

# **Amlib Release Notes**

**Version 5.3**

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# Amlib Release Notes - Version 5.3

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





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## Summary of New Features in Release 5.3

<p><b>General</b></p> 	<p><i>Version 5.3</i> – changes mainly to support new modules available:</p> <ul style="list-style-type: none"> <li>• <i>Debt Collection</i> (needs extra license)</li> <li>• VDX Integration</li> </ul>
<p><b>Amlib Backup Manager</b></p>	<ul style="list-style-type: none"> <li>• Changes to Backup Manager interface to reduce the size of the Form and allow it to fit on to screens with smaller resolutions.</li> <li>• Used in relation to <i>SQL Express</i> editions of <i>SQL Server</i></li> </ul>
<p><b>Authority</b></p> 	<ul style="list-style-type: none"> <li>• No changes to this module</li> </ul>
<p><b>Borrower</b></p> 	<ul style="list-style-type: none"> <li>• Substantial changes to Borrower Financials</li> <li>• All new Financials added using a <b>New Charge</b> button</li> <li>• <b>WAIVE</b> button available in Single as well as Double-Entry Accounting</li> </ul>
<p><b>Catalogue</b></p> 	<ul style="list-style-type: none"> <li>• Allow Non-Authority subfield data (only in mixed tags) when creating catalogue records through worksheet</li> <li>• Fixed an issue that caused <b>008</b> tags to be updated incorrectly when editing them via the <b>008</b> screen</li> <li>• When inserting a new non-authority tag into a catalogue record, a blank space is no longer inserted into the subfield editing table</li> </ul>
<p><b>Circulation</b></p> 	<ul style="list-style-type: none"> <li>• Calculate fines correctly in relation to closed days and grace periods</li> </ul>
<p><b>Debt Collection Module</b></p>	<p>New module available to use with Double-Entry accounting. Separate licensing necessary. Contact <i>Amlib Sales</i> for a quote.</p> <p><i>Separate notes are available in the <b>Amlib/Help</b> folder for Installation and User Guide</i></p>
<p><b>Finance and Orders</b></p> 	<p>Circ Finance:</p> <ul style="list-style-type: none"> <li>• <b>Insert</b>, <b>Save</b> and <b>Delete</b> buttons removed for Single and Double-Entry Accounting</li> <li>• System-generated Financial Types incorporated that cannot be deleted</li> </ul>

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<p><b>NetOpacs</b></p> 	<ul style="list-style-type: none"> <li>• Financial Changes</li> <li>• Improvements to subject interest selection</li> <li>• Changes to renewal of items</li> </ul>
<p><b>Periodicals</b></p> 	<ul style="list-style-type: none"> <li>• No change</li> </ul>
<p><b>Reports</b></p> 	<ul style="list-style-type: none"> <li>• Small changes to <u>Financial Reports</u> made for use in the <u>Borrower Financial</u> screen</li> <li>• Fixed an issue that occurred when using the email attachment facility (for example: for SMS reports) which then caused any subsequent print to file reports to be sent as attachments.</li> </ul>
<p><b>Stockitem</b></p> 	<ul style="list-style-type: none"> <li>• <i>Reserve Allocate</i> will now sort reservations based on Date</li> <li>• <i>Reserve Shuffle</i> returns in Stockitem Item menu</li> <li>• Stock Keyword facility (<b>Ctrl - K</b>) applies the <i>On Loan</i>, <i>On Order</i> and <i>On Reserve</i> filters correctly</li> </ul>
<p><b>Supervisor</b></p> 	<ul style="list-style-type: none"> <li>• New installation parameters</li> <li>• Usernames – New button security for Debt Collection Manager</li> </ul>
<p><b>VDX Integration</b></p>	<p>Allows VDX to communicate with <i>Amlib</i> via the NCIP protocol. Messages include:</p> <ul style="list-style-type: none"> <li>• Request items – <i>Amlib</i> then determines whether the requested reservation is allowed and creates the reservation if allowed</li> <li>• Cancel Request – <i>Amlib</i> deletes the reservation</li> <li>• Issuing items – <i>Amlib</i> issues an item</li> <li>• Renewal of items – <i>Amlib</i> determines whether the requested renewal is allowed and then renews the item if allowed. A new due date will be returned</li> <li>• Return of items - <i>Amlib</i> returns the item</li> </ul> <p><i>Separate notes are available in the <b>Amlib/Help</b> folder for Installation and User Guide</i></p>

## General

Release Version 5.3.0.0 – changes to incorporate the ability to use new modules

- *Debt Collection* module (extra license needs to be purchased)
- *VDX* integration

## Authority

- No changes

## Amlib Backup Manager Utility

- I1102940: Changes to backup manager interface to reduce the size of the form and allow it to fit on screens with smaller resolutions
- The Amlib Backup Manager application and Amlib Backup Manager service allow sites to configure and run automatic backups for SQL Server Express Edition.
- Higher editions of SQL Server already come with tools for performing these tasks. As a result, sites running editions greater than Express Edition do not need to install these programs.
- The following article defines how to determine which version of SQL Server is installed <http://support.microsoft.com/kb/321185>.
- This will require access to the server running SQL Server.

## To summarise:

- Open Management Studio
- Click **New Query**
- Enter the following in the query window:
  - **SELECT SERVERPROPERTY('productversion') as [Version], SERVERPROPERTY ('productlevel') as [Service Pack], SERVERPROPERTY ('edition') as Edition**
- **Highlight** the text and click the **F5 Query** button
- The result query will return one row with three columns. The edition column contains the edition. If this value contains Express Edition, then the backup manager and service will need to be installed.

*Apply for the Installation Guide from Customer Support for further information*

## Borrower

### New Field: Exclude from Debt Collection

- When **Y**, the borrower is NOT included in any Submission for Debt Collection. Also Added to Mass Change options and Where Search Column

### New Field: Status Date

- Updates whenever the *Status* is changed

### Debt Collection Status

- With this status assigned and entered in *Supervisor Installation*, a Borrower cannot be allocated or removed from this status unless Submitted or Updated by the Debt Collection automated process. **Not for** Manual process.

### Debt Collection History

- If Borrowers are Submitted to Debt Collection, a History Report is written with a Report Type of **DCOLLSUB** with the date and time of Submission and a comment of "Debt Collection Submission at XXX (Location code). If updated within Debt Collection the Report Type will be **DCOLLUPD**, with a comment of **Debt Collection Update at XXX (Location code)**

### Borrower Financial

- New Format: Choose **F1 New Charge** button to enter a new Financial Transaction
- New Columns:
  - **Date Modified** – displays the date a change was made to the Borrower Financial Transaction. This ensures the Invoice Date and Transaction Date remain unchanged
  - **Amount Outstanding** - the outstanding balance for the borrower is now visible in the last Column of the Financial Table – Sum of the Value & Sum of the Paid From Financial Transactions for the specific Borrower
- **Waive** button now available in single line and double line accounting (Permissions need to be set for the Button permissions in **Supervisor > Usernames > Viewing Menu – Borrower Financial** – change the **red Waive** button to **green**). Log out of Amlib and back into Borrower Financials. **Waive** buttons should now be available to waive transactions if required
- In Single-Entry and Double-Entry Financials, editing is not allowed on rows, except on Comments in Single Entry. **Payments** are made via **Allocation** or able to **Waived** or **Deleted** (Single-Entry)
- Manual creation of Financial Transaction will no longer be allowed from the grid
- User can pick the Financial Types from a drop down of **CR** or **DB** transaction types. **CR** Financial Types available in Payment sections, Debit Financial Types available in Charge sections

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- On creating a New Charge, the Charge and Payment can be made on the same window. This is useful for simple transactions where the Borrower is charged and pays at the desk. For example: Transactions for a New Card
- User can select an Item from a search launched from the form
- Charges and Payments are now linked with an ID (this is not obvious to the User but linked through the system). New index created to prevent the creation of unique IDs
- See also changes in Circulation Finance in Finance section

### New Columns in Where Searches:

- Exclude from Debt Collection: Ignore unless using *Debt Collection* module

### Service Requests

- **I10032024:** Ensure Lock Corporate Borrower Data installation parameter is obtained from Login location

Please Note: This was made available in *Version 5.2.3*.

### Catalogue

- **I10091667**

Allow Non-Authority subfield data to display separately as valid Catalogue data when there are mixed Authority and Non Authority Subfields included in the Marc Tag. This may occur in the Catalogue Worksheet when there is no need for accompanying Authority Subfield data (was only an issue in mixed tags when creating Catalogue records through Catalogue Worksheet). For example, where 260 c Date is to be entered without the Publisher and Place of Publication and when the Date was a Non Authority and the other Tags were Authority).

*Please Note: This was made available in Version 5.2.3.*

### Circulation

#### Service Requests

- **I1011185:** Fixed Credit issue when switching from Single to double line accounting
- **I1101969:** Ensure correct closed day calculations when applying an Overdue Fine



## Debt Collection Module

The *Debt Collection* interface is a new module, specifically designed as an interface to the *Unique Management Services*. It is a separate program and will require separate licensing to *Amlib*.

- Only to be setup and used by those who have purchased it
- Only needs to be set up for those who will need to run (could perhaps be a person outside the Library)

The interface is responsible for:

### Submission

- Identifying Borrower's whose financial transactions meet the library's criteria for submission to the Debt Collection process
- Submitting the details to *Unique Management* in the required format
- View option available which will allow Institution to check results prior to running in *Update* mode – has **Test** button and **Run** button

### Update

- Identifying updated details for the Borrowers previously submitted
- Delivering the updated details to *Unique Management*
- View option available which will allow Institution to check results prior to running in *Update* mode – has **Test** button and **Run** button

### Synchronization

- Collating details of all Borrowers who are currently in submission for synchronization of the systems
- Delivering the synchronization data to *Unique Management* in the required format
- View option available which will allow Institution to check results prior to running in *Update* mode – has **Test** button and **Run** button

## DIY Module

- Financial Changes
- Changes to suit *3M C Series* chute returns
- Return updates as per *Envisionware* specs
- **I11011610**: Added login switch to amlib.ini
- **I11011162**: Check-in – ensure floating item's permanent location is set to current location so no alert is sent in the check-in response
- **I11021010**: Update Quantity column in financial table with correct number of days when returning that incur an overdue fine

## Finance and Orders

### Circulation Finance

- Improve the design of the data structure to facilitate simpler and more reliable linking of financial transactions for Double-Entry accounting - A new database table will link credits and debits for double entry financial transactions
- Improve performance when accessing financial transactions for a borrower for Double-Entry accounting
- Define and enforce rules for the use of Financial Type codes both by the system and manually by the user
- Ensure that the Debt Collection interface can extract the correct data in a reliable manner

Financial Types window now has **CR** or **DB** Columns showing whether it is valid for **Credit** or **Debit** – for use with applying Financial to Borrower records

There are now a Standard set which must be defined and cannot be edited or deleted. A subset of these Financial Types are System Financial Types and are reserved for System use and cannot be used for Manual Circulation Financial Transactions

The System only ones are shown below in Bold.

CIRCULATION TRANSACTION TYPE (STANDARD)	DESCRIPTION	CREDIT/DEBIT	SYSTEM USE ONLY
<b>ACCOUNT</b>	<b>Account</b>	<b>DB - Debit</b>	<b>√</b>
CNH	<i>Claims Never Had</i>	<i>CR - Credit</i>	
CR	<i>Claims Returned</i>	<i>CR - Credit</i>	
DAM	<i>Damaged Item</i>	<i>DB - Debit</i>	
<b>DCFEE</b>	<b><i>Debt Collection Fee</i></b>	<b><i>DB - Debit</i></b>	<b>√</b>

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FEES	<i>Fees</i>	<i>DB - Debit</i>	
<b>ISSUE</b>	<b><i>Issue Charge</i></b>	<b><i>DB - Debit</i></b>	<b><i>√</i></b>
LATEFINE	<i>Fine</i>	<i>DB - Debit</i>	
LEGAL	<i>Legal Charge</i>	<i>DB - Debit</i>	
LOST	<i>Lost Item</i>	<i>DB - Debit</i>	
<b>OVERDUE</b>	<b><i>Overdue Item</i></b>	<b><i>DB - Debit</i></b>	<b><i>√</i></b>
PAYDAM	Payment for Damaged Item	<i>CR - Credit</i>	
PAYFINE	Payment for Fine	<i>CR - Credit</i>	
PAYLEGAL	Payment for Legal Charge	<i>CR - Credit</i>	
PAYLOST	Payment for Lost Item	<i>CR - Credit</i>	
<b>RESADV</b>	<b><i>Reservation Advice Charge (through Reports)</i></b>	<b><i>DB - Debit</i></b>	<b><i>√</i></b>
<b>RESCANC</b>	<b><i>Reservation Cancellation Charge</i></b>	<b><i>DB - Debit</i></b>	<b><i>√</i></b>
<b>RESERVE</b>	<b><i>Reservation Charge (within Circulation)</i></b>	<b><i>DB - Debit</i></b>	<b><i>√</i></b>
<b>RESFEE</b>	<b><i>Reservation Charge – Fee (through Reports)</i></b>	<b><i>DB - Debit</i></b>	<b><i>√</i></b>
<b>RENEW</b>	<b><i>Renewal Charge</i></b>	<b><i>DB - Debit</i></b>	<b><i>√</i></b>
<b>RETURN</b>	<b><i>Returned Item</i></b>	<b><i>CR - Credit</i></b>	<b><i>√</i></b>
<b>WAIVE</b>	<b><i>Waive a Fine, Fee or Charge</i></b>	<b><i>CR - Credit</i></b>	<b><i>√</i></b>
WRITEOFF	<i>Write Off a Debt</i>	<i>CR - Credit</i>	

### Circulation Finance Window

- Mandatory definition of Financial Types will assist searching on this screen
- Disallow editing of credit and debit charges in this Window
- Disallow deletion from Table view OR the Main screen
- Remove New Transaction from Transactions Menu

## NetOpacs (Opac via Web Browser)

- Financial Changes – creation of waive transaction type controlled by an amlib.ini switch - RefundReserve
- Ensure items marked as on loan and issued to current borrower when performing renewals
- **I1009120:** Modifications to subject interest processing to improve performance and prevent crashing
- **I1012192:** Ensure correct Borrower details are retrieved when using viewing subject interests and returning to borrower details screen
- **I10121253:** Use issue location to obtain circulation parameters when renewing items
- **I1103323:** Prevent Renew URL from being used to access other patron records

## Offlines

- No Changes

## Periodicals

- No Changes

## Reports

- Changes to Borrower Financial Receipts and Table Reports to allow printing of Dates and Outstanding charges
- **I11011677:** Fixed problem with SMS reports where they were causing other reports to send E-mail attachments

## Stockitem

- **I1101922:** Fixed Stock Keyword Facility: For Loan, On Order and Reserved Search Filters work correctly
- **I10071122:** *Reserve Allocate* will now sort reservations based on the date the reservation was created. Added *Reserve Shuffle* menu item back to Stockitem table menu (this was removed for 5.2)

## Supervisor

### Installation Parameters

### **Borrower**

- Validation applied to Default Borrow Status in Borrower Installation parameters

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## Circulation

- Debt Collection Borrower Status in the DEFAULT set of parameters. This is ONLY to be used in conjunction with running the *Debt Collection* module

## System

- Change of parameter wording from Disallow editing of Financial Transactions once saved to Double Entry Accounting (Y/N)

SETTING	DESCRIPTION	EXPLANATION
Y	Unable to delete Financial Transactions. Able to Waive	Changes made to make Financial Transactions more secure
N	Able to delete Financial Transactions. Able to undo within Allocate Window	Changes made to make Financial Transactions more secure

- **Please Note:** Sites switching to Double-Entry accounting cannot undo this setting. Once set the site **MUST** remain in Double-Entry accounting. There is **no** switch BACK to Single-Entry accounting
- **Please Note:** Sites must switch to Double-Entry accounting if they intend to use the Debt Collection module. There is an Update path that can be followed, to implement this and ensure that Borrower Financial Transactions are still valid and correct

## Other

- Default Financial transaction type for credits – enter the Transaction Type that will be the Default (for example: one that is in use the most) for payments
- Default Financial transaction type for debits – enter the Transaction Type that will be the Default (for example: one that is in use the most) for charges
- POP3 Alert email level – None (N), Error (E), Success (S), Both – Error and Success (B) – for use with VDX integration via structured email. Should be entered for each Location Installation required
- POP 3 CC Email address for alerts – Enter Email Address to which VDX alerts will be sent. For use with VDX integration via structured email. Should be entered for each Location Installation required
- POP 3 server address – enter the IP address or Server name of the Server to be used for VDX Email. Should be entered for each Location Installation required
- POP 3 server login – enter the Username for login to the Server. For use with VDX integration via structured email. Should be entered for each Location Installation required
- POP3 server password – enter the Password to login to the Server. For use with VDX integration via structured email. Should be entered for each Location Installation required

### User Permissions

- Debt Collection Manager – needs to be a Manager to access the Debt Collection Program (if purchased)

### VDX

VDX email interface (application)

*Amlib VDX ILL Email* allows for the receipt of a structured email sent from *OCLC's VDX Inter-Library Loans System*.

This structured email creates Stockitem and ILL records within the *Amlib* client, as well as creating a reservation for the borrower as entered into *VDX*. This user guide covers how to configure and run the *Amlib VDX ILL Email* solution.

The *Amlib VDX ILL Email* is available to all *Amlib* libraries that currently use the *OCLC VDX Inter-Library Loans System*, at no additional cost to the library.

The solution is available in two modes – automated Service or manual Client.

When manually run by an operator, the *Amlib VDX ILL Email client* will:

1. Allow the automatic creation of a temporary Stockitem record on a requesting *Amlib* library's database when the library has requested an item from another library via *VDX*
2. Allow the automatic creation of a reservation on the temporary holding record in *Amlib*
3. Allow the automatic creation of a corresponding ILLs record in *Amlib* applications

The *Amlib VDX ILL Email Service* (run via the *Amlib Configuration Manager*) will:

1. Require a schedule to be set and activated using the *Amlib Configuration Manager* (see below)
2. Allow an overall scheduled processing time and cycle to be set
3. As per the schedule, allow the automatic creation of a temporary Stockitem record on a requesting *Amlib* library's database for any request placed on behalf of a patron by library staff on the *OCLC VDX ILL system*
4. Allow the automatic creation of a reservation on the temporary holding record in *Amlib*
5. Allow the automatic creation of a corresponding ILLs record in *Amlib* Applications