current Date** (via **Special** button) – this can be altered to suit your particular needs
  - b. Additionally, you may wish to limit by **Borrower Location, Type, Group and Class**
  - c. Select on the **F3 Save** button when complete

# Amlib Introductory Training

**Circulation Reports - Where**

F3 Save      F5 Query

**1 Choose Search Column**

- Always use Address 1 (Y/N)
- Issue Date Due Back
- Issue Location
- Issue Date Issued
- Bor Barcode
- Bor Type

**2 Choose Operator**

LIKE     LIKE     IN     IN  
 =         ≠         <     >  
 <         ≤         ≥         >

**3 Type the WHERE Condition and Press PASTE**    OR    Press **SPECIAL**

Paste

Special

Optional Multiple Brackets ( )

(	Column	Oper	Where	)	
	Bor Class	IS NOT	NULL		AND
	Issue Date Due Back	<=	Current Date - 1 Day		

AND

OR

Delete

## Order

1. Select the report from the list and select on the **F9 Order** button – the Circulation Reports – Order By screen will display
2. Use the arrow keys to select fields to Order By – for example: **Bor Class**
3. Select on the **F3 Save** button

**Circulation Reports - Order By**

F3 Save      F5 Query

Columns

- Issue Date Due Back
- Issue Location
- Issue Date Issued
- Bor Barcode
- Bor Type
- Bor Group
- Bor Class
- Bor Email Address
- Bor Use Email
- Bor Mobile/Cell Number
- Bor use Mobile/Cell
- Bor Location
- Bor Owing
- Bor Surname
- Bor Given

Order By

ASC    DESC

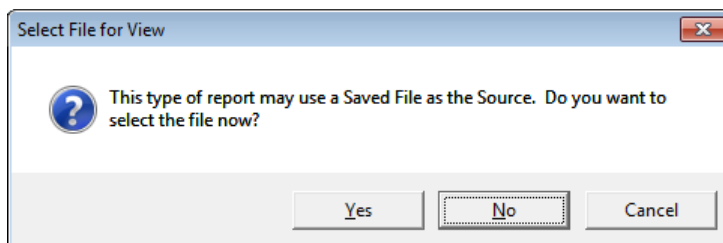
Column	
Bor Class	ASC
Bor Surname	ASC
Bor Given	ASC

UP    DOWN

## View Report

When your report is set up with the template, Where statement, and order, you can then preview the report as follows:

1. Highlight the report and select the **F8 View** button
2. The Select File for View prompt will display with following message: **This type of report may use a Saved File as the Source. Do you want to select the file now?** (rather than the entire database)



3. If you would like this report to use just a Saved File, select the **Yes** button, otherwise select the **No** button (generally users select the **No** button)
4. The report will open in the Report – View screen:

The screenshot shows a window titled "Report - View" with a toolbar at the top. The main content area displays a report titled "Class Overdue List" for "Grade 1A - Miss Williams". The report is a table with columns: Name, Total, Title, Call No., and Date Due. It lists items for Ms Jemma G Dykstra and Miss Jordan B Dykstra. At the bottom, it shows "Class members: 2" and "Total Number of Items: 4".

Name	Total	Title	Call No.	Date Due
<b>Ms Jemma G Dykstra</b>	1	<i>Finding Nemo / adapted by Angela Cr</i>	813./6	16/12/2009
<b>Miss Jordan B Dykstra</b>	3	<i>The yellow Cortina / by Betty Roberts</i>	A.V.C. LIT ROB	16/12/2009
		<i>Blood Red Rose / Maxwell Grant</i>	PB GRAN	16/12/2009
		<i>Green Grass of Wyoming / Mary O'H</i>	STACK J O'HAR	16/12/2009

Class members: 2    Total Number of Items: 4

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



## NETOPACS

*Amlib NetOpacs* allows access to your database via the internet or intranet (networked computers). This is a dynamic access method where data is accessed in real time. It is possible to allow reservations and/or renewals via the *NetOpacs*.

Available options can be viewed on our *NetOpac* sample window at:

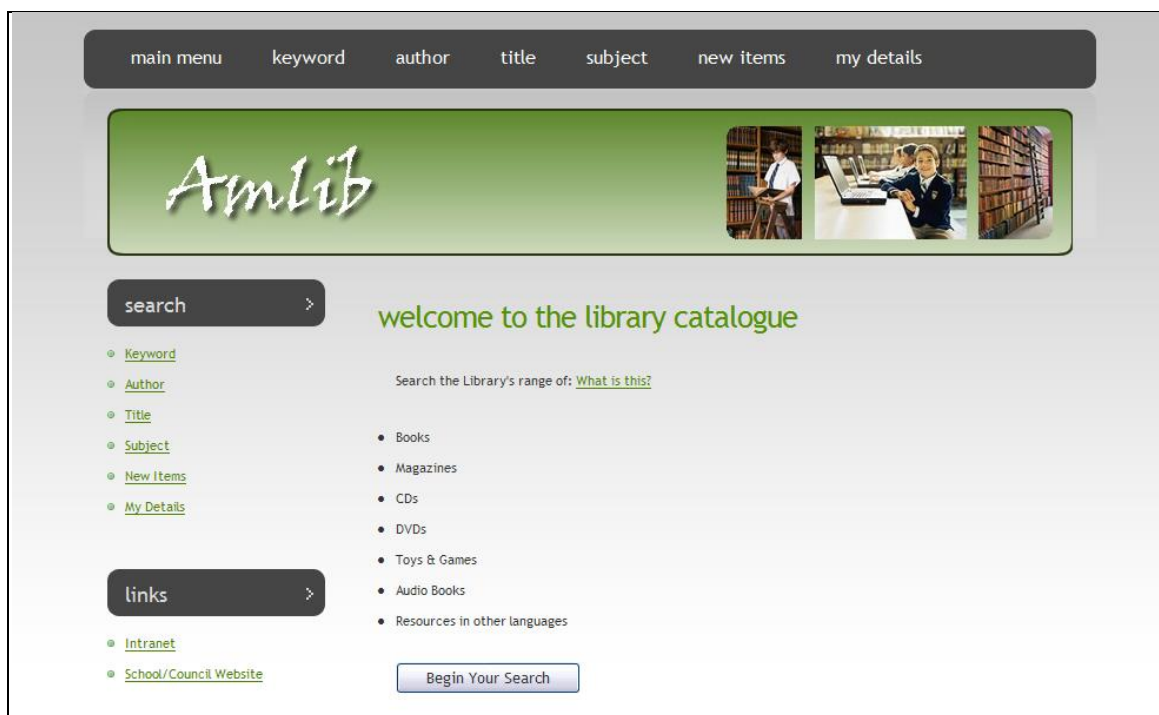
- <http://amlibsupport.oclc.com.au/netopacs/index.htm> [ no longer available]

The path of your *NetOpacs* pages is displayed in the **Main > Supervisor > WebParams** screen. It is necessary to recompile the *NetOpacs* after any changes to the Opac or WebParams settings in *Amlib*.

**Please Note:** *NetOpacs* can usually be displayed from your internet browser by typing the address: <http://servername/amlibweb/webquery.dll?>

The **servername** will vary from site to site. For example: if the servername was **libserver** the path would be **http://libserver/amlibweb/webquery.dll?**

- *NetOpacs* make extensive use of hyperlinks: a hyperlink is a "hot spot" that allows you to jump to another location
- The Main Menu will vary depending on the Search options – for example: Periodicals, Hot Topics, etc.



- Author and Subject generally display an interim (Authorities) Search Result list where the matching Authorities will display first, and then the Stockitems displayed after selecting on a link:

**Subject List**

Back    Next Page    Last Page    View All    View     ⇐ ⇨

90 subjects found for gold.

1	<input type="checkbox"/>	<a href="#">Aboriginal Australians - Western Australia - Eastern Goldfields - Anecdotes.</a>
2	<input type="checkbox"/>	<a href="#">Aboriginal Australians - Western Australia - Eastern Goldfields - Legends.</a>
3	<input type="checkbox"/>	<a href="#">Australia, Central - Gold discoveries.</a>
4	<input type="checkbox"/>	<a href="#">Australia - Gold discoveries</a>
5	<input type="checkbox"/>	<a href="#">Australia - Gold discoveries - Juvenile literature.</a>
6	<input type="checkbox"/>	<a href="#">Australia - Gold discoveries - Social aspects.</a>
7	<input type="checkbox"/>	<a href="#">Bear, Goldy (Fictitious character) - Fiction.</a>
8	<input type="checkbox"/>	<a href="#">Eastern Goldfields (W.A.) - Description and travel.</a>
9	<input type="checkbox"/>	<a href="#">Eastern Goldfields (W.A.) - Guidebooks.</a>
10	<input type="checkbox"/>	<a href="#">Eastern Goldfields (W.A.) - History - Sources.</a>

Back    Next Page    Last Page    View All    View     ⇐ ⇨

An Item List will display the Loan Status of each item:

**Item List**

Back    View All

3 items found for PRETTY and HORSES.    SORT BY:     Go

- [All the pretty horses \[videorecording\]](#)

**Feature films.**

Call No:	Status:	Reserve Title:	Item Type:	Home Location:
F ALL	<b>Date Due 28/10/2008 with 0 reserves 28 Oct 2008</b>	<a href="#">Reserve</a>	Fiction Digital Video Disc	FREEMAN LIBRARY
  
- [The border trilogy / Cormac McCarthy.](#)  
 McCarthy, Cormac.  
 Ranch life - Fiction.  
[More info via Amazon.com \(alk. paper\)](#)

Call No:	Status:	Reserve Title:	Item Type:	Home Location:
F MCC	<b>Date Due 14/10/2008 with 0 reserves 14 Oct 2008</b>	<a href="#">Reserve</a>	Fiction	FREEMAN LIBRARY

- Select on the Title link text to see the full details of each Bibliographic record:

## Catalogue Details

[Back](#)

ISBN **978-0-670-91156-1 ( 0670911569 )**  
ISBN **978-0-14-056866-0 (pbk.) ( 0140568662 )**  
Shelf Number **JK HOL**  
Author **[Holabird, Katharine.](#)**  
Title **Angelina on stage / story by Katharine Holabird ; illustrations by Helen Craig.**  
Publisher **London : Viking, 2001.**  
Physical Description **1 v. (unpaged) : chiefly col. ill. ; 21x26 cm.**  
Series **Angelina Ballerina / Katharine Holabird.**  
Summary **Angelina and Henry have parts in a ballet. During rehearsals, Angelina's excitement turns to jealousy when Henry becomes the favourite of Madame Zizi. But after a near disaster on opening night, Angelina and Henry become better friends than ever. 4 yrs+**  
Subject **[Mice - Juvenile fiction.](#)**  
Subject **[Angelina Ballerina \(Fictitious character\) - Juvenile fiction.](#)**  
Subject **[Ballet dancers - Juvenile fiction.](#)**  
Author **[Craig, Helen.](#)**



- The Main Menu can provide a facility to view Borrower's own loan information, including current loans, reservations and past loans.
- To view these details the Borrower must enter their personal Barcode number and select enter. If required a PIN can be entered as extra security. If a PIN is entered in the Borrower Details screen in the *Amlib Borrower* module for a particular borrower, then this must be entered to view these details:

### Borrower Details

Enter your barcode number into the field below and press Enter or click the Display History button.

Barcode Number :

## MAINTAINING THE SYSTEM

---

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

### Backing Up Your Database

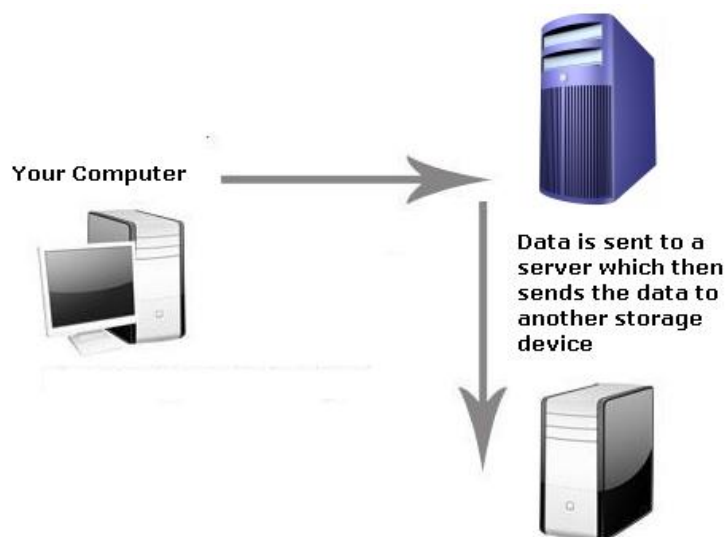
- *SQL Server* and *Oracle* installations should have a Database Maintenance Plan and logs of the backups should be checked regularly
- The backup process **indexes** the database and **deletes unnecessary logs**
- We have documents on recommended Database and Backup Maintenance Plans (ensure your IT has a copy of this)

### 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*



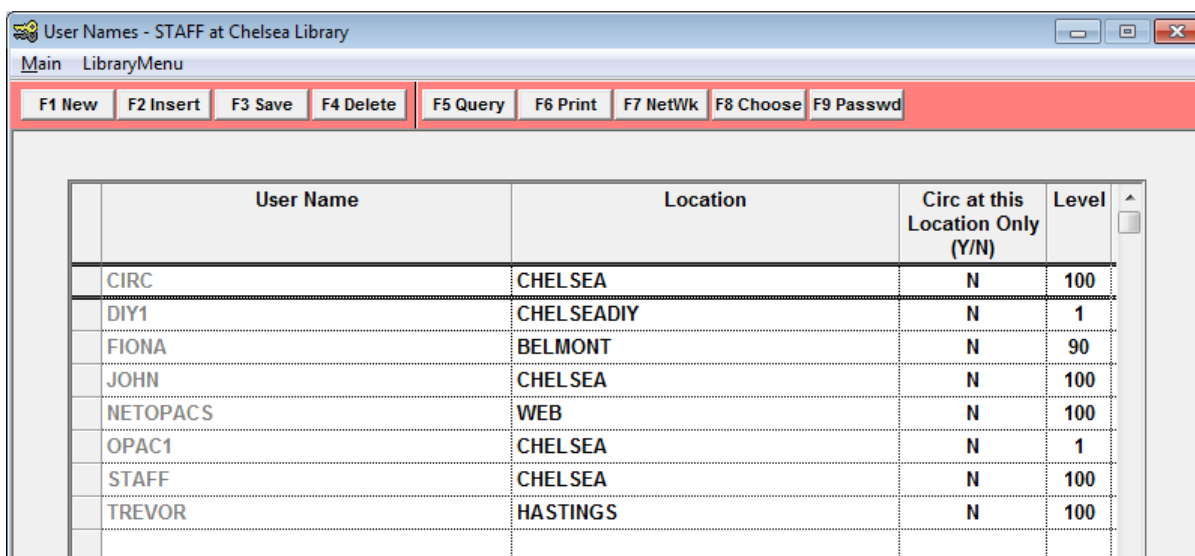
## APPENDICES

### Appendix 1: Setting Up Usernames and Permissions

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:



User Name	Location	Circ at this Location Only (Y/N)	Level
CIRC	CHELSEA	N	100
DIY1	CHELSEADIY	N	1
FIONA	BELMONT	N	90
JOHN	CHELSEA	N	100
NETOPACS	WEB	N	100
OPAC1	CHELSEA	N	1
STAFF	CHELSEA	N	100
TREVOR	HASTINGS	N	100

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

FIELD	EXPLANATION	
<b>User Name</b>	This is the <u>User Name</u> used when logging onto the <i>Amlib</i> client	
<b>Location</b>	The default location that displays when the User logs into the <i>Amlib</i> client (the user may select a different location)	
<b>Circ at this Location Only (Y/N)</b>	Y	Can operate Circulation only at the location specified in the <u>Location</u> field
	N	Can operate Circulation at <u>all</u> Locations within the system
<b>Level</b>	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. Select the **F1 New** or **F2 Insert** button – a new entry will appear in the table

# Amlib Introductory Training

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

User Name	Location	Circ at this Location Only (Y/N)	Level
→ CHRIS	HASTINGS	N	100
CIRC	CHELSEA	N	100
DIY1	CHELSEADIY	N	1
FIONA	BELMONT	N	90
JOHN	CHELSEA	N	100
NETOPACS	WEB	N	100
OPAC1	CHELSEA	N	1
STAFF	CHELSEA	N	100
TREVOR	HASTINGS	N	100

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

Operator Password

Operator Password

Operator: CHRIS

Password: \*\*\*\*\*

Confirm Password: \*\*\*\*\*

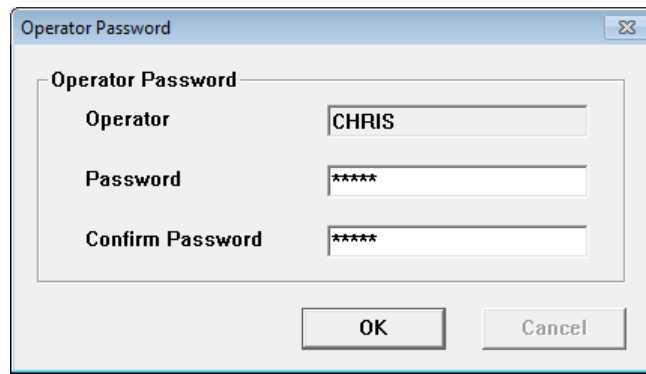
OK Cancel

4. Type in a Password and Confirm Password
5. Select 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 User Names table will display
3. Highlight the User Name in the table
4. Select the **F9 Passwd\*** button – the Operator Password screen will display:

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The image shows a dialog box titled "Operator Password". It contains three input fields: "Operator" with the text "CHRIS", "Password" with six asterisks "\*\*\*\*\*", and "Confirm Password" with six asterisks "\*\*\*\*\*". At the bottom of the dialog are two buttons: "OK" and "Cancel".

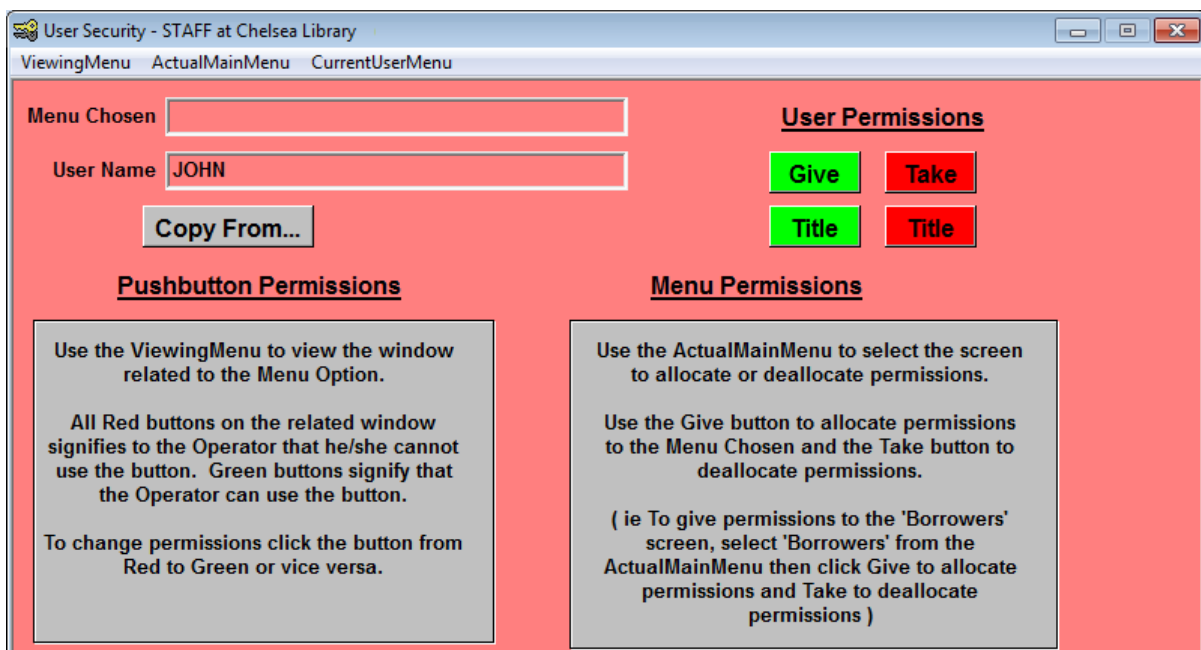
5. Type in the new Password and Confirm Password
6. Select the **OK** button when complete
7. Select the **F3 Save** button
8. Close and restart the *Amlib* client to allow the new Password to come into effect

\*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 [below](#)).

## View Existing User Permissions

*Amlib* client Usernames can be configured to restrict access to certain modules, screens, menu items and buttons. Only Users with full Supervisor permissions can edit the permissions for other Users.

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
4. Select the **F8 Choose** button – the User Security screen will display:



The image shows a window titled "User Security - STAFF at Chelsea Library". The window has a menu bar with "ViewingMenu", "ActualMainMenu", and "CurrentUserMenu". The main area has a red background and contains several sections:

- Menu Chosen**: A text input field.
- User Name**: A text input field containing "JOHN".
- Copy From...**: A button.
- User Permissions**: A section with four buttons: "Give" (green), "Take" (red), "Title" (green), and "Title" (red).
- Pushbutton Permissions**: A section with a grey box containing text: "Use the ViewingMenu to view the window related to the Menu Option. All Red buttons on the related window signifies to the Operator that he/she cannot use the button. Green buttons signify that the Operator can use the button. To change permissions click the button from Red to Green or vice versa."
- Menu Permissions**: A section with a grey box containing text: "Use the ActualMainMenu to select the screen to allocate or deallocate permissions. Use the Give button to allocate permissions to the Menu Chosen and the Take button to deallocate permissions. ( ie To give permissions to the 'Borrowers' screen, select 'Borrowers' from the ActualMainMenu then click Give to allocate permissions and Take to deallocate permissions )"

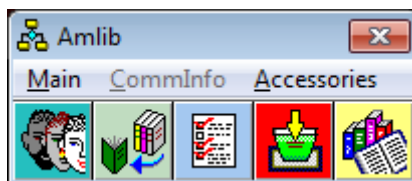
# Amlib Introductory Training

## 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)

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

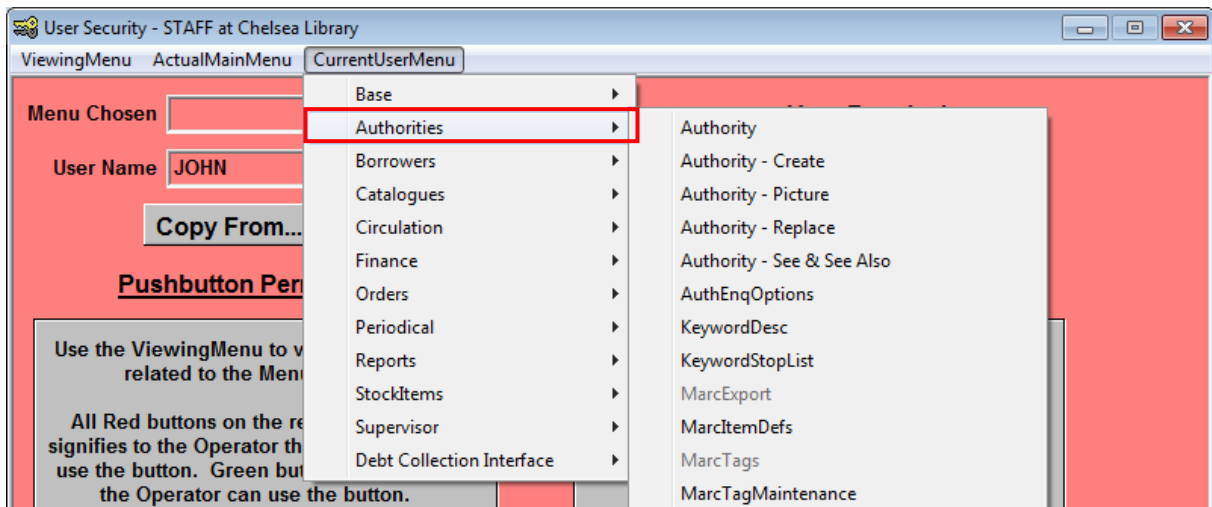
User Name	Location	Circ at this Location Only (Y/N)	Level
CHRIS	HASTINGS	N	100
CIRC	CHELSEA	N	100
DIY1	CHELSEADIY	N	1
FIONA	BELMONT	N	90
JOHN	CHELSEA	N	100
NETOPACS	WEB	N	100
OPAC1	CHELSEA	N	1

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

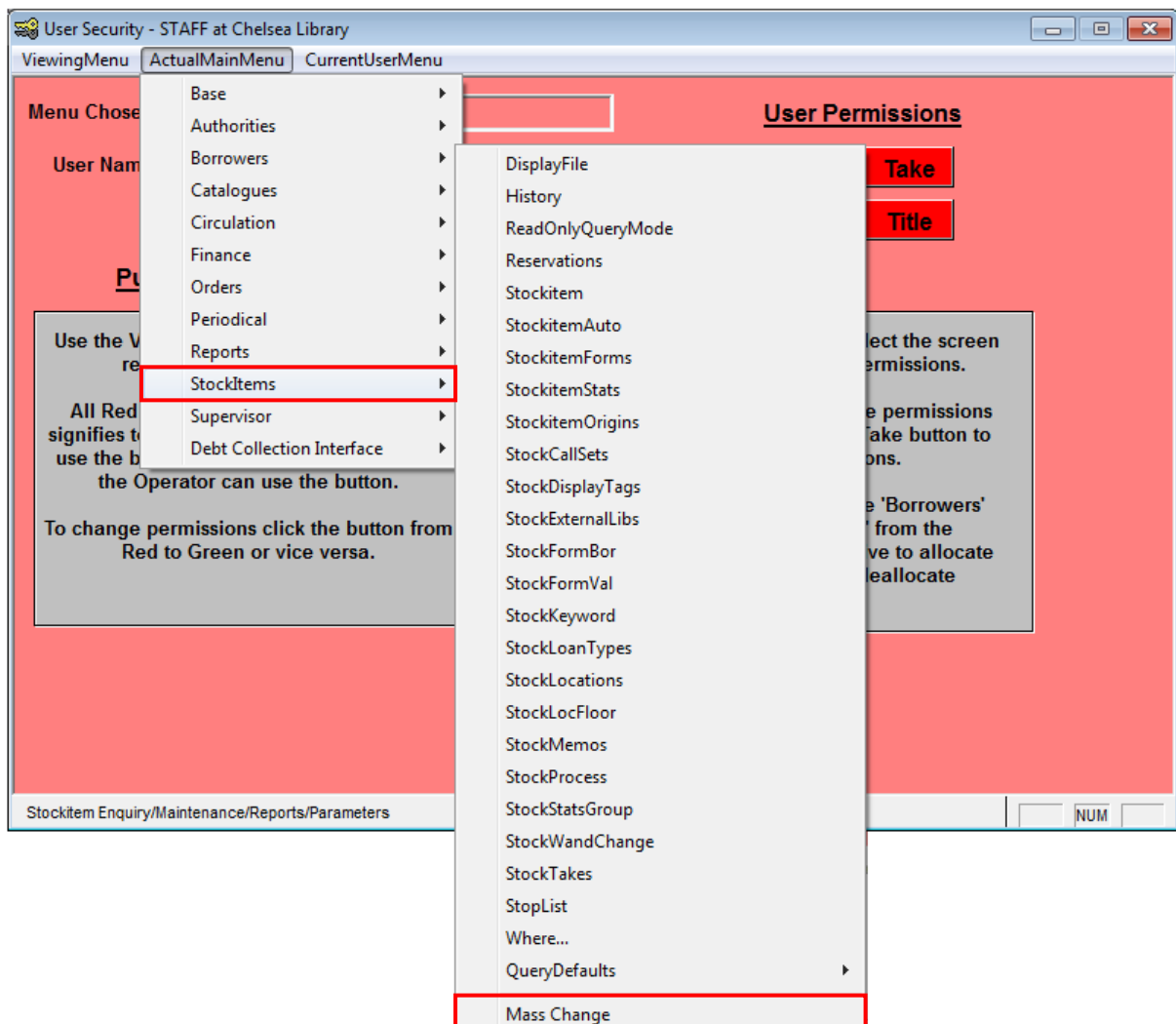


# Amlib Introductory Training

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):

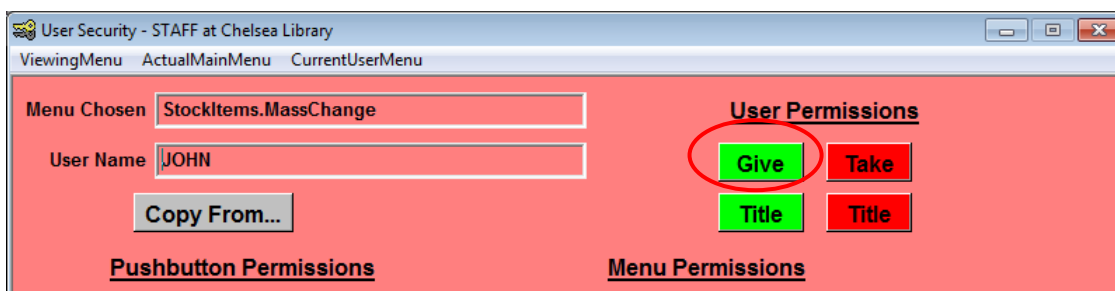


4. To enable a permission, navigate to the **ActualMainMenu** and then to the menu option you wish to grant- this example uses **Stockitem > Mass Change**



# Amlib Introductory Training

- The chosen menu item will then display in the Menu Chosen box – for example: **StockItems.MassChange**



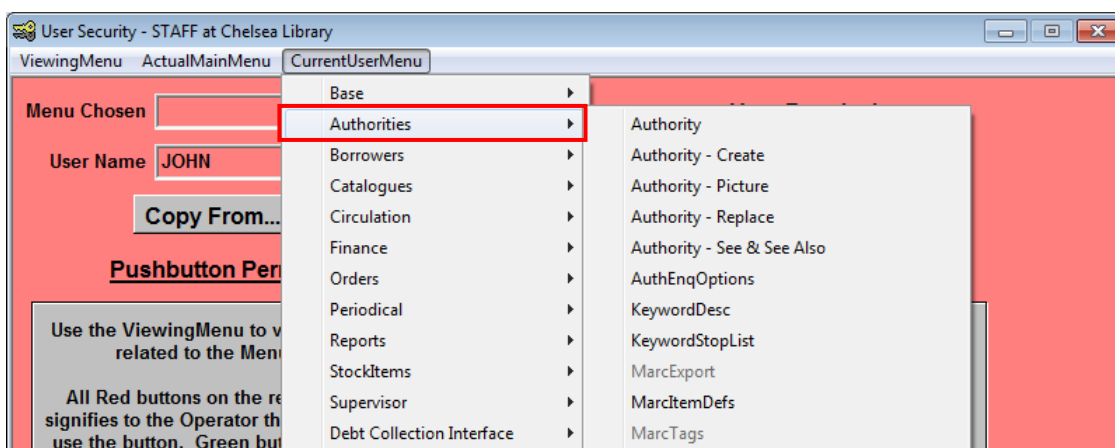
- Select the green **Give** button
- You can then recheck the setting in the CurrentUserMenu to see if it has been ENABLED (it will be **bolded**)
- Then close out of the window and restart the *Amlib* client for the change to have effect

## Disabling a Single Username Permission

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

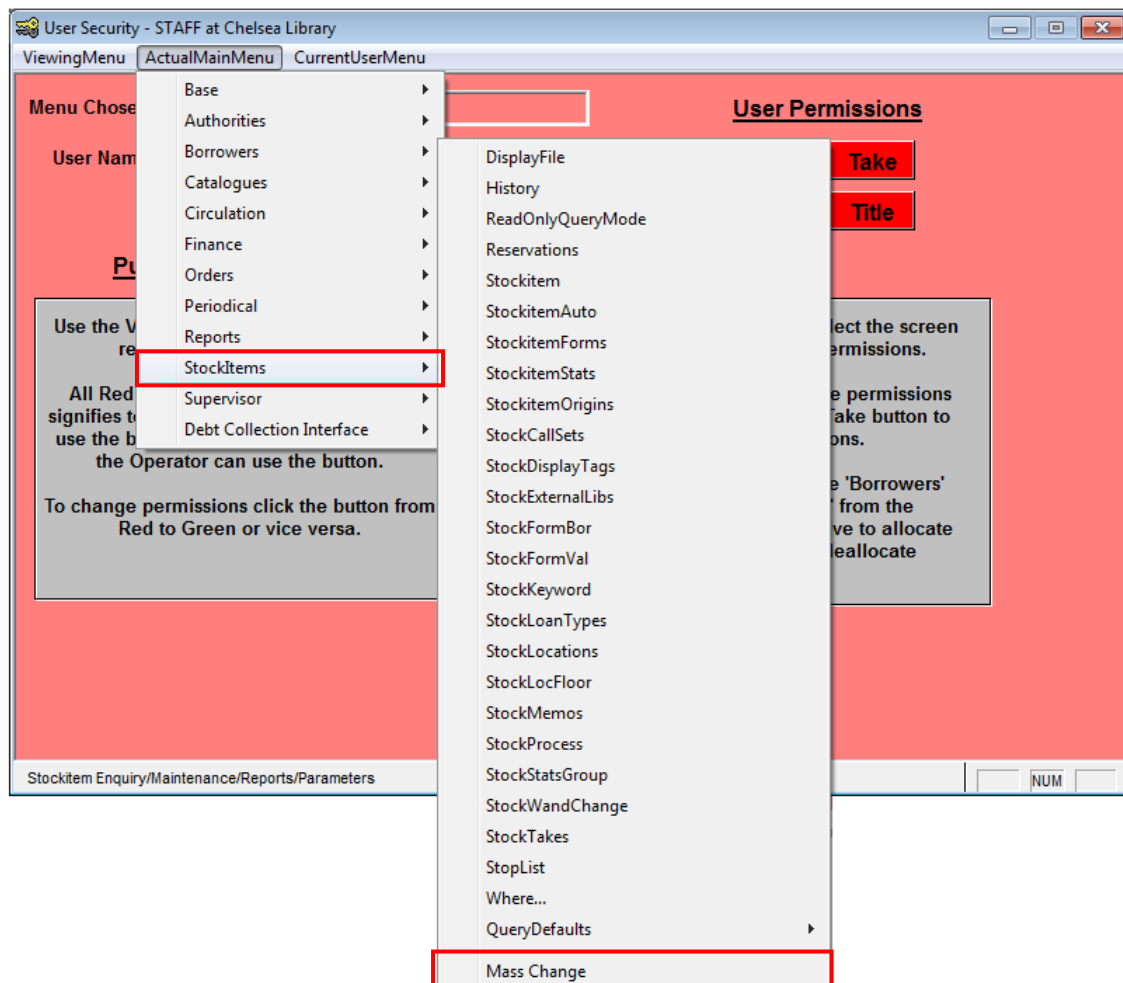
User Name	Location	Circ at this Location Only (Y/N)	Level
CHRIS	HASTINGS	N	100
CIRC	CHELSEA	N	100
DIY1	CHELSEADIY	N	1
FIONA	BELMONT	N	90
<b>JOHN</b>	<b>CHELSEA</b>	<b>N</b>	<b>100</b>
NETOPACS	WEB	N	100

- Highlight the **User Name** you would like to grant a permission to and select the **F8 Choose** button – the User Security screen will display
- 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):

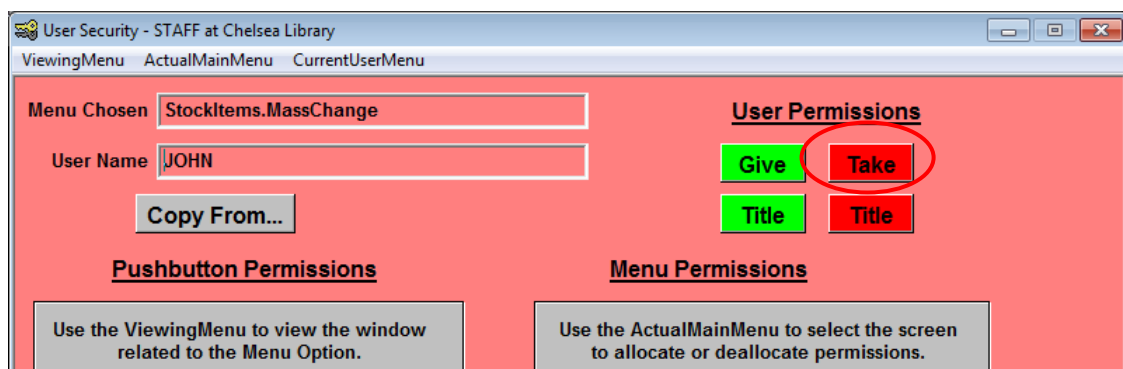


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4. To disable a permission, navigate to the **ActualMainMenu** and then to the menu option you wish to grant- this example uses **Stockitem > Mass Change**



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



6. Select the red **Take** button
7. You can then recheck the setting in the CurrentUserMenu 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

# Amlib Introductory Training

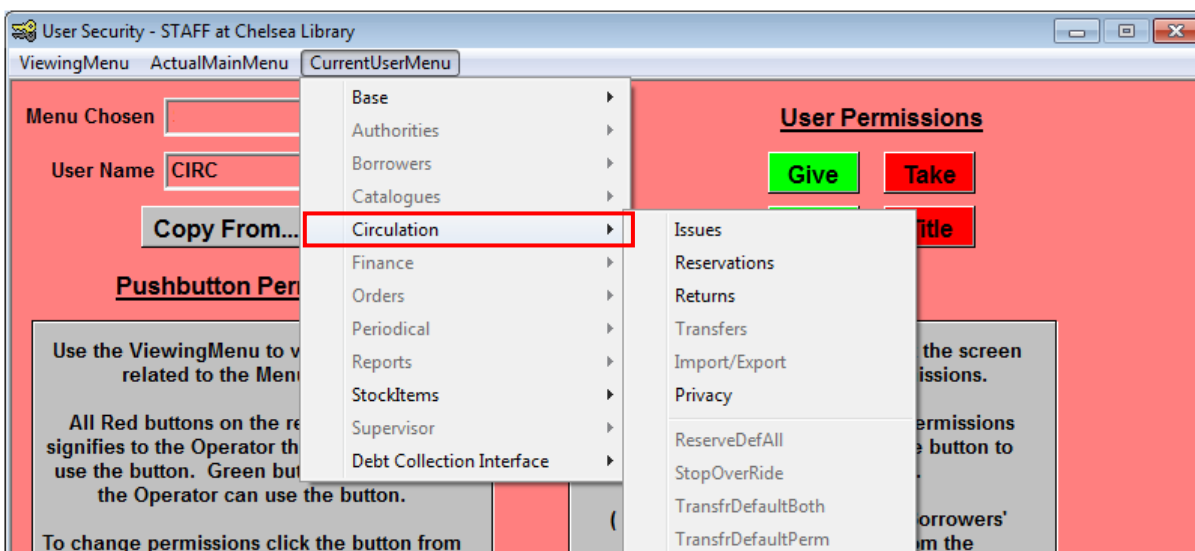
## Enabling Access to an Entire Module

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

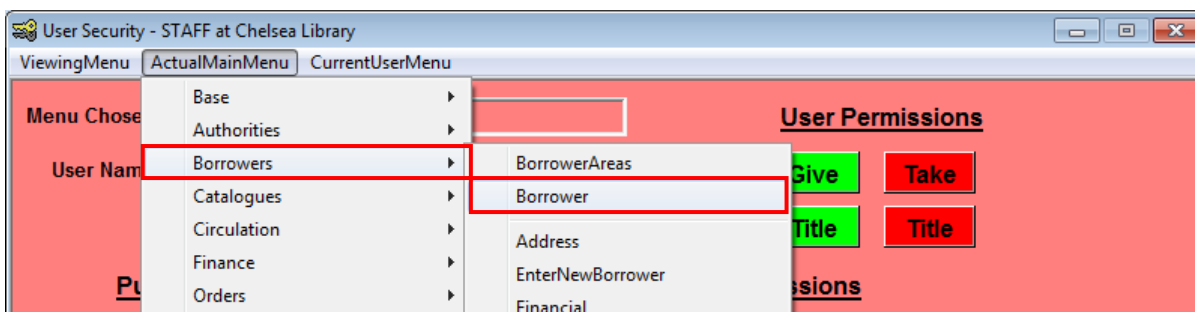
1. Go to **Main > Supervisor > UserNames** – the User Names table will display:

User Name	Location	Circ at this Location Only (Y/N)	Level
CHRIS	HASTINGS	N	100
CIRC	CHELSEA	N	100
DIY1	CHELSEADIY	N	1

2. Highlight the **User Name** you would like to grant a permission to and select 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 **Periodical** amongst others are not permitted for the **CIRC** Username login example below:

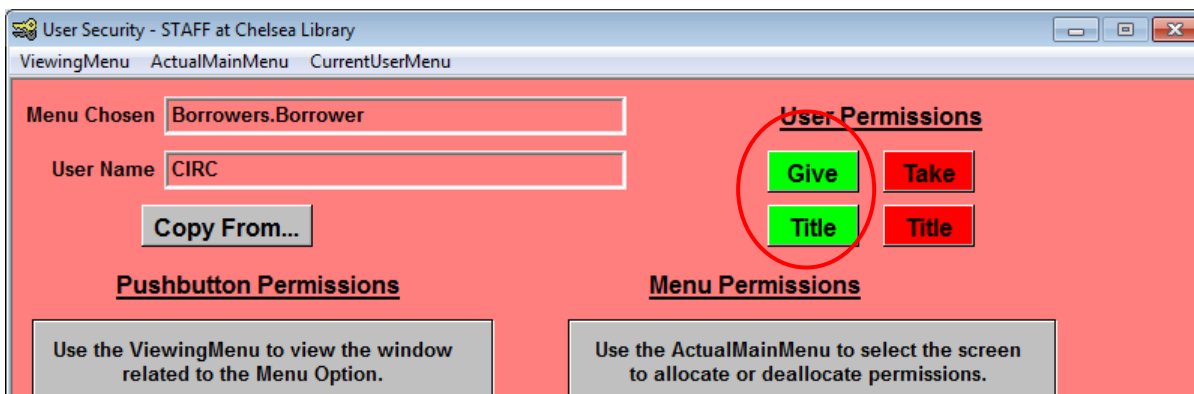


4. To enable a module, navigate to the **ActualMainMenu** and then to the menu option you wish to grant – for example: **Borrowers > Borrower**

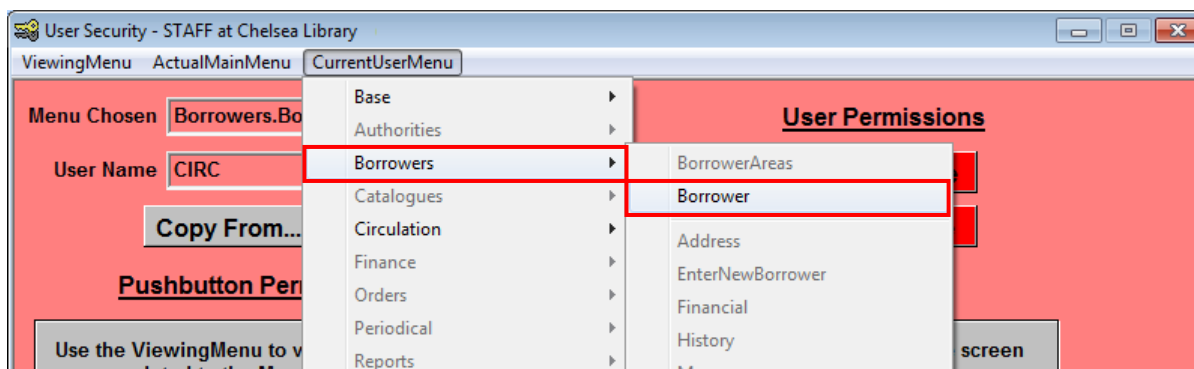


# Amlib Introductory Training

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



- Select the green **Give** button and then the green **Title** button
- Selecting the **Current User Menu** at this stage will show that you have granted access to the Borrower screen only – you still need to add individual menu screen permissions – for example: **History** and **Memos** using the steps outlined above



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

## Disabling Access to an Entire Module

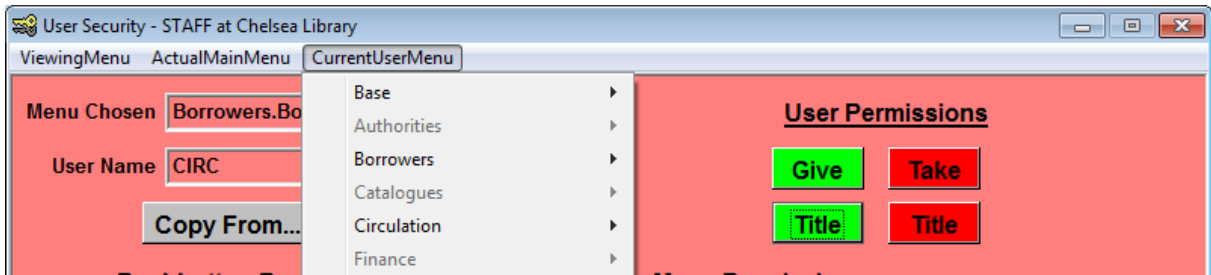
- Go to **Main > Supervisor > UserNames** – the User Names table will display:

User Name	Location	Circ at this Location Only (Y/N)	Level
CHRIS	HASTINGS	N	100
CIRC	CHELSEA	N	100
DIY1	CHELSEADIY	N	1

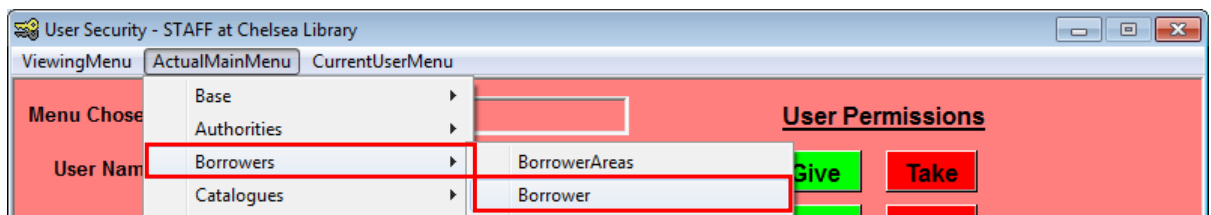
- Highlight the **User Name** you would like to grant a permission to and select the **F8 Choose** button – the User Security screen will display

# Amlib Introductory Training

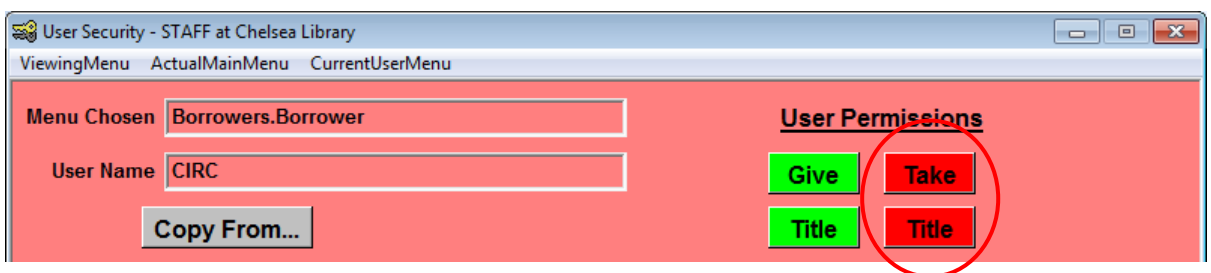
3. Navigate to the **CurrentUserMenu** to see the permissions that the user currently has – any module names that appear in *grey* in the menu are permissions that the user does not currently have – for example: **Authorities**, **Catalogues** and **Finance** amongst others are not permitted for the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



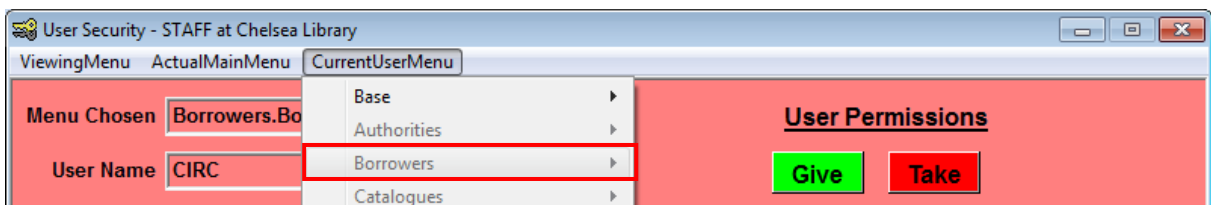
4. To disable a module, navigate to the **ActualMainMenu** and then to the menu option you wish to remove – for example: **Borrowers > Borrower**



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



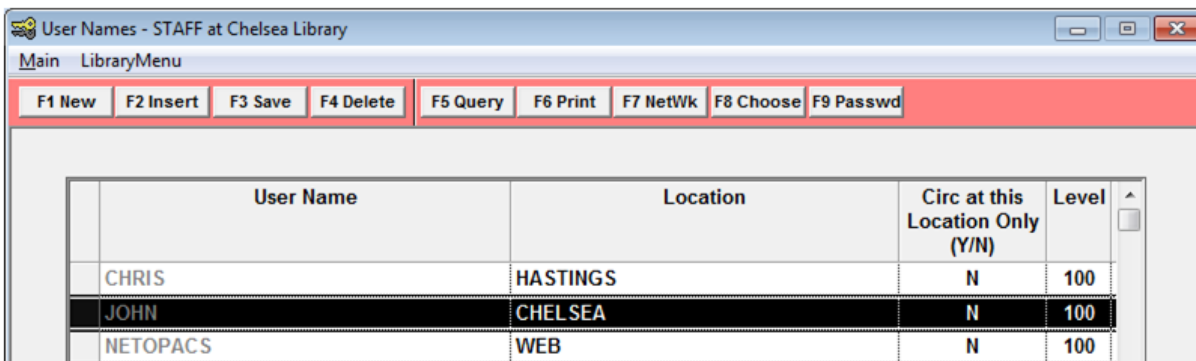
8. Then close out of the window and restart the *Amlib* client for the change to have effect

## Enabling/Disabling Buttons

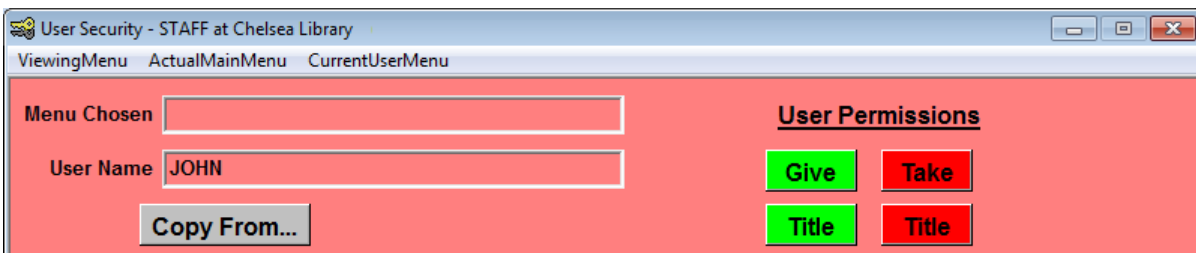
It is possible to show/hide the buttons the user sees on any given screen – this can be used to restrict the user's ability to perform certain tasks – for example: perform updates or delete records.

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

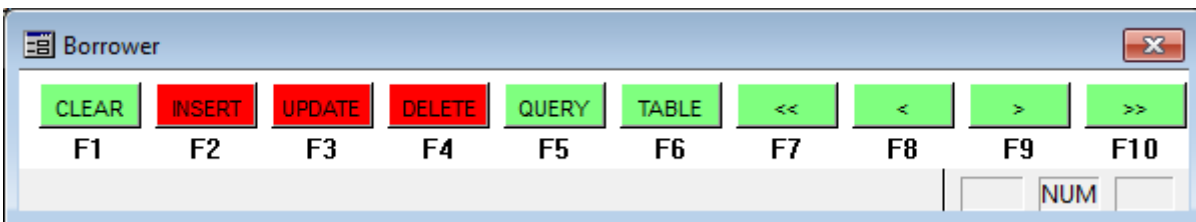
# Amlib Introductory Training



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

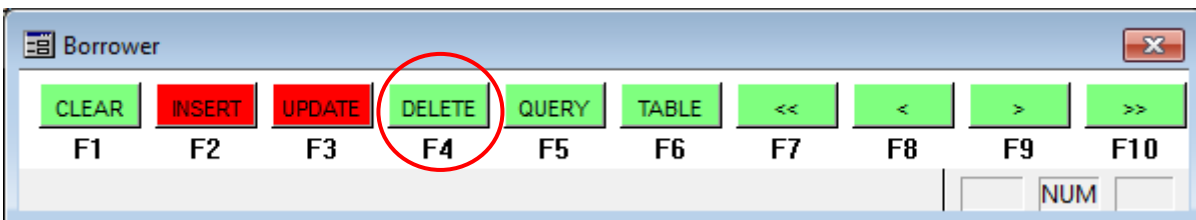


3. Navigate to the **ViewingMenu** and then to the menu option you wish to enable/disable buttons for – for example: **Borrowers > Borrower** – the Borrower buttons menu will display:



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 select a **red** button with your mouse – the button will then turn **green** – in the following example, the **DELETE** button has been enabled:

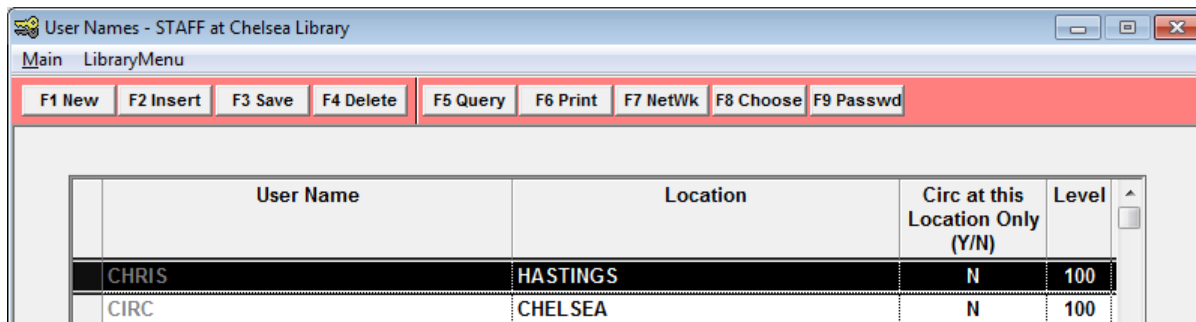


5. Similarly, to disable (hide) a button, simply select a **green** button with your mouse – the button will then turn **red**
6. Then close out of the button menu, the User Security window and restart the *Amlib* client for the changes to take effect

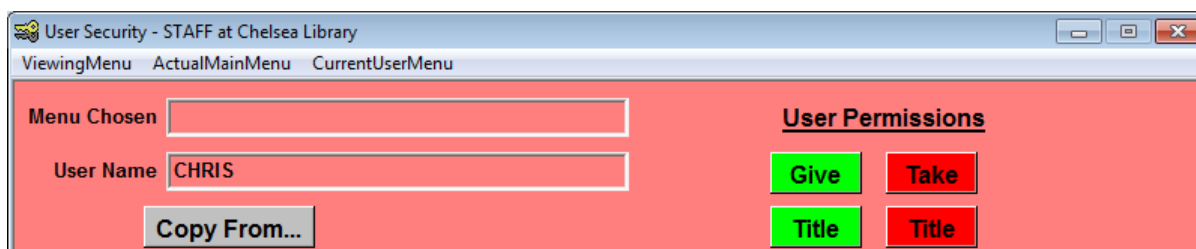
## Enabling the F9 Passwd Button on the User Names Screen

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

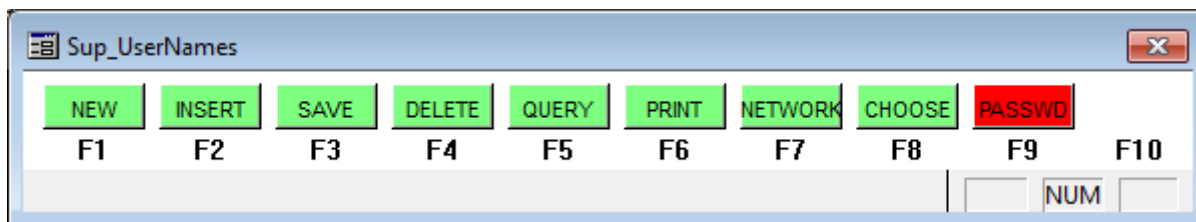
# Amlib Introductory Training



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 select the **F8 Choose** button – the User Security screen will display:

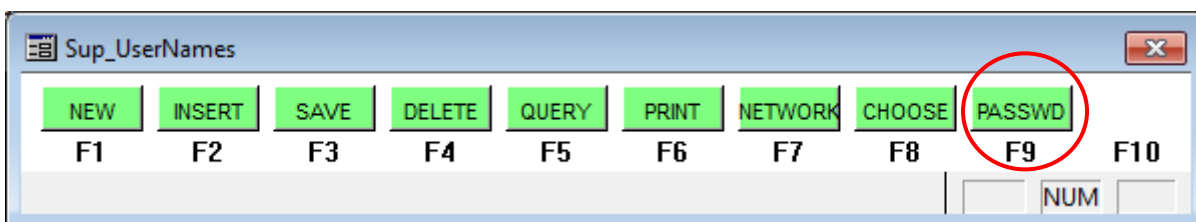


3. From the menu, select **ViewingMenu > Supervisor > UserNames** – the Sup\_UserNames button menu will display:



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

4. Select 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

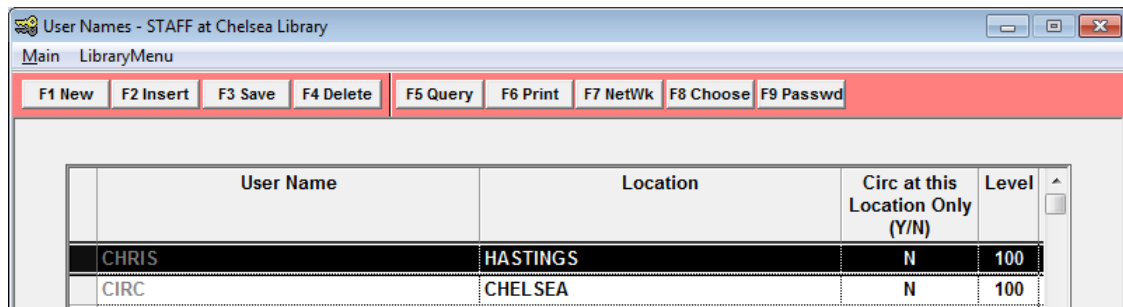
## Copying Permissions from One User to Another

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

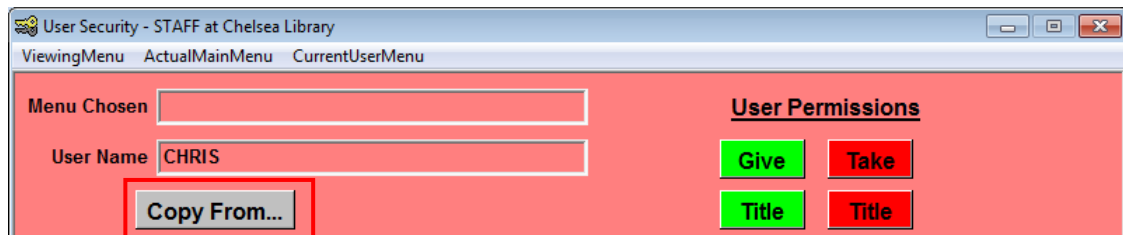
1. Go to **Main > Supervisor > UserNames** – the User Names table will display:



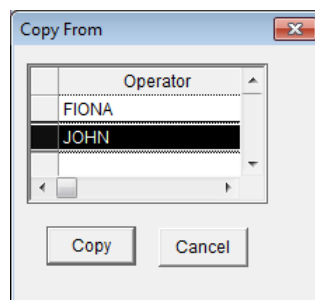
# Amlib Introductory Training



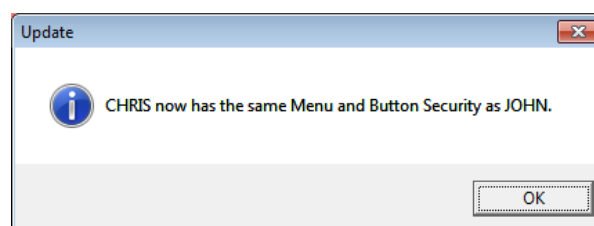
2. Highlight the **User Name** you would like to copy the permissions to (for example: CHRIS) and select the **F8 Choose** button – the User Security screen will display:



3. Select 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 select 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

## Appendix 2: Saved Files

There are many functions within the *Amlib* client that use (or can use) a Saved File as part of the process.

This includes the following:

# Amlib Introductory Training

- Reports
- Mass updates
- Catalogue Maintenance tasks
- Subscription Circulation Lists
- Marc record importing

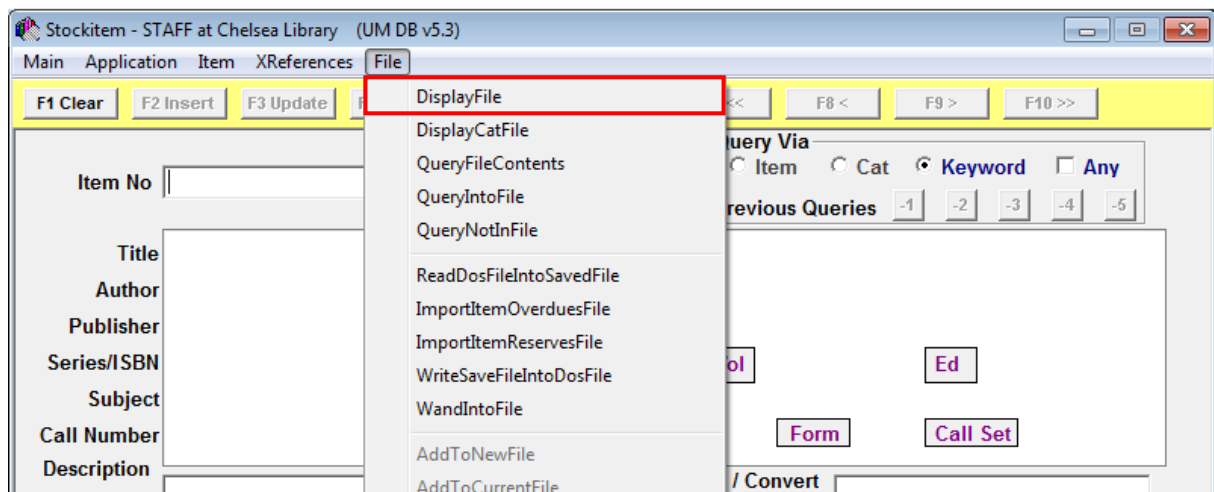
Saved Files can be created in the following modules:

- Authorities
- Borrower
- Catalogue
- Stockitem

## Create a Saved File

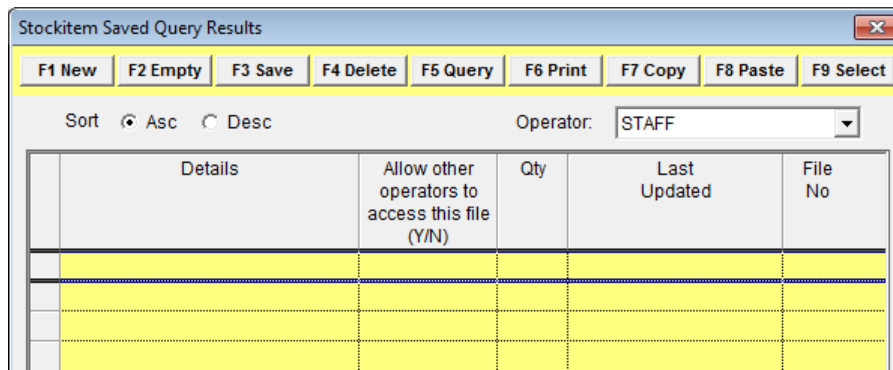
**Please Note:** Many saved files are created as part of another process. The following shows you how to create a Saved File independently of a process.

1. Launch the *Amlib* client
2. Navigate to the appropriate module – for example: Stockitem (**Main > StockItems > Stockitem**)
3. From the menu, select **File > DisplayFile**

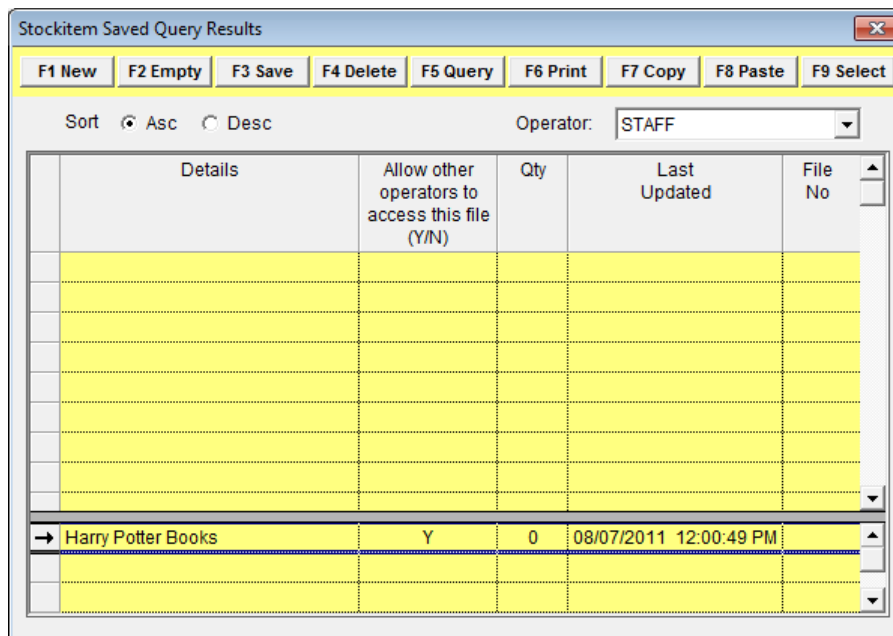


4. The Stockitem Saved Query Results screen will display:

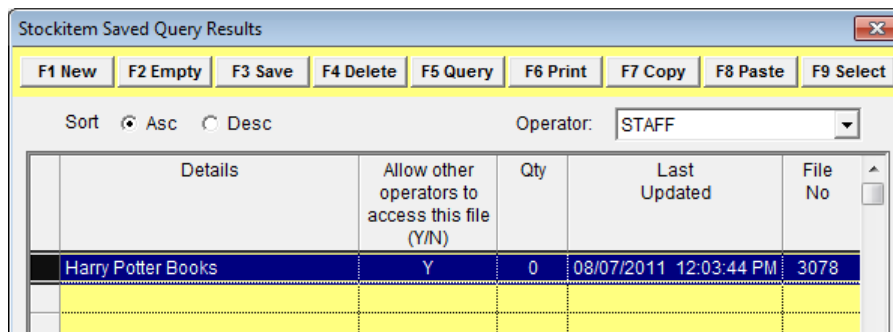
# Amlib Introductory Training



5. Select the **F1 New** button
6. Type a description in the Details column – for example: **Harry Potter Books**
7. Allow other operators to access this file (Y/N): enter a **Y** (for **Yes**) or **N** (for **No**) – the default is **Y**



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



The Saved File has been created and is now ready for use.

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## Create (or Save to) a Saved File from a List

**Please Note:** Many saved files are created as part of another process. The following shows you how to create a Saved File as part of a search.

1. Launch the *Amlib* client
2. Navigate to the appropriate module – for example: Stockitem (**Main > StockItems > Stockitem**)
3. Enter your search parameters and select the **F5 Query** button

Stockitem - STAFF at Chelsea Library (UM DB v5.3)

Main Application Item XReferences File

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

Query Via  
 Item  Cat  Keyword  Any

Previous Queries -1 -2 -3 -4 -5

Item No  Cat Ref No

Title **harry potter**

Author

Publisher

Series/ISBN  Vol  Ed

Subject

Call Number  Sts Code  Form  Call Set

Description

Copy No / Convert

Location  Temp  Floor  Origin/Source

Perm

For Loan (Y/N)  Loan Type  Opac?  Alert  Process

Received  < = > Accessioned  Current Cost

Group

ILL Library: ILL Ren: ILL Due: ITEM TYPE: MEMOS: 0

On Loan Due On Order Res Seq Set ?Size  
 0 0 200

Last Modified by Issues 0

Title  NUM

4. The results will display in a List:

Stockitem List - 20 rows

Main Table XReferences File

Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Ec
1	Exploring Harry Potter / by Elizabeth Schafer, Elizabeth	Schafer, Elizabeth	823/.914	BK	JNF	N		0	CHEL		Y	Beacham's s		20
2	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	ANF	Y	21/03/2	1	CHEL		N	978-0-7475-3		19
3	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	Y	10/08/2	2	BELM		N	978-0-7475-3		19
4	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	N		0	CHEL		N	978-0-7475-3		19
5	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	Y	07/07/2	0	CHEL		N	978-0-7475-3		19
6	Harry Potter and the Deathly	Rowling, J.K.	ROW	BK	J	N		0	CHEL		Y			
7	Harry Potter and the Deathly	Rowling, J.K.	ROW	BK	J	N		0	HAST		Y			
8	Harry Potter and the Goblet of	Rowling, J.K.	F ROW	BK	AFIC	Y	17/05/2	0	CHEL		N			19
9	Harry Potter and the Goblet of	Rowling, J.K.	F ROW	BK	J	N		0	CHEL		N			19
10	Harry Potter and the half-blood	Rowling, J.K.	F ROW	BK	AFIC	N		3	BELM		N	Harry Pottery		20

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- Select the items you would like to Save to File – use your mouse to **highlight** a *single* item, or hold down the **Ctrl** key and use your mouse to **highlight** *multiple* items (if saving ALL items, then there is no need to select anything)

Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Ec
1	Exploring Harry Potter / by Elizabeth	Schafer, Elizabeth	823/.914	BK	JNF	N		0	CHELSEA		Y	Beacham's sc		20
2	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	ANF	Y	21/03/2	1	CHELSEA		N	978-0-7475-3		19
3	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	Y	10/08/2	2	BELMONT		N	978-0-7475-3		19
4	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	N		0	CHELSEA		N	978-0-7475-3		19
5	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	Y	07/07/2	0	CHELSEA		N	978-0-7475-3		19
6	Harry Potter and the Deathly	Rowling, J.K.	ROW	BK	J	N		0	CHELSEA		Y			
7	Harry Potter and the Deathly	Rowling, J.K.	ROW	BK	J	N		0	HASTINGS		Y			
8	Harry Potter and the Goblet of	Rowling, J.K.	F ROW	BK	AFIC	Y	17/05/2	0	CHELSEA		N			19
9	Harry Potter and the Goblet of	Rowling, J.K.	F ROW	BK	J	N		0	CHELSEA		N			19
10	Harry Potter and the half-bloo	Rowling, J.K.	F ROW	BK	AFIC	N		3	BELMONT		N	Harry Pottery		20
11	Harry Potter and the half-bloo	Rowling, J.K.	F ROW	BK	AFIC	N		3	CHELSEA		N	Harry Pottery		20
12	Harry Potter and the Order of	Rowling, J.K.	F ROW	BK	J	N		4	CHELSEA		Y	978-0-439-35		20

- From the menu, select **File > SavedMarked** (if you would like to save ALL items, then select **File > SaveAll**)

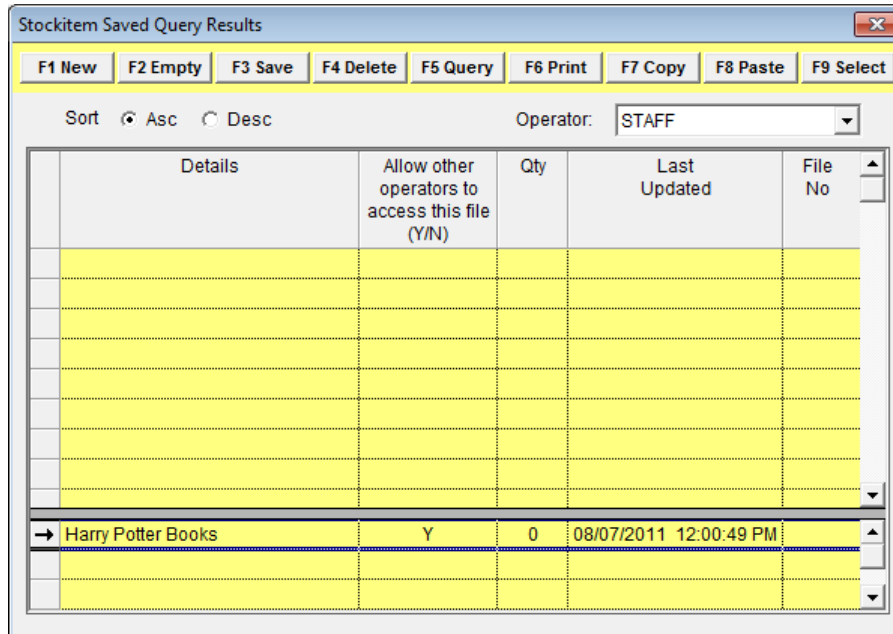
Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Ec
1	Exploring Harry Potter / by Elizabeth	Schafer, Elizabeth	823/.914	BK	JNF	N		0	CHELSEA		Y	Beacham's sc		20
2	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	ANF	Y	21/03/2	1	CHELSEA		N	978-0-7475-3		19
3	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	Y	10/08/2	2	BELMONT		N	978-0-7475-3		19
4	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	N		0	CHELSEA		N	978-0-7475-3		19
5	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	Y	07/07/2	0	CHELSEA		N	978-0-7475-3		19
6	Harry Potter and the Deathly	Rowling, J.K.	ROW	BK	J	N		0	CHELSEA		Y			
7	Harry Potter and the Deathly	Rowling, J.K.	ROW	BK	J	N		0	HASTINGS		Y			
8	Harry Potter and the Goblet of	Rowling, J.K.	F ROW	BK	AFIC	Y	17/05/2	0	CHELSEA		N			19

- The Stockitem Saved Query Results screen will display:

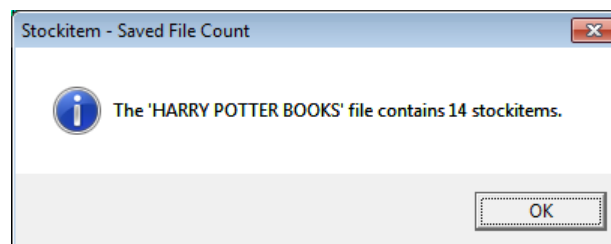
Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No

# Amlib Introductory Training

8. It is possible to add the selected items to an existing Saved File or to create a new Saved File as follows:
  - a. Select the **F1 New** button
  - b. Type a description in the Details column – for example: **Harry Potter Books**
  - c. Allow other operators to access this file (Y/N): enter a **Y** (for **Yes**) or **N** (for **No**) – the default is **Y**



- d. Select the **F3 Save** button when complete
9. Highlight the Saved File you would like to use and select the **F9 Select** button  
**Please Note:** If selecting an existing Saved File, it is possible to delete the pre-existing saved items from the file by selecting the **F2 Empty** button
10. A prompt will display with the following message: **The 'XXX' file contains XX stockitems.**



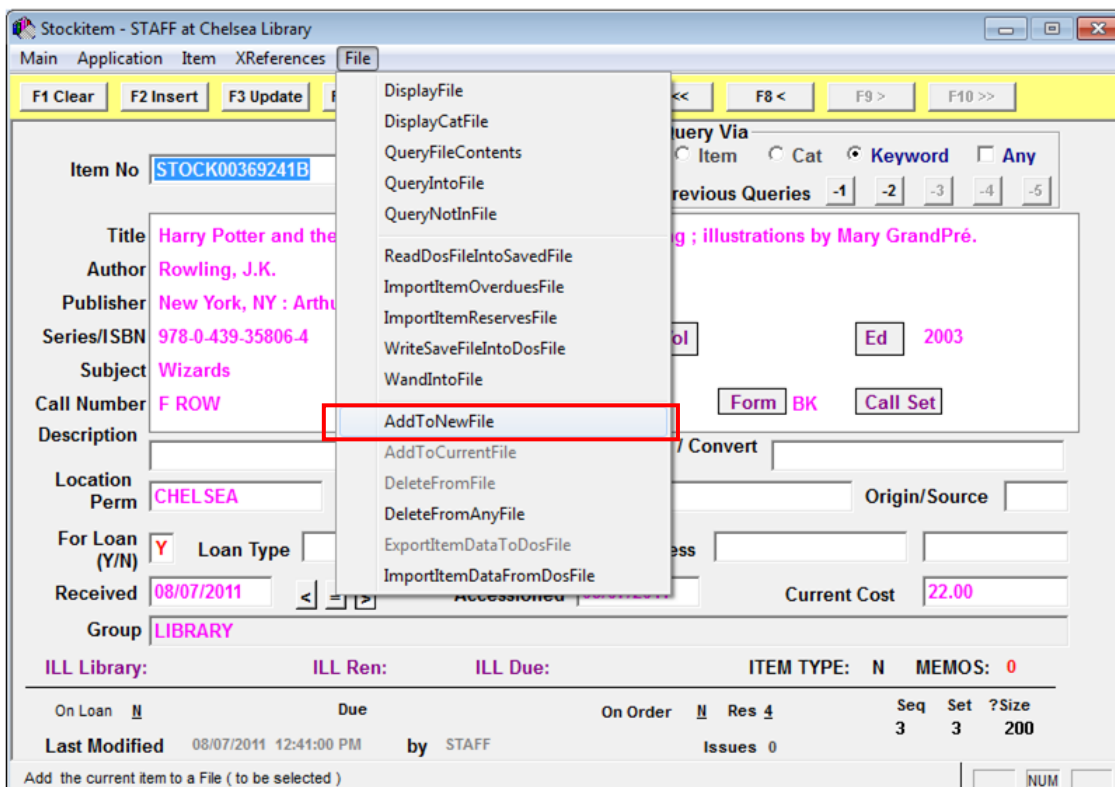
The selected items have now been saved to file.

# Amlib Introductory Training

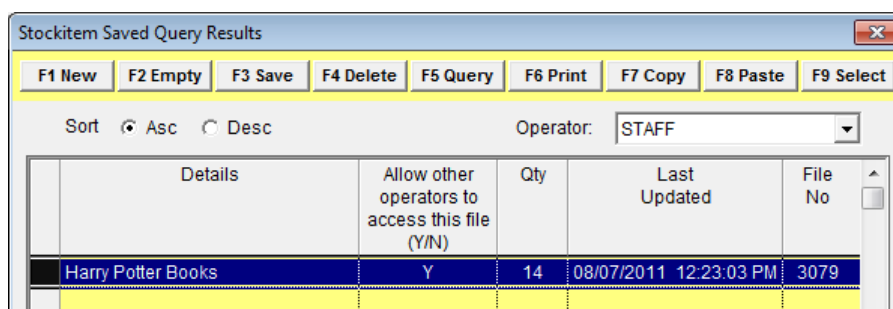
## Save a Single Item/Borrower to File

**Please Note:** It is possible to save the item (or borrower) currently being displayed to a Saved File.

1. Launch the *Amlib* client
2. Navigate to the appropriate module – for example: Stockitem (**Main > StockItems > Stockitem**)
3. Locate and display the item to be saved
4. From the menu, select **File > AddToNewFile**



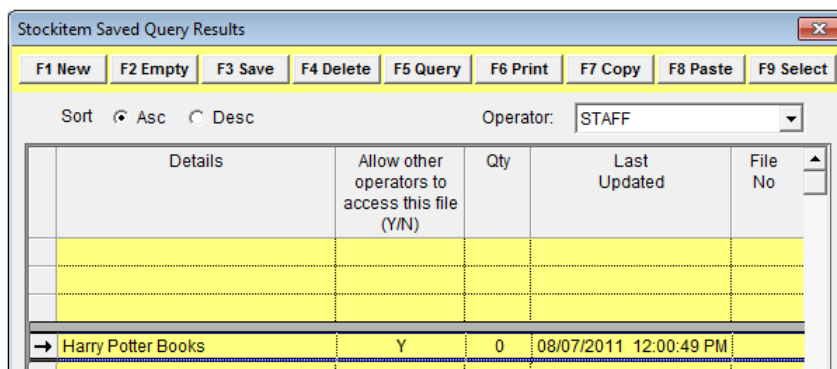
5. The Stockitem Saved Query Results screen will display:



6. It is possible to add the selected items to an existing Saved File or to create a new Saved File as follows:
  - a. Select the **F1 New** button
  - b. Type a description in the Details column – for example: **Harry Potter Books**

# Amlib Introductory Training

- c. Allow other operators to access this file (Y/N): enter a **Y** (for **Yes**) or **N** (for **No**) – the default is **Y**



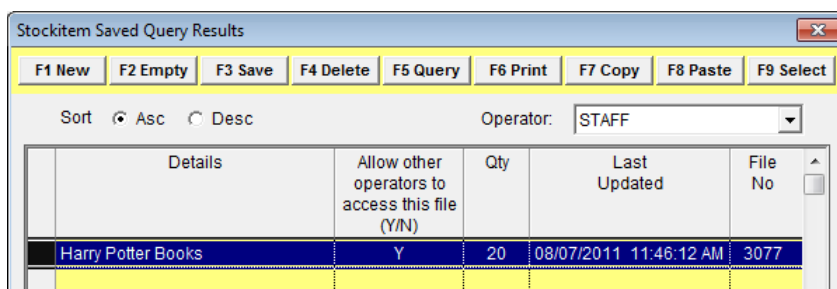
- d. Select the **F3 Save** button when complete

7. Highlight the Saved File you would like to use and select the **F9 Select** button  
**Please Note:** If selecting an existing Saved File, it is possible to delete the pre-existing saved items from the file by selecting the **F2 Empty** button

The selected item has now been saved to file.

## View an Existing Saved File

1. Launch the *Amlib* client
2. Navigate to the appropriate module – for example: Stockitem (**Main > StockItems > Stockitem**)
3. From the menu, select **File > DisplayFile** – the Stockitem Saved Query Results screen will display:



4. Highlight a Saved File and select the **F9 Select** button – the results will display in a List:

Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Ec
1	Harry Potter and the Deathly	Rowling, J.K.	ROW	BK	J	N		0	CHEL		Y			
2	Harry Potter and the Deathly	Rowling, J.K.	ROW	BK	J	N		0	HAST		Y			
3	Harry Potter and the half-bloo	Rowling, J.K.	F ROW	BK	AFIC	N		3	BELM		N	Harry Potterv		20
4	Harry Potter and the half-bloo	Rowling, J.K.	F ROW	BK	AFIC	N		3	CHEL		N	Harry Potterv		20
5	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	ANF	Y	21/03/2	1	CHEL		N	978-0-7475-3		19



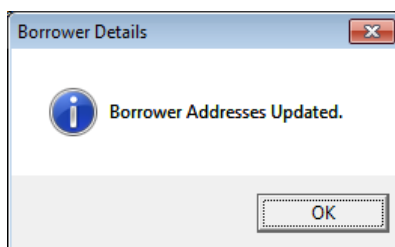
## Appendix 3: Linking Addresses

It is possible to link to other addresses – for example, you may wish to link addresses for all members of the same family. This makes it easier when a change of address is needed.

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

### 1st Member of the Family

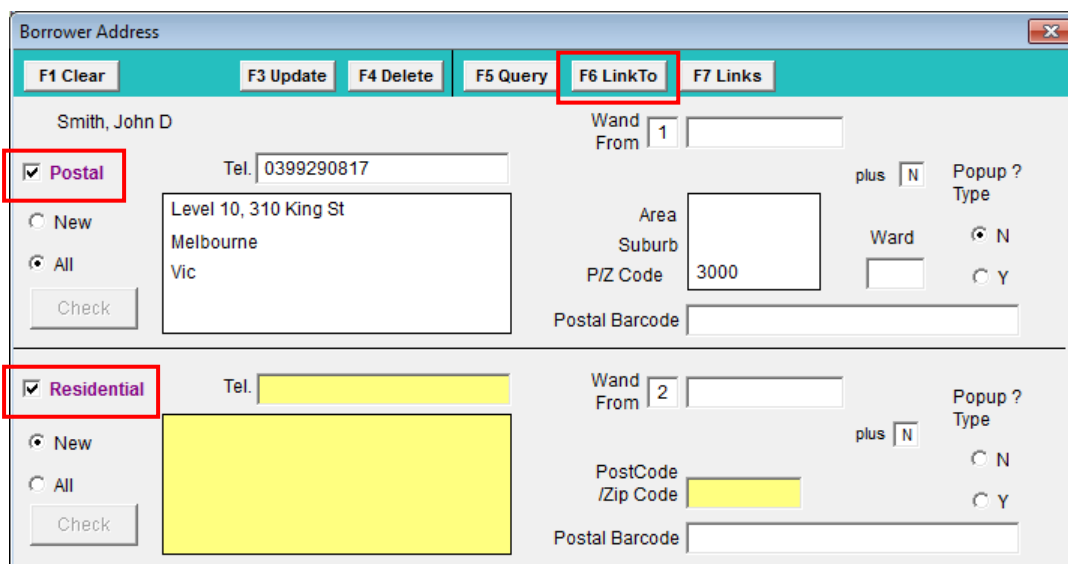
3. Locate the borrower using **F5 Query** or wand in their barcode (for example: **Sarah J Smith**)
4. From menu, select **Borrower > Address** from the menu – the Address screen will display
5. Add the Addresses as required – for example: Postal, Residential, and Guardian
6. Select the **F3 Update** button when complete – a prompt with the following message will display: **Borrower Addresses Updated.**



7. Select the **OK** button

### 2<sup>nd</sup> Member of the Family (if not a child)

1. Locate the borrower using **F5 Query** or wand in their barcode (for example: **John D Smith**)
2. From menu, select **Borrower > Address** from the menu – the Address screen will re-display:

A screenshot of the "Borrower Address" screen. At the top, there are several buttons: "F1 Clear", "F3 Update", "F4 Delete", "F5 Query", "F6 LinkTo", and "F7 Links". The "F6 LinkTo" button is highlighted with a red box. Below the buttons, the name "Smith, John D" is displayed. There are two address entries. The first entry has a checked "Postal" checkbox (highlighted with a red box) and contains the address "Level 10, 310 King St, Melbourne, Vic" and the telephone number "0399290817". The second entry has a checked "Residential" checkbox (highlighted with a red box) and contains a yellowed-out address and telephone number. Both entries have "Wand From" fields (1 and 2 respectively) and "Area Suburb P/Z Code" fields. The "Postal Barcode" field is empty for both. There are also "plus" and "N" buttons, and "Popup ? Type" options (N and Y) for each entry.

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3. Select the Addresses you would like to link by selecting in the tick boxes adjacent to the headings
4. Select the **F6 LinkTo** button – the Borrower Family screen will display listing borrowers with the same surname:

Borrower Family

**F3 Link** **F5 Query**

Enter Surname and Given Name (optional)

Smith

Alternatively you may do an address search  
ie '24 System Street' or '2% Digital Road'

Borrower	Sta.	Postal	Residential	Guardian
Smith, Alan A	OK	9878 7368, 72 Fredrick S		
Smith, Debbie P	OK	93524132, 101 Power S		
Smith, Jack L	OK	93524132, 101 Power S		
Smith, Jill R	OK	93524132, 101 Power S		
Smith, Jim G	OK	93524132, 101 Power S		
Smith, Sarah J	OK	399290818, Level 10, 310 King St, Melbourne, Vic 3000	0399290800, Level 10, 310 King St, Melbourne, Vic 3000	0861047200, Mr & Mrs S
Smith-Lawrence, Ca	OK	94352131, 91 Rose Ave		

5. If the borrower to whom the link is to be made is not displaying – for example: the member has a different surname – enter the member's name and select the **F5 Query** button
6. Highlight the desired borrower (for example: **Sarah J Smith**) in the table and select the **F3 Link** button
7. The addresses will then be linked – if the link has not taken place, it may be that the relevant address boxes were not ticked (if so you will be returned to the Address screen to tick the appropriate boxes)
8. The address details of the selected borrower (for example: **Sarah J Smith**) will overwrite the address details of second borrower (for example: **John D Smith**):

Borrower Address

**F1 Clear** **F3 Update** **F4 Delete** **F5 Query** **F6 LinkTo** **F7 Links**

Smith, John D

Wand From 1

Postal Tel. 0399290817 plus N Popup? Type

New Level 10, 310 King St Area

All Melbourne Suburb Ward  N

Check Vic P/Z Code 3000  Y

Postal Barcode

---

Residential Tel. 0399290800 plus N Popup? Type

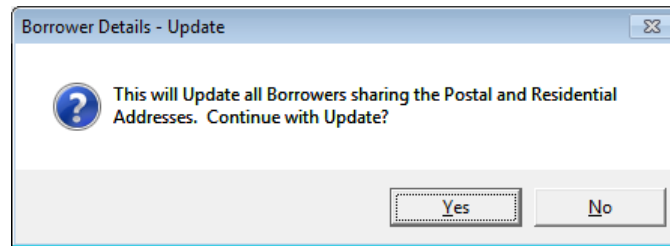
New Level 10, 310 King Street

All Melbourne PostCode /Zip Code 3000  N

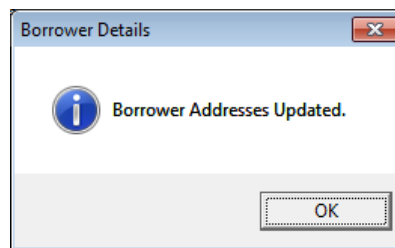
Check Vic Postal Barcode  Y

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9. Select the **F3 Update** button – a prompt with the following message will display: **This will Update all Borrowers sharing the XXX and XXX Addresses. Continue with Update?**



8. Select the **Yes** button to proceed – a prompt with the following message will display: **Borrower Addresses Updated.**

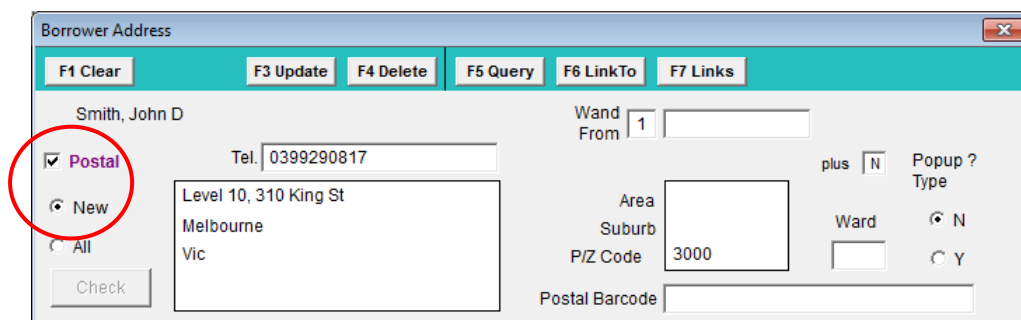


9. Select the **OK** button

## Check Links/Update Address Details/Delink Borrowers

In the Borrower Address screen:

- To check which other Borrowers the current Borrower is linked to, select the **F7 Links** button
- Any changes made to any of the linked borrowers Address details will default to updating **All** borrowers
- However, there are times when a member shifts to different address and the borrower will need to be delinked:
  - a. Enter the new address details (the Postal tick box will automatically **ticked**)
  - b. Select the **New** radio button to indicate that this is a new address and that **All** the linked borrowers are not to be updated
  - c. Select the **F3 Update** button
- To delink the borrower (without changing the address):
  - a. Tick the Postal tick box, select the **New** radio button and select the **F3 Update** button



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## 1<sup>st</sup> Child: Wand From Option

It is sometimes useful to wand from another family member's card to enter the Address details. This allows the first (or Residential) address details of the parent/guardian to be copied to the third (or Guardian) address details of the child.

1. Locate the borrower using **F5 Query** or wand in their barcode (for example: **Luke P Smith**)
2. From menu, select **Borrower > Address** from the menu – the Address screen will re-display:

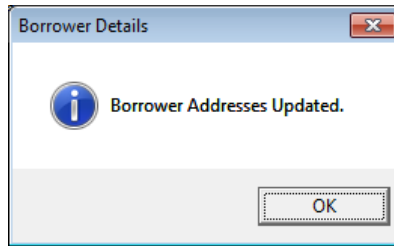
The screenshot shows the 'Borrower Address' window for 'Smith, Luke P'. It has three sections: Postal, Residential, and Guardian. Each section has a 'Wand From' field and a 'plus' button. In the Guardian section, the 'Wand From' field is set to '1' and the 'plus' button is set to 'Y'. A red box highlights the 'Wand From' field, and a red circle highlights the 'plus Y' button, with an arrow pointing from the circle to the field.

3. In this example, we are copying the Address 1 details of **Sarah J Smith** into the Address 3 details of **Luke P Smith** (however, we can copy any Sarah J Smith's addresses into any of Luke P Smith's addresses)
4. Select the following:
  - a. Wand From: **1**
  - b. plus = **Y** (this means **plus name**: the name of the scanned borrower will be copied into Line 1 of the address)
  - c. Wand the barcode of **Sarah J Smith** into the field adjacent to the Wand From field

The screenshot shows the 'Borrower Address' window for 'Smith, Luke P' with the Guardian section selected. The address details are: Tel. 0399290817, Ms Sarah J Smith, Level 10, 310 King St, Melbourne, Vic. The 'Wand From' field is set to '1' and the 'plus' button is set to 'Y'.

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- The name and Address 1 details of the scanned borrower will be added into the selected Address 3 fields
- Select the **F3 Update** button – a prompt with the following message will display:  
**Borrower Addresses Updated.**



- Select the **OK** button
- For subsequent children of the family, the address can be linked to this child by selecting on the Guardian box as well as the other addresses and selecting the **F6 LinkTo** button

## Appendix 4: Import of Borrowers into Amlib

The Borrower Import function enables sites to import borrower data from an Administration system (for example: *Cases*, *EDSAS*, *Maze*, *Synergetic*, etc.) into the *Amlib* system.

This allows for:

- New borrowers, including address information, to be included in *Amlib* without having to manually enter them
- Updates of existing borrower records with new Type, Class codes, addresses etc.

This function is predominantly used by school libraries at the start of each year/semester to update their student records (or add new ones).

The program allows for the restoration of the old data if necessary.

It has a facility to “map” administrative codes to those used on your *Amlib* database. They **do not** have to be the same codes, but need to be matched to the corresponding codes so they will import correctly for each borrower record.

The data file to be imported can be copied from the administrative database onto a USB drive, CD or to a file accessible on the network. You will need to know the exact path so that you can access it during the Borrower download process (from your administrative database). Once the data file has been downloaded from the administrative database, it can be uploaded into *Amlib*.

The file sent to you should be in one of the following file formats:

- CSV (comma delimited)
- TAB delimited
- Pipe separated (|)

You can have empty fields in your import, but they must be left empty and not have the data moved across. For example: if you didn't have a Second Name or Preferred Name, you would leave two blank fields where they should be in your file:

11152	Ngo	Jessica			K5	0 KG	27/09/2001 F	KENT	a12345678 a12345678 a12345678 NSW	2137 8765 8313
11153	Alali	Yasmin			K5	1 1S	30/09/2000 F	KENT	Dr C and N a12345678 STRATHFIELD NSW	2135 9642 5229

Example format (CSV):

- **ANDERL,ANDERTON,LAURENCE,WILLIAM,LAURIE,1,RED,B1SJ,1/01/83,M,BB,MR & MRS W B ANDERSON, 5/165 KING EDWARD STREET,BAYSWATER,WA,6053,9462 1111**

If the above example left out the **RED** Group code, the data would be:

- **ANDERL,ANDERTON,LAURENCE,WILLIAM,LAURIE,1, ,B1SJ,1/01/83,M,BB,MR & MRS W B ANDERSON,5/165 KING EDWARD STREET,BAYSWATER,WA,6053,9462 1111**

Pipe (|) separated:

- **ANDERL|ANDERTON|LAURENCE|WILLIAM|LAURIE|1| |B1SJ |1/01/83|M|BB|MR & MRS W B ANDERSON|5/165 KING EDWARD STREET|BAYSWATER|WA|605|9462 1111**

Dates must be formatted in one of the following three ways:

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- 11/12/09
- 11/12/2009
- 11 Dec 09

If there are trailing spaces in the data, the program strips these out and causes no problems with the download.

### Format 1: MAZE, Synergetic, CASES, COSYCORNER

This format contains only **17-18** fields, which should be downloaded into a data file from the administrative software (for example: *MAZE, Synergetic, CASES, COSYCORNER*, etc.) in the sequence as shown below.

**Mandatory Fields:** *The data must include **Borrower Shortname** (Unique ID/BarCode), **Surname** and **Type**. These cannot be left as null fields. Any unused fields should be left blank but included as null fields.*

FIELD	CSV COLUMN	EXAMPLE
1. (Unique ID/BarCode) Borrower Short Name/MAZE Key	A	ANDERL
2. Surname	B	ANDERSON
3. Given	C	LAURENCE
4. Second Name (only imports initial)	D	WILLIAM
5. Preferred (overrides Borrower Given)	E	LAURIE
6. Type	F	1
7. Group	G	RED
8. Class	H	B1SJ
9. Date of Birth (or date of entry depending on what is used by the admin. database)	I	1/01/83
10. Sex	J	M
11. Location	K	BB
12. Contact name	L	MR & MRS W.B. ANDERSON
13. Contact Address Line 1	M	5/165 King Edward St
14. Contact Address Line 2	N	Bayswater
15. Contact Address Line 3	O	WA
16. Postcode	P	6053
17. Contact Phone Number	Q	9462 1111
18. Email (Optional)	R	john.smith@oclc.org

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### Format 2: SIS (WA Education Dept)

This format contains only **22** fields, which should be downloaded into a data file from the Administrative software (SIS) in the sequence as shown in below.

**Please Note:** All files must be in a standard **.CSV** format. Any unused fields should be left blank but included as null fields.

FIELD #	FIELD NAME	TYPE & SIZE	EXAMPLE
1	(Unique ID) ID/REF/BarCode	Alpha Numeric 15	1234
2	Type	Alpha Numeric 1	1 student 2 teaching staff 3 Non Teacher
3	Date of Birth	Date	12 JAN 1993
4	Sex	Alpha Numeric 1	M / F
5	Surname	Alpha Numeric 40	Smith
6	First name	Alpha Numeric 40	Jonathon
7	2nd name	Alpha Numeric 20	Peter
8	3rd name	Alpha Numeric 40	Paul
9	Preferred name	Alpha Numeric 40	John
10	Addr line 1	Alpha Numeric 40	151 Royal St
11	Addr line 2	Alpha Numeric 40	
12	Addr line 3	Alpha Numeric 40	
13	Suburb	Alpha Numeric 50	East Perth
14	State	Alpha Numeric 40	WA
15	Postcode	Alpha Numeric 10	6004
16	Phone 1	Alpha Numeric 30	9264 1111
17	Phone 2	Alpha Numeric 30	9264 1113
18	E-mail	Alpha Numeric 100	john.smith@oclc.org
19	Parent Salute	Alpha Numeric 60	Mr & Mrs Smith
20	Class	Alpha Numeric 15	Room 5
21	Group (Type)	Alpha Numeric 2	4 (K, P 12, up etc.)
22	Entry Date	Date	22 SEP 1998



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### Format 3: All Fields/EDSAS (SA Education Dept.)

You must have at least **19** columns, and up to **25** (with the exception of **22** columns – see [Format 2](#)).

**Mandatory Fields: Borrower Shortname** (Unique ID/BarCode) and **Borrower Type**. Additionally, you *need* to have data in the Location column even if this does not come from your Admin system. If you do not store patron location against the student in your admin system, you can just put a **1** in every line of the file and match this 1 to your library location later.

**Please Note:** If the data file only contains **19** fields the Guardian details are copied from fields **12 – 16**. Any unused fields should be left blank but included as null fields.

FIELD	CSV COLUMN	EXAMPLE
1. (Unique ID /BarCode) Borrower Short Name	A	ANDERL or B9988
2. Surname	B	ANDERSON
3. Given Name	C	LAURENCE
4. Middle Name (only imports initial)	D	WILLIAM
5. Preferred Name (overrides Given)	E	LAURIE
6. Type	F	1
7. Group	G	RED
8. Class	H	10A
9. BirthDate	I	01/01/91
10. Sex	J	M
11. Location	K	BB
12. Address 3 Line 1 (Guardian Name)	L	MR & MRS ANDERSON
13. Address 1 Line 1	M	5/165 King Edward St
14. Address 1 Line 2	N	Bayswater
15. Address 1 Line 3	O	WA
16. P/Z Code	P	6053
17. Address 1 Tel.	Q	08 9462 1111
18. Email	R	<a href="mailto:laurie@oclc.org">laurie@oclc.org</a>
19. (Other ID) Ref2	S	18846
20. Address 3 Line 2	T	8 Osborne Rd.
21. Address 3 Line 3	U	Innaloo
22. Address 3 Line 3 (merges with above)	V	WA
23. Address 3 Postcode/Zip Code	W	6017
24. Address 3 Tel.	X	08 9754 0000
25. Mobile/Cell	Y	0425 113 655

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## How Records Are Matched

The records will be matched in the following way:

1. Unique ID/Other ID – If the Unique ID/Other ID (BarCode/Ref2) from the file is found in Borrower, then the information for that patron will be overwritten with the data there, regardless of whether or not the name is the same. So, if a student changes their surname, the new surname would come across in the import as long as the Borrower ID/Barcode is identical.
2. Surname/Given Name – If no matching Borrower ID/BarCode is found, the system will then do a search for any matching surnames and first names. If there is one match found, the system will overwrite that record with the data in your file.
3. Date of Birth – If more than one match is found for the surname and first name, the system will then try to locate the correct one using the date-of-birth. If a matching date-of-birth for that surname and first name is found, that record is updated. If the birthdates for these Borrowers are null, then the Borrowers are considered duplicates (and the system creates a new record with an auto-generated **AMLIB** BarCode).

In the example below **John Goldsmith** changed his Surname to **Smith**. The BarCode in the *Amlib* borrower record was identical to the Unique Import Key (Unique ID), therefore the details were updated, showing the Borrower details with the new Surname.

UPD	B9999	Smith	John	D	Adult		12/06/1964
UPD	B9988	Smith	Sarah	J	Adult	Mrs Harris	16/05/1957
NEW	B9977	Peabody	Amy		Adult		22/09/1981
NEW	B9966	Rumford	Emilia	P	Adult		10/03/1977

- The Borrower Import will remove single quotes from any incoming names – for example: **O'Brien** becomes **OBrien**.

## Suggested 'Pre-import' Tasks

You may wish to move all year 12 students (or year 6 students – for primary schools) into another class such as **Year 13** or **Year 7** using Mass Borrower Change. From there you can upgrade all other years and import new students. Any returning year 12 (or 6) students would be updated and moved back to class year 12 (6). All Remainder students can be dealt with as necessary.

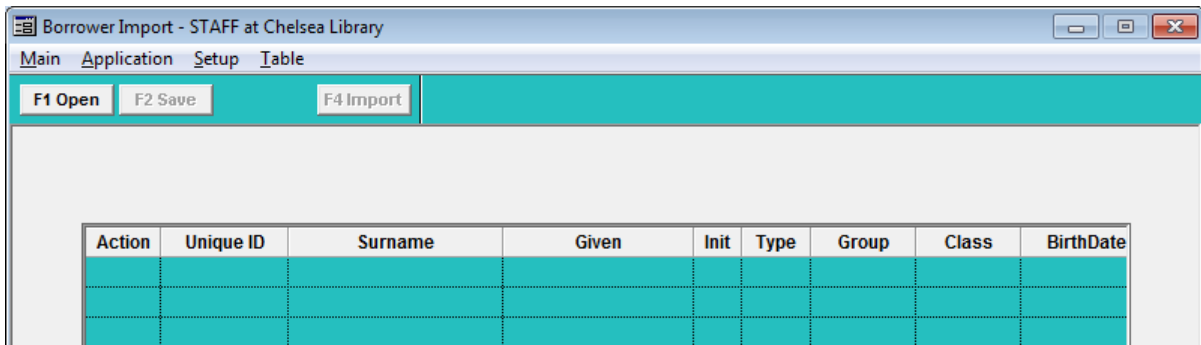
Alternatively, all students may be mass changed to a generic class via Mass Borrower Change, thus giving all students a single class. When doing then next import, all classes will be changed to the correct class. Any left with the generic class can be dealt with as necessary.

Before starting the import process, check the Type, Group, Class and Location tables in *Amlib* to ensure all required codes have been created. Check the Location table to ensure that the locations required have a Valid for Borrower setting of **Y**.

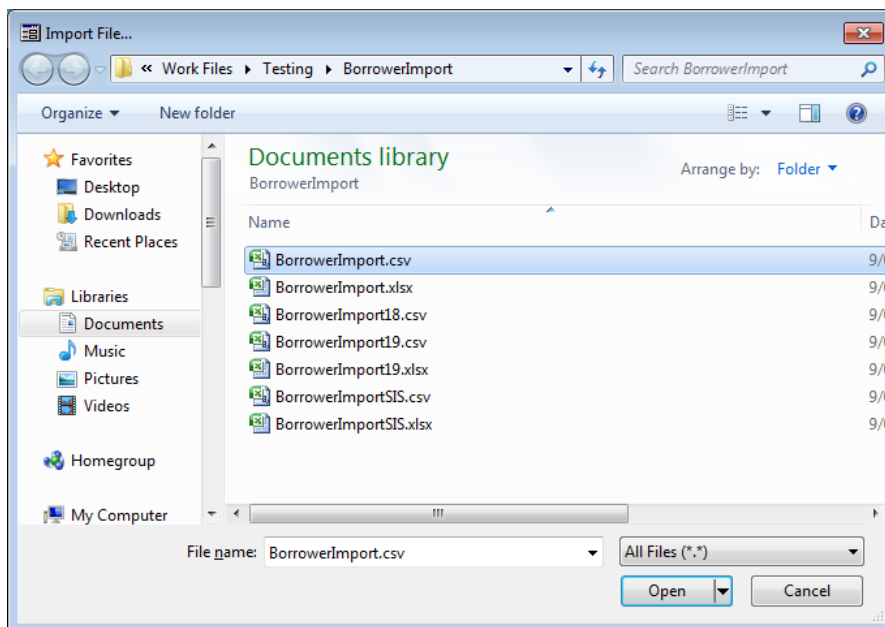
# Amlib Introductory Training

## Importing Into Amlib

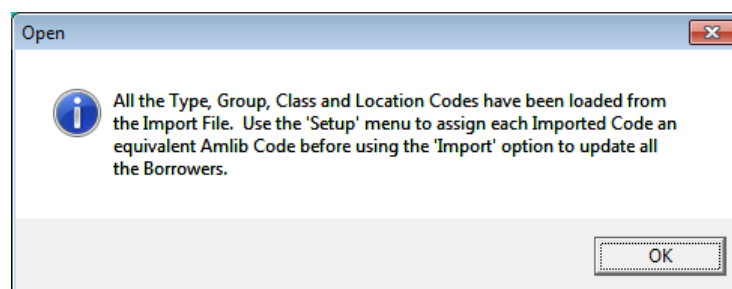
1. Launch the *Amlib* client
2. Go to **Main > Borrowers > BorrowerImport** – the Borrower Import screen will display:



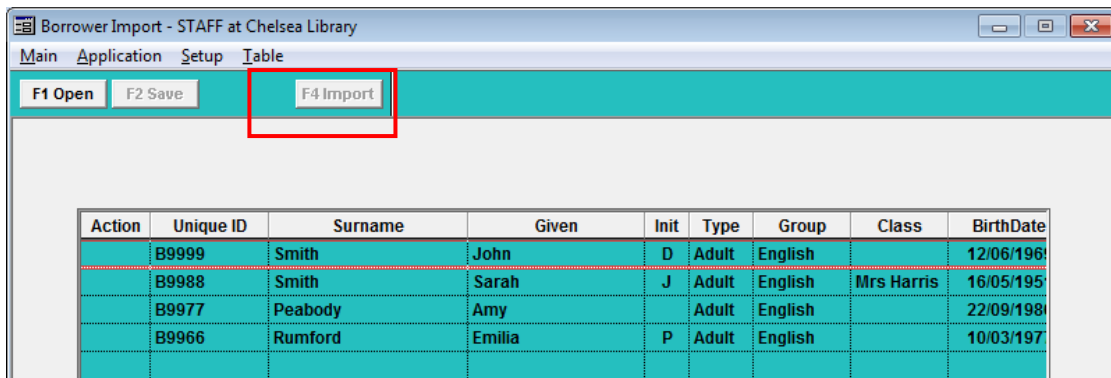
3. Select the **F1 Open** button – the Import File... screen will display:



4. **Browse** to file to be uploaded, select (highlight) it and select on the **Open** button
5. Your data will appear in the Borrower Import screen and a prompt will display with the following message: **All the Type, Group, Class and Location Codes have been loaded from the Import File. Use the 'Setup' menu to assign each Imported Code an equivalent Amlib Code before using the 'Import' option to update all the Borrowers.**

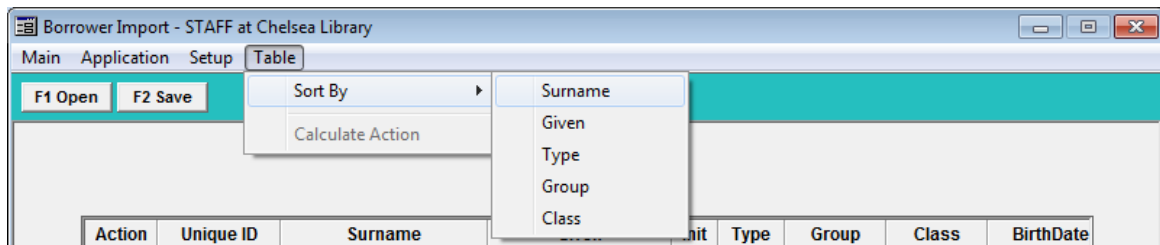


# Amlib Introductory Training

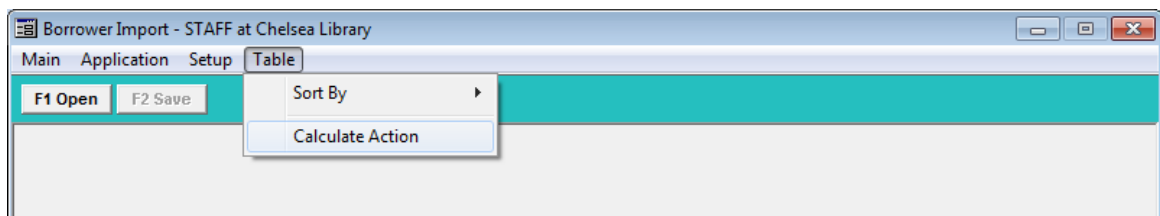


The data read from the Borrower Import File can be sorted or have the actions calculated prior to importing the data into *Amlib*.

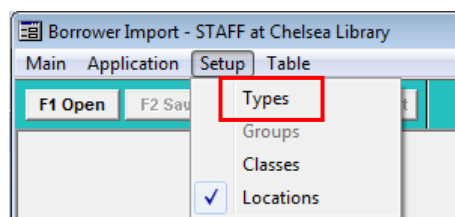
6. To sort: From the menu, select **Sort By** > and select the sort field – the data can be sorted by **Surname, Given name, Borrower Type, Group or Class**.



7. The calculate action option (**Table > Calculate Action**) will read the import data and state whether each student import will be **UPDATED**, **NEW** or a **DUPLICATED** student record



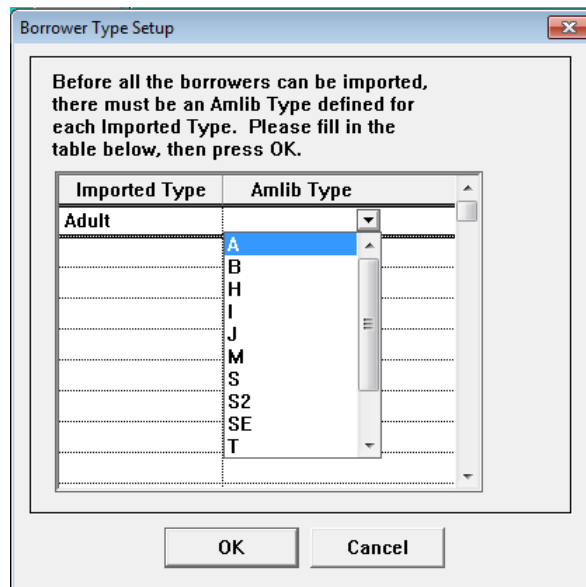
8. If the **F4 Import** button is *greyed* out, it indicates the mapping between the imported codes needs to be setup (or adjusted) to match the codes used within *Amlib*. If it's bolded, the skip ahead to step 13
9. From the menu, select **Setup** and then select one of the following Borrower fields: **Types, Groups, Classes or Locations** – in the example below, we have selected **Types**:



**Please Note:** If a selection is *greyed* out, this indicates there are no codes requiring mapping for that field. Once a field has been successfully mapped a **bolded tick** will appear at the front of the selection.

## Amlib Introductory Training

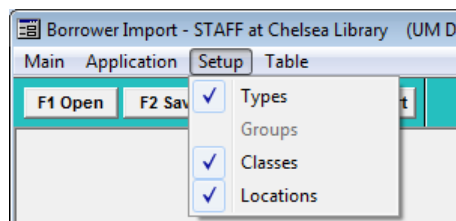
10. A **Setup** screen will display with two columns: The **Imported Type** and the **Amlib Type**. The **Imported Type** will be the data located in your **Borrower Type** column (Field 6/CSV column F) of your import file. The **Amlib Type** will be the codes located in the **Main > Borrowers > BorrowerTypes** screen.



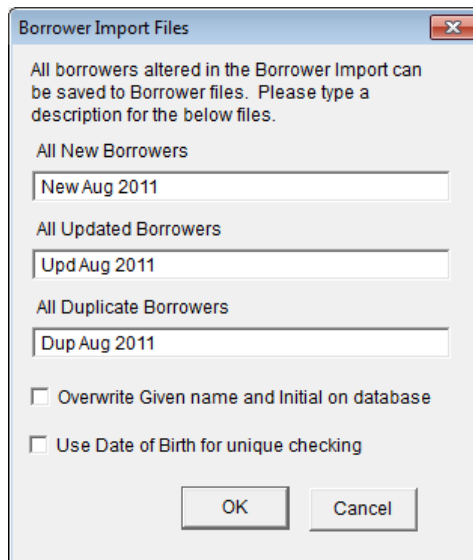
11. For each **Imported Type**, use the **Amlib Type** drop-down to select a **Borrower Type** you would like to match (map) it against

**Please Note:** It is possible to map more than one **Imported Type** to the same **Amlib Type**.

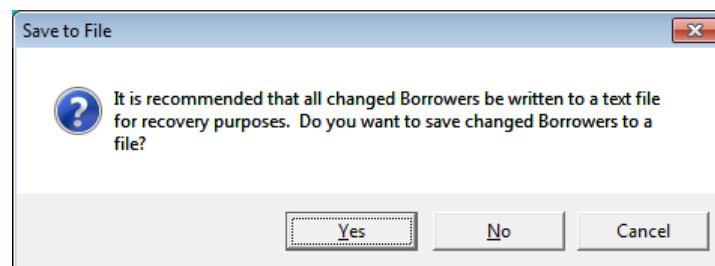
12. You will need to do this for all the **bolded** selections in the **Setup** menu – when you have finished all the fields, they will all have a **bolded tick** next to them and the **F4 Import** button will then be active (**bolded**):



13. Select the **F4 Import** button – the **Borrower Import Files** screen will display – this screen allows you to create files to save **New**, **Updated** and **Duplicate** borrowers to. It also allows you to **Overwrite Given name(s) and initial(s)** and to **Use (their) Date of Birth for unique checking**.

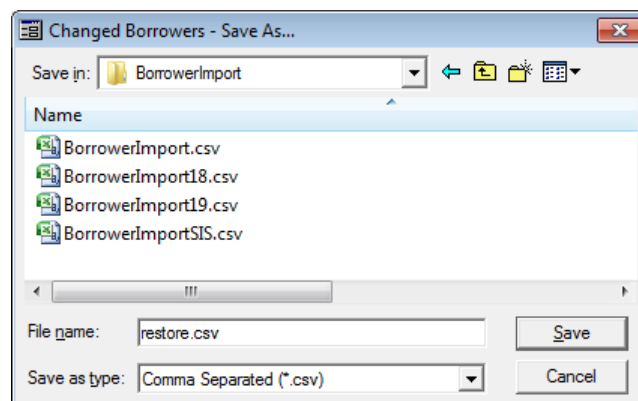


14. Type in the filenames, and **tick** the settings you would like to use, then select the **OK** button – a prompt will display asking if you wish to save any changed borrowers to a file for recovery purposes: **It is recommended that all changed Borrowers be written to a text file for recovery purposes. Do you want to save changed Borrowers to a file?**



**WARNING! This is your insurance for your borrower data and is thoroughly recommended!!**

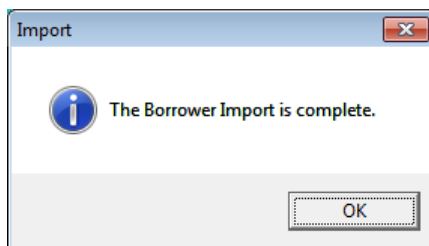
15. If you select the **Yes** button, a dialog box will display so that you can choose the file name for your original data and where to save it



**Please Note:** In subsequent downloads, the **restore.txt** or **restore.csv** file will already exist and a message will display asking if you wish to overwrite this file. You would normally respond **Yes** to overwrite the file.

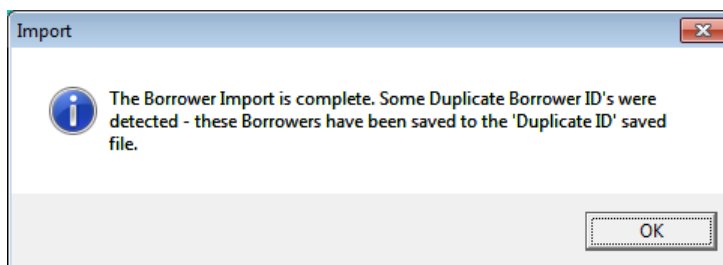
# Amlib Introductory Training

16. Once complete, a prompt will display notifying you that: **The Borrower Import is complete.**



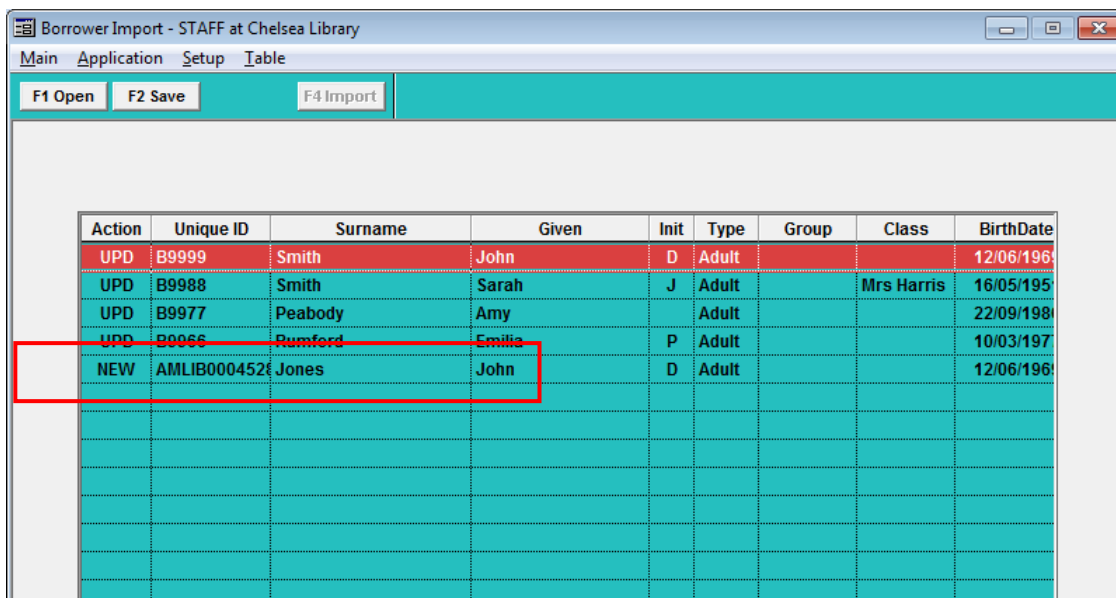
**Please Note:** The import process can take several minutes (for example: 1-3 seconds per borrower). The status of the import displays at the bottom of the screen.

17. If borrowers with duplicate Borrower IDs are imported, then you will receive notification of this as part of the completion notice: **The Borrower Import is complete. Some Duplicate Borrower ID's were detected – these Borrowers have been saved to the 'Duplicate ID' saved file.**



## File Checking

1. An **Amlib Unique ID (BarCode)** was created for the borrower who had the same ID as someone else (**AMLIB0000...**):



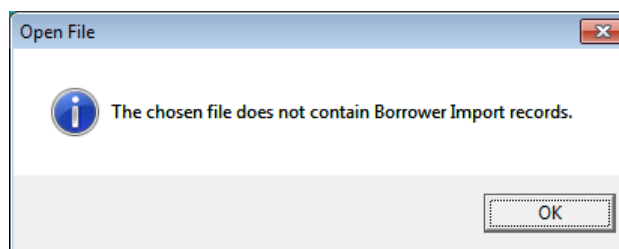
Action	Unique ID	Surname	Given	Init	Type	Group	Class	BirthDate
UPD	B9999	Smith	John	D	Adult			12/06/196
UPD	B9988	Smith	Sarah	J	Adult		Mrs Harris	16/05/195
UPD	B9977	Peabody	Amy		Adult			22/09/198
UPD	B0066	Rumford	Emilia	P	Adult			10/03/197
NEW	AMLIB000452	Jones	John	D	Adult			12/06/196

2. If you go into the main *Borrower* screen (**Main > Borrowers > Borrower**) and go to **File > DisplayFile** you will see your three files for new, updated and duplicate borrowers, and a file for any duplicate IDs if your import had any

Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
Dup Aug 2011	Y	1	09/08/2011 8:56:50 PM	3187
New Aug 2011	Y	1	09/08/2011 8:56:50 PM	3185
Upd Aug 2011	Y	4	09/08/2011 8:56:50 PM	3186
Matched Pictures 2011	Y	2	08/08/2011 9:38:46 PM	3155

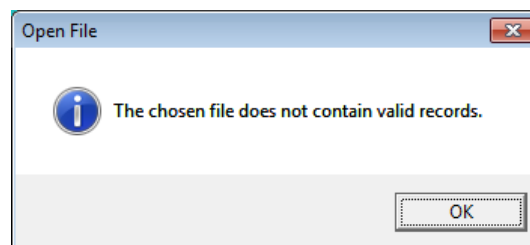
## Common Errors

- **The chosen file does not contain Borrower Import records.**



This could be caused by either having the information in the correct columns or having headings across the top of your document. Remove any headings and double check your file against the Import formats in this document.

- **The chosen file does not contain valid records.**



This could be caused by having headings across the top of your import file or it being saved in an incorrect format (for example: **.xlsx** and not **.csv**). Please remove any headings, ensuring that it only contains Borrower information and make sure it is in one of the three formats mentioned at the beginning of this document.

**Please Note:** It is always a good idea to run a Borrower Import on your test databases first, to ensure no errors happen. If you do not have a test databases, please contact Support via one of the above methods to find out how to set one up.

## Borrower Import Matching

The following explains the exact method in which *Amlib* matches on borrower imported records:

1. Uses the *Unique ID* to **match** on Borrower BarCode
2. If **no matches**, then uses the *Unique ID* to **match** on Borrower Ref2



3. If a *Preferred Name* has been Supplied:
  - Matches on **Surname** and **Preferred** EXACTLY
4. If 2, *matches* on **Surname** and **Preferred** EXACTLY
5. If *Date-of-Birth* Supplied:
  - Searches on **Surname, Preferred** and **Date-of-Birth**
6. If *no matches* and an **Initial** has been supplied:
  - Matches on **Surname, Preferred** and **Initial**
7. If *no matches* and an **Initial** has NOT been supplied:
  - Matches on **Surname, Preferred** and NULL **Initial**
8. If *no Date-of-Birth* Supplied:
9. If *no matches* and an **Initial** has been supplied
  - Matches on **Surname, Preferred** and **Initial**
10. If *no matches* and an **Initial** has NOT been supplied
  - Matches on **Surname, Preferred** and NULL **Initial**
11. If *no matches* on **Surname** and **Preferred** EXACTLY
  - Searches on **Surname** EXACTLY and LIKE **Preferred** (for example: Preferred%)
12. If *no matches*, then *matches* on **Surname** and **Given** EXACTLY
13. If 2, *matches* on **Surname** and **Given** EXACTLY
14. If *Date-of-Birth* Supplied:
  - Searches on **Surname, Given** and **Date-of-Birth**
15. If *no matches* and an **Initial** has been supplied:
  - Matches on **Surname, Given** and **Initial**
16. If *no matches* and an **Initial** has NOT been supplied
  - Matches on **Surname, Given** and NULL **Initial**
17. If *no Date-of-Birth* Supplied:
18. If *no matches* and an **Initial** has been supplied:
  - Matches on **Surname, Given** and **Initial**
19. If no matches and an **Initial** has NOT been supplied:
  - Matches on **Surname, Given** and NULL **Initial**
20. If no matches on **Surname** and **Given** EXACTLY
  - Searches on **Surname** EXACTLY and LIKE **Given** (for example: Given Name)

### Appendix 5: Stockitem Field Labels

Some Stockitems (particularly equipment) do not conform to the standardised labels in use by the system. However, it is possible to modify the labels displayed for a particular Form type.

# Amlib Introductory Training

**Please Note:** The default Stockitem Form type used throughout the system (including the blank Stockitem screen) is set in **Main > Supervisor > Installation – Stockitem** tab: Default Item Form = for example: **BK**.

1. Launch the *Amlib* client
2. Go to **Main > StockItems > StockitemForms** – the Form Codes table will display:

Form	Description	Allow Loan	Floating ?	Cat Def Defined
CI	Community Information	N	N	N
CR	CD ROMs	N	N	N
DVI	Digital Video	N	N	N
EBK	Ebooks	Y	N	N
<b>EQ</b>	<b>Equipment</b>	<b>Y</b>	<b>N</b>	<b>N</b>
LH	Local History	N	N	N

3. Highlight a Form – for example: **EQ** and select the **F9 Display** button – the Stock Display Tags screen will display:

Line	Label	Tags to Display
Line 1	Title	245
Line 2	Author	100 110 700
Line 3	Publisher	260
Line 4	Series/ISBN	490 830 440 020
Line 5	Subject	650 651 600
Line 6	Call Number	082 089 099 984

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

Edition   Volume   Price   Form

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

Tag	Description
000	Leader information
001	Control number
008	Fixed Length Data Elements
010	LC Control Number
020	ISBN
022	ISSN

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4. Adjust as per the following example:

- Line 1: Label = **Equipment** | Tags to Display = **245**
- Line 2: Label = **Model No** | Tags to Display = **300**
- Line 3: Label = **Manufacturer** | Tags to Display = **260 710**
- Line 4: Label = **Description** | Tags to Display = **500**
- Line 5: Label = **Subject** | Tags to Display = **650 651 600**
- Line 6: Label = **Call Number** | Tags to Display = **984 082**

**Please Note:** Tags to display should type in order of preference (the first tag containing a value will then display).

5. Select on the **F3 Save** button when complete
6. To refresh the data displayed for a particular stockitem, select **Item > RefreshFromCat**
7. Select the **F3 Update** button to save changes

## Appendix 6: Setting Default Dates and Holidays

# Amlib Introductory Training

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

## Supervisor Settings

### Default

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

Description	Value
Adjust the date due by ### minutes for overnight hourly loans	2
All items must be returned by the following date:	19/12/2011
All Semester loans are due back on the following date:	12/12/2011
All Term loans are due back on the following date:	12/12/2011
All Year loans are due back on the following date:	12/12/2011
Allow hourly loans to be issued overnight (Y/N)	Y
Are there different closed days depending upon the location (Y/N)	Y
Are there different loan parameters for each location (Y/N/G)	N
Automatically answer Y to Fines on Chute Returns	N
Automatically answer Y to Fines on Normal Returns	N
Calculate all fines from the grace (Y) or overdue (N) date	N
Calculate renewal date from due date (Y/N)	N
Check (B)orrower or (I)tem for fines and charges	B
Claims returned process code	
Days of week where ALL locations are closed (0=Sun, ..., 6=Sat)	06

4. Adjust the following settings:
  - a. All items must be returned by the following date:
  - b. All Semester loans are due back on the following date:
  - c. All Term loans are due back on the following date:
  - d. All Year loans are due back on the following date:
5. Dates must be entered in **DD/MM/YYYY** format – for example: **15/12/2011**
6. Select the **F3 Save** button
7. Exit and restart the *Amlib* client for the new settings to take effect

# Amlib Introductory Training

## Location

It is also possible to adjust these settings by individual Location, allowing for a different set of dates to be entered. It is very important to check your other locations to make sure that old dates are not saved in there.

1. From the *Supervisor* Module Installation screen: from the menu, select **Installation > Choose Location** – the Installation location screen will display
2. Select a location (for example: **Chelsea Library**) and select the **OK** button
3. The Installation screen for that location will then display – for example: **Chelsea Library**
4. Select the **Circulation** tab

Description	Value
Adjust the date due by ### minutes for overnight hourly loans	
All items must be returned by the following date:	
All Semester loans are due back on the following date:	
All Term loans are due back on the following date:	
All Year loans are due back on the following date:	
Allow hourly loans to be issued overnight (Y/N)	
Automatically answer Y to Fines on Chute Returns	
Automatically answer Y to Fines on Normal Returns	
Calculate all fines from the grace (Y) or overdue (N) date	
Calculate renewal date from due date (Y/N)	

5. If you would like to use the DEFAULT settings, then you can leave the date settings in this table blank, otherwise adjust the following settings (these settings will apply only to that location):
  - a. All items must be returned by the following date:
  - b. All Semester loans are due back on the following date:
  - c. All Term loans are due back on the following date:
  - d. All Year loans are due back on the following date:
6. Dates must be entered in **DD/MM/YYYY** format – for example: **15/12/2011**
7. Select the **F3 Save** button when complete
8. Repeat for all other circulating locations (including WEB – the location used by the *NetOpacs*)
9. Exit and restart the *Amlib* client for the new settings to take effect

# Amlib Introductory Training

## Borrower Settings

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

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

Note: The 'From' and 'To' ages include years & months.  
ie. 5 to 14 means 5 years 0 months to under 15 years .

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

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

# Amlib Introductory Training

## 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

Description	Value
Check (B)orrower or (I)tem for fines and charges	B
Claims returned process code	
Days of week where ALL locations are closed (0=Sun, ..., 6=Sat)	06
Debt Collection Borrower Status	DC
Default Booking Increment	
Display a confirmation message of Credit (Y/N)	Y
Display Chute Returns on the Main Menu instead of Returns	N
Display the borrower's image in Circulation screens (Y/N)	Y
Fines for an item cannot exceed the price of the item	N
Give a Message when an Interlibrary Loan is Returned	Y
Hide the Message ITEM BELONGS AT LOCATION XX in Returns	N
If a borrower owes money go straight to collect on Issue window	N
If a Borrower owes money go straight to collect on Returns window	N
If set to Y allows an Issue return date > than the specified ILL Return date	N
If Set to Y allows renewals to be due after the ILL Return date	N

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. Select the **F3 Save** button when complete
6. Exit and restart the *Amlib* client for the new settings to take effect

# Amlib Introductory Training

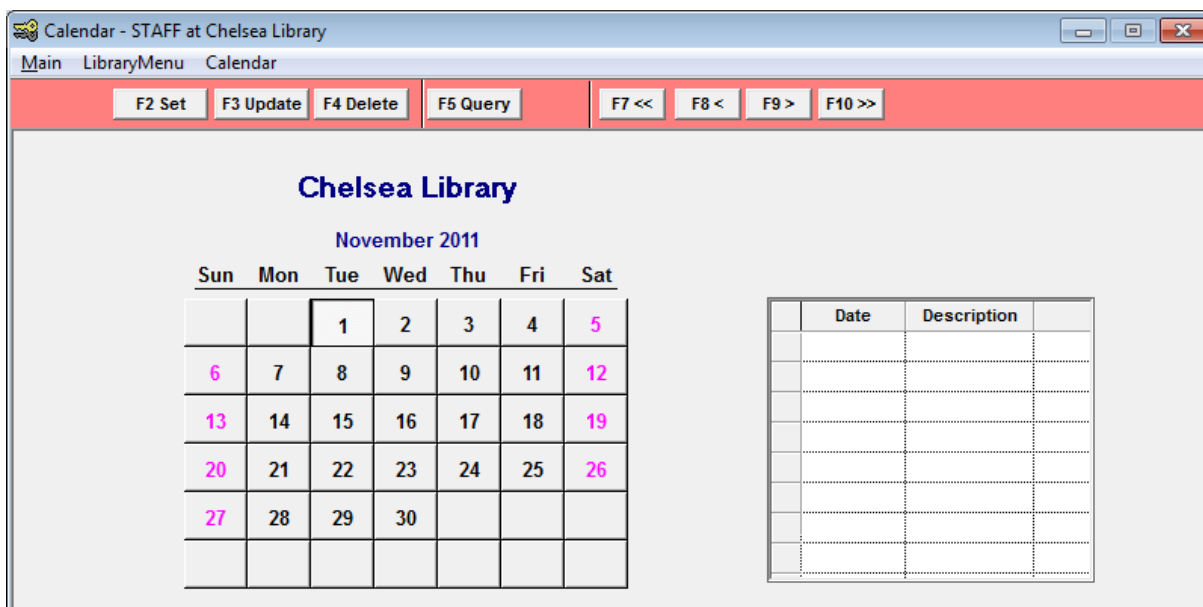
## Holidays

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

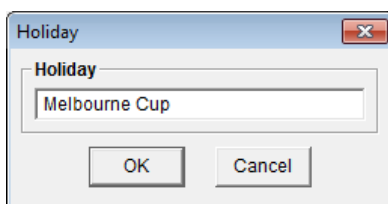
When an item is issued, the program will ensure that it the item is not due for return on closed dates. Reservations will not be due for collection on closed dates. Dates may be entered as far in advance as desired.

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:



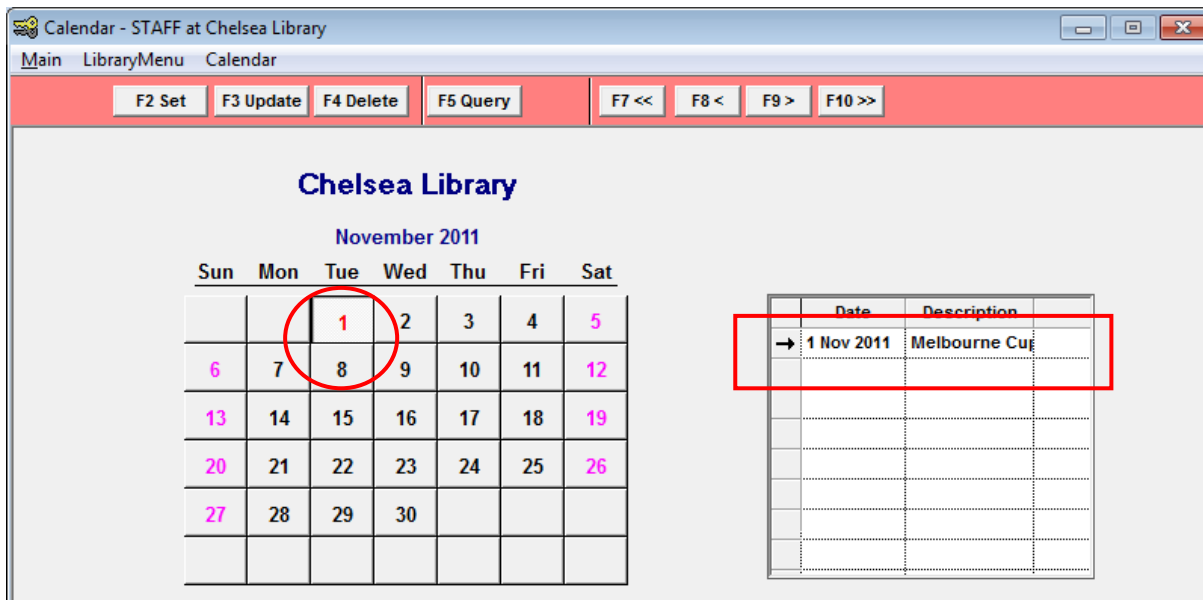
4. Select a date with your mouse – for example: **1 November 2011**
5. Select the **F2 Set** button – the Holiday prompt will display:



- Type in a suitable description in the dialogue box – for example **Melbourne Cup** or **Term Break**
  - Select 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:



# Amlib Introductory Training



7. Once the dates have been set, select 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:

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

## Remove a Closed Date

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

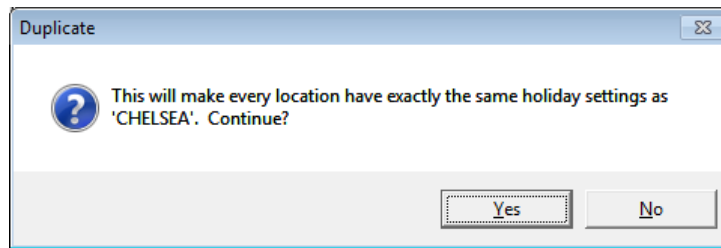
## Copy a Closed Date to Other Locations

Closed dates in Calendar can be copied to other Locations.

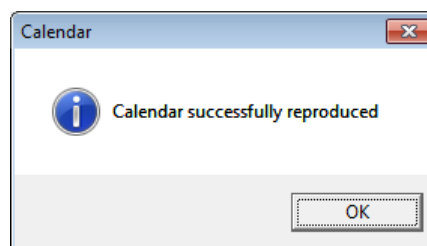
# Amlib Introductory Training

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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. Select 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. Select 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 select the **OK** button
3. The set the closed dates for this Location
4. Select the **F3 Update** button when complete
5. Exit and restart the *Amlib* client for the new settings to take effect

## Appendix 7: USMARC: Some Common Tags

MARC is an acronym for **MA**chine **R**eadable **C**atalogue (record). USMARC was developed by the Library of Congress and was formerly named LC MARC. It is now the international standard for cataloguing). Each record is written in a format that can easily be read, retrieved and manipulated by a computer).

Each Marc record can consist of:

### Tags

Each data field (for example: Place Published) is identified by a 3-digit number (replacing descriptors for reasons of accuracy, efficiency in computer transfer and storage of bibliographic data.) As MARC is written in a format for computers rather than people, *Amlib* has descriptions of each tag showing when tags are inserted. The Worksheet cataloguing screen also has labels at the top of the columns to indicate what type of data input is required.

### Subfields

A lower-case letter or occasionally a number identifies each Subfield. In general, if you are using a tag, it **MUST** contain a Subfield a. Publication data is an exception to this rule.

### **Indicators (usually the computer system sorts these out for us – we do not usually have to enter data in these columns!)**

Each indicator is identified by a number between 0 to 9 (letters can be used but are not common). The numbers often are an indication as to how to “treat” text or categorise a tag. For example, the 2<sup>nd</sup> indicator for title indicates the number of non-filing characters to ignore, including spaces. In the 245 tag below, the 2<sup>nd</sup> indicator shows 4, to ignore The\_ so that filing begins with the letter Q in Quasar. The first indicator in the 600 Personal Name Subject Heading entry indicates the type of entry (for example: 1 Surname, 3 Family name). Therefore, most would have a 1 as the first indicator.

### Tag “Families”

<b>000s</b>	Control fields, number & codes
<b>100s</b>	Main entries – usually author
<b>200s</b>	Title and Title related fields
<b>300s</b>	Physical description
<b>400s</b>	Series related fields
<b>500s</b>	Notes
<b>600s</b>	Subject related fields
<b>700s</b>	Other added entries – tracings. Included added authors etc.
<b>800s</b>	Series added entries
<b>900s</b>	Locally defined entries. For example, holdings information so used in conversions

## More Common Marc Tags

- **010:** LCCN Library of Congress Control Number
- **020:** ISBN
- **022:** ISSN
- **050:** LC classification number
- **082:** DC classification number
- **100:** Author main entry
- **110:** Corporate main entry
- **111:** Conference main entry
- **130:** Uniform title as a main entry, e.g., Bible
- **240:** Uniform title after 1XX main entry, e.g. Symphony ...
- **245:** Title proper
- **246:** Title added entry e.g., a distinctive subtitle
- **250:** Edition
- **260:** Place, Publisher, Year.
- **300:** Physical Description (may include specific material designation, e.g. [videorecording])
- **440:** Series
- **490:** Series Statement
- **500:** General notes
- **502:** Thesis note
- **504:** Bibliography note
- **505:** Contents note.
- **508:** Production/credits
- **511:** Participants note, e.g., performers, speakers at a conference
- **518:** Date and place, e.g., of a performance or conference
- **520:** Summary (Most often used with AV material)
- **525:** Supplements
- **546:** Language of text
- **600:** Person as a subject
- **610:** Corporate body as a subject
- **611:** Corporate body as subject
- **630:** Title as a subject
- **655:** Genre, e.g., Feature film
- **700:** Person as an added entry
- **710:** Corporate body as an added entry
- **711:** Conference as an added entry
- **730:** Uniform title as an added entry
- **856:** URL

COMMON TAGS	INDICATORS		SUBFIELDS				
	1	2	Many of these Subfields will never be used. In most cases a tag MUST have a Subfield a.				
<b>020</b> <b>ISBN</b>	0	0	<b>a</b> ISBN	<b>z</b> Erroneous Number (or cancelled)	<b>b</b> Qualification		
			<b>0732248493</b>	<b>0397318487</b>	<b>(pbk)</b>		
<b>022</b> <b>ISSN</b>  (Periodicals often have an ISSN)			<b>a</b> ISSN				
			<b>1077-7199</b>				
<b>082</b> <b>Dewey No.</b>  Used by SCIS	0	0	<b>a</b> Base Number	<b>b</b> Item Note			
			<b>523.8</b>	<b>SMI</b>			
<b>099</b> <b>Call No.</b>  Used by SLoFWA	0	0	<b>f</b> Prefix	<b>a</b> Base No.	<b>b</b> Author Prefix		
			<b>Q</b>	<b>591.994</b>	<b>SMI</b>		
<b>100</b> <b>Personal name added entry</b> <b>(usually main author)</b>	0	0	<b>a</b> Entry	<b>q</b> Qualifier (Full name)	<b>b</b> Roman numeral	<b>d</b> Dates	<b>c</b> Qualifier
			<b>Asimov, Isaac L</b>	<b>(Isaac Leo)</b>	<b>XV</b>	<b>1920-</b>	<b>Dr</b>

## Amlib Introductory Manual

<b>245 Main Title</b>	0	4	<b>a</b> Title proper	<b>b</b> Other title information  (remainder)	<b>h</b> General material	<b>l</b> Parallel Title	<b>c</b> First Statement	<b>n</b> Volume Number	<b>p</b> Volume Title	<b>f</b> Second Statement
			<b>The Quasars, pulsars, and black holes of space</b>	<b>a study</b>	<b>[sound recording]</b>	<b>Canto por las palams</b>	<b>Isaac Asimov</b>	<b>Book 4</b>	<b>Taxonomy</b>	<b>Pictures by El Stymes</b>
<b>260 Publication information</b>	0	0	<b>a</b> Place of Publication or Distribution	<b>b</b> Name of publisher/distributor	<b>c</b> Date of Publication					
			<b>Sydney :</b>	<b>Collins,</b>	<b>1988.</b>					
<b>300 Physical description</b>	0	0	<b>a</b> Pagination and/or volumes	<b>b</b> Illustration Statement	<b>c</b> Size	<b>e</b> Other material				
			<b>38p.</b>	<b>Ill. (col.), maps</b>	<b>13cm.</b>	<b>1 study guide</b>				
<b>490 Series Statement</b>	0	0	<b>a</b> Series Title	<b>v</b> Volume						
			<b>Isaac Asimov's library of the Universe</b>	<b>No.34</b>						
<b>500 General Notes</b>	0	0	<b>a</b> General Note							
			<b>Includes glossary</b>							

# Amlib Introductory Manual

<b>520</b> Summary	0	0	<b>a</b> Summary Notes							
			<b>Contains information on several of marine life. Keywords: fish, anemones, octopus, crayfish</b>							
<b>600</b> Subject Heading (Personal name)	1	0	<b>a</b> Entry element	<b>q</b> Qualifier (full name)	<b>t</b> Title of a work	<b>c</b> Qualifier – Titles ass.	<b>d</b> Dates	<b>x</b> Subjects	<b>y</b> Period	<b>z</b> Place
			<b>Leakey, L.S.B.</b>	<b>(Louis Seymour Bazett)</b>	<b>Sea songs</b>	<b>King of France</b>	<b>1903-1972</b>	<b>Drama</b>	<b>To 1970</b>	<b>United States</b>
<b>650</b> Subject Heading (Topical)			<b>a</b> Entry Element	<b>x</b> Subject or form subdivision	<b>y</b> Period Subdivision	<b>z</b> Place Subdivision				
			<b>Astronomy</b>	<b>Fiction</b>	<b>19<sup>th</sup> Century</b>	<b>Western Australia</b>				
<b>651</b> Subject Heading (Geographical)			<b>a</b> Entry Element	<b>x</b> Subject or Form subdivision	<b>y</b> Period Subdivision	<b>z</b> Place Subdivision				
			<b>Australia</b>	<b>History</b>	<b>1800-1899</b>	<b>Kimberley</b>				
<b>700</b> Personal Name (added entry) Usually other authors			<b>a</b> Entry	<b>c</b> Additions to name	<b>q</b> Fuller form	<b>d</b> Dates	<b>t</b> Title element			

## Amlib Introductory Manual

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			<b>Kick, M. A.</b>	<b>Dr</b>	<b>(Marion Anne)</b>	<b>1901-1975-</b>	<b>Works</b>
<b>856</b> <b>Electronic location and access</b>			<b>u</b> Uniform Resource Locator (URL)	<b>z</b> Descriptor (Link Text)			
			<b>http://amlib.net.au</b>	<b>Select here to link to web site</b>			

There are literally hundreds of MARC tags that can be used. However only about 10% of these are used commonly.

A useful MARC resource:

- Library of Congress Home Page: <http://www.loc.gov/marc/umb/> and <http://www.loc.gov/marc>



## Appendix 8: Support

We recognise that Customer Support Services are just as important as the product itself. That's why we offer the *Amlib* Software Support Agreement.

Services provided to Customers with current Support and Maintenance Agreements include:

- Online Support (via Email and *OCLC Online Help Desk*)
- Telephone Support
- Regular Software Updates (including Enhancements and New Features)
- Remote Access / Diagnostics (via the internet)

### Online Help Desk (TOPdesk)

New requests for *Amlib Support* may be logged through the *OCLC Online Help Desk*. You may also use the helpdesk to review and track existing *Amlib Support* incidents for your library.

The *OCLC Online Help Desk* is available at:

- <https://servicedesk.oclc.org/tas/public/index.jsp>

We ask that queries be logged via the *Online Help Desk* refer to [Appendix 9: Submit a TOPdesk Request](#) for further information on how raise or check calls on TOPdesk. Any **URGENT** or **CRITICAL** requests requiring immediate assistance can be logged by phone to ensure priority service -

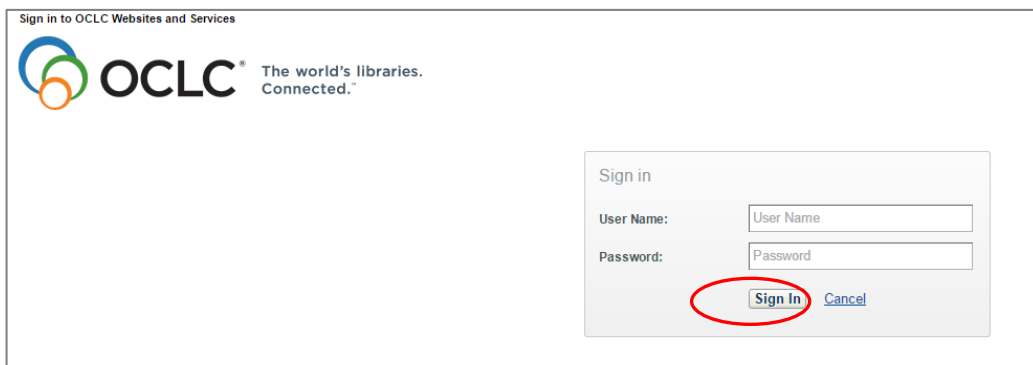
You will be provided with a login and password for accessing the *Online Help Desk*. Additional logins can be provided as required for other staff at your library.

### OCLC Website


OCLC's Support and Training website contains help documentation, training manuals, updates and patches, training information, and user group meeting information for our products.

Each person will have their own login to the OCLC Support and Training website. If you do not know your login to the website, please log a TOPdesk call requesting this information.

1. Navigate to <https://www.oclc.org/support/services/amlib.en.html> Select on the **SIGN IN** link



Sign in to OCLC Websites and Services

 **OCLC**® The world's libraries. Connected.™

Sign in

User Name:

Password:

2. Enter your username and password and select **Sign in**.

## Updates

New releases and updates to *Amlib* software are available to download free of charge to licensed users. Notification of any new releases and updates is posted on the OCLC website and email notification is also sent out via the *Amlib* mailing lists.

Software and documentation are available for download from the *OCLC Website*.

## Mailing List

Notifications of updates and enhancements to *Amlib* are also sent out to all *Amlib* mailing lists.

- Contact us at [support-amlib@oclc.org](mailto:support-amlib@oclc.org) to confirm that you and other interested staff at your library are subscribed to these mailing lists

## User Groups

There are *Amlib User Groups* Australia wide. For example, there are two User Groups in Western Australia – a *School User Group* and a *Public User Group*. These meet approximately three to four times a year.

**Please Note:** Many notices about Upgrades and User Groups are sent via the mailing list. Please notify us of your current Email address.

## Getting Help/Manuals

Help is available from the online manual. This can be accessed from any application screen by selecting **Ctrl + H** on your keyboard. The online manual uses an internet browser to display. It is also possible to add the manual chapters to your Favourites or Bookmarks in your browser.

## Email (Amlib Support)

- [support-amlib@oclc.org](mailto:support-amlib@oclc.org)

## Amlib Website

- <https://www.oclc.org/support/services/amlib.en.html>

## Telephone Support (Amlib Support)

- **1300 260 795** (Local call cost within Australia)

## Appendix 9: Submit a TOPdesk Request

### Login to TopDesk

1. From your Internet browser go to:  
<https://oclc.topdesk.net/tas/public/login/form>
2. Enter your Username & Password, and select the **Login** button (remember these are case sensitive)




### Create a New Incident

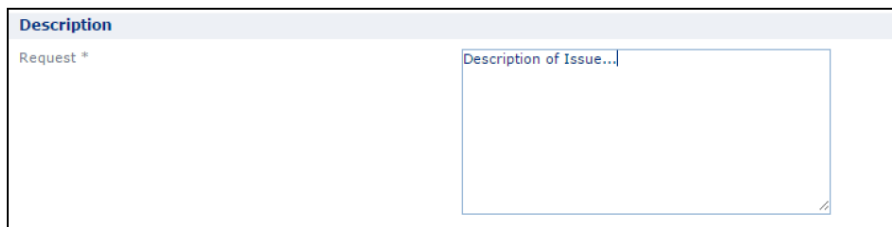
1. Once logged into TOPdesk, select the '**New Incident**' button



2. Specify the Incident Type from the drop down box for example: Support question



3. Enter details of your Issue/Request into the Request area

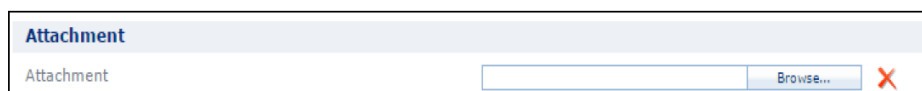


4. Once all the details have been filled, select **Register** button





5. Documents/Screenshots can be attached AFTER registering a new incident, once a new Incident is created. On the Home screen of TOPdesk, select the Incident number to which the document/screenshot is to be attached

6. To upload supporting documents/screenshot (optional) in the Attachment area:




\* Click on the Browse button and the Open window will appear navigate to the Document/Screenshot and click the Open button

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7. Select the **Edit** button to place a message into the Feedback area to inform Support Staff that files have been attached for example: *See attached files as requested* 
1. Once you have added your message, select the Save button 

## Replying/Adding to Incidents

If you need to reply to an email Support Staff have sent to you or add further information to an incident– please log into TOPdesk and place your reply into the Feedback area


1. Log into TOPdesk
2. On the Home screen of TOPdesk select the Incident number you wish to reply to or add information to
3. Select the **Edit** button to place a reply or add to an incident 

### Last logged Incidents

> [Please send updated stocktake manual ... \(I12071252\)](#)

4. Add your reply or additional information into the Feedback area



5. Once you have added your reply or additional information, select the **Save**  button

## Finding an Existing Incident Using Quick Finder

If you want to quickly find existing Incident to reply to, or see the status or actions taken, this can be done through TOPdesk Quick Finder. Use the incident number that that is usually in the Subject of emails Support Staff sent to you for example: RE: Regarding incident **I12071252**; Example School.

1. Log into TOPdesk
2. On the Home screen of TOPdesk, on the right side of the screen type in the Incident number in the Search box
3. Select the Search icon button, the incident will display

