OCLC Amlib

Library Management System

Reports Training – Basic Reports

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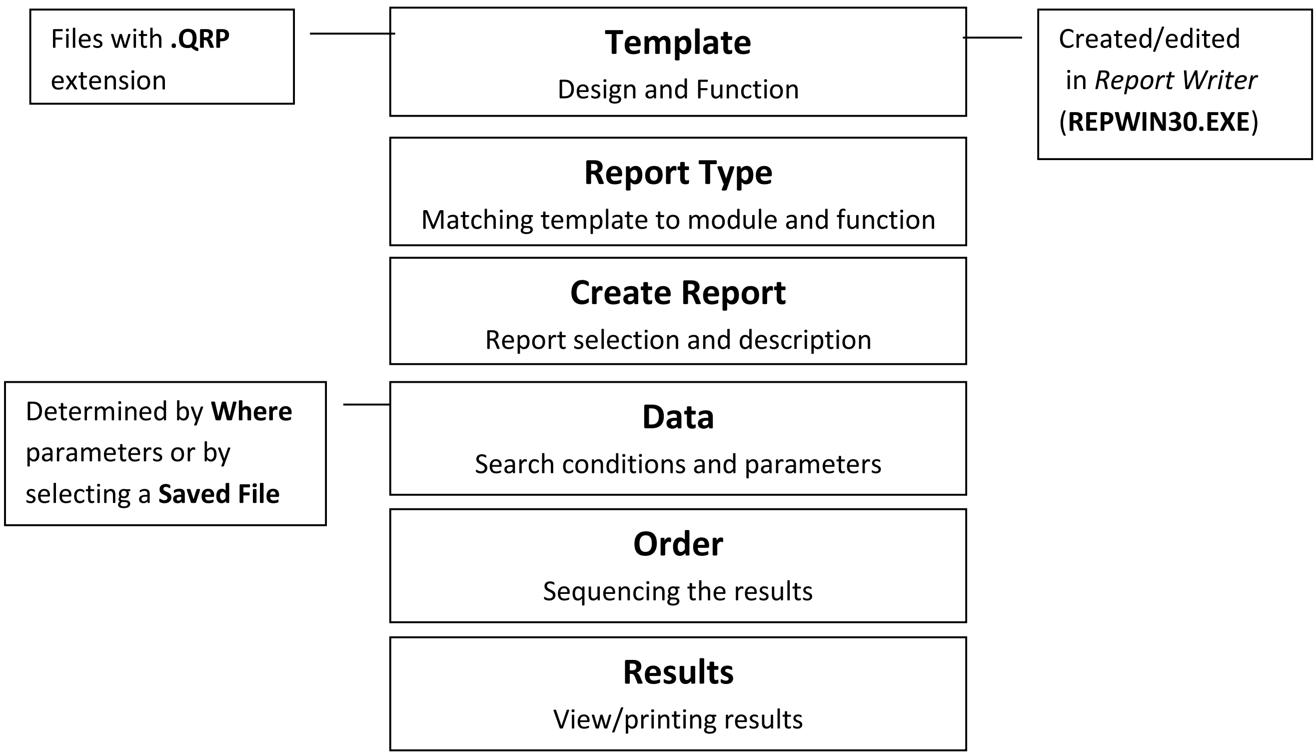
REPORTS – OVERVIEW

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

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

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



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)

Template Location

Most report templates can be found in the **Amlib/Reports** folder on your *Amlib* server. If you do not normally have access to this space, then you should contact your IT support staff about arranging access to this location to enable you to customise your report templates.

It is possible load templates from your PC, but these templates will only be available for use by that PC.

Template Types

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.

Customised Report Templates

These are edited/reformatted templates that usually begin with ampersand (**&**) – and a few with a dollar sign (**$**) – which have been resaved with a new name. The general practice when customising a report template is to remove the ampersand (**&**) and add in a few letters indicating your library name:

- **&ODEMAIL.QRP →AMODEML.QRP**

SYMBOL	TEMPLATE TYPE	EXAMPLE	EXAMPLE DESCRIPTION
&	**System**	**&ODEMAIL.QRP**	Overdue Email Notice
$	**Table**	**$BOTYPES.QRP**	List of Borrower Types
#	**Special**	**#ADDLABL.QRP**	Borrower Address Labels
[No symbol]	**Custom**	**AMODEML.QRP**	Custom Overdue Email

Template Design

The design of a report template determines what data will ultimately be printed (even taking into account the data selection parameters or Where statement) and the format it will be printed in.

A template is typically subdivided as follows:

- **Report Header and Footer**
- **Page Header and Footer**
- **Group**-defined **Headers and Footers** – for example: **Borrower Barcode**
- **Detail Block**

A template is typically comprised of the following:

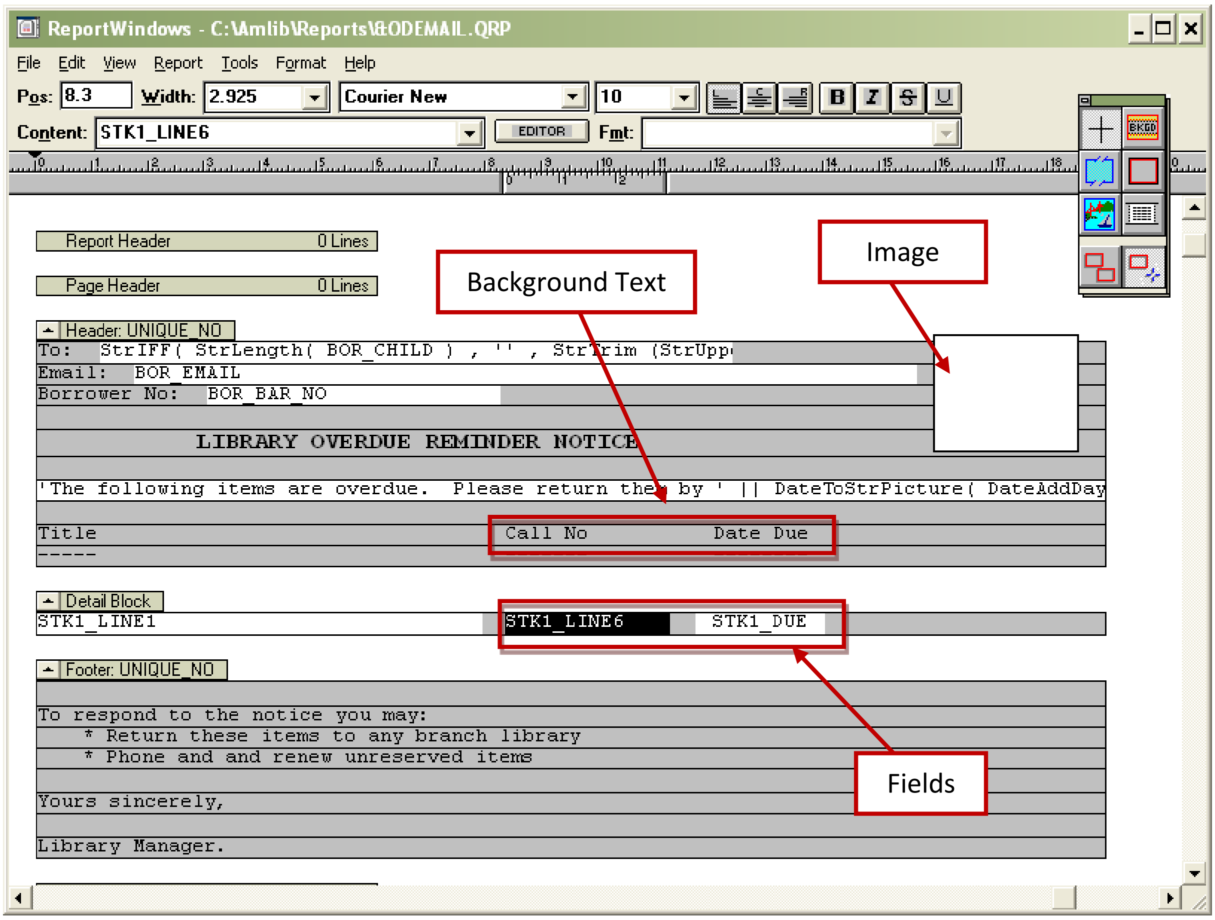
- **Lines** – an object that can be added to any subdivision which can then be formatted and then text, fields or images added
- **Background Text** – generally text and headings
- **Fields** – a placeholder ultimately replaced by information derived from a particular *Amlib* field (for example: **Title**) or a user-defined variable that performs a function on these fields (for example: **Total Cost**)
- **Images** – either pictures or objects that have been imported into the template
- **Box** – a user-defined line art shape

Editing Templates

Report Writer (**REPWIN30.EXE**) is a separate program, produced by *Centura*, which is utilised by *Amlib* for Reports. We have many templates created for library use, but you can customise them, as well as create your own.

Format

The text on a report template is known as **Background Text**. You can see that it is different from **Fields** because **Fields** show up in white:



It is also possible to incorporate text into a **Field**:

```
'The following items are overdue.  Please return them by ' || DateToStrPicture( DateAddDay
```

Insert/Delete Lines

To delete lines:

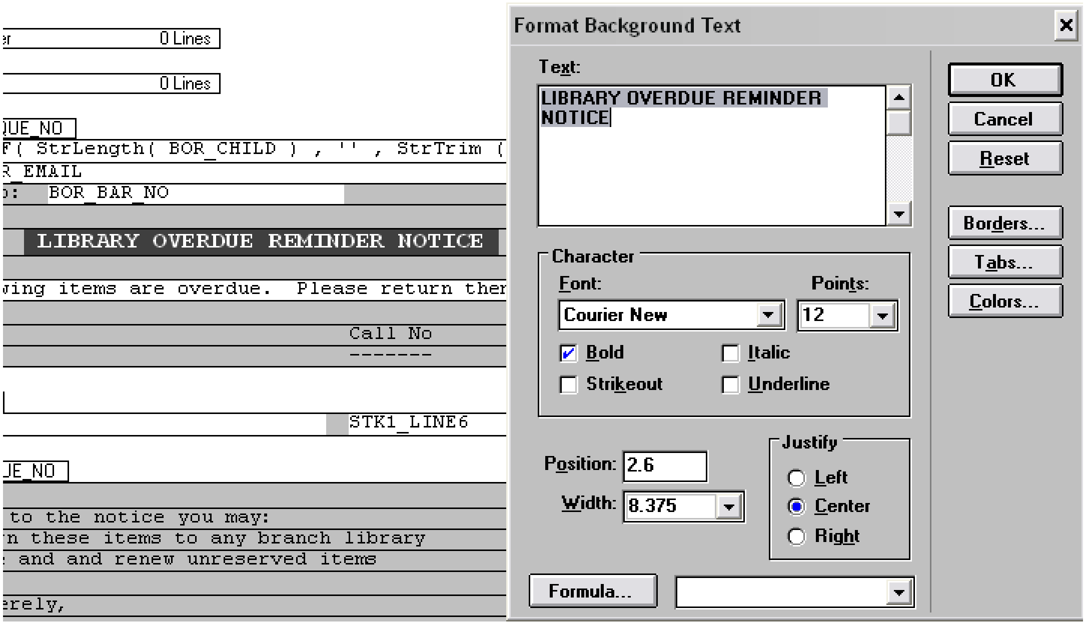
- Click and highlight the line you want to delete and press the **Delete** button on your keyboard

To insert lines:

- Click and highlight the line below where you want to insert a new one and press the **Insert** button on your keyboard

Edit Text

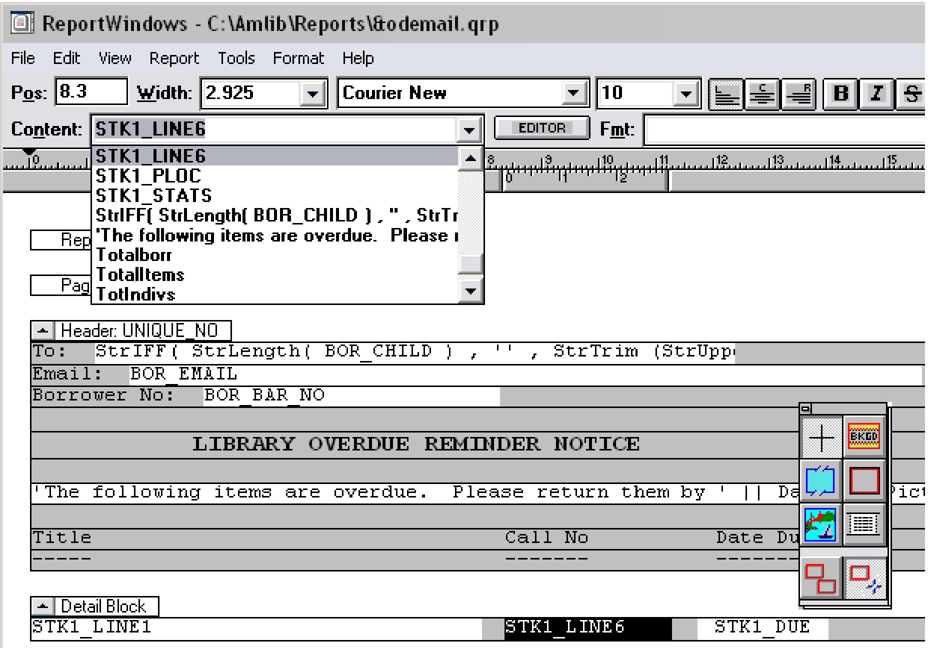
1. Double-click on the **Background Text** object you want to edit – the Format Background Text dialogue box will open



2. Edit/format the text as desired
3. Click on the **OK** button when complete

Edit Fields

1. To change what is displayed in a **Field**, you can select the **Field** and choose a new item from the <u>Content</u> drop-down box at the top:

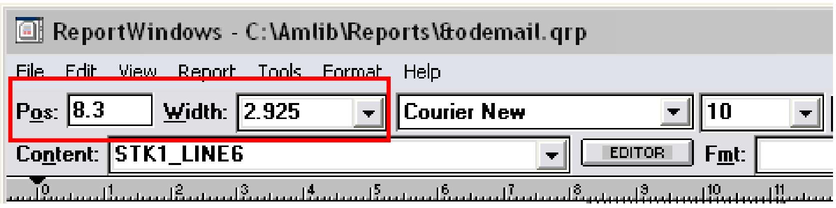


Insert a New Background Text or Field Object

1. From the main menu, select **Tools** > **Background Text** or **Field**
2. Position the cursor where you would like the object to appear and click the mouse to insert

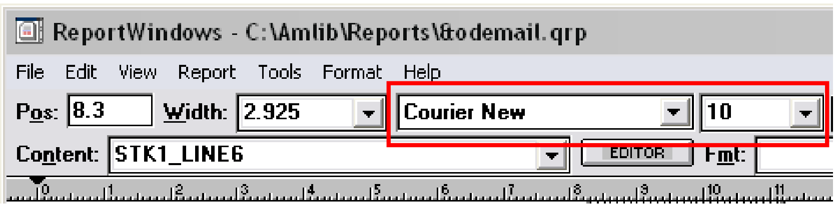
Reposition Background Text and Field Objects

- You can move text/field objects around by changing the **Pos**ition and **Width** in the menu bar:



Change Fonts and Font Sizes

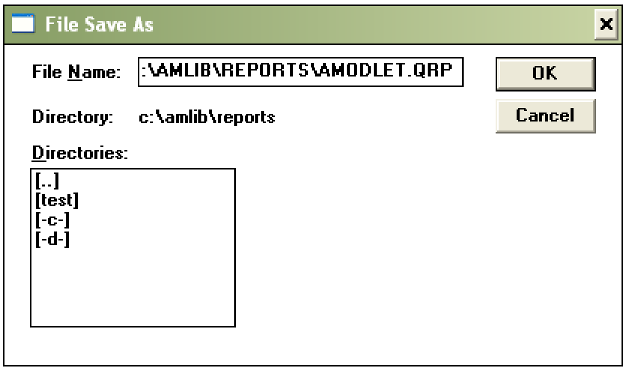
- You can change and font and size of text/field objects in the menu bar:



Saving Templates

When you have finished customising a template, ensure that the template is saved with a new name to avoid it being overwritten in any future upgrades – for example: **AMODLET.QRP**

You will notice that the above example does not have an **&** at the start of the template name. An **&** indicates that it is a standard **System Report Template**, and the lack of an **&** indicates that it is a **Custom Report Template**.



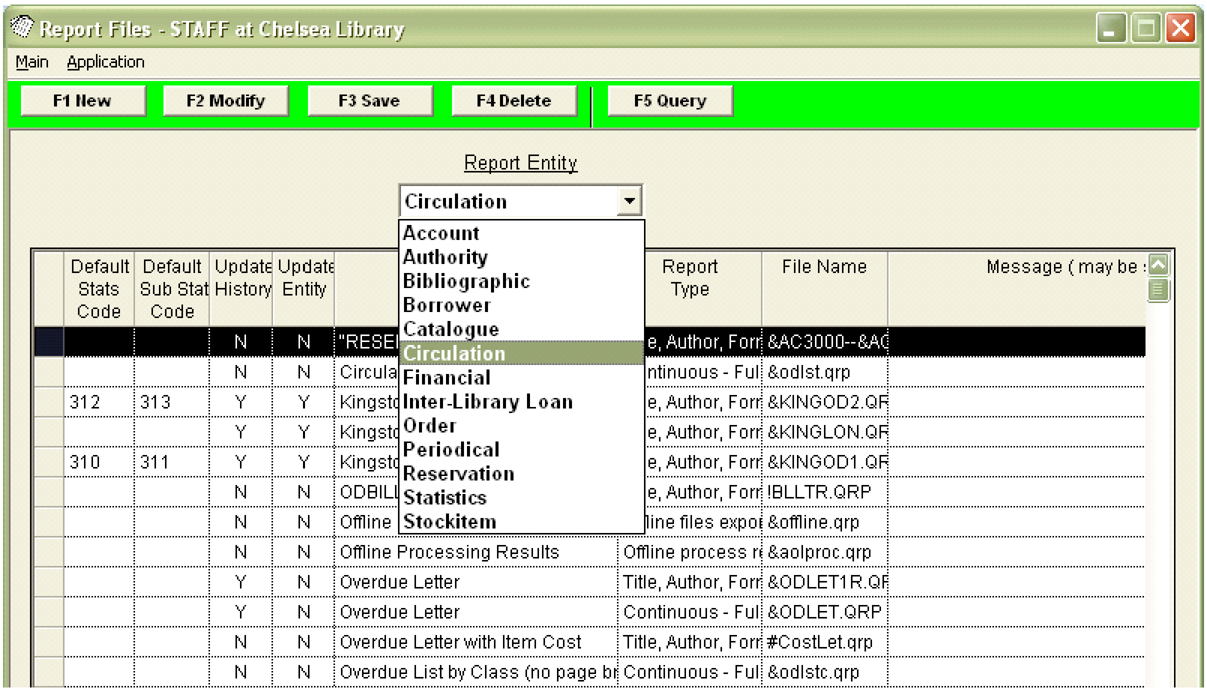
Save the customised template into the **Amlib/Reports** folder on the *Amlib* server. This will make the template available for use for all users. Alternatively, you may save it into a local folder on your PC – but please be aware, that the template (once loaded) will only be available for use on that PC.

Loading Templates

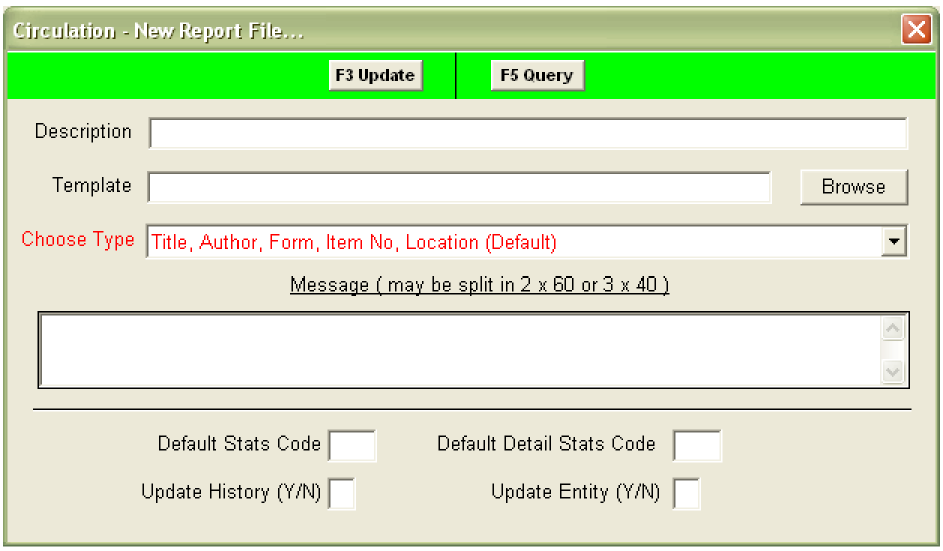
Your new/customised template needs to be saved somewhere that can be accessed by every workstation, such as the **Drive:/Amlib/Reports** folder on your *Amlib* server.

To add them into the *Amlib* client:

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

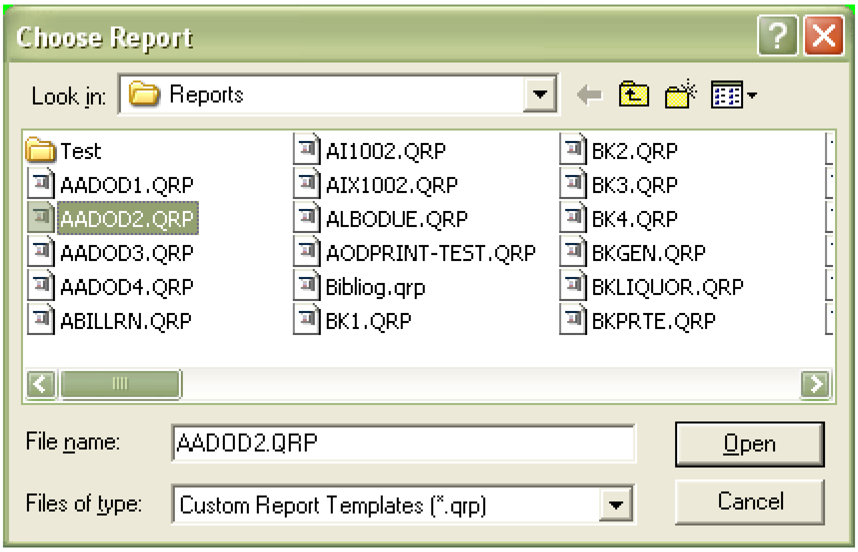


1. From the Report Entity drop-down, select the appropriate module for your report – for example: **Circulation**
2. Click the **F1 New** button – the New Report File screen will display:

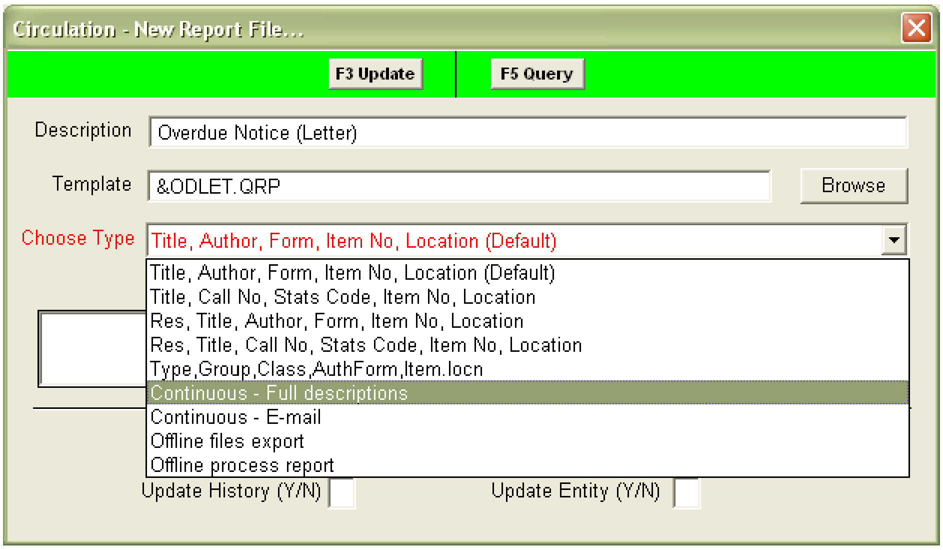


3. Type in an appropriate Description – for example: **Overdue Notice (Letter)**

4. Template – click on the **Browse** button – the Choose Report screen will display:



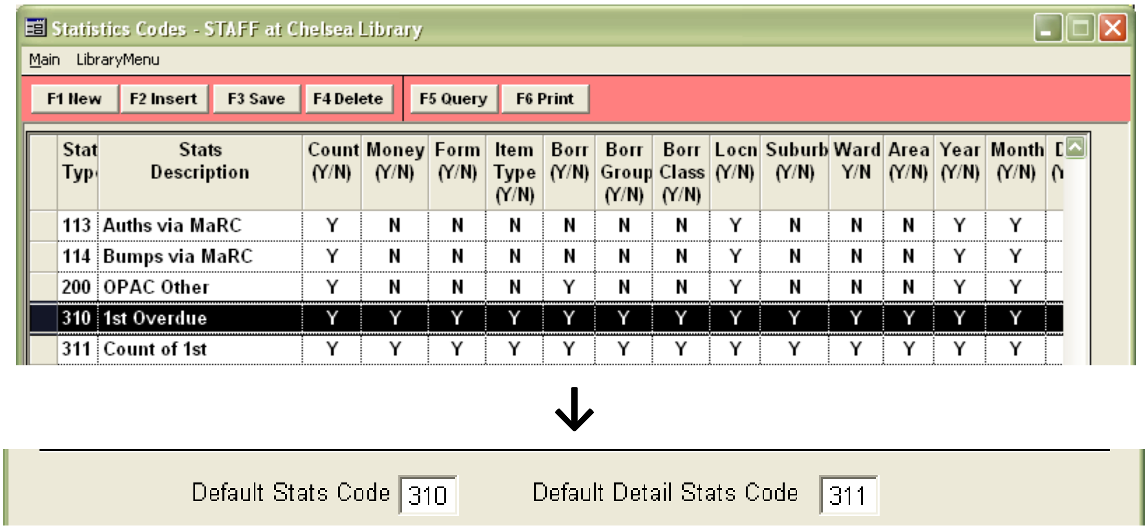
5. Navigate to the **Drive:/Amlib/Reports** folder on your *Amlib* Server (if the template has been loaded onto your PC – then navigate to the local folder)
6. Files of type:
   - Select **Custom Report Templates (*.qrp)** for customised templates
   - Select **System Report Templates (*.qrp)** for all standard system templates
7. Locate the template to be loaded and highlight it
8. Click the **Open** button – the template will be selected the Choose Report window will close
9. Choose Type – it is *essential* that the appropriate type be chosen that this will inform how your template operates and the information that is sent to it – in this example: **Continuous - Full descriptions** has been selected



10. Message – leave blank

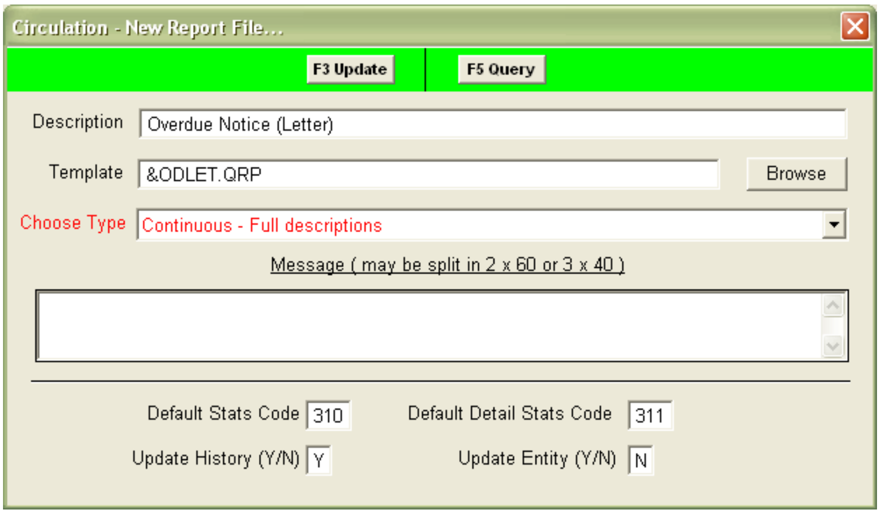
11. Default Stats Code – it is possible to collect statistics on the number of times that this report is run by adding an entry into the Statistics Codes table (**Main** > **Supervisor** > **StatsParams**) and then adding the **Stat Type** into the Default Stats Code box

12. Default Detail Stats Code – it is possible to collect statistics on the number of individual notices that a particular report generates by adding an entry into the Statistics Codes table (**Main** > **Supervisor** > **StatsParams**) and then adding the **Stat Type** into the Default Detail Stats Code box (not available for all modules)



13. Update History (Y/N) – it is possible to retain a record of the report having been generated – for example: the above **Overdue Letter** report can add a record of the overdue being printed to the Borrower History of affected patrons

14. Update Entity (Y/N) – this field can be used to update the status or alter a parameter of a record – for example: an account may be generated for an overdue circulation report



15. Click the **F3 Update** button

16. Close out of the Report Files screen

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

Report Types

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

SETTING UP REPORTS

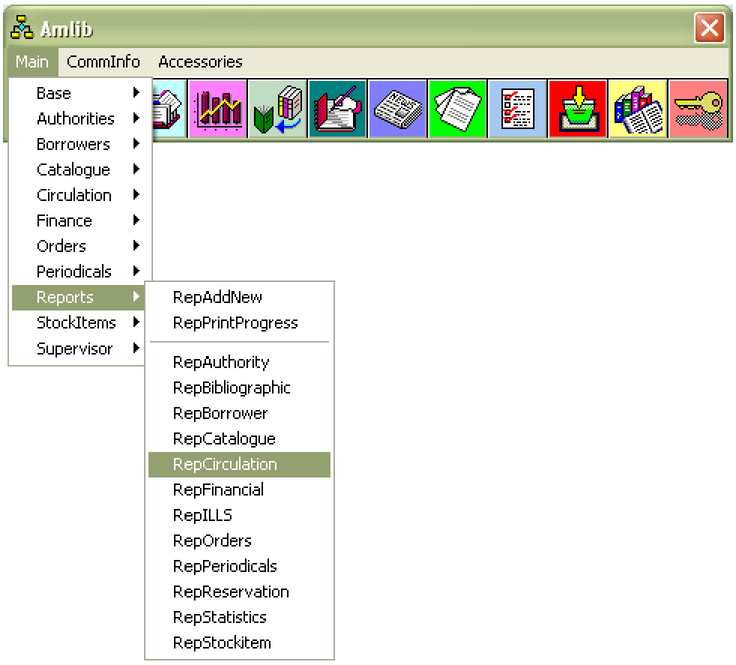
Report Module Categories

The Reports module is split into the following categories:

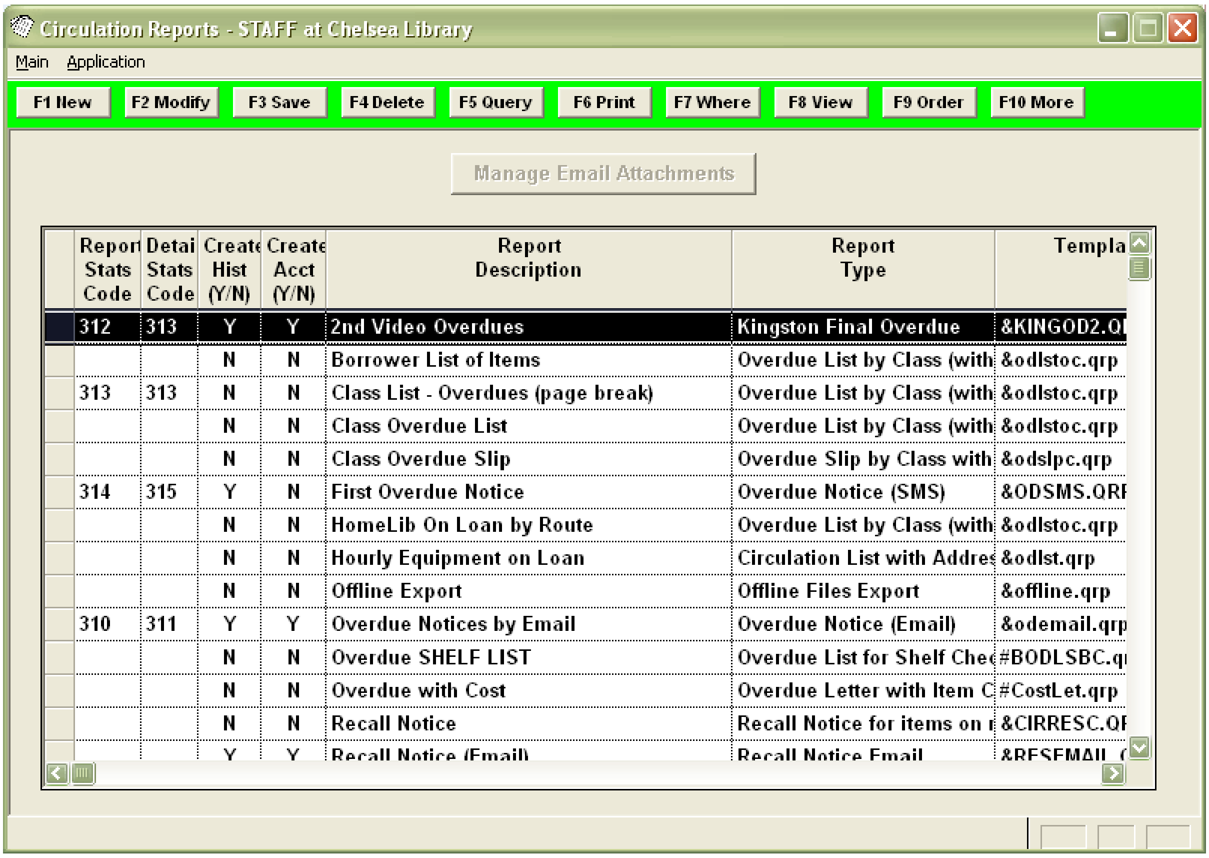
REPORT	DESCRIPTION	EXAMPLES
RepAccounts	Accounts Reports	Account Reprints without creating a Financial record for the borrower.
RepAuthority	Authority Reports	Author, Series, Subject Heading Listings, etc
RepBibliographic	Bibliographic (Catalogue Data) Reports	New items displaying Title, Author, Subject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

Create a Report

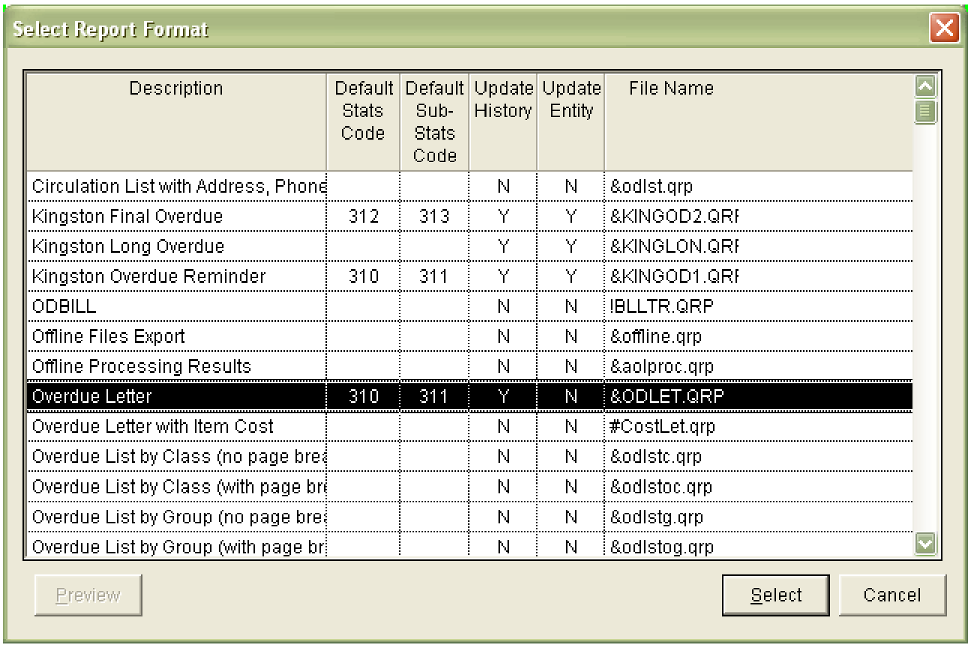
1. Launch the *Amlib* client
2. Go to the Reports category required – for example: Circulation Reports (**Main** > **Reports** > **RepCirculation**)



3. The corresponding Reports screen will display:



4. Click the **F1 New** button – the Select Format Report table will display:

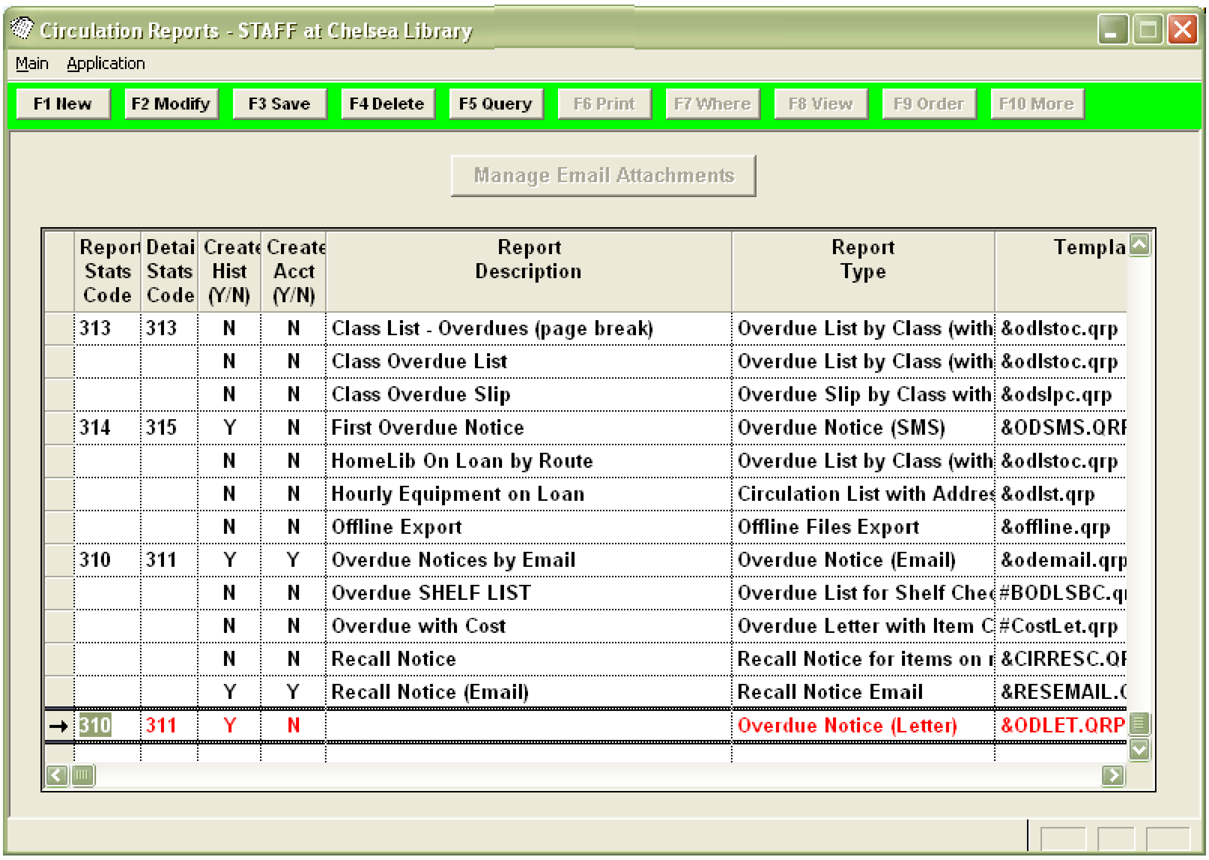


Select Report Format

Description	Default Stats Code	Default Sub-Stats Code	Update History	Update Entity	File Name
Circulation List with Address, Phone			N	N	&odlst.qrp
Kingston Final Overdue	312	313	Y	Y	&KINGOD2.QRI
Kingston Long Overdue			Y	Y	&KINGLON.QRI
Kingston Overdue Reminder	310	311	Y	Y	&KINGOD1.QRI
ODBILL			N	N	!BLLTR.QRP
Offline Files Export			N	N	&offline.qrp
Offline Processing Results			N	N	&aolproc.qrp
Overdue Letter	310	311	Y	N	&ODLET.QRP
Overdue Letter with Item Cost			N	N	#CostLet.qrp
Overdue List by Class (no page brea			N	N	&odlstc.qrp
Overdue List by Class (with page bre			N	N	&odlstoc.qrp
Overdue List by Group (no page bre			N	N	&odlstg.qrp
Overdue List by Group (with page br			N	N	&odlstog.qrp

Preview Select Cancel

5. **Highlight** the report you would like to use and click the **Select** button
   - **Need help with choosing the right report?** A complete list is available in the Appendices
6. Your selection will appear at the bottom of the Reports table in **red**:



Circulation Reports - STAFF at Chelsea Library

Main Application

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

Manage Email Attachments

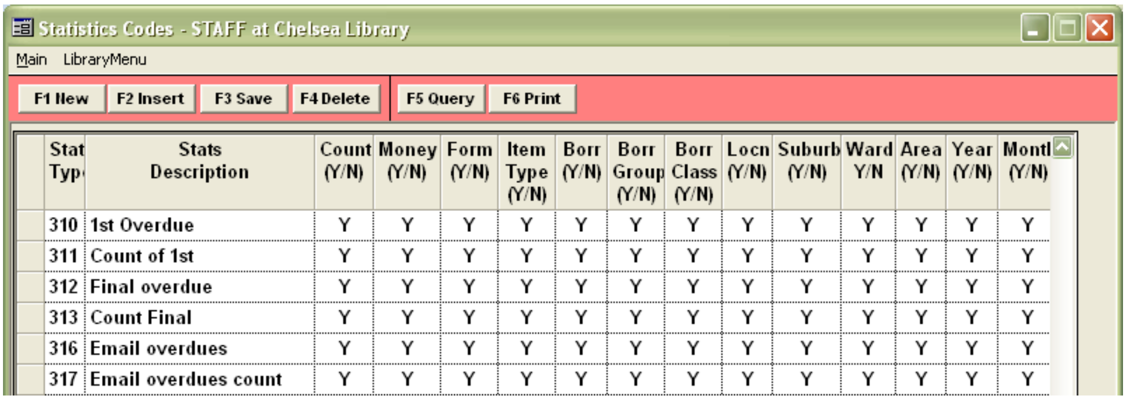
Report Stats Code	Detail Stats Code	Create Hist (Y/N)	Create Acct (Y/N)	Report Description	Report Type	Templa
313	313	N	N	Class List - Overdues (page break)	Overdue List by Class (with	&odlstoc.qrp
		N	N	Class Overdue List	Overdue List by Class (with	&odlstoc.qrp
		N	N	Class Overdue Slip	Overdue Slip by Class with	&odslpc.qrp
314	315	Y	N	First Overdue Notice	Overdue Notice (SMS)	&ODSMS.QRI
		N	N	HomeLib On Loan by Route	Overdue List by Class (with	&odlstoc.qrp
		N	N	Hourly Equipment on Loan	Circulation List with Addres	&odlst.qrp
		N	N	Offline Export	Offline Files Export	&offline.qrp
310	311	Y	Y	Overdue Notices by Email	Overdue Notice (Email)	&odemail.qrp
		N	N	Overdue SHELF LIST	Overdue List for Shelf Chec	#BODLSBC.qı
		N	N	Overdue with Cost	Overdue Letter with Item C	#CostLet.qrp
		N	N	Recall Notice	Recall Notice for items on ı	&CIRRESC.QI
		Y	Y	Recall Notice (Email)	Recall Notice Email	&RESEMAIL.(
310	311	Y	N		Overdue Notice (Letter)	&ODLET.QRP

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

- This is a description often serves as the heading of the report (including many Stockitem reports)

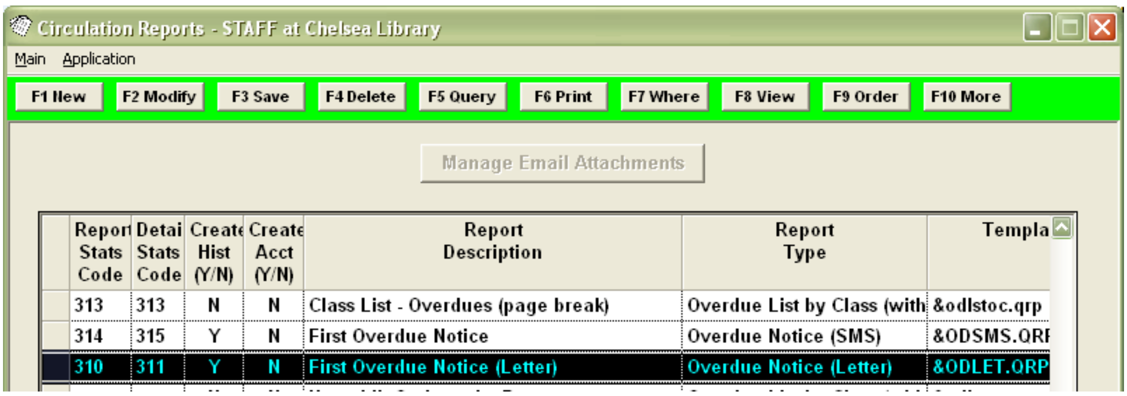
→	310	311	Y	N	First Overdue Notice (Letter)	Overdue Notice (Letter)	&ODLET.QRP

8. Report Stats Code – it is possible to collect statistics on the number of times that this report is run by adding an entry into the Statistics Codes table (**Main** > **Supervisor** > **StatsParams**) and then adding the **Stat Type** into the Default Stats Code box
9. Detail Stats Code (where applicable) – it is possible to collect statistics on the number of individual notices that a particular report generates by adding an entry into the Statistics Codes table (**Main** > **Supervisor** > **StatsParams**) and then adding the **Stat Type** into the Default Detail Stats Code box (not available for all modules)
   - For reports using the same template which already include Stats Codes, you may wish to add in unique Stats Code for *each* report to further differentiate your statistics – for example: **1st Overdue** and **Final Overdue**



Stat Typ	Stats Description	Count (Y/N)	Money (Y/N)	Form (Y/N)	Item Type (Y/N)	Borr (Y/N)	Borr Group (Y/N)	Borr Class (Y/N)	Locn (Y/N)	Suburb (Y/N)	Ward Y/N	Area (Y/N)	Year (Y/N)	Montl (Y/N)
310	1st Overdue	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
311	Count of 1st	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
312	Final overdue	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
313	Count Final	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
316	Email overdues	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
317	Email overdues count	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y

10. If you would like the affected record to retain a record of any notice generated, then ensure that Create Hist (Y/N) = **Y**
11. Update (where applicable) – there is often an Update column of some sort present; this allows the report to be used to update the status or alter a parameter of a record – for example: an account may be generated for an overdue circulation report
12. Click the **F3 Save** button



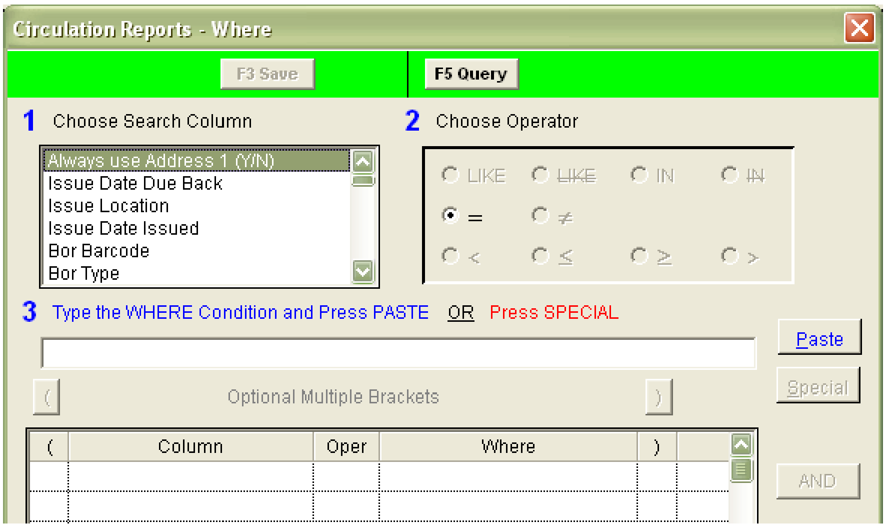
Report Stats Code	Detail Stats Code	Create Hist (Y/N)	Create Acct (Y/N)	Report Description	Report Type	Templa
313	313	N	N	Class List - Overdues (page break)	Overdue List by Class (with	&odlstoc.qrp
314	315	Y	N	First Overdue Notice	Overdue Notice (SMS)	&ODSMS.QRF
310	311	Y	N	First Overdue Notice (Letter)	Overdue Notice (Letter)	&ODLET.QRP

Where Statement

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 click the **F7 Where** button – the Reports - Where screen will display:

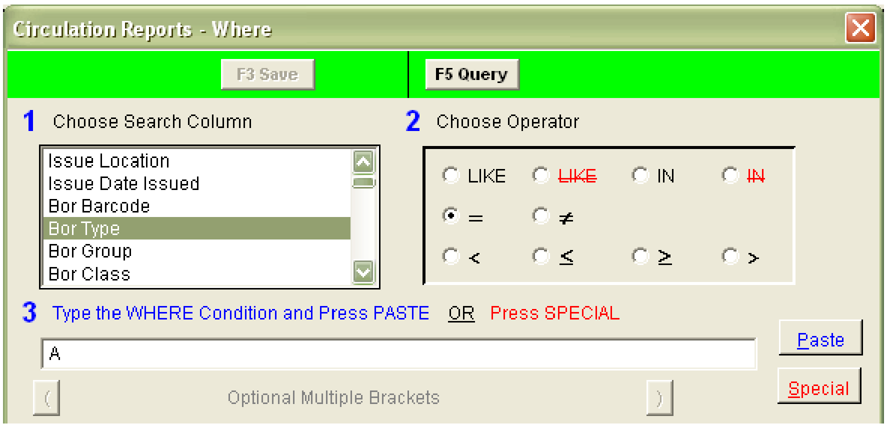


2. You can then enter one or more search conditions:
   a. Choose Search column: The options differ between Report Categories and Report Types. If you're not sure which of these is the correct one, it can help to have a look at the corresponding module screen you want to get information from – for example: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

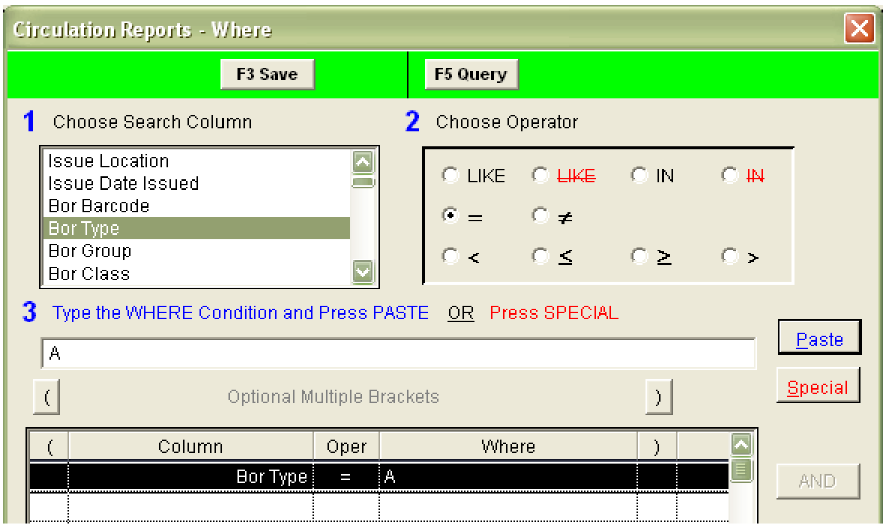
OPERATOR	DESCRIPTION	EXAMPLE
LIKE	Where the required data in this field begins with the text entered	**LIKE ELD** (for **Eldorado**)
~~LIKE~~	Where the required data in this field does not begin with the text entered	**~~LIKE~~ ELD** (for all except **Eldorado**)
IN	Useful for selecting multiple codes	**IN A,J,YA** (for all of these types)
~~IN~~	Useful for multiple codes not to be included	**~~IN~~ 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 Useful for **NOT EQUAL TO NULL** – choose this operator, do not enter any data and click the **Paste** button	≠ **J** (borrowers who do not have a code of **J**)
<	Where the text entered is less than the data required	< **01/10/10** (less than 1 Oct 2010)
≤	Where the text entered is equal or less than the data required	≤ **01/10/10** (less than or equal to 1 Oct 2010)
>	Greater than	>**01/10/10** (greater than 1 Oct 2010)
≥	Equal or greater than the text entered	≥ **01/10/10** (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, click the **Paste** button – the condition will be added to the table at the bottom of the screen:



3. You can then add in further conditions:

- Join conditions together using the **AND** and **OR** Boolean operands buttons.
- Delete unwanted items by **highlighting** the line and clicking the **Delete** button

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

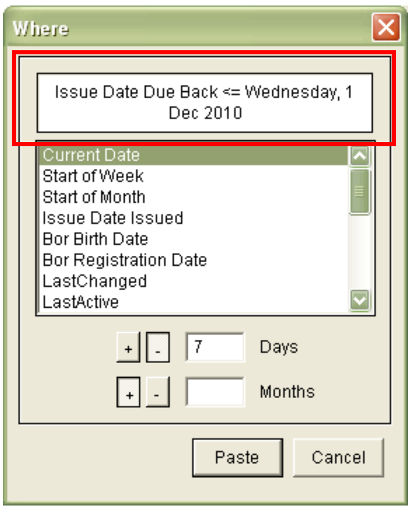
Special Button

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**).

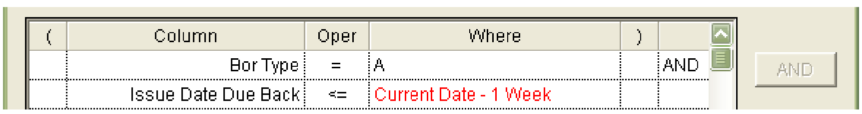
For example: if you would like to look at dates from a week ago or further back, you could enter the following Where condition:

- **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. Click the **Special** button – another Where window will open
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**
6. An example of the expressed condition will be visible in the box at the top of the window:

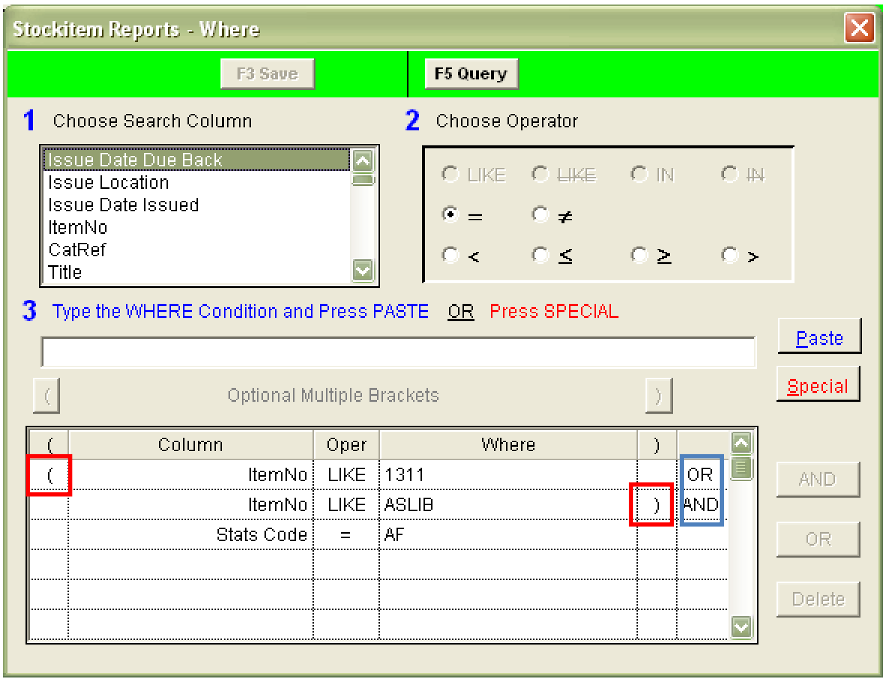


7. Click the **Paste** button when complete



Brackets

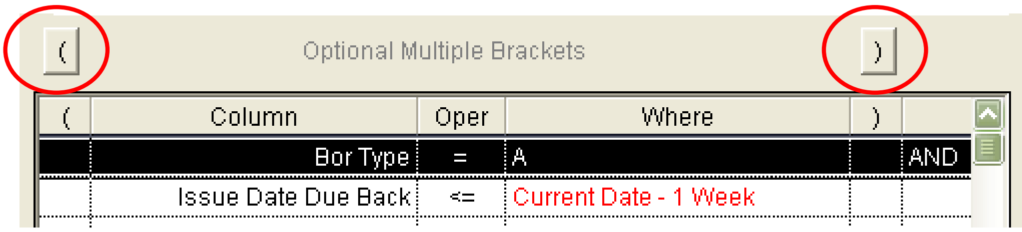
Brackets can be used to group items together and it is very important that they're used correctly. This screenshot is an example of a Where statement using brackets to find all **Adult Fiction** items whose barcodes begin with a particular alphanumeric range:



If you ran this statement without the brackets, instead of finding items that either had an **ItemNo** starting with **3111** or **ASLIB**, with the **Stats Code** of **AF**, you would find every item where the ItemNo started with **3111** (regardless of **Stats Code**) and every item with the **ItemNo** starting **ASLIB** with the **Stats Code** of **AF**.

To enter brackets:

1. Select your first condition in the list that you would like to put brackets around and click the **(** button at the top of the list
2. Then select the last condition in the list that you would like to put brackets around and click the **)** button at the top of the list

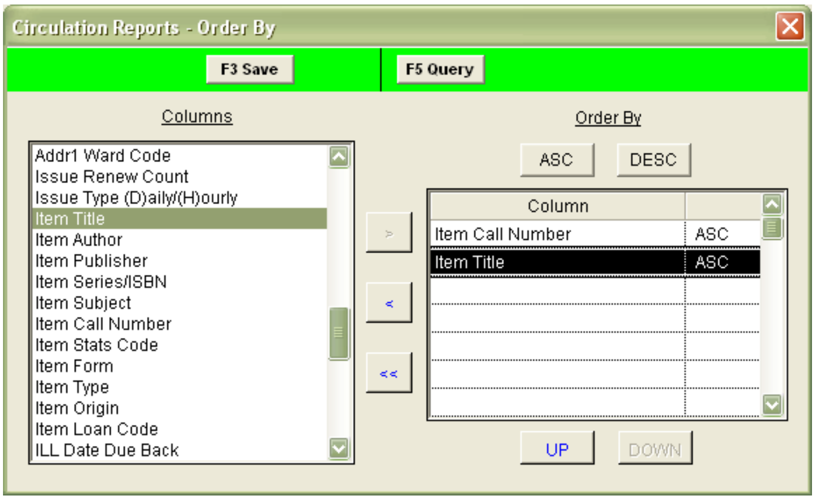


F9Order

This feature defines the sequence of the items displayed in the report. For example, an item report may be printed in **Call Number** order if you need to find them on the shelf, or in **Title** order for another list of items. The order can be important for certain reports that require a set sequence – for example: Statistics Reports.

Many of these reports have a fixed order and cannot be changed (the **F9 Order** button is greyed out). To define the sequence, select the **F9 Order** button. The sort options available differ between categories and report types.

1. Select the report from the list and click on the **F9 Order** button – the Order By screen will display
2. Use the arrow keys to select fields to Order By – for example: **Item Call Number**
3. It is possible to have more than one option – for example: the report may be sorted by **Item Call Number** and if there are several items with the same **Call Number**, you can then have the second option to sort by **Item Title**



4. The order can be **ASC**ending or **DESC**ending, with **ASC**ending as the default. **ASC**ending goes from the lowest value to the highest – for example: A to Z, 1 to 100 (Occasionally the order may be better **DESC**ending, such as in a report designed to see the highest costing items)

>	Choose the sort order. Highlight the sort option and click this button to move the option across to the Order By column
<	Change the sort order. Highlight the sort option to remove in the Order By column, and click this button to move the sort option back
<<	Remove all the sort options by clicking this button

5. The **UP** and **DOWN** buttons can be used to move the highlighted field up or down in sort priority
6. Click on the **F3 Save** button when you have finished defining the order

F10 More

The **F10 More** button provides additional parameters to allow you to apply charges, set up SMS functionality or map the fields to be used.

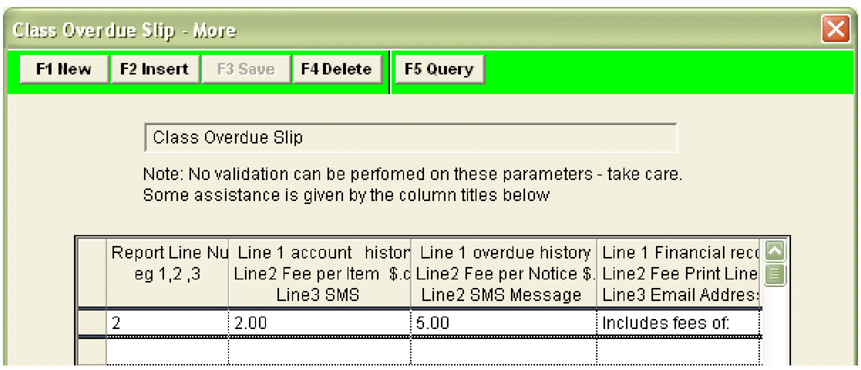
Please Note: A report employing **F10 More** parameters must be run via the *Scheduler*.

In this example report, we will be setting up a **F10 More** statement that includes additional fees:

	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5
HEADING	Report Line Number	Line 2 Fee per Item $.c	Line 2 Fee per Notice $.c	Line 2 Fee Print Line	Line 2 not Used
EXAMPLE	**2**	**2.00**	**5.00**	**Includes fees of:**	<Leave blank>
COMMENT	Line 2 is used to add Fees to reports	Enter amount to be charged for each overdue item [Optional] Amount will be added to the **FORM_ CHARGES** Field in the Report	Enter amount to be charged per notice (in addition to any item fee) [Optional] Amount will be added to the **FORM_ CHARGES** Field in the Report	Text will be added to the **USER_LINE1** Field in the Report [Optional]	

Set Up Overdue Fee Parameters

1. Click the **F10 More** button – the More screen will display
2. Click the **F1 New** or **F2 Insert** button
3. Enter the following parameters:
    a. Report Line Number = **2**
    b. Line 2 Fee per Item = **2.00**
    c. Line 2 Fee per Notice = **5.00**
    d. Line 2 Fee Print Line = **Includes fees of:**

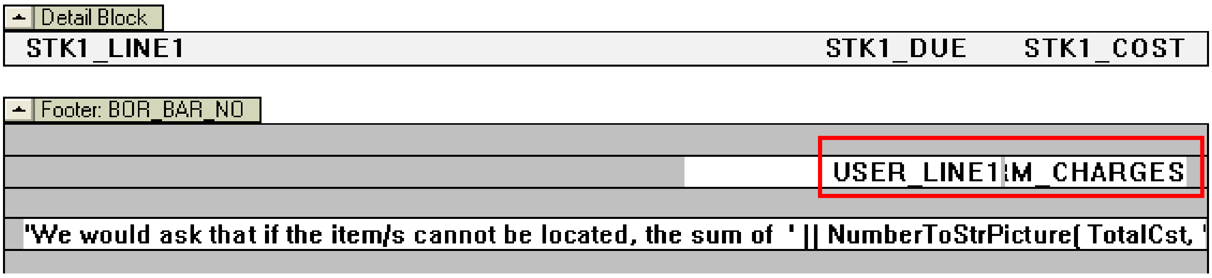


4. Click the **F3 Save** button when complete

Edit the Template to Include Charges

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

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



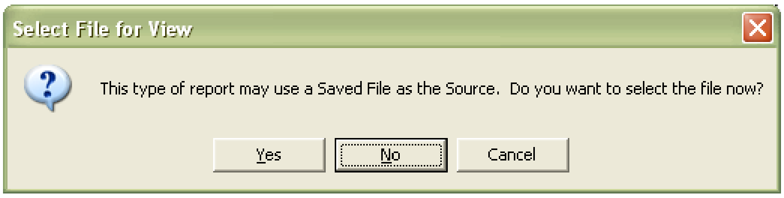
The **FORM_CHARGES** field can be added to the total charge [Field = **FORM_CHARGES**] or included as part of a **TotalCst** (**TotalCst+FORM_CHARGES**). You can also include the field **USER_LINE1** which will include the text you entered in the **F10 More** statement.

VIEW/PRINT REPORT

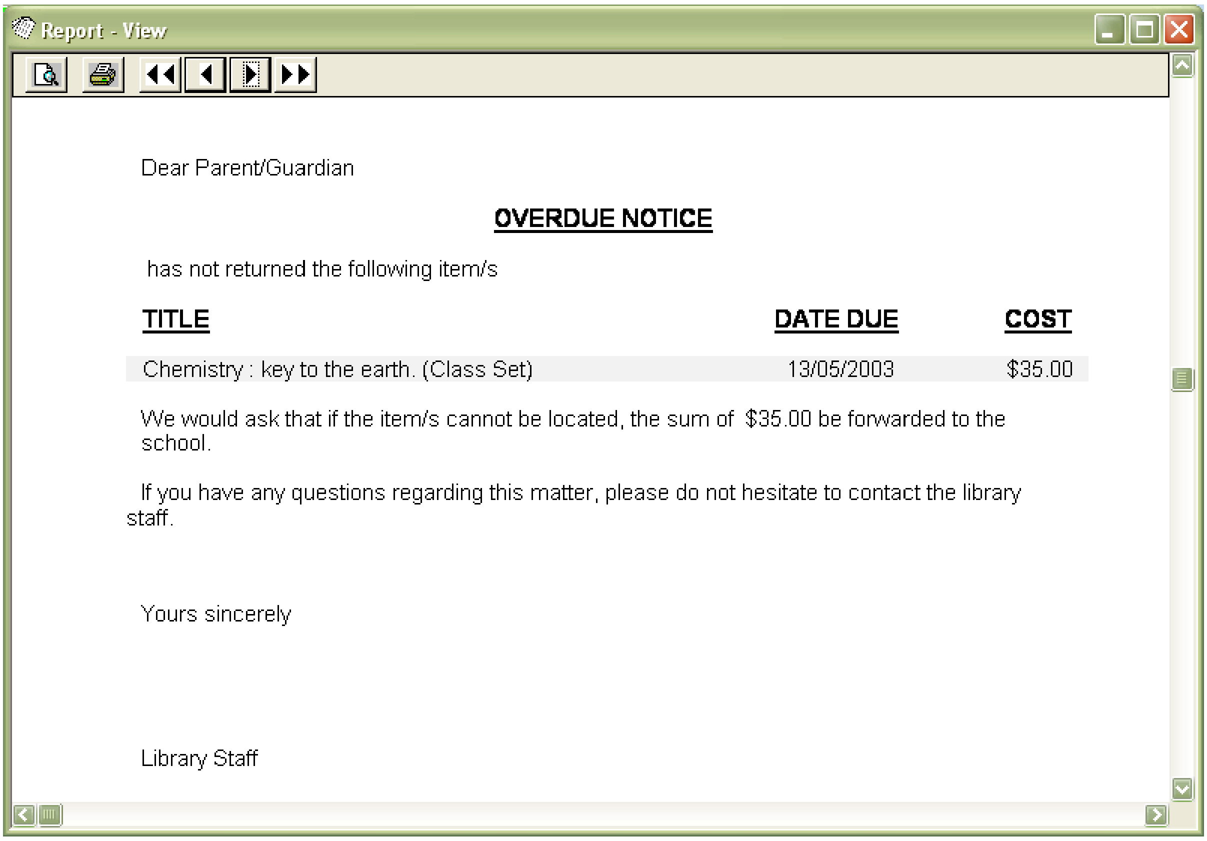
View Report

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 click the **F8 View** button
2. The Select File for View prompt will display:



3. **This type of report may use a Saved File as the Source** (rather than the entire database). If you would like this report to use just a Saved File, click the **Yes** button, otherwise click the **No** button (generally users select the **No** button)
4. The report will display in the Report – View screen:



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

Print Report (via Scheduler)

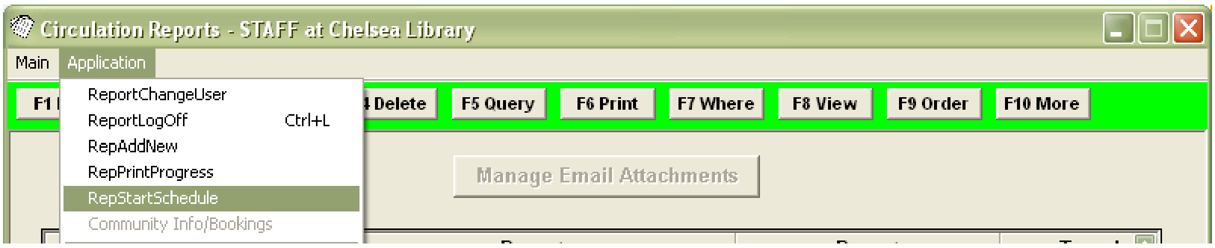
If you only want to print a report then the quickest method is to use the **F8 View** button and print from the Report – View window (see above).

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

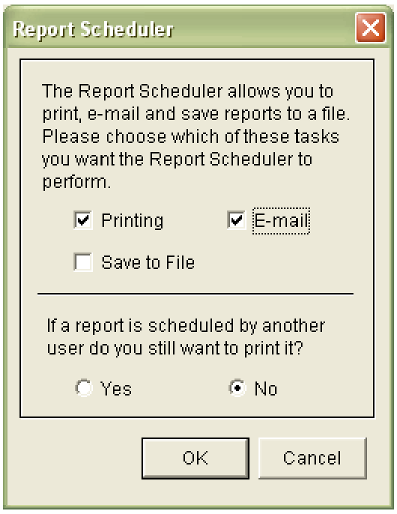
This guide will take you through setting up a report to use *RepStartSchedule*.

Start the Scheduler

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

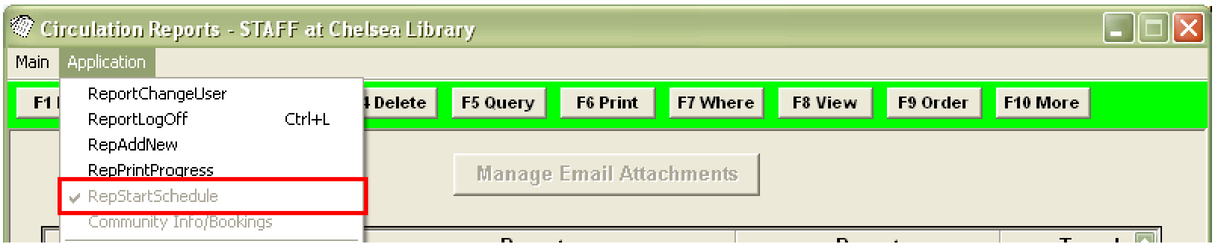


2. The Report Scheduler screen will display:



3. Select your printing options: Ensure **Printing**, **E-mail** and/or **Save to File** are ticked (you can tick all three if you intend on printing up multiple reports using multiple formats during a session)
4. Also decide If a report is scheduled by another user do you still want to print it? = **Yes**/**No**
5. Click the **OK** button

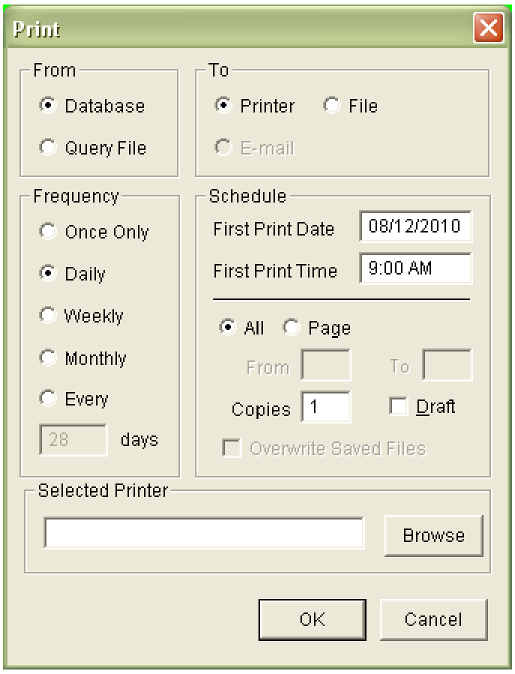
6. After clicking **OK**, if you go back into the **Application** menu you will see that *RepStartSchedule* is now ***greyed*** out with a **tick** next to it – this indicates that the *Scheduler* is now running



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

Scheduling the Report

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



2. Select from the following options:

   a. From:

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

   b. To:

      - **Printer** (to generate print reports)
      - **E-mail** (to generate email reports)
      - **File** (to save a report as a file)

   c. Frequency:

- Once Only (if this is the only time you're going to print this report)
- Daily (if you plan to send it every day)
- Weekly (if this is a once a week item)
- Monthly (if this is to be printed every calendar month)
- Every ___ days (if you want to set a specific schedule

d. Schedule:

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

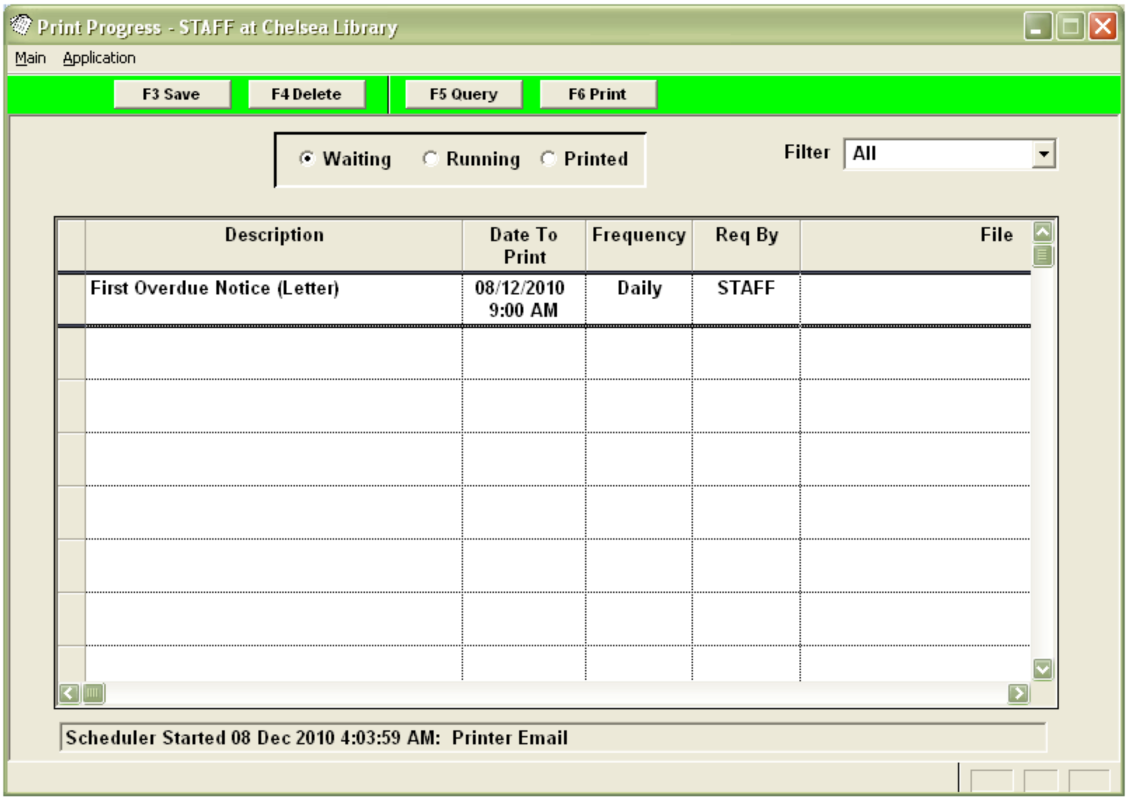
e. Selected Printer:

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

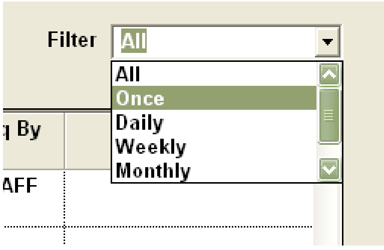
3. Click the **OK** button when complete

Check Print Progress

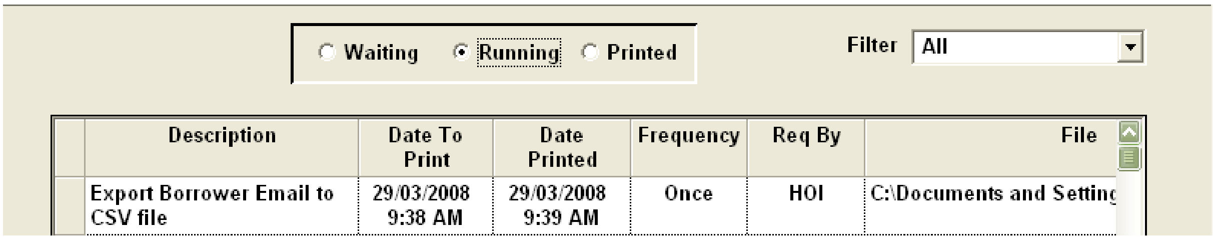
1. You can check the progress of your reports at any time by going into **Main** > **Reports** > **RepPrintProgress** – the Print Progress screen will display:



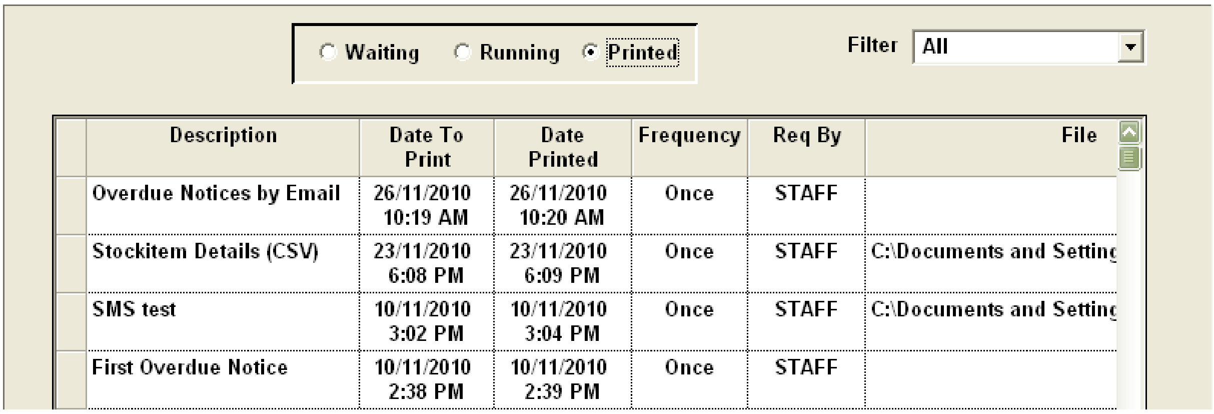
2. If your library uses the *scheduler* for a lot of reports, you can select a frequency type from the Filter drop-down menu at the top:



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



4. Your report will show up in “Printed” when it is complete



Additional Items

When scheduling reports, you must remember:

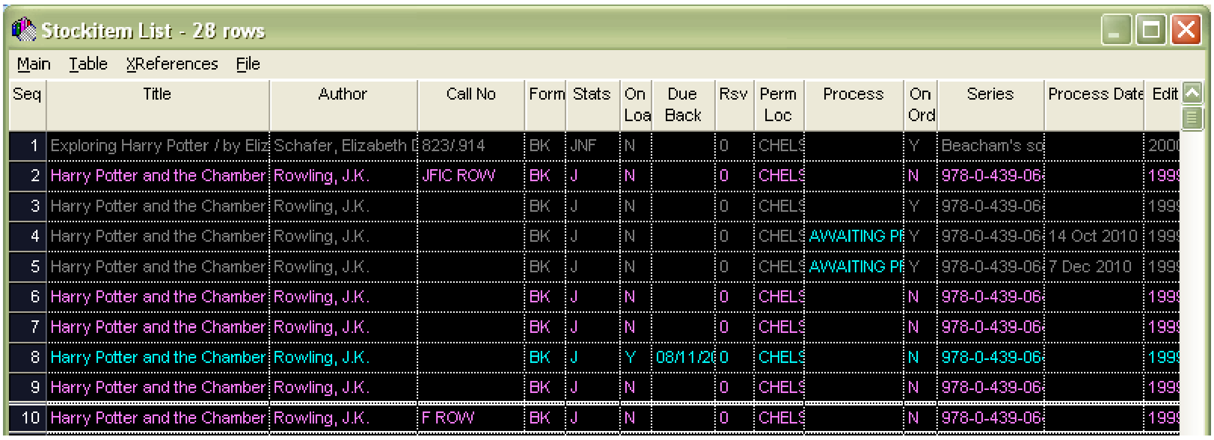
- The scheduler must be started prior to the time that reports are scheduled to run – you may have a procedure to start the *scheduler* first thing in the morning. Schedule your reports a bit later (for example: if you start at 8:30am, then schedule the first report for 9:30am) so that if there are any unforeseen delays, the print schedule will still go as normal.
- Schedule reports with time to spare: Allow time for Amlib to be started and the scheduler to be started. Allow time between scheduled reports (at least 10-15 minutes) in case you need time to refill the printer, or something else happens.
- Check and stock the printer before the reports are due to run: Scheduling reports that print to file or send e-mails are somewhat easier to manage, so you may want to try the scheduling with these first. If you are scheduling printed reports, ensure that the printer is full of paper, not low on toner and if possible have someone near the printer when the reports are due to run, so they can fix any paper jams quickly.
- Check the 'Waiting' queue: Old reports that have not run can jam up the print queue and stop your scheduled reports from running. It is good practice when starting the scheduler for the day to check *RepPrintProgress* and delete out any old print jobs from the "Waiting" queue.
- Check and maintain your "Printed" queue: A large amount of print jobs in your printed queue can stop your reports from running. While there is ample space in this area to store information on past print jobs, the space in not unlimited. If the print jobs are not deleted on a regular basis (perhaps quarterly or every few months) this area will eventually become too full to allow the reports to run. It is fine to keep some print jobs in the "Printed" area of *RepPrintProgress*. Perhaps keep the last few days or few weeks and delete the rest. How many reports and how often you print will determine how far back you can keep this information.
- If scheduled reports do not run for some reason (there is a paper jam or the *scheduler* is not started, etc.) they will sit in the "Waiting" queue in *RepPrintProgress* and stop other reports from printing. If there is a delay, check the "Waiting" queue. If the reports due to run have a date/time next to them that has already passed, these will need to be deleted and then manually printed via the 'print' button.
- Check before your re-run reports: If there was a delay or paper jam and you have to run a report for a second time, check your settings before running it. If the report creates accounts for very overdue items, running it a second time will generate a second charge – it is best to run manually via **F8 View** and then print from the view screen. Do the same if you are adding history to records or recording statistics. Reservations will require a different procedure as they will already have their status changed to "Printed".

SAVING A REPORT TO FILE

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

Table

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

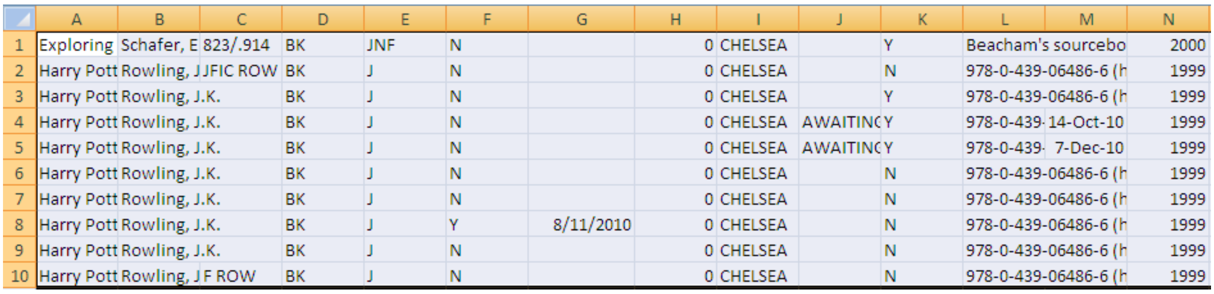


Stockitem List - 28 rows

Main Table XReferences File

Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Edit
1	Exploring Harry Potter / by Eliz	Schafer, Elizabeth D	823/.914	BK	JNF	N		0	CHELS		Y	Beacham's so		2000
2	Harry Potter and the Chamber	Rowling, J.K.	JFIC ROW	BK	J	N		0	CHELS		N	978-0-439-06		1999
3	Harry Potter and the Chamber	Rowling, J.K.		BK	J	N		0	CHELS		Y	978-0-439-06		1999
4	Harry Potter and the Chamber	Rowling, J.K.		BK	J	N		0	CHELS	AWAITING PR	Y	978-0-439-06	14 Oct 2010	1999
5	Harry Potter and the Chamber	Rowling, J.K.		BK	J	N		0	CHELS	AWAITING PR	Y	978-0-439-06	7 Dec 2010	1999
6	Harry Potter and the Chamber	Rowling, J.K.		BK	J	N		0	CHELS		N	978-0-439-06		1999
7	Harry Potter and the Chamber	Rowling, J.K.		BK	J	N		0	CHELS		N	978-0-439-06		1999
8	Harry Potter and the Chamber	Rowling, J.K.		BK	J	Y	08/11/20	0	CHELS		N	978-0-439-06		1999
9	Harry Potter and the Chamber	Rowling, J.K.		BK	J	N		0	CHELS		N	978-0-439-06		1999
10	Harry Potter and the Chamber	Rowling, J.K.	F ROW	BK	J	N		0	CHELS		N	978-0-439-06		1999

↓



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

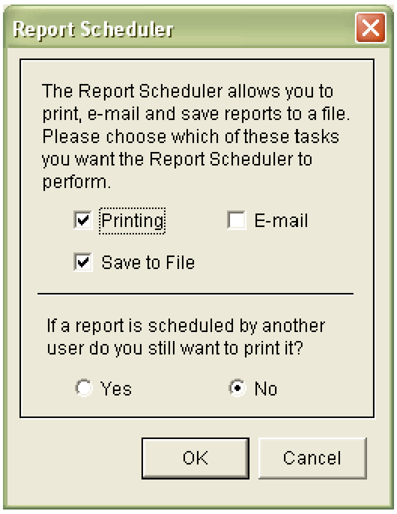
This method works best if you don’t have a large number of results.

Report

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

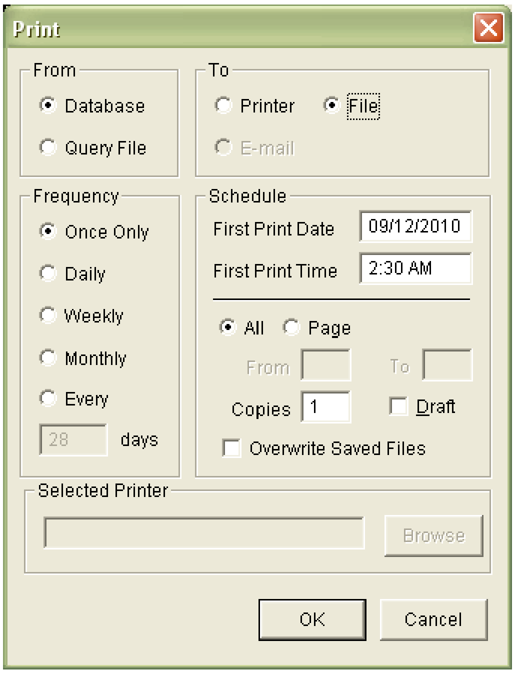
In this example, we are going to use the **&XSTKCSV.QRP** template in the **Reports** > **RepStockitem** screen:

1. Launch the *Amlib* client
2. Go to **Main** > **Reports** > **RepStockitem** – the Stockitem Reports screen will display
3. Click the **F1 New** button – the Select Report Format screen will display
4. Highlight the **&XSTKCSV.QRP** file and click the **Select** button – a new entry will appear in the Stockitem Reports table
5. Type in an appropriate Description – for example: **Harry Potter Items**
6. Click the **F3 Save** button
7. Highlight the report and click the **F7 Where** button – the Stockitem Reports – Where screen will display
8. Enter an appropriate search condition(s) – for example: **Title LIKE Harry Potter**
9. Click the **F3 Save** button
10. Highlight the report and click the **F9 Order** button – the Stockitem Reports – Order By screen will display
11. Use the arrow keys to add fields to the Order By column – for example: **Title | ASC** using the arrow keys
12. Click the **F3 Save** button
13. From the menu, select **Application** > **RepStartSchedule** – the Report Scheduler prompt will display:

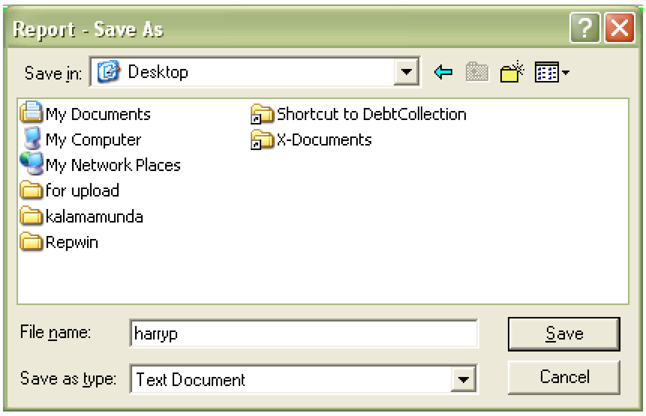


14. Ensure that **Save to File** is ticked and click the **OK** button

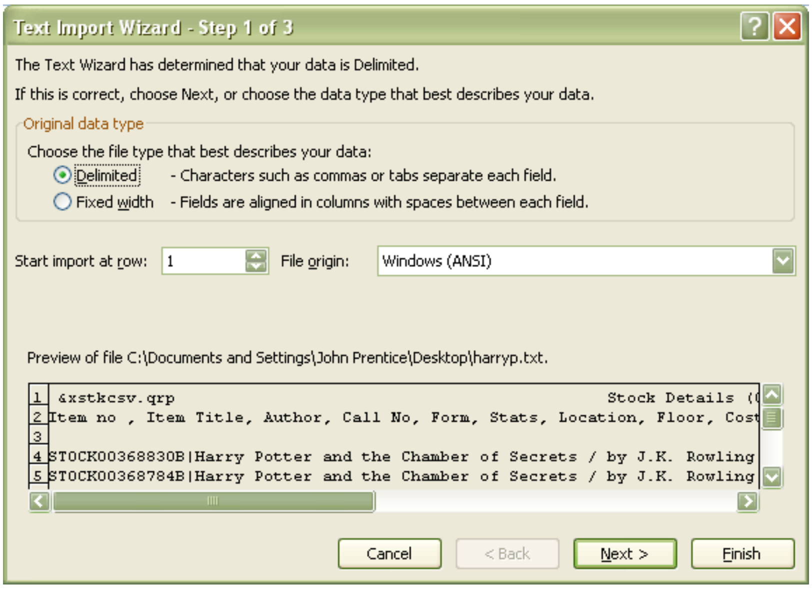
15. Highlight the report and click the **F6 Print** button – the Print screen will display:



16. Change the To: option to **File** and click the **OK** button – the Report – Save As dialogue box will display:



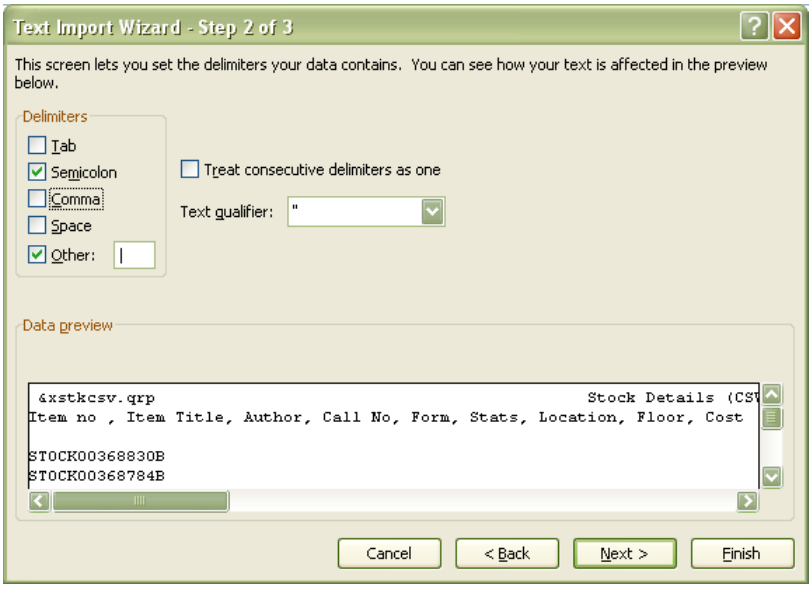
17. Save As options:
    a. To save it for a *Word* document, leave the Save as type: as **Rich Text Format (RTF)**
    b. To be able to open it in *Excel*, change the Save as type: to **Text Document**
18. You can check the progress of your report in by selecting *Reports > RepPrintProgress* from the menu
19. If you've saved the report to open in *Excel* (Text Document) then you will need to follow these steps so it is displayed correctly:
    a. Open *MS Excel*
    b. Use **File** > **Open** to open the text file you've saved – ensure that the Files of type: = **All Files (*.*)**
    c. The Text Import Wizard will open



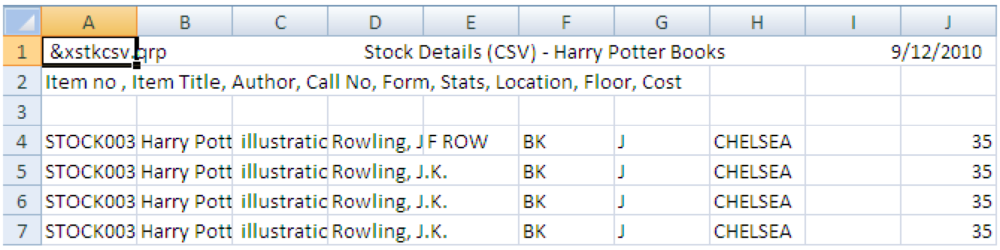
d. *Excel* will recognise your file as **Delimited**, so click the **Next** button

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

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



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

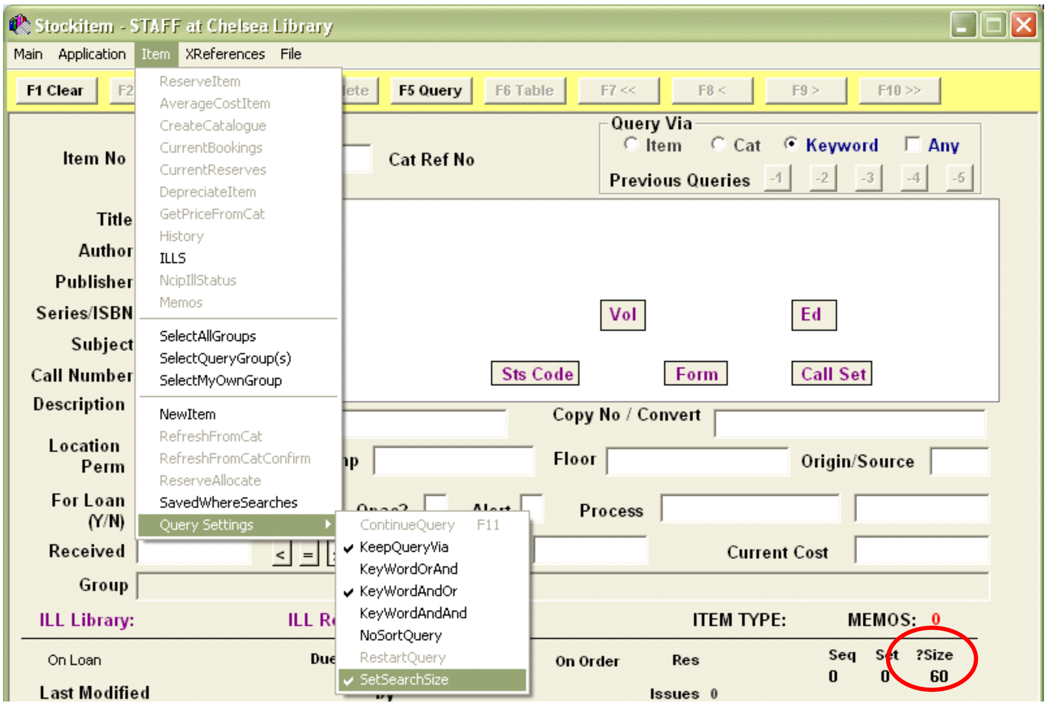


REPORTS IN OTHER MODULES

You can create reports in other *Amlib* modules such as *Stockitem* and *Borrower* by getting a table of data. This can be done by either conducting a standard search in the main module screen, or doing a Where search.

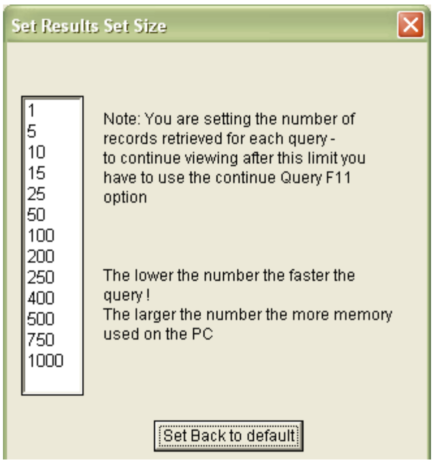
Search Size

The number of items or borrowers that display in a table depend on the Search Size set. In the bottom, right hand corner of your screen you will see ?Size which will show you the current Search Size setting:

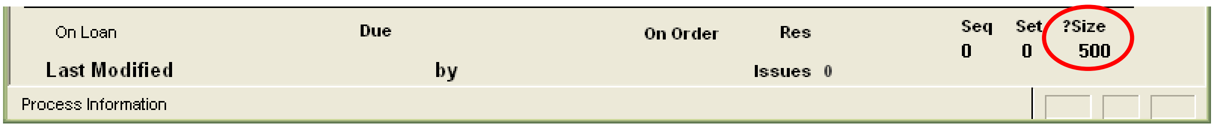


To change the search size:

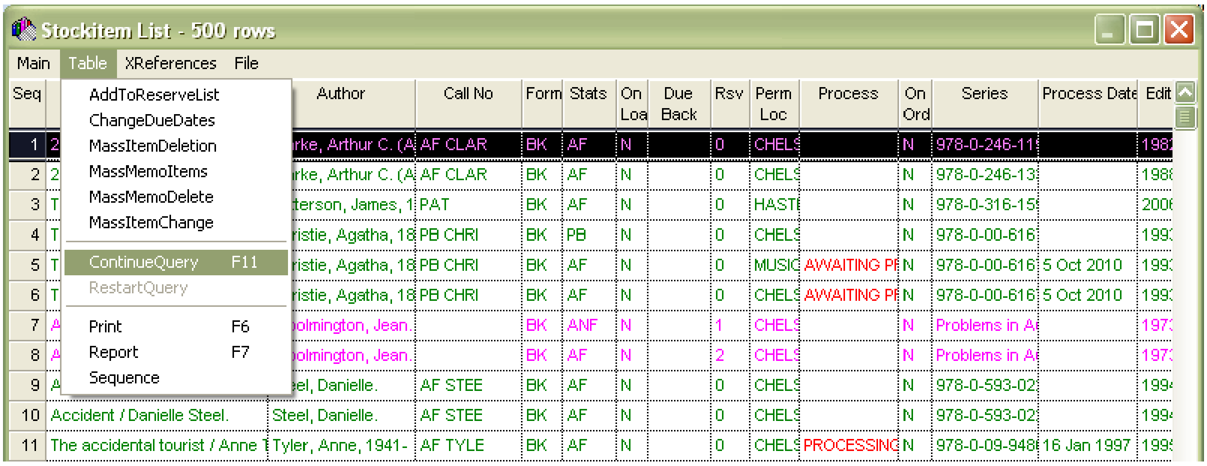
1. From the menu, select **Item** > **Query Settings** > **SetSearchSize** – the Set Results Search Size screen will display:



2. Select a **number** (for example: **500**) – the table will then close and the ?Size will have been updated:



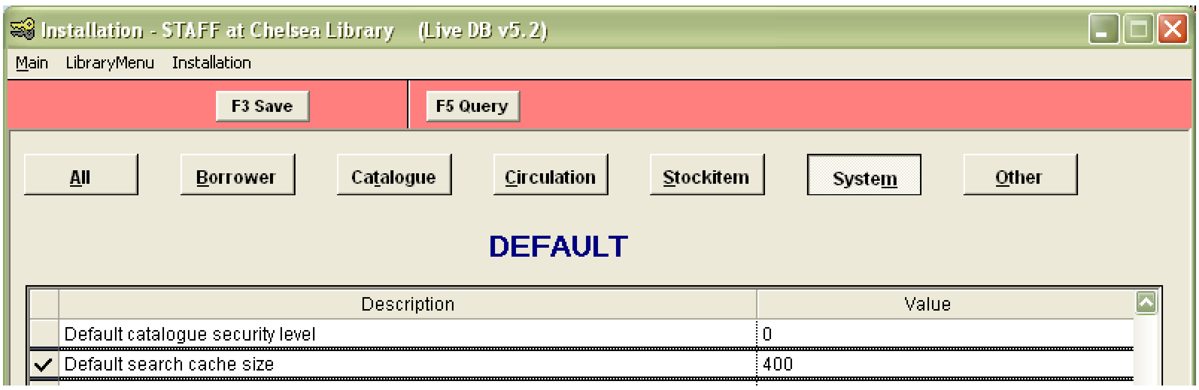
3. If there are more items in the results table than the Search Size set, you can go on to the next list by selecting **Table** > **ContinueQuery** from the menu (or by clicking the **F11** button)



Default Search Size

You can adjust the default search size in Supervisor settings:

1. Go to **Main** > **Supervisor** > **Installation** – the Installation (DEFAULT) screen will display
2. (Optional) From the main menu, select **Installation** > **Choose Location**, then select the **location** you log in as
3. Select the System tab
4. Scroll down to: Default search cache size **=** <enter an appropriate size> – for example: **400**



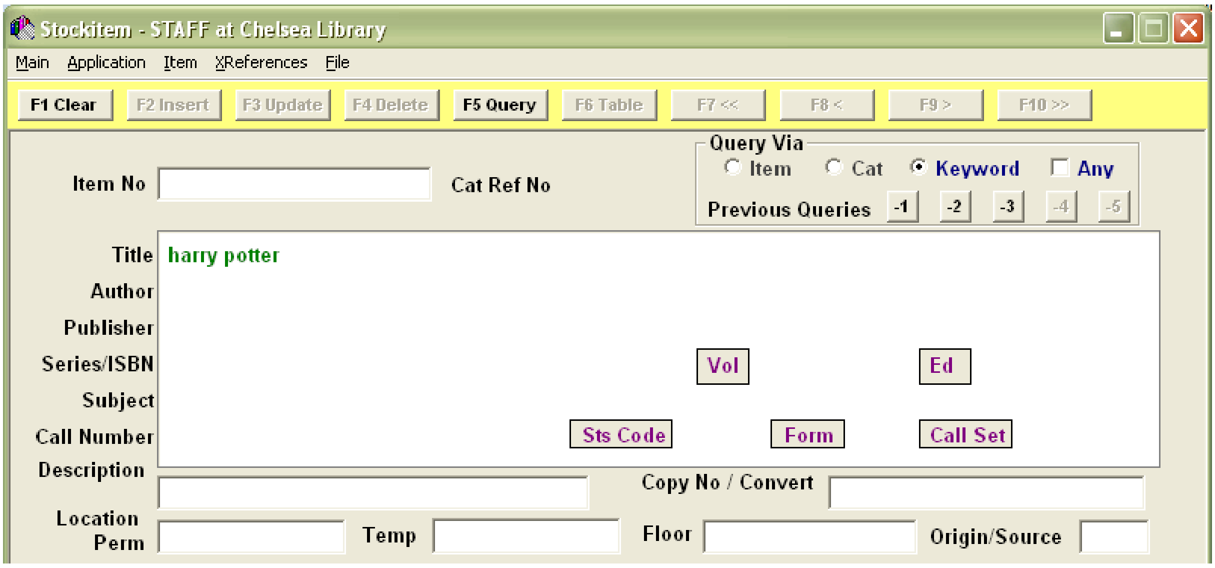
5. Click the **F3 Save** button when complete
6. Exit and restart the *Amlib* client for the new parameters to take effect

Creating a Table

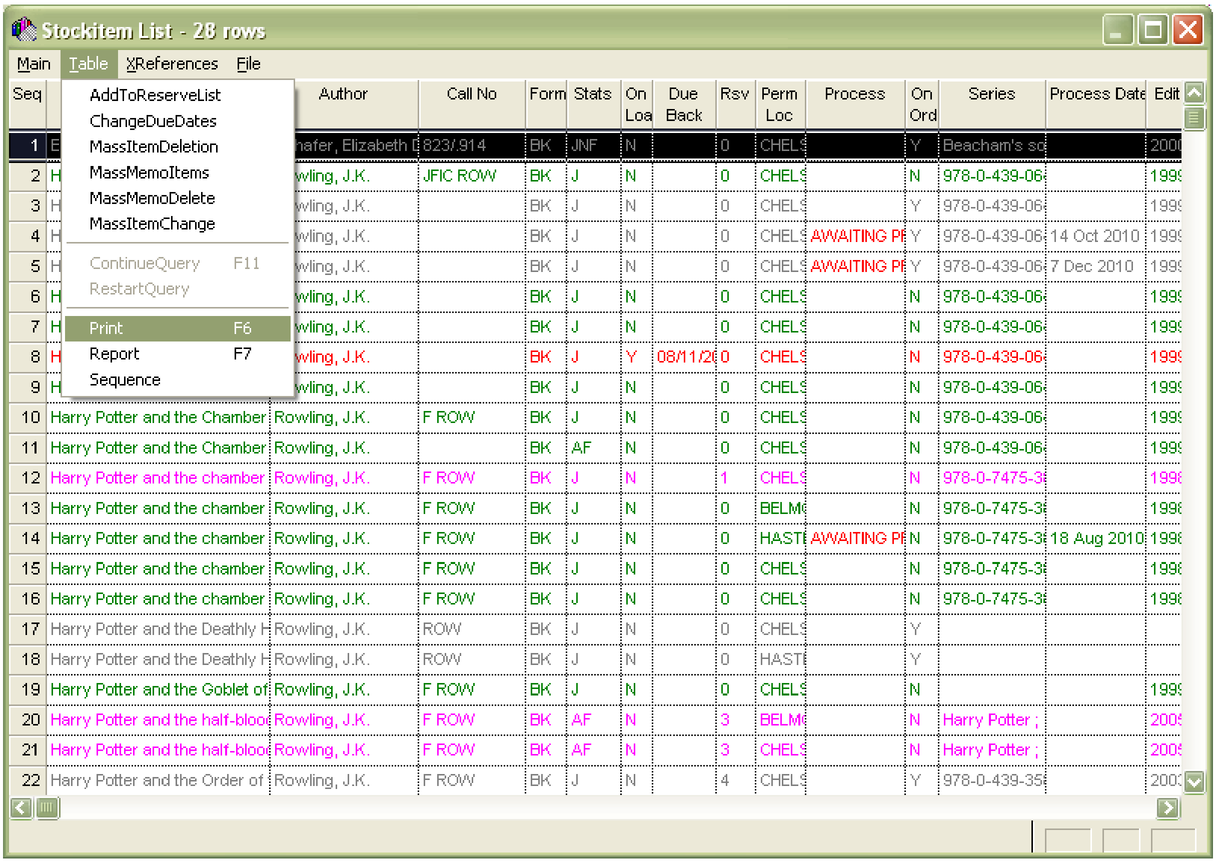
1. In whichever module you're searching (*Borrower* or *Stockitem*) ensure that the screen is clear – if not clear: click the **F1 Clear** button
2. Enter in your search terms (just about any field in a screen can be used to query the database, and you can do full stop (**.**) and **<Tab>** to bring up a list of codes, such as in the Stats Code field

There are also different query options available:

QUERY VIA	
Item	Browse search for data displayed within the *Stockitem* module
Cat	Browse search for data displayed within the *Catalogue* module
Keyword	Searches any keyword within the *Stockitem* and *Catalogue* module using one of the six bibliographic lines available: Stockitem: Title, Author, Subject, Series, Publisher or Call No. Typing in the Subject line will search only Subject keywords.
Any	Searches for any keyword within the *Stockitem* and *Catalogue* module – for example: even if the Title line is chosen the keyword will be search in Title, Author, Subject, etc.



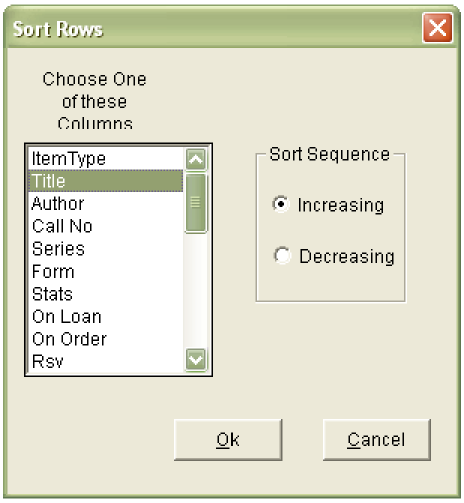
3. When you have your search terms typed in, select the **F5 Query** button
4. If the query finds more than one item, the results will display as a List. From this List the items can be viewed individually. It is possible to save the records to a file, or go to other applications for the items (for example: *Stockitems*, *Authorities*, *Periodicals*) by choosing the **XReferences** menu at the top of the screen



5. In this table view you can change the sequence of items from the **Table** > **Sequence**, or you can choose **Table** > **Print** (**F6**) or **Table** > **Report** (**F7**):

Sequence

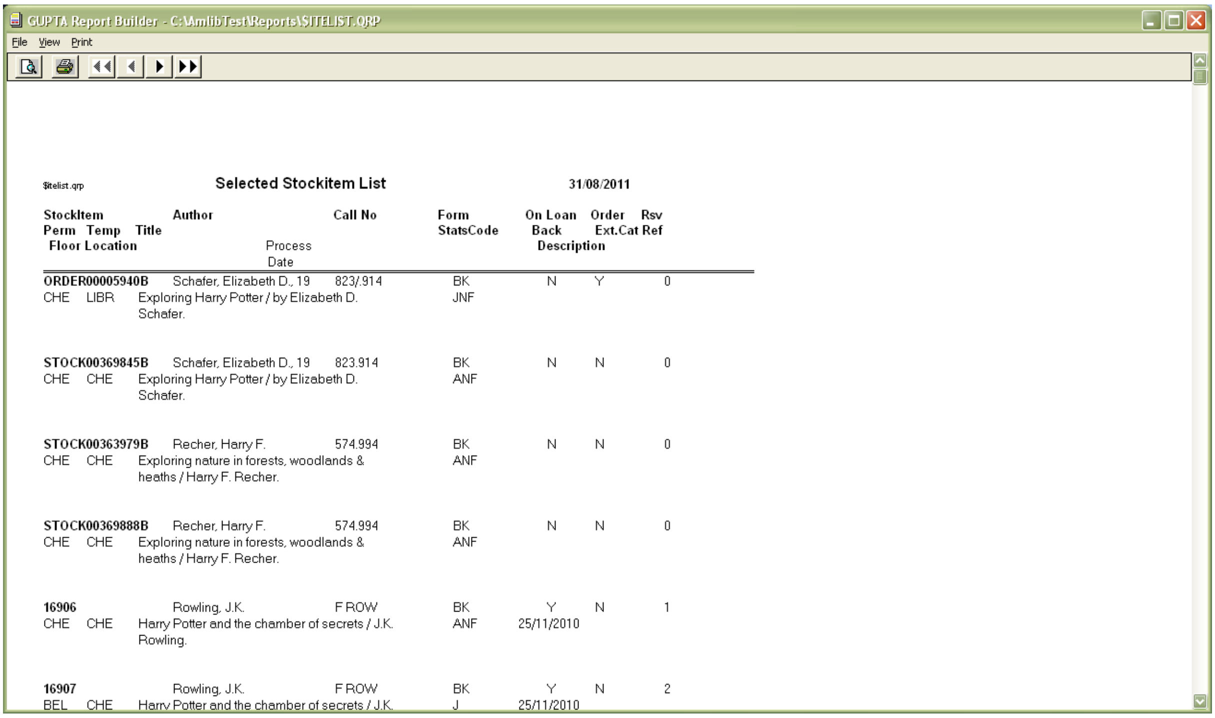
1. From the List menu, select **Table** > **Sequence** – the Sort Rows prompt will display:



2. You can only choose one sequence option for example: **Title**
3. Click the **OK** button when complete – the then be reordered according to your selection

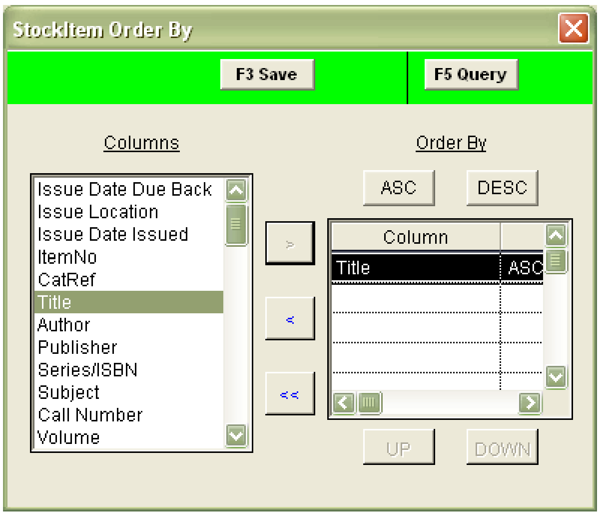
Print (F6)

1. From the List menu, select **Table** > **Print** (or click the **F6** key)
2. Your result list will appear in a print table – click on the **print** button to print

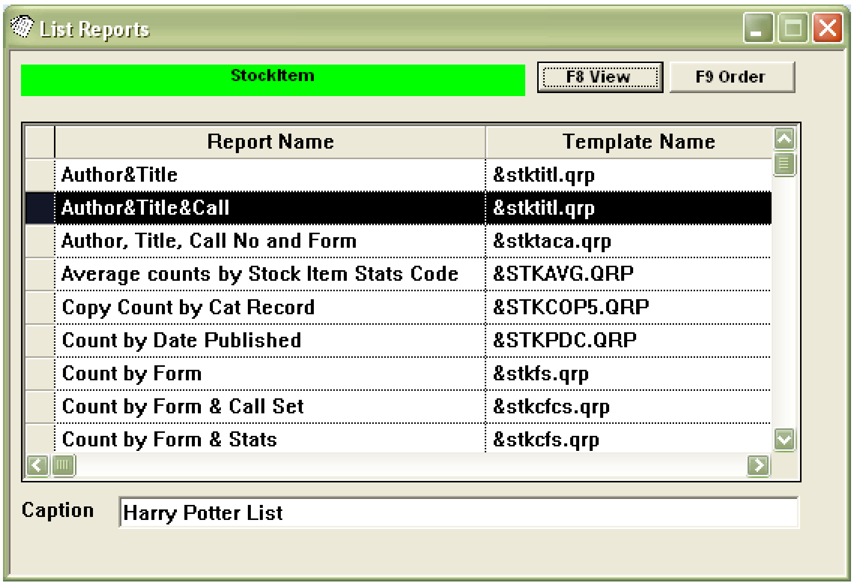


Report (F7)

1. Highlight the items you would like to use in the report
2. Select **Table** > **Report** (or click the **F7** key) – the List Reports dialogue box will display
3. All the available templates for that category will be displayed
4. Select a Report – for example: **Author&Title&Call** (**&STKTITL.QRP**)
5. Click the **F9 Order** button to choose the sequence of your results:



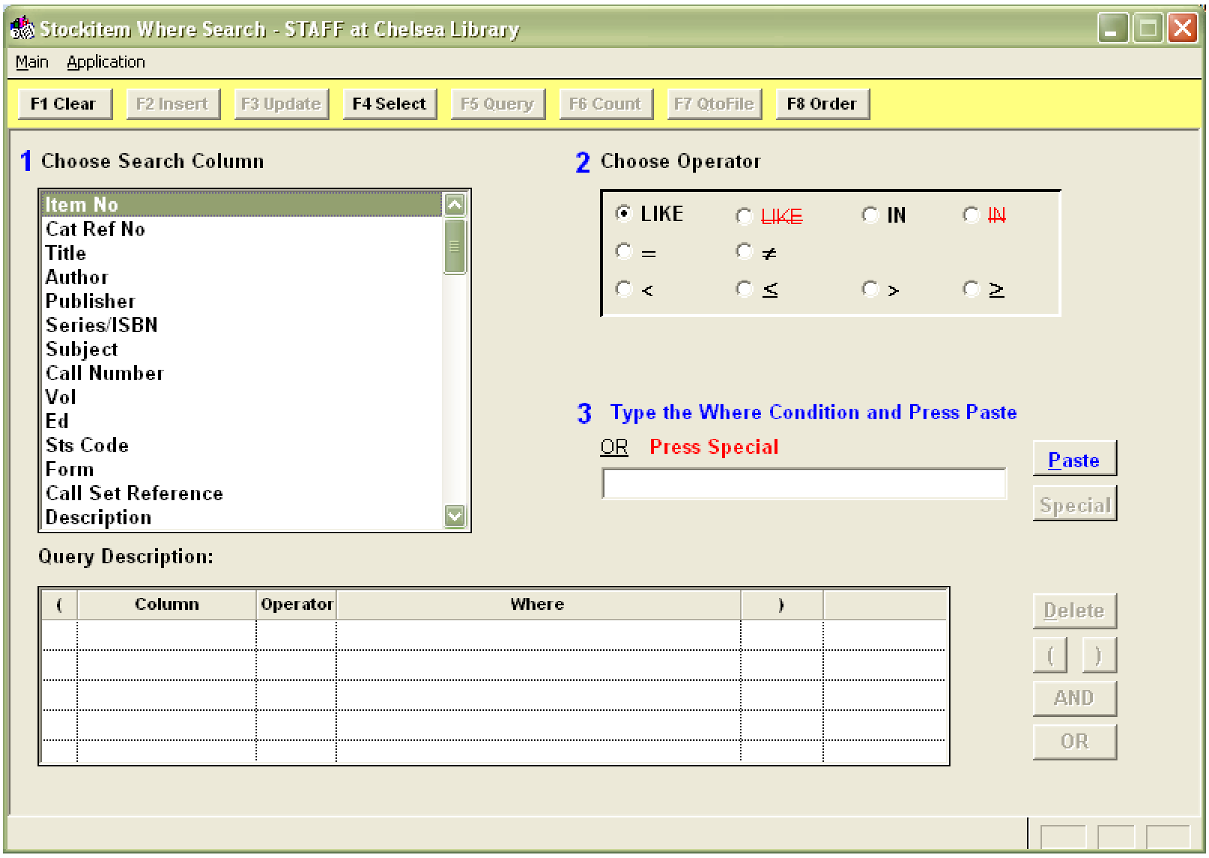
6. Enter a Caption for the report – for example: **Harry Potter List**



7. Click the **F8 View** button – the results will appear in a Report – View window
8. Click on the **print** button to print

WHERE SEARCH

You can access <u>Where</u> searches in the *Stockitem* and *Borrower* modules by selecting **Application** > **Where...** (in the *Stockitem* module) or **Application** > **BorrowerWhere** (in the *Borrower* module):



1. **Choose Search column**: it can be helpful to have a look at the main <u>Stockitem</u> (or <u>Borrower Details</u>) screen if you're confused about which fields contain what information
2. **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**)
~~LIKE~~	Where the required data in this field does not begin with the text entered	**~~LIKE~~ ELD** (for all except **Eldorado**)
IN	Useful for selecting multiple codes	**IN A,J,YA** (for all of these types)
~~IN~~	Useful for multiple codes not to be included	**~~IN~~ 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 Useful for **NOT EQUAL TO NULL** – choose this operator, do not enter any data and click the **Paste** button	≠ **J** (borrowers who do not have a code of **J**)
<	Where the text entered is less than the data required	**< 01/10/10** (less than 1 Oct 2010)
≤	Where the text entered is equal or less than the data required	≤ **01/10/10** (less than or equal to 1 Oct 2010)
>	Greater than	**>01/10/10** (greater than 1 Oct 2010)
≥	Equal or greater than the text entered	≥ **01/10/10** (greater than or equal to 1 Oct 2010)

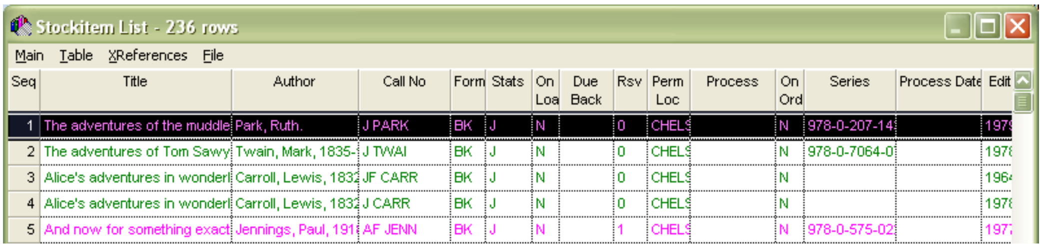
3. **Type the Where condition**: this can be a date, a code, letters, numbers, etc

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

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

   a. Count the number of results by clicking the **F6 Count** button – a prompt with the following message will display: **XXX Stock Item(s) were found.**

b. Get the list of results by clicking the **F5 Query** button – the results will then display in the relevant List:

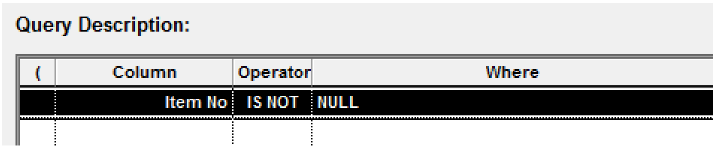


5. If you wanted to find ALL of something (for example: Borrower, StockItems, items on loan) then you could run a query such as:

   a. **BarCode IS NOT NULL** (all Borrowers)

   b. **ItemNo IS NOT NULL** (all StockItems)

   c. **Issue Due Date Back IS NOT NULL** (all items on loan)

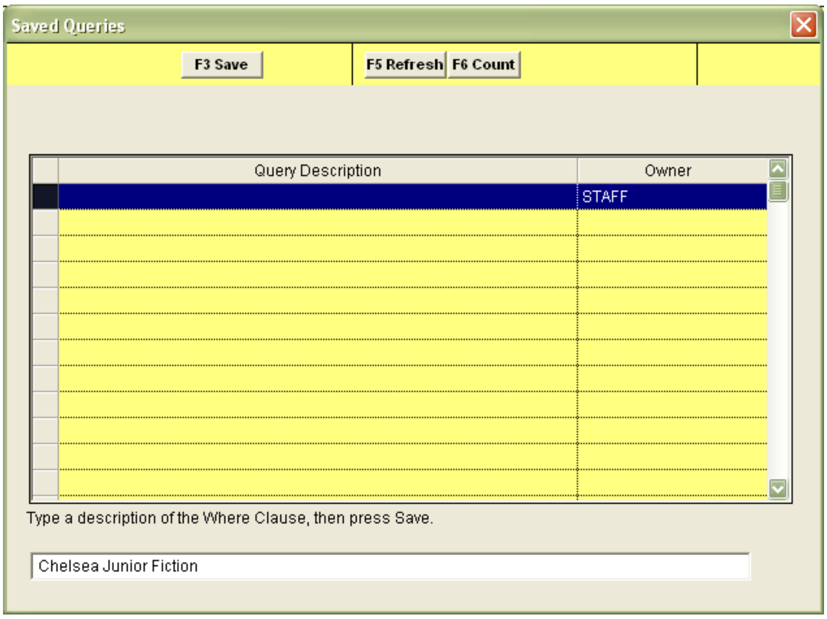


The **NULL** value is achieved by simply leaving a blank space in the field 3 Type the Where Condition and Press Paste – as soon as the **Paste** button is clicked a **NULL** value is entered into the Query Description table

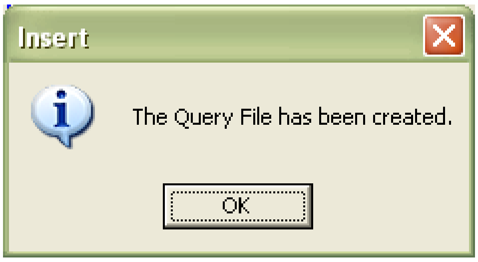
Saving a Where Search

It is possible to save a Where search:

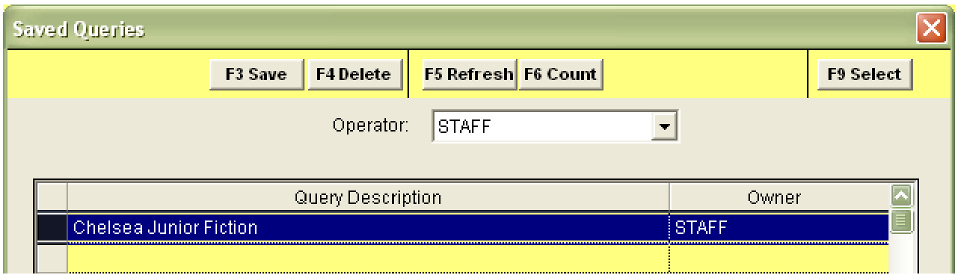
1. Click the **F2 Insert** button – the Saved Queries table will display:



2. Type in a Description (for example: **Chelsea Junior Fiction**) and click the **F3 Save** button – a prompt with the following message will display: **The Query File has been created.**



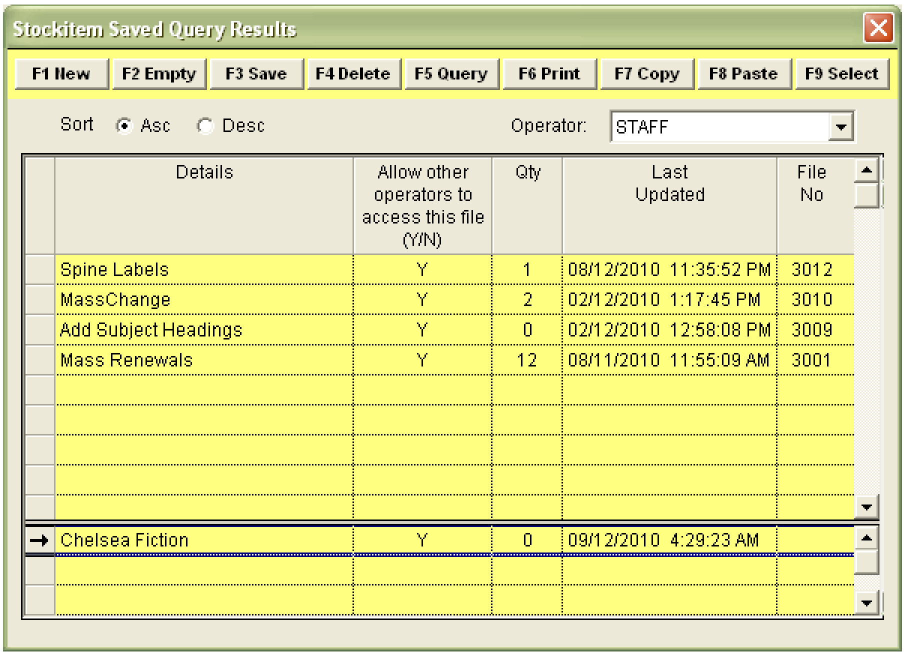
3. Once saved, you can access saved Where search by clicking the **F4 Select** button in the Where screen, selecting the **Saved Query** from the list and then clicking the **F9 Select** button:



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, click the **F7 QtoFile** button – the Saved Query Results table will display:



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 click **F9 Select** (click **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: clicking on the **F1 New** button, typing in the Details (for example: **Chelsea Fiction**) and then clicking on the **F3 Save** button. Then highlight the file and click on the **F9 Select** button.
3. This Saved File can now be used as part of a report or procedure

APPENDICES

Appendix 1: Report Writer (RepWin30)

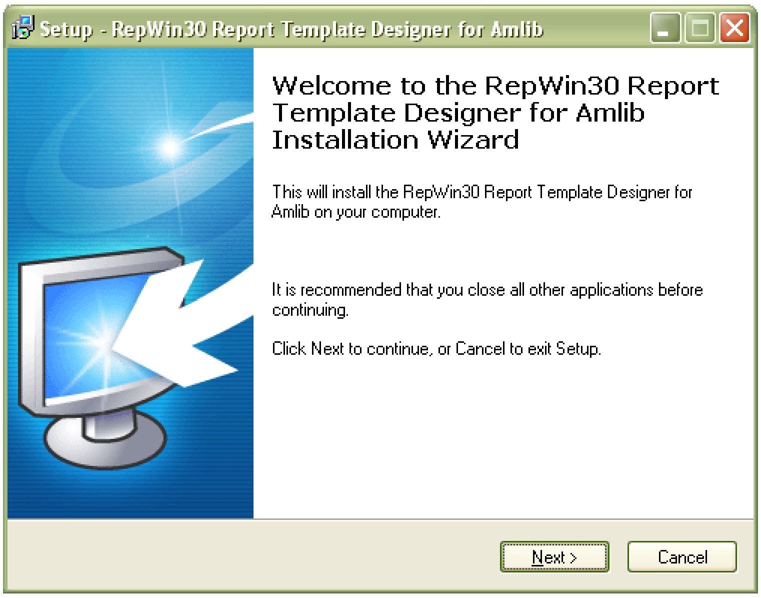
The **REPWIN30.EXE** program used to edit reports is located on your *Amlib* server in the **Drive:\Amlib\Utility** folder (for example: **C:\Amlib\Utility**)

You will find both the **Repwin** folder (containing the **REPWIN30.EXE**) and the **REPWINSETUP.EXE** (which you can use to install *RepWin30* on a local PC).

If you are unable to access your *Amlib* server for any reason, then contact Amlib Support and they will sent you a copy of the installer.

To install *RepWin30* on your PC:

1. Copy the **REPWINSETUP.EXE** to your desktop
2. Double-click on the **REPWINSETUP.**EXE – the RepWin30 Report Template Designer for Amlib Installer Wizard will display:



3. Just follow the instructions on the Wizard to install

Appendix 2: Creating Spine Label Reports

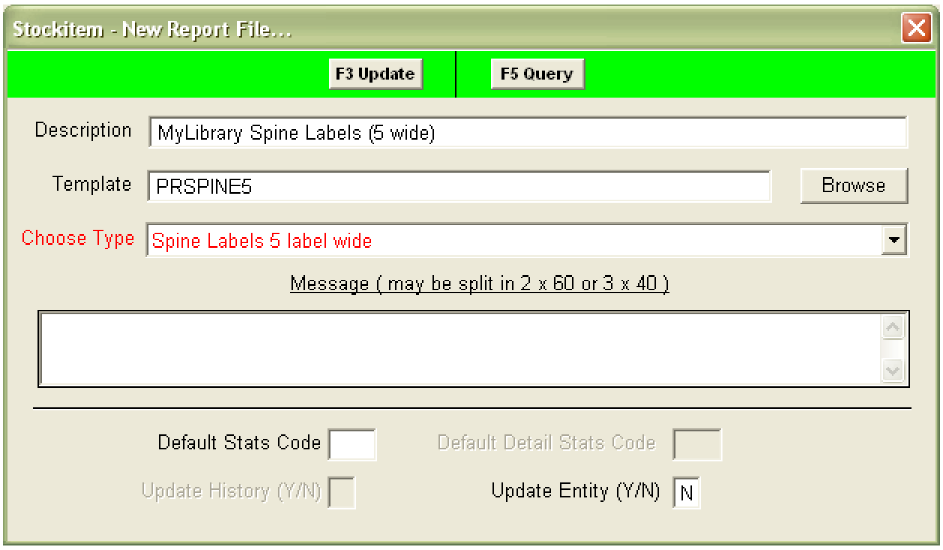
Most spine label reports require the loading of a customised spine label. The following guide takes you through the entire process for loading the customised template, creating a new report, creating a Saved File of items to print and running the report.

Save the Template

- Save the template into the **Amlib/Reports** folder on the *Amlib* server. This will make the template available for use for all users. Alternatively, you may save it into a local folder on your PC – but please be aware, that the template (once loaded) will only be available for use on that PC.
- Ensure that the template is saved with a name that clearly identifies it as a customised spine label – for example: **PRSPINE5.QRP**

Load the Template

1. Launch the *Amlib* client
2. Go to **Main** > **Reports** > **RepAddNew** – the Report Files screen will display
3. From the Report Entity drop-down select: **Stockitem**
4. Click the **F1 New** button – the Stockitem – New Report File screen will display:



5. **Type** in a Description **–** for example: **MyLibraryName Spine labels (5 wide)**
6. Click on the **Browse** button and navigate to the **Amlib/Reports** folder on your *Amlib* Server and locate the template to be loaded (if the template has been loaded onto your PC – then navigate to the local folder)
7. **Select** the file and then click on the **Open** button
8. Choose Type – ensure you select **Spine Labels** (with the matching number of columns to those in your template) – for example: **Spine Labels 5 label wide**
9. You can leave Default Stats Code blank

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

11. Click the **F3 Update** button to save the new template

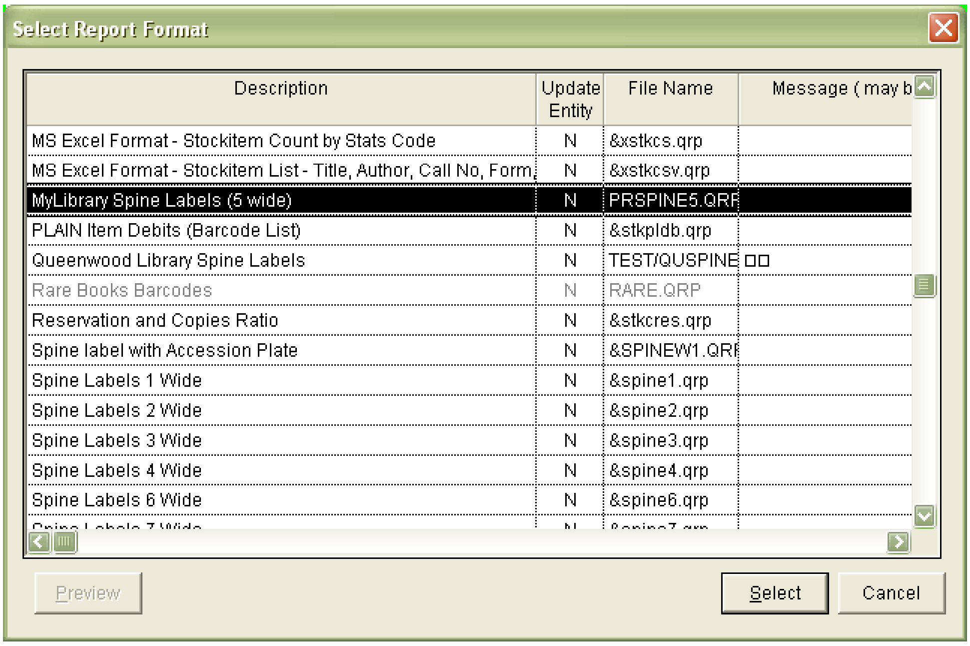
12. Close out of the Report Files window

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

Create the Report

1. Go to **Main** > **Reports** > **RepStockitem** – the Stockitem Reports screen will display

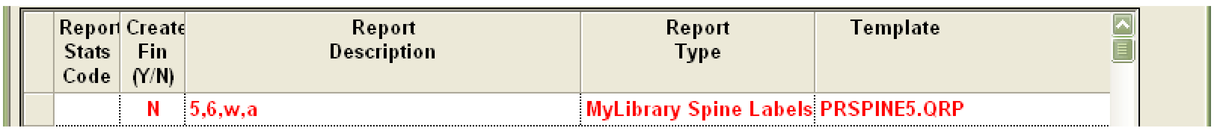
2. Select the **F1 New** button – the Select Report Format table will display:



Description	Update Entity	File Name	Message (may b
MS Excel Format - Stockitem Count by Stats Code	N	&xstkcs.qrp	
MS Excel Format - Stockitem List - Title, Author, Call No, Form,	N	&xstkcsv.qrp	
MyLibrary Spine Labels (5 wide)	N	PRSPINE5.QRP	
PLAIN Item Debits (Barcode List)	N	&stkpldb.qrp	
Queenwood Library Spine Labels	N	TEST/QUSPINE	
Rare Books Barcodes	N	RARE.QRP	
Reservation and Copies Ratio	N	&stkcres.qrp	
Spine label with Accession Plate	N	&SPINEW1.QRP	
Spine Labels 1 Wide	N	&spine1.qrp	
Spine Labels 2 Wide	N	&spine2.qrp	
Spine Labels 3 Wide	N	&spine3.qrp	
Spine Labels 4 Wide	N	&spine4.qrp	
Spine Labels 6 Wide	N	&spine6.qrp	

3. Locate the template you just loaded via RepAddNew, **highlight** it and click on the **Select** button

4. You will be returned to the Stockitem Reports screen – locate the report you just created and **highlight** it (the entry will be in **bolded red** and the **Report Type** = the **Report Description** of the template you loaded)



Report Stats Code	Create Fin (Y/N)	Report Description	Report Type	Template
	N	5,6,w,a	MyLibrary Spine Labels	PRSPINE5.QRP

5. The spine label settings should be typed into the Report Description field – for example: **5,6,w,a**. **DO NOT** type in any other descriptive characters as this will stop the report from functioning correctly – your Description should be similar to that in the example above. The Report Description is composed of four positions using the following criteria:

   a. The **first** position: how many labels to ignore before printing is commenced. In the example there would be *5 labels missed* before printing. On a 5 column wide spine label printout, printing would then start from the first label on the second line). To print on a new sheet of labels, the value would be **0**.

b. The **second** position: each line has a maximum of X characters before going to the next line (in the example, the line would be *6 characters* wide).

c. The **third** position – **t** or **w**

   i. **w**: Wrap the remainder of the Call Number to the next line(s)

   ii. **t**: Truncate the remainder of the Call Number
   (The example will **wrap** the remainder to the next lines)

w	t
591. 994994 56890 SMI	591. 994994 SMI

d. The **fourth** position: **a**, **b** or **s**

   i. **a**: Puts a full stop at the end of the line

   ii. **b**: Put a full stop at the beginning to the next line

   iii. **s**: Sets the **space** as the break and ignores other Punctuation

a	b	s
591. 994 SMI	591 .994 SMI	591.994 SMI

6. Select the **F3 Save** button

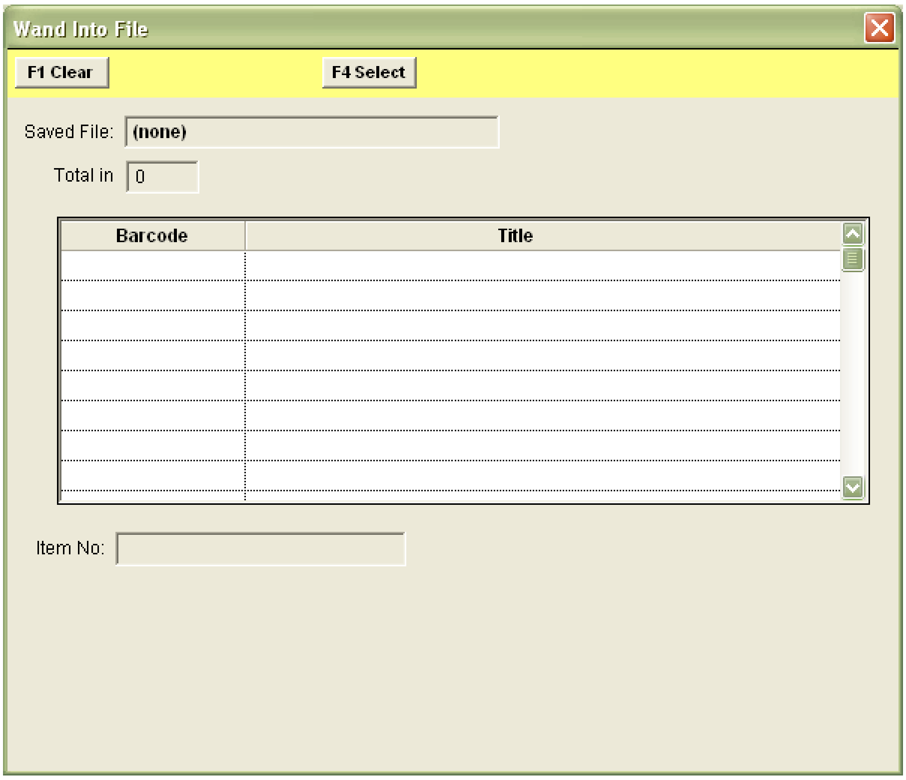
Once saved the line will be **bolded red** as the report does not have a **F7 Where** search. Typically this report is used only with a Saved File (therefore requiring no Where search). However, a **F7 Where** search of **Received Date = Current Date** could be used for those items received on that day only.

Wand Into File

Items can be wanded into a selected file. This is useful if you wish to use the group of items in a Report (for example: **Spine Labels**):

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

2. From the menu, select **File** > **WandIntoFile** – the Wand Into File screen will display:

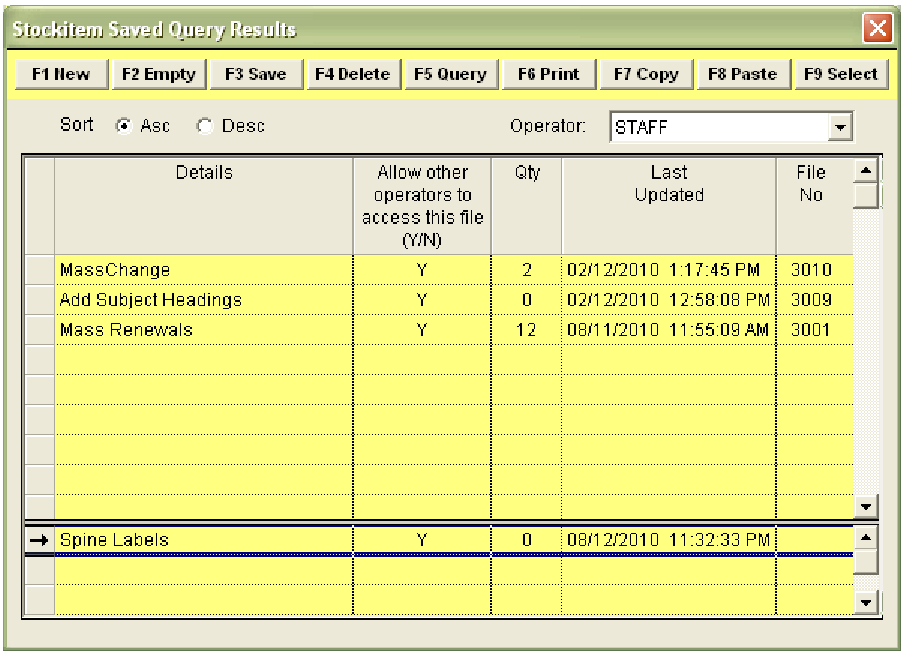


3. Click the **F4 Select** button – the Stockitem Saved Query Results table will display

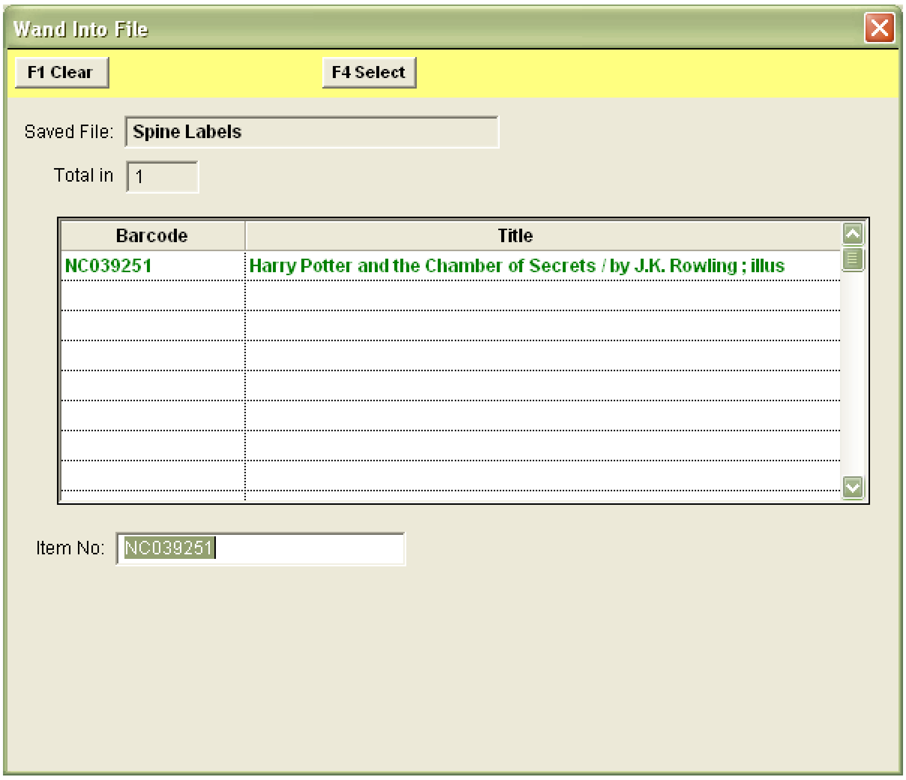
4. You can either use a pre-existing list file or create a new list file:

   a. To use a pre-existing file: select a list entry from the table and click **F9 Select** (click **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: clicking on the **F1 New** button, typing in the Details (for example: **Spine Labels**) and then clicking on the **F3 Save** button. Then highlight the file and click on the **F9 Select** button.



5. This will return you to the Wand Into File screen – the name of the selected list file will now appear in the Saved File: field:



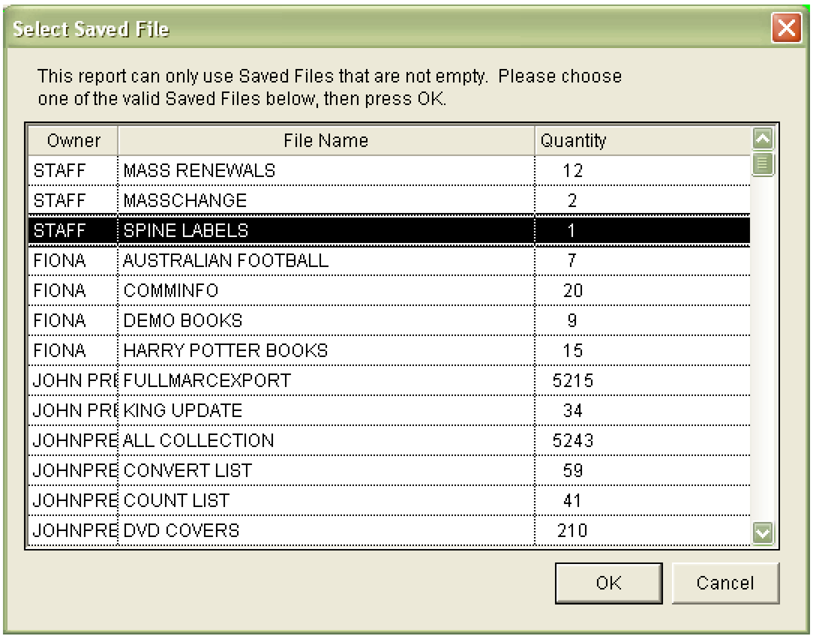
8. You can now start wanding in items: as each item is wanded, the **Barcode** and **Title** display in the window (they will be automatically saved into the selected Saved File)
9. After all the items have been wanded close the window by clicking the **[X]** in the top right-hand corner

Run the Spine Label Report

1. Go to **Main** > **Reports** > **RepStockitem** – the Stockitem Reports screen will display

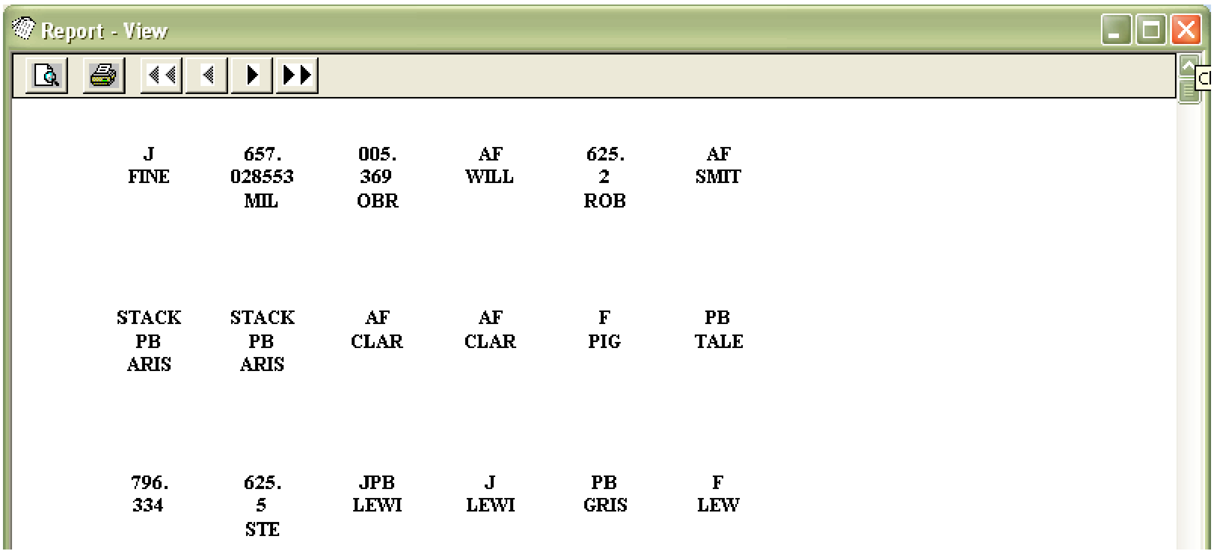
2. Locate the ***report you created as part of the <u>Create a Report</u> procedure above*** and **highlight** it

3. Select the **F8 View** button – the **Select Saved File** stable will display:



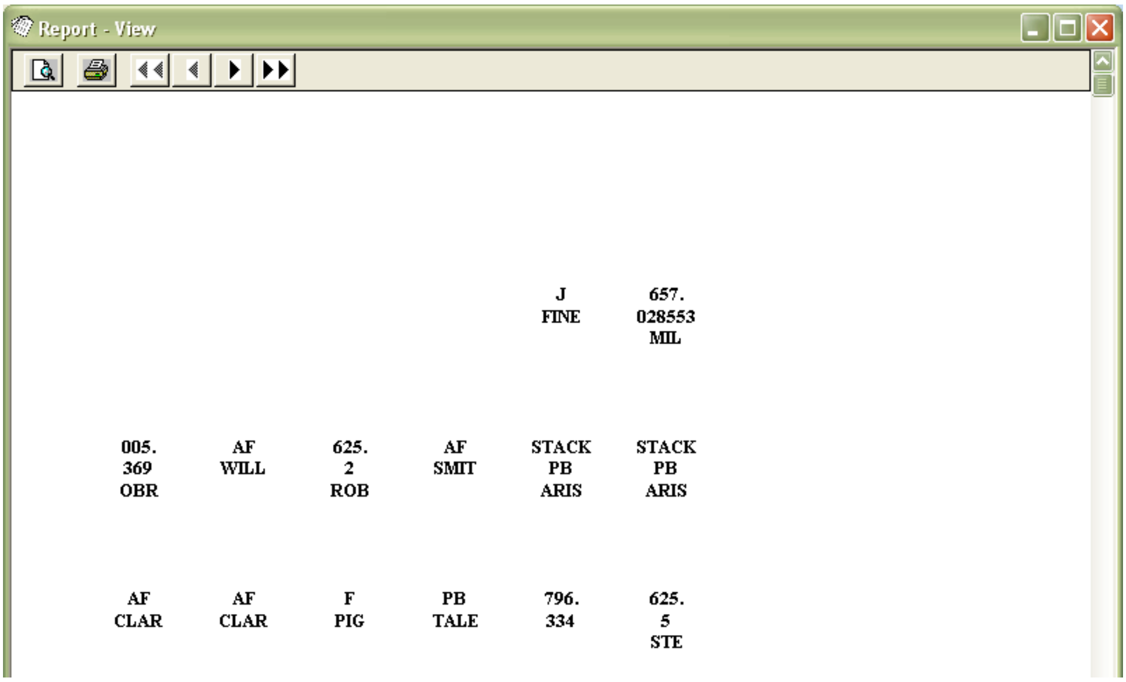
4. **Select** the <u>File Name</u> (that you wanded your items into) and click the **OK** button

5. A <u>Report - View</u> screen will display:



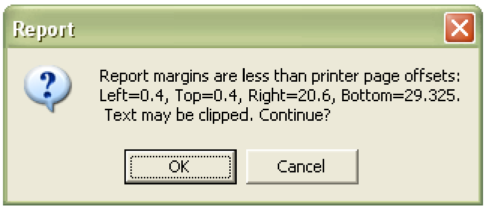
- The above example, shows a report starting at the first label: <u>Report Description</u> = **0,6,w,a**

- The following example shows a list starting at the tenth spine label: Report Description = **9,6,w,a**



6. Select the **print** button to print

Please Note: When the **print** button is clicked, a prompt with the following message may display: **Report margins are less than printer offsets…Text may be clipped. Continue?**



The message is the result of the report template having particularly narrow borders. Users should click **OK** button and check printouts to ensure that no clipping has occurred.

Clearing the File

After successfully printing the spine labels, the file can be emptied, ready for the next batch.

1. In the *Stockitem* module, select **File** > **DisplayFile** from menu – the Stockitem Saved Query Results screen will display
2. Highlight the **SPINE LABELS** file and click the **F2 Empty** button – a prompt with the following message will display: **Are you sure you want to remove all entries from the 'SPINE LABELS' saved file?**
3. Click the **Yes** button
4. Click the **F3 Save** button when complete

Appendix 3: Reservation Reports

Reservation Statuses

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

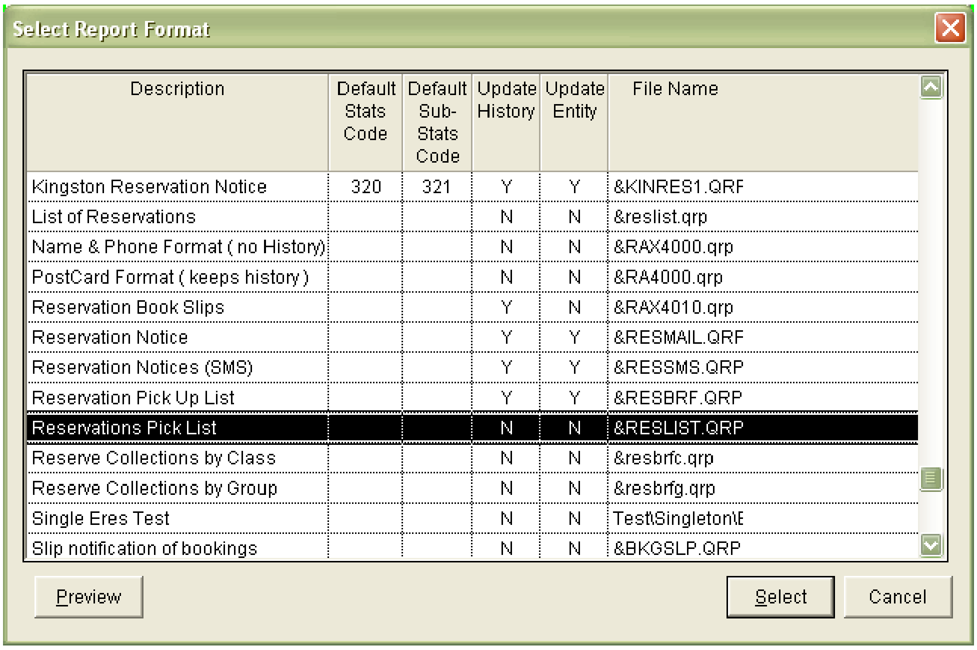
STATUS	EXPLANATION
ISSUE	Item was on loan when reserved (reserve placed via *Amlib* client)
ON LOAN	Item was on loan when reserved (reserve placed via *NetOpacs*)
SHELF	Item was on shelf (available) when reserved
RETURN	Item has been returned AFTER reservation placed
TRANSFER	Item was on transfer when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

<u>Setting Up the Report: Pick-Up List</u>

If you allow reservations to be placed on items that are **ON SHELF** (available) at the time of the reservation, then you will need to create and run a report that will create a pick-up list to collect these items

Create Report

1. Launch the *Amlib* client
2. Go to **Main** > **Reports** > **RepReservation** – the <u>Reservation Reports</u> screen will display
3. Click the **F1 New** button – the <u>Select Report Format</u> screen will display:



Description	Default Stats Code	Default Sub-Stats Code	Update History	Update Entity	File Name
Kingston Reservation Notice	320	321	Y	Y	&KINRES1.QRF
List of Reservations			N	N	&reslist.qrp
Name & Phone Format (no History)			N	N	&RAX4000.qrp
PostCard Format (keeps history)			N	N	&RA4000.qrp
Reservation Book Slips			Y	N	&RAX4010.qrp
Reservation Notice			Y	Y	&RESMAIL.QRF
Reservation Notices (SMS)			Y	Y	&RESSMS.QRP
Reservation Pick Up List			Y	Y	&RESBRF.QRP
Reservations Pick List			N	N	&RESLIST.QRP
Reserve Collections by Class			N	N	&resbrfc.qrp
Reserve Collections by Group			N	N	&resbrfg.qrp
Single Eres Test			N	N	Test\Singleton\E
Slip notification of bookings			N	N	&BKGSLP.QRP

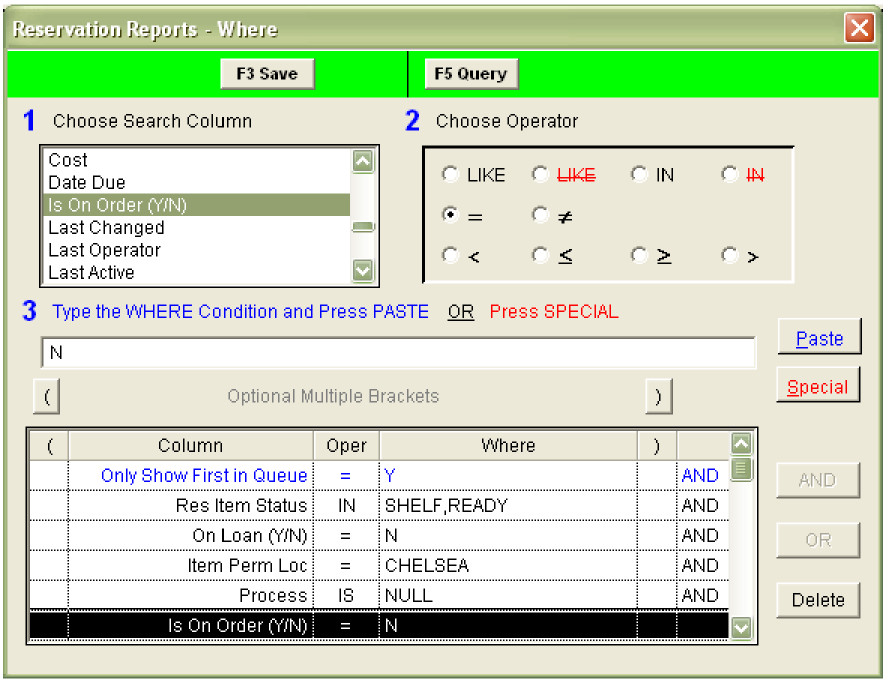
4. Highlight <u>Reservation Pick List</u> (wording may differ – it will be using the **&RESLIST.QRP** print template) and click the **Select** button
5. Type in a <u>Report Description</u> – for example: **Reservations Pick List**
6. If you would like the borrower record to retain a record of any notice sent, then ensure that <u>Create Hist (Y/N)</u> = **Y**
7. <u>Update Res Status</u> = **N**
8. Click the **F3 Save** button

Where Statement

1. Select the report from the list and click the **F7 Where** button – the Reservation Reports – Where screen will display
2. The statement **must** include the following settings:

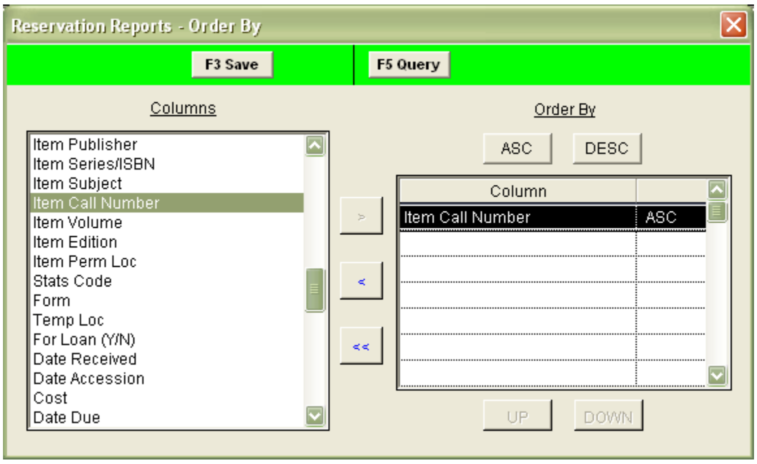
   - **Only Show First in Queue (Y/N) = Y** (otherwise ALL reserves on an item will show)
   - **Res Item Status IN SHELF,READY** (this will pick up any available or recently expired reservation items)
   - **On Loan (Y/N) = N** (this will exclude items on loan from the list)
   - (Optional) **Item Perm Loc =** (enter your location code) – for example: **Item Perm Loc = CHELSEA** (where multiple locations available)
   - (Optional) **Process IS NULL** (paste without putting a value in 3 – this will exclude any items in Processing, Binding, Missing, etc)
   - (Optional) **Is on Order (Y/N) = N** (this will exclude any items on order)

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



Order

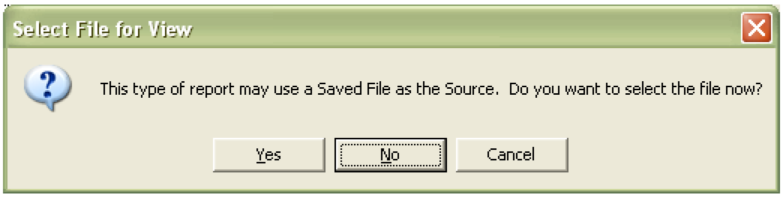
1. Highlight the report from the list and click on the **F9 Order** button – the Reservation Reports – Order By screen will display:



2. Use the arrow keys to select fields to Order By – for example: **Item Call Number**
3. Click the **F3 Save** button when complete

Print

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



2. Click the **No** button
3. The Report – View screen will display with a list of the items
4. (Optional) Click the **print** button to print the list

Please Note: No notices will be generated to patrons nor will the Reservation Status of the item be altered.

Update Status on Items

It is important that the items collected from the shelves should be processed (returned) before being set aside for collection. This allows you to do two things:

1. Generate a collection slip to place in the item (optional)
2. Updates the Reservation Status of the item to **RETURNED**

Setting up the Report: Notices

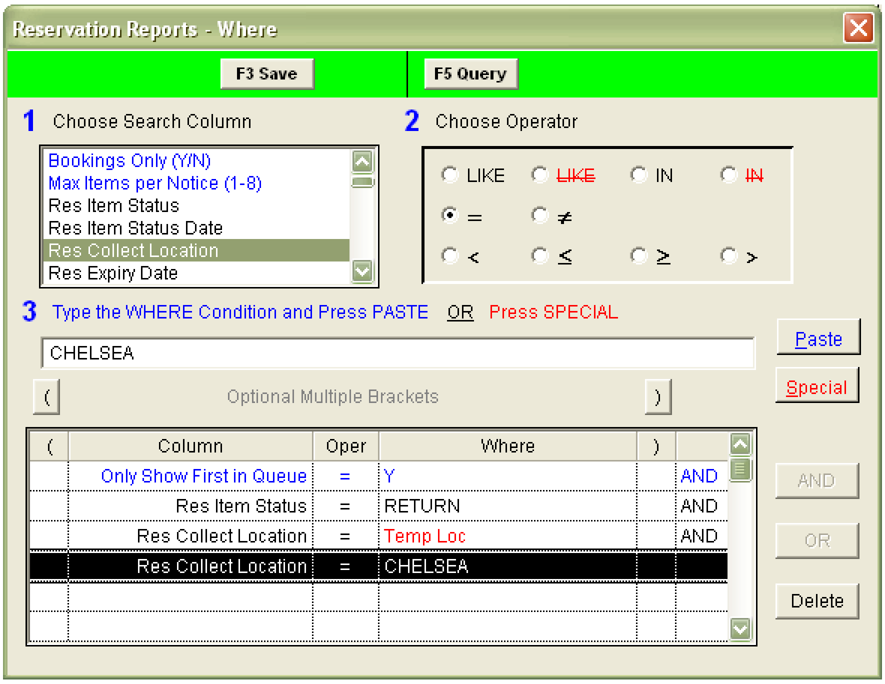
This is the report that generates a patron notice. Notices can be sent in one of three formats: **Letter**, **Email** or **SMS**. Unlike the pick list, it is possible to use one report to generate ALL notices for ALL locations (if desired). Patron notices **MUST** be run via the *Scheduler* to update the Reservation Status of the item to **PRINTED**.

Create Report

1. Go to **Main** > **Reports** > **RepReservation** – the Reservation Reports screen will display
2. Click the **F1 New** button – the Select Report Format screen will display
3. Highlight the notice template (**&RESMAIL.QRP**, **&RESEML.QRP** or **&RESSMS.QRP**) you would like to use and click the **Select** button
4. Type in a Report Description – for example: **Reservation Notices**
5. If you would like the borrower record to retain a record of any notice sent, then ensure that Create Hist (Y/N) column = **Y**
6. Ensure Update Res Status column = **Y** (this will prevent notices from being printed twice)
7. Click the **F3 Save** button when complete

Where Statement: Letter

1. Select the report from the list and click on the **F7 Where** button – the Reservation Reports – Where screen will display:



2. The statement must include the following settings:

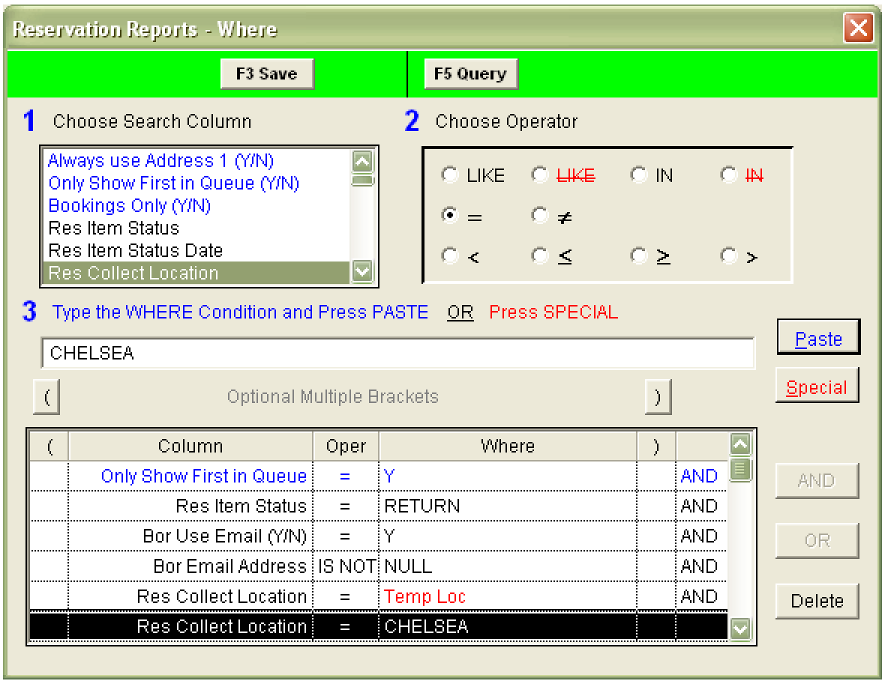
    1. **Only Show First in Queue (Y/N) = Y** (otherwise ALL reserves on an item will show)
    2. **Res Item Status = RETURN** – this status will change to **PRINTED** once this report is run, to prevent duplicate emails being sent
    3. (Optional) **Res Collect Location = Temp Loc** [select using the **Special** button] – this ensures that the item is at the collection location)
    4. (Optional) **Res Collect Location =** (enter your location code – for example: **CHELSEA**) – this will limit the notices sent to items for collection at the selected location

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

Where Statement: Email

Please Note: Please refer to the *Email Reports* guide for full details for setting up email installation parameters.

1. Select the report from the list and click on the **F7 Where** button – the Reservation Reports – Where screen will display:



2. The statement must include the following settings:

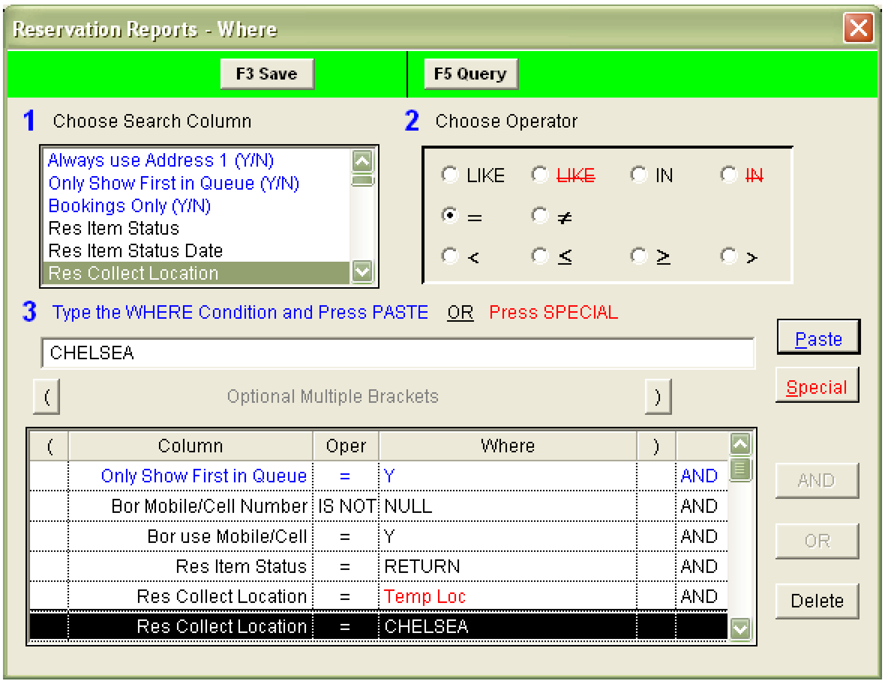
   - **Only Show First in Queue (Y/N) = Y** (otherwise ALL reserves on an item will show)
   - **Res Item Status = RETURN** – this status will change to **PRINTED** once this report is run, to prevent duplicate emails being sent.
   - **Bor Email Address IS NOT NULL** (**Paste** without placing a value in 3)
   - **Bor Use Email (Y/N)** = **Y**
   - (Optional) **Res Collect Location = Temp Loc** [select using the **Special** button] – this ensures that the item is at the collection location)
   - (Optional) **Res Collect Location =** (enter your location code – for example: **CHELSEA**) – this will limit the notices sent to items for collection at the selected location

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

Where Statement: SMS

Please Note: Please refer to the *SMS Reports* guide for full details.

1. Select the report from the list and click on the **F7 Where** button – the Reservation Reports – Where screen will display:



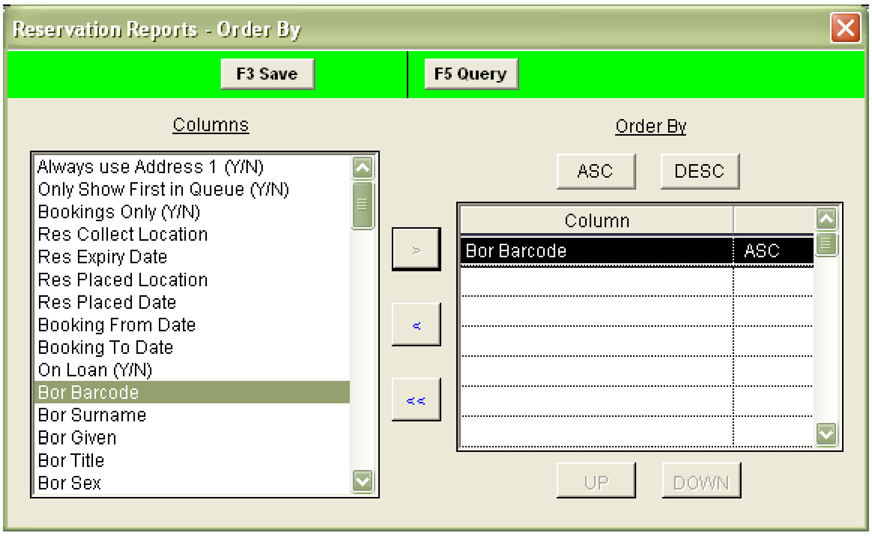
2. The statement must include the following settings:

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

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

Order

1. Select the report from the list and click on the **F9 Order** button – the Reservation Reports – Order By screen will display:



2. Use the arrow keys to select fields to Order By – for example: **Borrower Barcode**
3. Click the **F3 Save** button when complete

Appendix 4: Sample Where Statements

Overdue Notice (Letter)

1. Highlight the report and select the **F7 Where** button – the Circulation Reports – Where screen will display
2. 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
3. The following settings are optional:
   a) **Borrower Location = CHELSEA**
   b) **Bor Type IN YR11, YR12**
   c) If the patron has a guardian address, then this is the default address for the notice – to revert back to the patron address: **Always use Address 1(Y/N) = Y**
   d) Additionally, you may wish to limit by **Bor Group** and/or **Bor Class**
   e) If you are running email reports as well, you should enter the following: **Bor Use Email != Y**
4. Click on the **F3 Save** button when complete

Overdue Notice (Email)

1. Highlight the report and select the **F7 Where** button – the Circulation Reports – Where screen will display
2. The statement **must** include the following settings:
   a. **Bor Use Email = Y**
   b. **Bor Email Address IS NOT NULL** (Paste without placing a value in 3)
   c. **Issue Date Back < Current Date** (via **Special** button) – this can be altered to suit your particular needs
3. The following settings are optional:
   a. **Borrower Location = CHELSEA**
   b. **Bor Type IN YR11, YR12**
   c. If the patron has a guardian address, then this is the default address for the notice – to revert back to the patron address: **Always use Address 1(Y/N) = Y**
   d. Additionally, you may wish to limit by **Bor Group** and/or **Bor Class**
4. Click on the **F3 Save** button when complete

Reservations Pick List

1. Select the report from the list and click the **F7 Where** button – the Reservation Reports – Where screen will display
2. The statement **must** include the following settings:
    a. **Only Show First in Queue (Y/N) = Y** (otherwise ALL reserves on an item will show)
    b. **Res Item Status IN SHELF,READY** (this will pick up any available or recently expired reservation items)
    c. **On Loan (Y/N) = N** (this will exclude items on loan from the list)
    d. (Optional) **Item Perm Loc =** (enter your location code) – for example: **Item Perm Loc = CHELSEA** (where multiple locations available)
    e. (Optional) **Process IS NULL** (paste without putting a value in 3 – this will exclude any items in Processing, Binding, Missing, etc)
    f. (Optional) **Is on Order (Y/N) = N** (this will exclude any items on order)
3. Click the **F3 Save** button when complete

Reservations Notice (Letter)

Please Note: This report must be run via the *Scheduler*

1. Select the report from the list and click on the **F7 Where** button – the Reservation Reports – Where screen will display
2. The statement **must** include the following settings:
    a. **Only Show First in Queue (Y/N) = Y** (otherwise ALL reserves on an item will show)
    b. **Res Item Status = RETURN** – this status will change to **PRINTED** once this report is run, to prevent duplicate emails being sent
    c. (Optional) **Res Collect Location = Temp Loc** [select using the **Special** button] – this ensures that the item is at the collection location)
    d. (Optional) **Res Collect Location =** (enter your location code – for example: **CHELSEA**) – this will limit the notices sent to items for collection at the selected location
3. If you are running email reports as well, you should enter the following: **Bor Use Email != Y**
4. Click the **F3 Save** button when complete

Reservations Notice (Email)

Please Note: This report must be run via the *Scheduler*

1. Select the report from the list and click on the **F7 Where** button – the Reservation Reports – Where screen will display
2. The statement **must** include the following settings:

    a. **Only Show First in Queue (Y/N) = Y** (otherwise ALL reserves on an item will show)

    b. **Res Item Status = RETURN** – this status will change to **PRINTED** once this report is run, to prevent duplicate emails being sent.

    c. **Bor Email Address IS NOT NULL** (**Paste** without placing a value in 3)

    d. **Bor Use Email (Y/N)** = **Y**

    e. (Optional) **Res Collect Location = Temp Loc** [select using the **Special** button] – this ensures that the item is at the collection location)

    f. (Optional) **Res Collect Location =** (enter your location code – for example: **CHELSEA**) – this will limit the notices sent to items for collection at the selected location

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

History Report (Borrower or Stockitem)

1. Select the report from the list and click on the **F7 Where** button – the Reports – Where screen will display
2. The statement **can** include the following settings:

    a. **History Type = ISSUE**
    You can use **ISSUE**, **RENEW** OR **RETURN**
    (Use the **Paste** button to insert the parameter into the list at the bottom of the screen)

    b. If using **History Type = Issue**, you may want to exclude any alterations made to the due date after renewals: **History Contents NOT LIKE Due Date Altered**

    c. Enter a start date: **History Date >=** enter a date in DD/MM/YYYY format – for example: **01/01/2010**

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

    e. You may want to add other restrictors – for example: **Borrower No =**

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

Audit Report

1. Select the report from the list and click on the **F7 Where** button – the Reports – Where screen will display

2. There are three audit types:

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

3. The statement **can** include the following settings:

    a. Enter an Audit Type – for example: **Audit Type (I/U/D) = I**

    b. Enter a start date: **Audit Date >=** enter a date in DD/MM/YYYY format – for example: **01/01/2010**

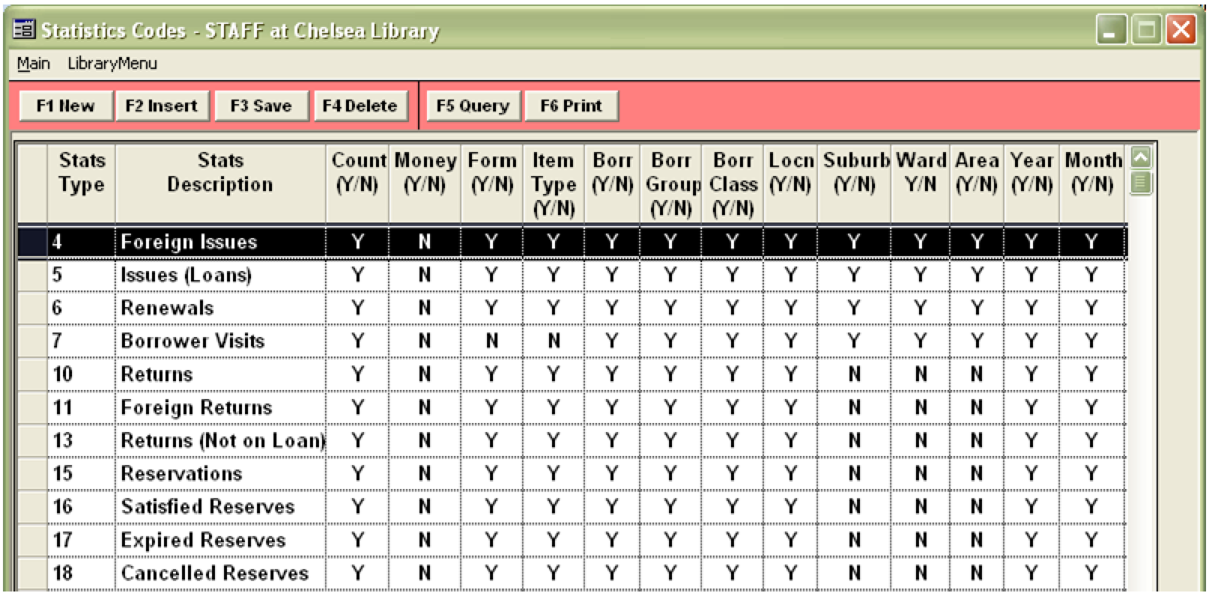
    c. Enter a finish date: **Audit Date <=** enter a date in DD/MM/YYYY format – for example: **10/10/2010** (a finish date is optional – if not inserted, the report will go up to the current date).

    d. You may also want to limit by **Location**, Borrower **Type**, etc.

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

Statistics Report

Please Note: For this report, the **TransType** = the Stats Types in the Statistics Codes table (**Main** > **Supervisor** > **StatsParams**):



Stats Type	Stats Description	Count (Y/N)	Money (Y/N)	Form (Y/N)	Item Type (Y/N)	Borr (Y/N)	Borr Group (Y/N)	Borr Class (Y/N)	Locn (Y/N)	Suburb (Y/N)	Ward Y/N	Area (Y/N)	Year (Y/N)	Month (Y/N)
4	Foreign Issues	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
5	Issues (Loans)	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
6	Renewals	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
7	Borrower Visits	Y	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	Y
10	Returns	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y
11	Foreign Returns	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y
13	Returns (Not on Loan)	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y
15	Reservations	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y
16	Satisfied Reserves	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y
17	Expired Reserves	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y
18	Cancelled Reserves	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y

1. Select the report from the list and click on the **F7 Where** button – the Statistics Reports – Where screen will display

2. The statement **can** include the following settings:

    a. Enter an Trans Type – for example: **Trans Type (Issue,Ret) IN 5,6,7,10**

        - These are the Stats Types for **Issues**, **Renewals**, **Borrower Visits** and **Returns** in the Statistics Codes table (see below)

- You can access the complete list of Statistics Codes in the *Supervisor* module: **Main** > **Supervisor** > **StatsParams**

b. Enter a start date: **Trans Date >=** enter a date in DD/MM/YYYY format – for example: **01/01/2010**

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

d. You may also want to limit by **Location**, **Borrower Type**, etc

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

Authority Report

1. Select the report from the list and click on the **F7 Where** button – the Reports – Where screen will display
2. There are four parameters:

- **Key**: Check for particular data contained in the MARC tag
- **Tag**: Search for a particular MARC tag
- **Oper**: User logged in when Authority was created
- **Date**

3. The statement can include the following settings:
   a. Tag – for example: **Tag = 245** (Title)
   b. Key – for example: **Key LIKE Harry Potter** (looks for all matching items where the Title BEGINS with **Harry Potter**)
   c. Oper – for example: **Oper= STAFF** (looks for all Authorities entered by users logged in as **STAFF**)
   d. (Optional) Enter a start date: **Date >=** enter a date in DD/MM/YYYY format – for example: **01/01/2010**
   e. (Optional) Enter a finish date: **Date <=** enter a date in DD/MM/YYYY format – for example: **10/10/2010** (a finish date is optional – if not inserted, the report will go up to the current date).
4. Click the **F3 Save** button when complete

Bibliographic Report

1. Select the report from the list and click on the **F7 Where** button – the Reports – Where screen will display
2. There are three unique parameters:

- **Auth Tag**: Search for a particular MARC tag

- **Auth Key**: Check for particular data contained in the MARC tag
- **Tags to Display**: MARC tags to display in report

3. The statement can include the following settings:
    a. Auth Tag – for example: **Auth Tag = 245** (Title)
    b. Auth Key – for example: **Auth Key LIKE Harry Potter** (looks for all matching items where the Title BEGINS with **Harry Potter**)
    c. Tags to Display – for example: **Tags to Display IN 100, 245** (will display Author and Title in report)
    d. (optional) Enter a start date: **Date >=** enter a date in DD/MM/YYYY format – for example: **01/01/2010**
    e. (optional) Enter a finish date: **Date <=** enter a date in DD/MM/YYYY format – for example: **10/10/2010** (a finish date is optional – if not inserted, the report will go up to the current date).
    f. You may also want to limit by **Catalogue Number**(s)
4. Click the **F3 Save** button when complete

Appendix 5: Sample F10 More Statements

Bibliographic

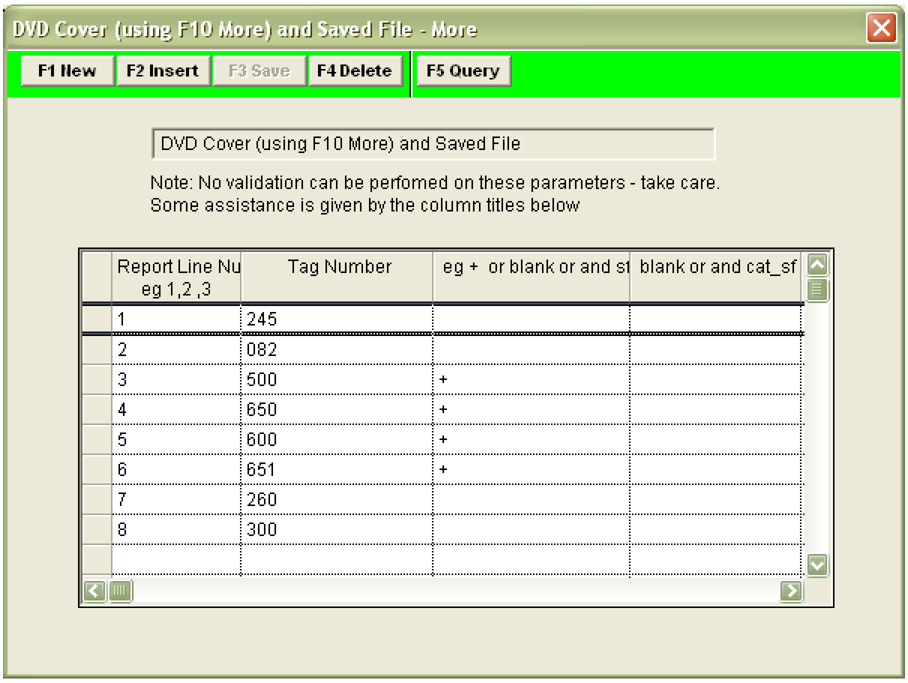
This function is used for mapping data to fields in Fixed Layout reports – for example: the DVD Cover template (**&DVDCOV.QRP**).

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

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

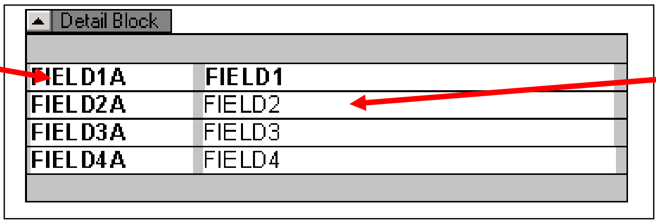
The table below explains how the user can specify which parts of the MARC tag to send:

OPERATOR	DESCRIPTION	EXPLANATION
blank (Default)	The entire MARC tag is printed	If the column is left blank, then the entire MARC tag is printed
+	All data in the specified tag is printed no matter how many tags are included in the record	All Subject listings are printed, where there is only one or several or hundreds!
and sf in ('p', 'n')	Only the subfields specified to be printed within this **Authority** Tag	If **490 | Series statement** tag, only the Series name and number printed
and cat_sf in ('c')	Only the subfields specified to be printed within this **Non-Authority** Tag	If **260 | Publisher** tag, only the 'c' (Date) subfield printed (and not Place or Publisher)



A fixed layout template displaying the Tag (or Subfield) data (**Fields 1-20**), and Tag Descriptions (**Fields 1A – 20A**):

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

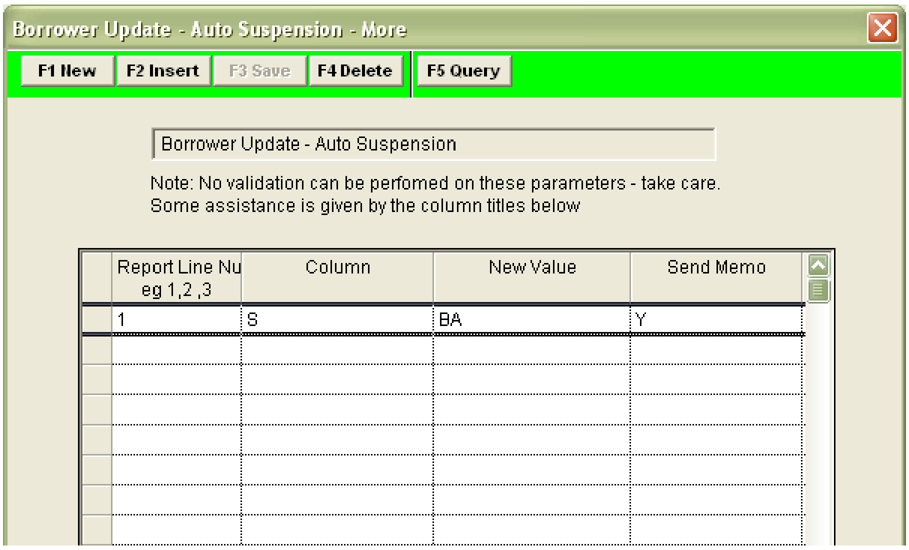


FIELDS 1 – 20 display the actual data for the relevant Marc Tags held in the *Authority* Module

Borrower

There are several different **F10 More** functions depending on the type of template selected.

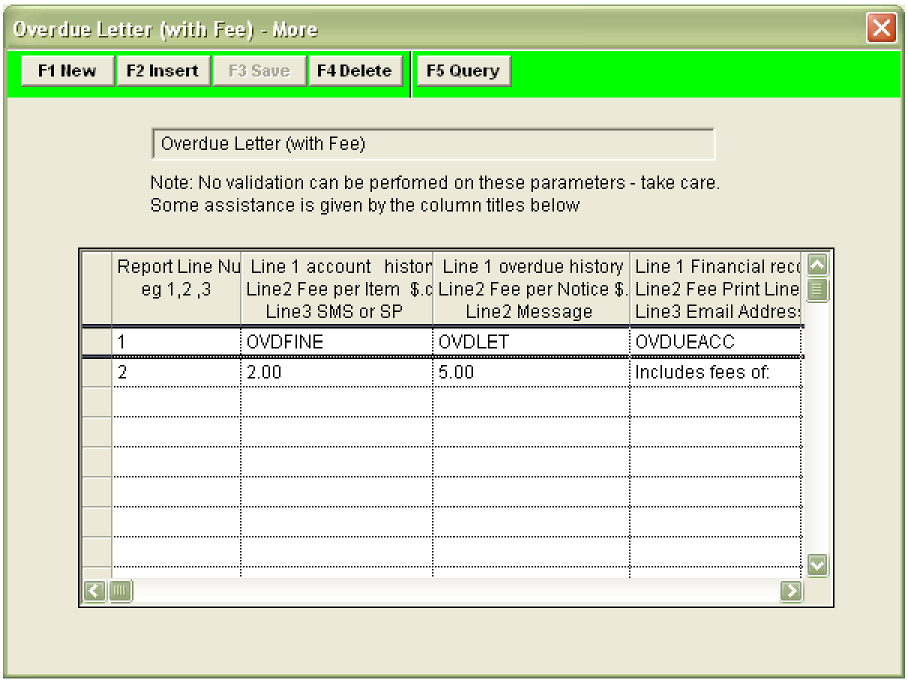
	COLUMN 1	**COLUMN 2**	**COLUMN 3**	**COLUMN 4**	**COLUMN 5**
HEADING (Borrower Automatic Update Report)	Report Line Number	Column	New Value	Send Memo	Address 3
EXAMPLE	**1**	**S**	**BA**	**Y**	**<leave blank>**
	2	**<leave blank>**	**<leave blank>**	**<leave blank>**	**Y**
COMMENT	Line 1 is used for updates Line 2 is used to delete Borrower address 3	Borrower field – can be Borrower Types (**T**), Classes (**C**) Groups (**G**) or Status (**S**)	The new value – must be a valid code for the selected column	If **Y**, create the memo in **Text for Letter**, found at the top of the Borrower Reports screen	If **Y**, can be used to delete Address 3 (Guardian Address) from Borrower record
HEADING (Borrower Financial Report)	Report Line Number	Line 1 – field 1 deletion reference no. from report of marked for delete trans.	Line 1 Field 2 – Cutoff date < format dd/mm/yyyy	Not used	Not used
EXAMPLE	**1**	**500**	**01/10/2010**	**<leave blank>**	**<leave blank>**
COMMENT	Line 1 is used for deletions		If no Date is entered the Deletion will take place regardless of Date		



Circulation

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

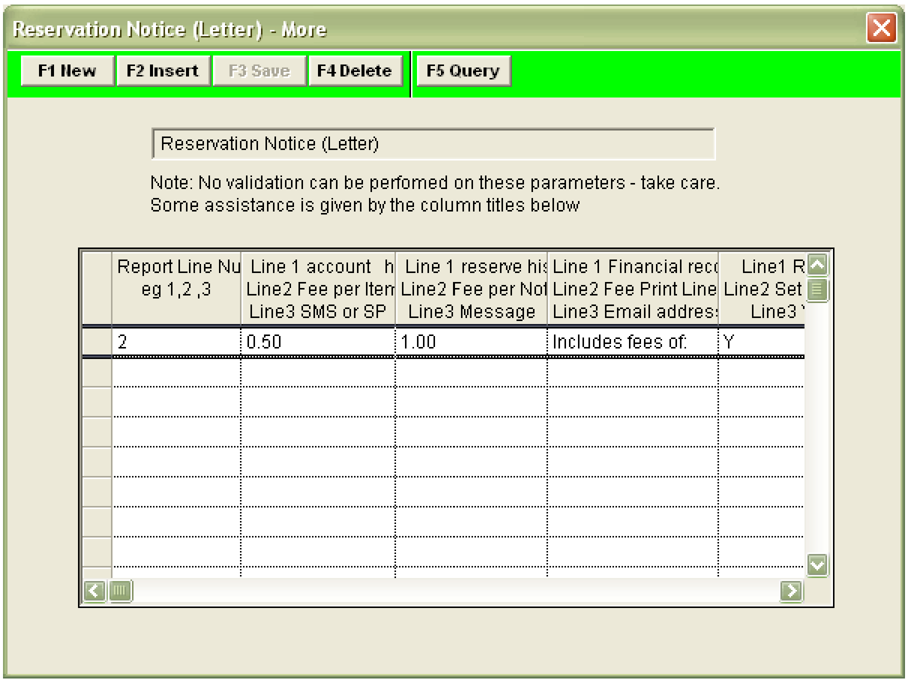
HEADING	Report Line Number	Line 3 SMS	Line 3 SMS Message	Line 3 Email Address	Line 3 Y or N to Delete file
EXAMPLE	**3**	**SMS**	**SMS Overdue Notice**	**sms@smsservice.com**	**N**
COMMENT	Line 3 is used for SMS reports	Always **SMS**	Message body – becomes the message in the email (50 chars)	The email address of the SMS-messaging service (50 chars)	After Sending, delete created File - **Y** or **N**



Reservations

	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5
HEADING	Report Line Number	Line 1 account history NAME	Line 1 reserve history NAME	Line 1 Financial record NAME	Line 1 Res Fees type name
EXAMPLE	**1**	**RESVACC**	**RESVLET**	**RESVACC**	**RESVFEE**
COMMENT	Line 1 is used for History and Financial reporting purposes	If left blank, the system will put a Report Type of **ACCOUNT** in the Borrower History window if **Create Hist (Y/N) = Y** and **Set to Y for create account = Y** (on Line 2) and the report run via the *Scheduler*. It is possible to specify your own name – see example (max: 8 chars).	If left blank, the system will put a Report Type of **RESADV** in the Borrower History window if **Create Hist (Y/N) = Y** and **Set to Y for create account = N** or left blank (on Line 2) and the report run via the *Scheduler*. It is possible to specify your own name – see example (max: 8 chars).	If left blank, the system will put a Financial Type of **RESADV** in the Borrower Financial window for overdue items if **Set to Y for create account = Y** and the report run via the *Scheduler*. It is possible to specify your own name – see example (max: 8 chars). **Please Note:** Customer-defined Financial record NAMES must also be defined in the Circulation Financial Types screen.	If left blank, the system will put a Financial Type of **FEE** in the Borrower Financial window for reports that have a **FORM_CHARGES** field in the report if **Set to Y for create account = Y** and the report run via the *Scheduler*. It is possible to specify your own name – see example (max: 8 chars). **Please Note:** Customer-defined Financial record NAMES must also be defined in the Circulation Financial Types screen.
HEADING	Report Line Number	Line 2 Fee per Item $.c	Line 2 Fee per Notice $.c	Line 2 Fee Print Line	Line 2 Set to Y to create account
EXAMPLE	**2**	**2.00**	**5.00**	**Includes fees of:**	**Y**
COMMENT	Line 2 is used to add Fees to Reports	Enter amount to be charged for each overdue item [Optional] Amount will be added to the **FORM_ CHARGES** Field in the Report	Enter amount to be charged per notice (in addition to any item fee) [Optional] Amount will be added to the **FORM_ CHARGES** Field in the Report	Text will be added to the **USER_LINE1** Field in the Report [Optional]	

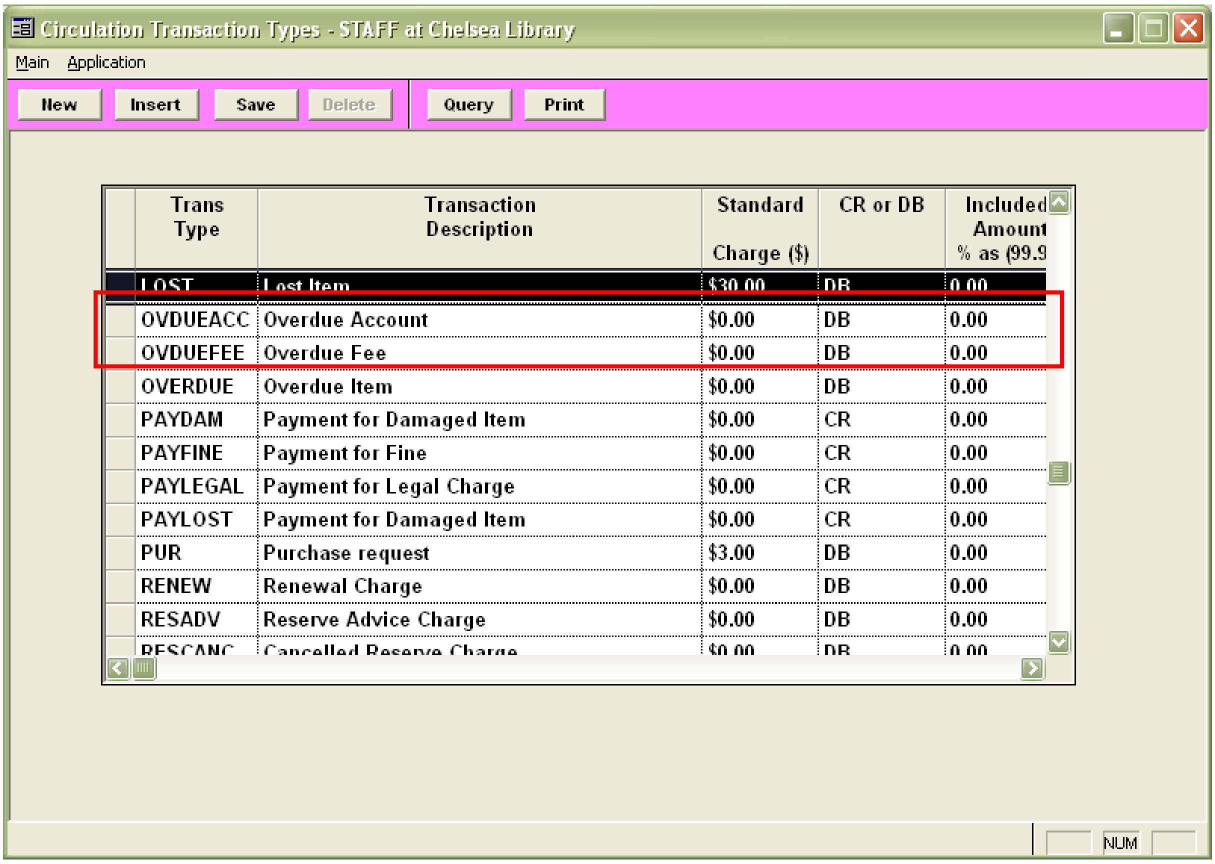
HEADING	Report Line Number	Line 3 SMS	Line 3 SMS Message	Line 3 Email Address	Line 3 Y or N to Delete file
EXAMPLE	**3**	**SMS**	**SMS Overdue Notice**	**sms@smsservice.com**	**N**
COMMENT	Line 3 is used for SMS reports	Always **SMS**	Message body – becomes the message in the email (50 chars)	The email address of the SMS-messaging service (50 chars)	After Sending, delete created File - **Y** or **N**



<u>Add the User-Defined Financial Record and Fees Type Names to the Circulation Transactions Types (RepCirculation and RepReservations Only)</u>

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

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



2. To add a new Transaction Type:

   a. Click the **New** or **Insert** button

   b. <u>Trans Type</u> – type in the user-defined name – for example: **OVDUEACC** or **OVDUEFEE**

   c. <u>Transaction Description</u> – for example: **Overdue Account** or **Overdue Fee**

   d. <u>CR or DB</u> = **DB**

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

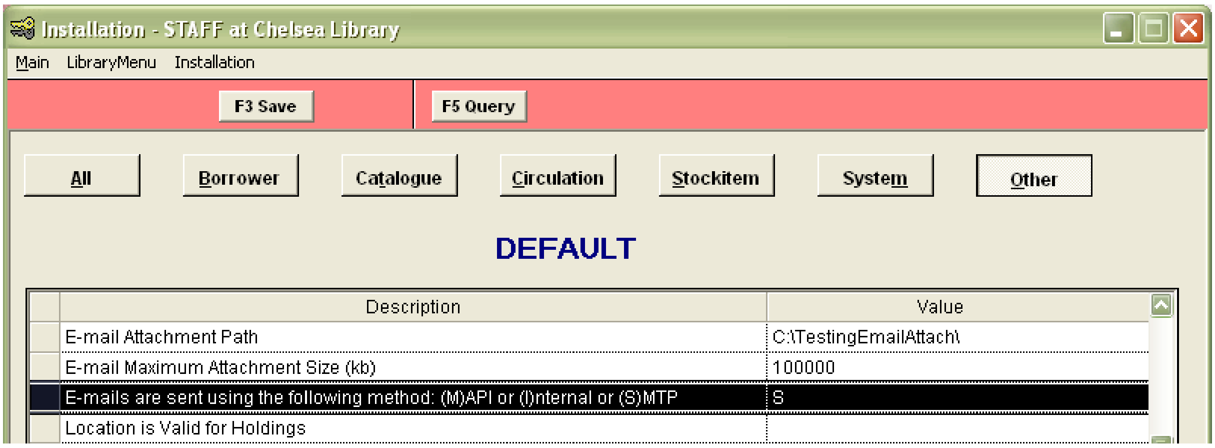
Appendix 6: Setup Email

Supervisor Parameters

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

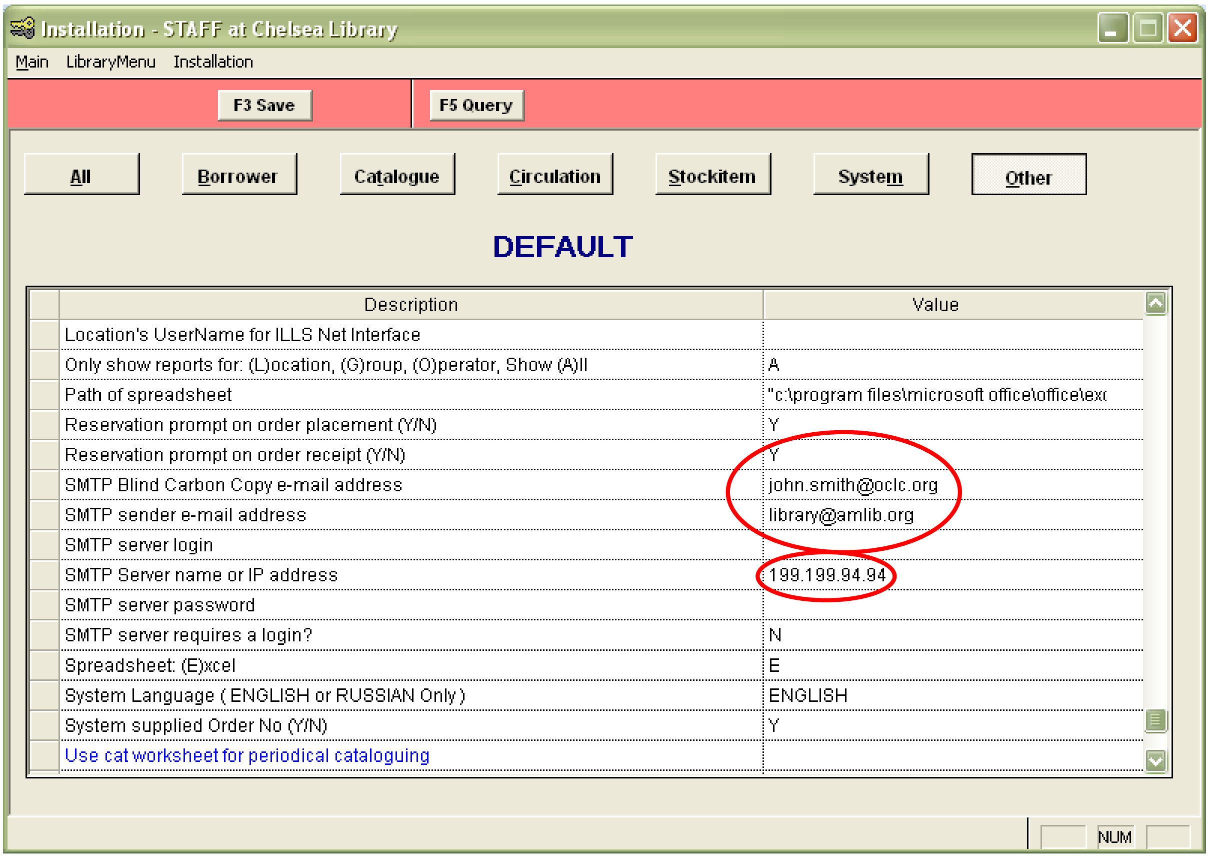
1. Launch the *Amlib* client
2. Go to **Main** > **Supervisor** > **Installation** – the Installation (**DEFAULT**) screen will display
3. Select the **Other** tab
4. Scroll down set the following: **E-mails are sent using the following method: (M)API or (I)nternal or (S)MTP**. Set to **S**, **I** or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

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



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

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



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

The complete set of parameters to consider:

DESCRIPTION	EXPLANATION	EXAMPLE
Emails are sent using the following methods (M)API, (I)nternal or SMTP	Generally (**S**) SMTP is recommended, especially if the organisation is not using a Microsoft Exchange Server. It also means that the email client does not need to be open on the PC running the notices AND can display the "from" name from one of the parameters below rather than the email address from the email client.	Set to **S**, **I** or **M**
SMTP Blind Copy e-mail address	**Optional**: If using the SMTP for emails. Enter only if copies of the email are to sent to a chosen email address – for example: Testing purposes	**library@amlib.com**
SMTP sender e-mail address	**Optional**: If using the SMTP for emails, enter the Address you wish to indicate as the sender	**enquiries@amlib.com.au**

SMTP server login	(Optional) From your Systems Administrator if required	
SMTP Server name or IP address	If using the SMTP for emails, enter the **Server Name** or **IP Address** of the Server installed with the e-mail communication protocol, responsible for receiving and forwarding email messages	ServerName – for example: **server.amlib.com.au**
SMTP server password	(Optional) From your systems administrator if required	
SMTP server requires a login?	If **Y**, supply a SMTP server logon and password If **N**, leave SMTP server logon and password blank	**Y/N**

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

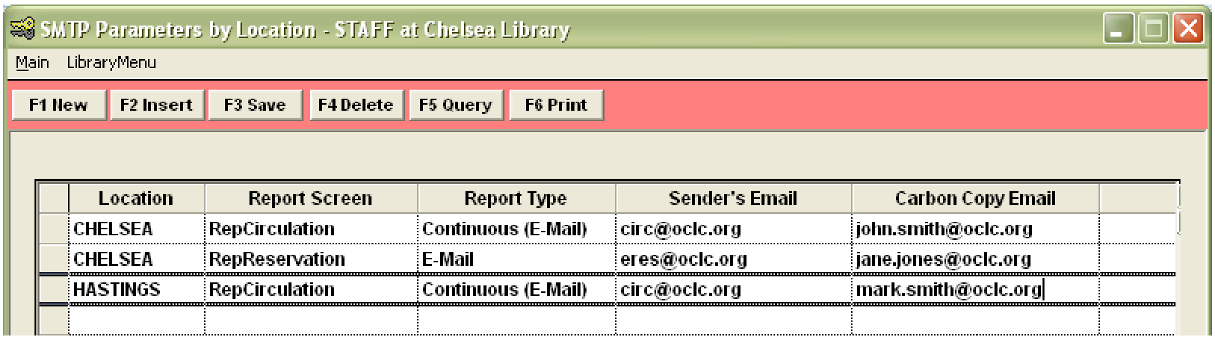
Setup Individual Email Systems by Location

1. In any Installation screen module, select **Installation** > **Choose Location** from the menu – the Locations prompt will display
2. Select a **Location** and click the **OK** button – the Installation screen for that Location will display
3. Repeats steps 3-5 above: if you would like to use the DEFAULT settings, then the relevant fields for each location should be left **blank**
4. Once complete, you must exit and restart the *Amlib* client to allow the settings to take effect

Setup Individual Email Locations, Modules and Reports

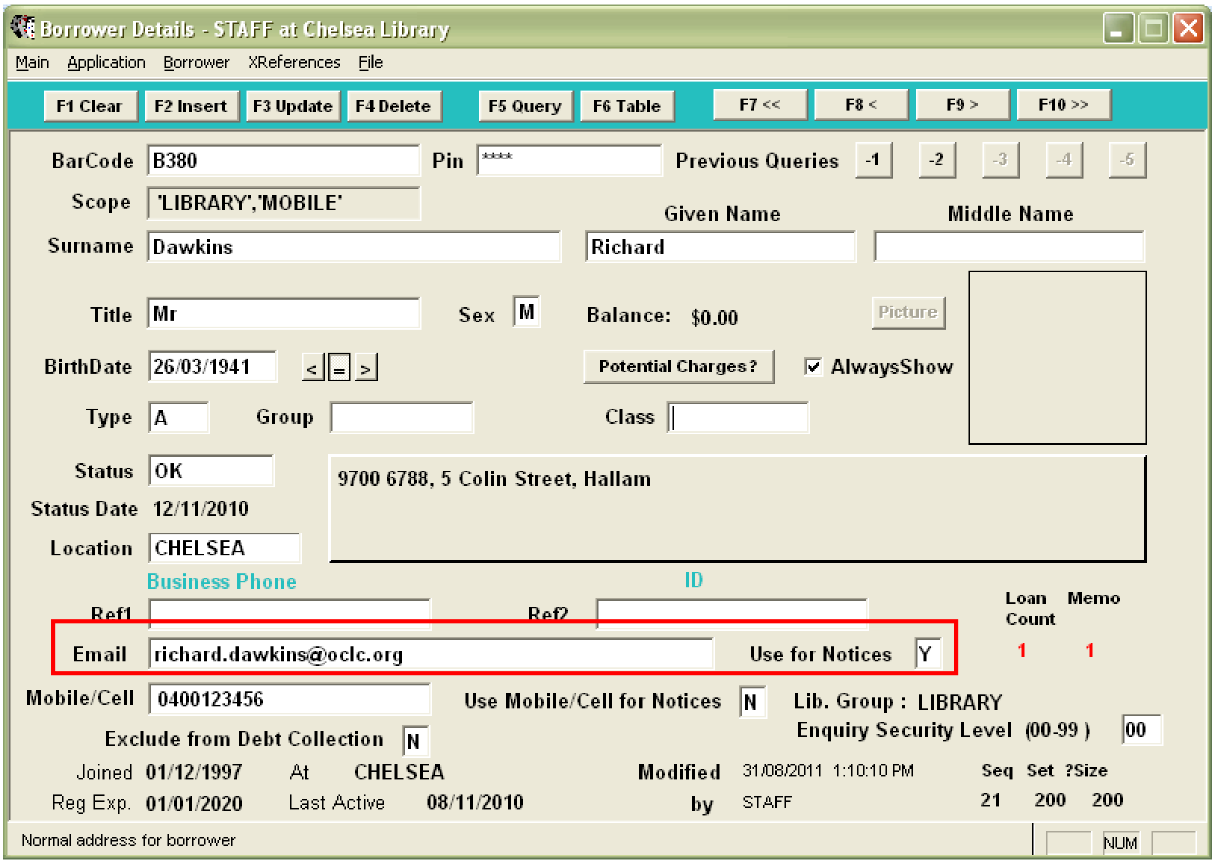
We recommend leaving the email set-up for particular locations until after initial testing has been completed. Once the initial testing has been done, then:

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



Borrower Settings

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

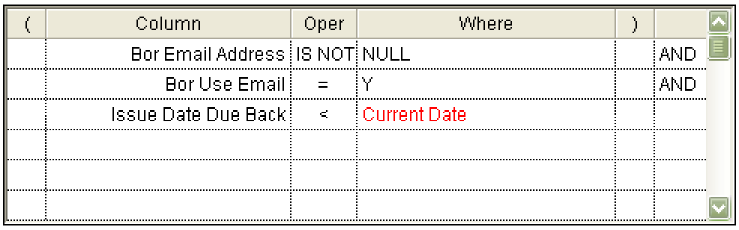


- Email address – for example: **richard.dawkins@oclc.org**
- Use for Notices = **Y** (for Yes)

Report Settings

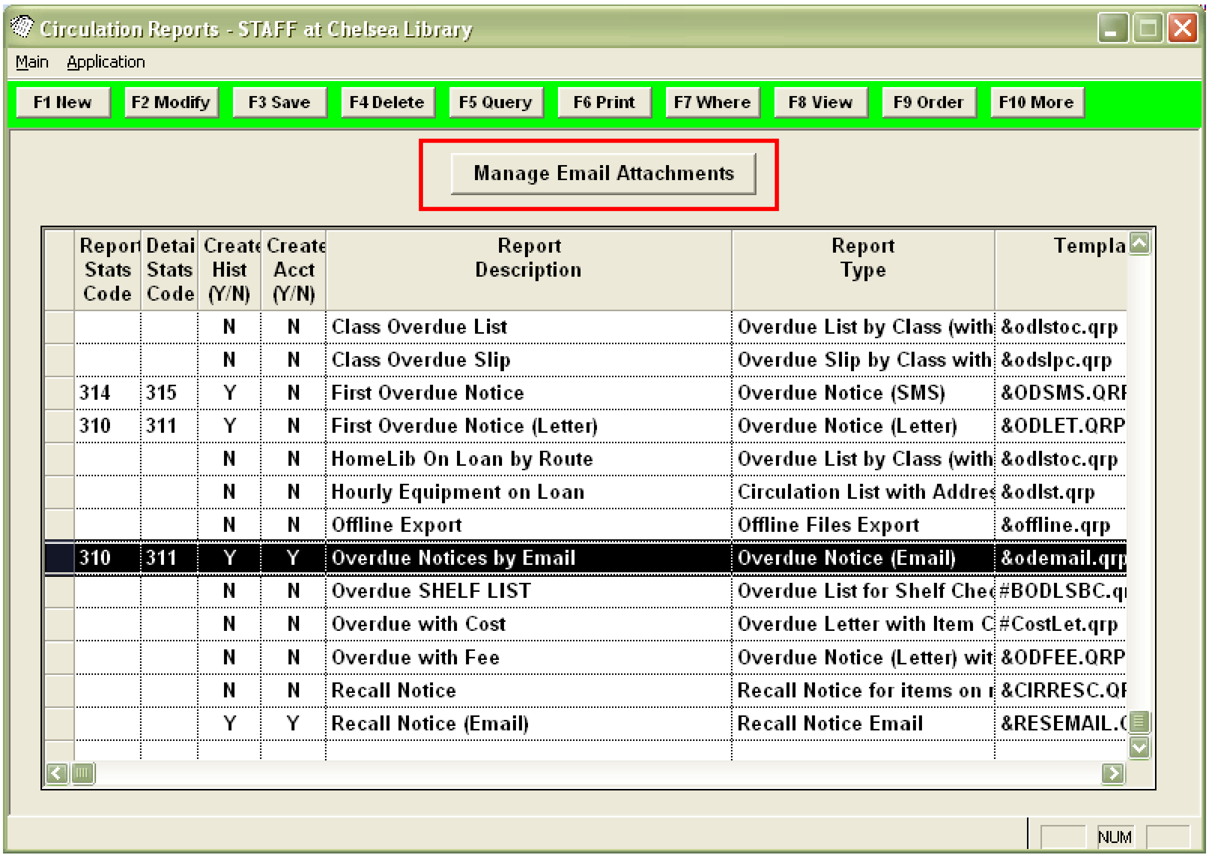
When creating an Overdue or Reservation email report, the following two settings must be included in the **F7 Where** parameters:

- **Borrower Email Address NOT NULL** (**Paste** without a value in 3 to get a NULL value)
- **Bor Use Email = Y**



Appendix 7: Manage Email Attachments

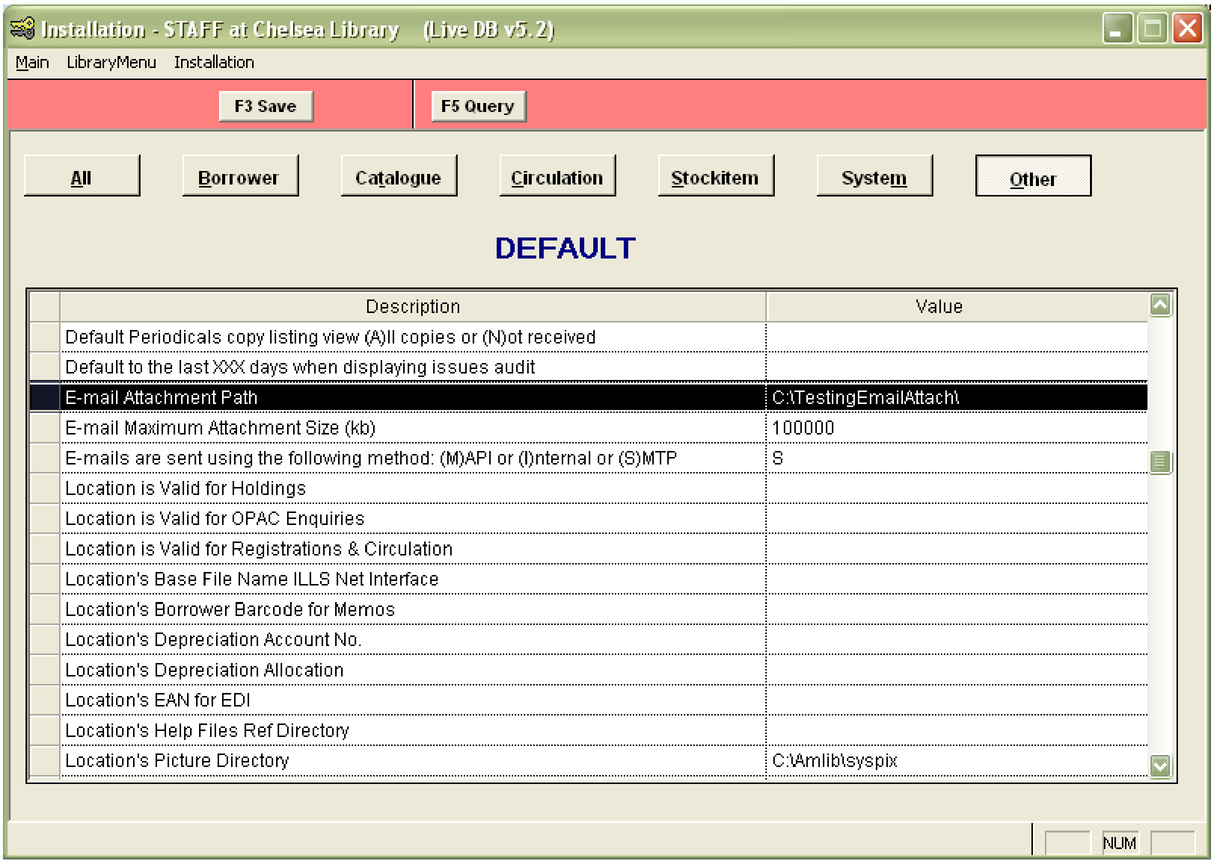
Reports with the option to send attachments via e-mail will have the **Manage Email Attachments** button enabled (button text is **bolded**).



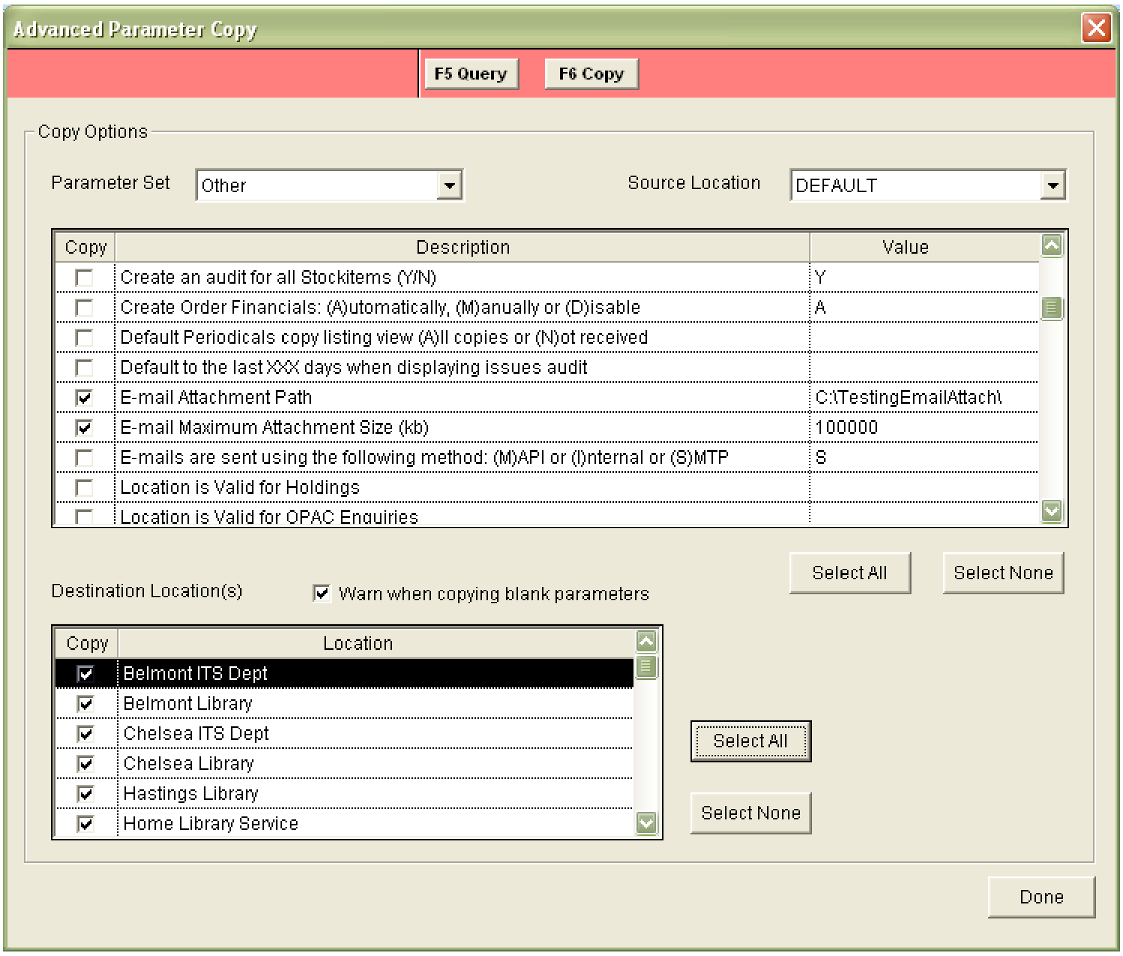
E-mail attachment parameters must first be set up in Supervisor settings. Once the correct template is selected, attachments such as **MS Word** documents can be sent with the e-mail messages.

Supervisor Settings

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



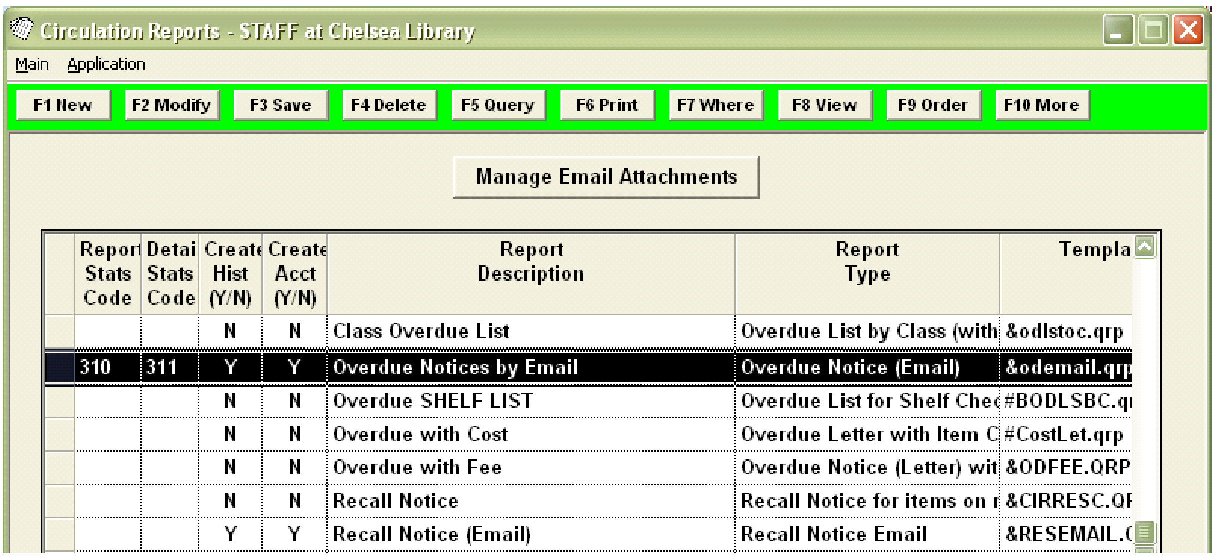
7. Make sure to copy these settings to your other locations – select **Installation** > **Advanced Copy** – the Advanced Parameter Copy screen will display:
   a. Parameter Set = **Other**
   b. Tick the **E-mail Attachment Path** and **E-mail Maximum Attachment Size (kb)** parameters
   c. Click the Select All button adjacent to the Destination Location(s) box
   d. Click the **F6 Copy** button
   e. Click the **Done** button



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

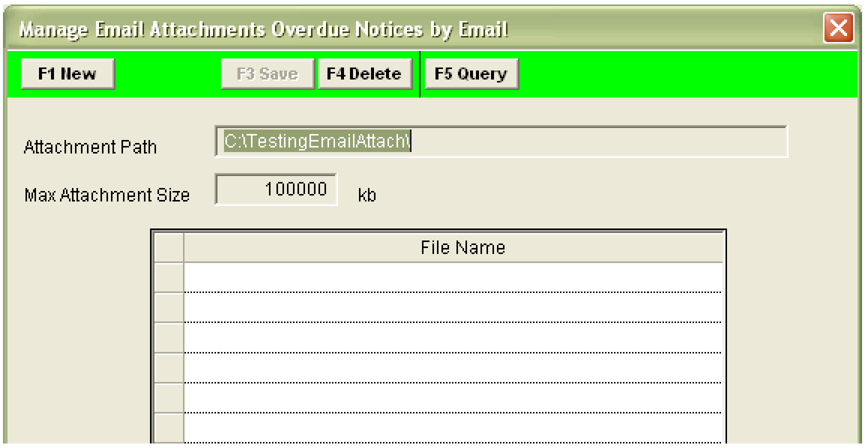
Create the Report

1. Go to **Main** > **Reports** > **RepBorrower** or **RepCirculation** – the Reports screen will display
2. Create the report – for example **&N1ADDEM.QRP** (see separate individual procedures for more information about creating email reports)

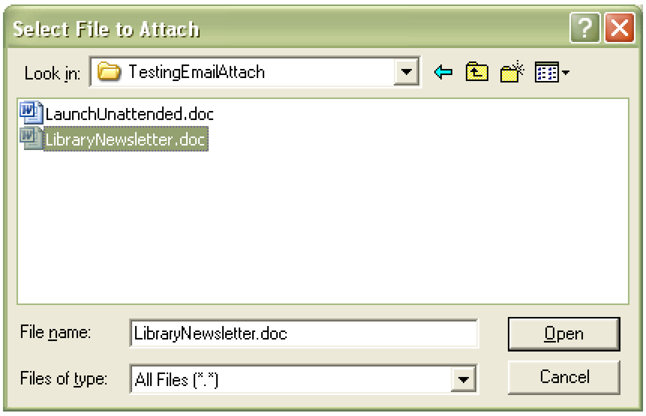


Adding the Attachment

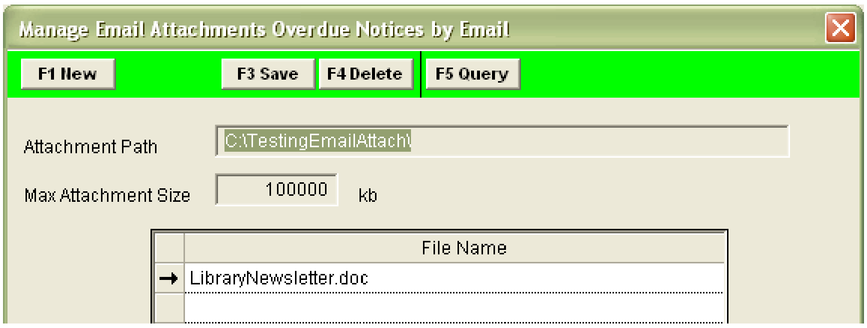
1. Highlight the report to which you would like to add an attachment
2. Select the **Manage Email Attachments** button – the Manage Email Attachments screen will display:



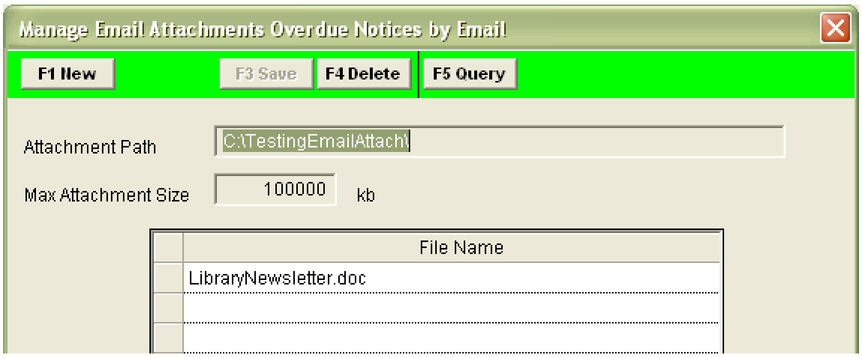
3. The attachment path set in **Main** > **Supervisor** > **Installation** will be visible in the Attachment Path field
4. Click the **F1 New** button – the Select File to Attach prompt will display:



5. **Browse** to the location of the attachment folder, select the file and click the **Open** button
6. The document name will appear in the File Name box (with an arrow next to it)



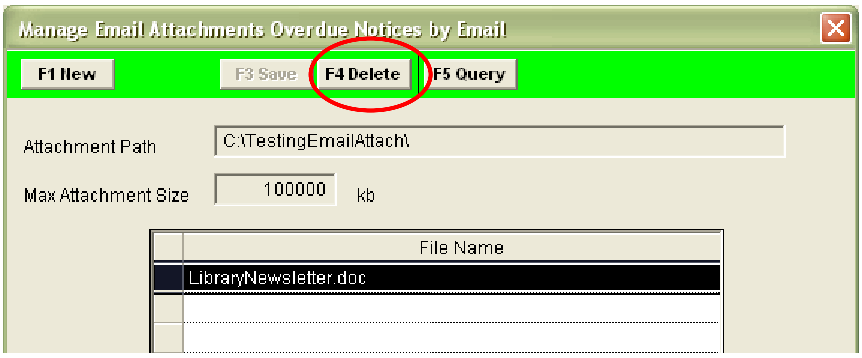
7. Click the **F3 Save** button (the arrow will disappear once saved)



8. To add further attachments, repeat 4 – 7 above

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

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



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

Email Text (RepBorrower Only)

- When sending an Email Letter to Borrower (**&N1ADDEM.QRP**) with attachment(s) in RepBorrower it is possible to send some accompanying text (see Appendix 8: Text for Letter)

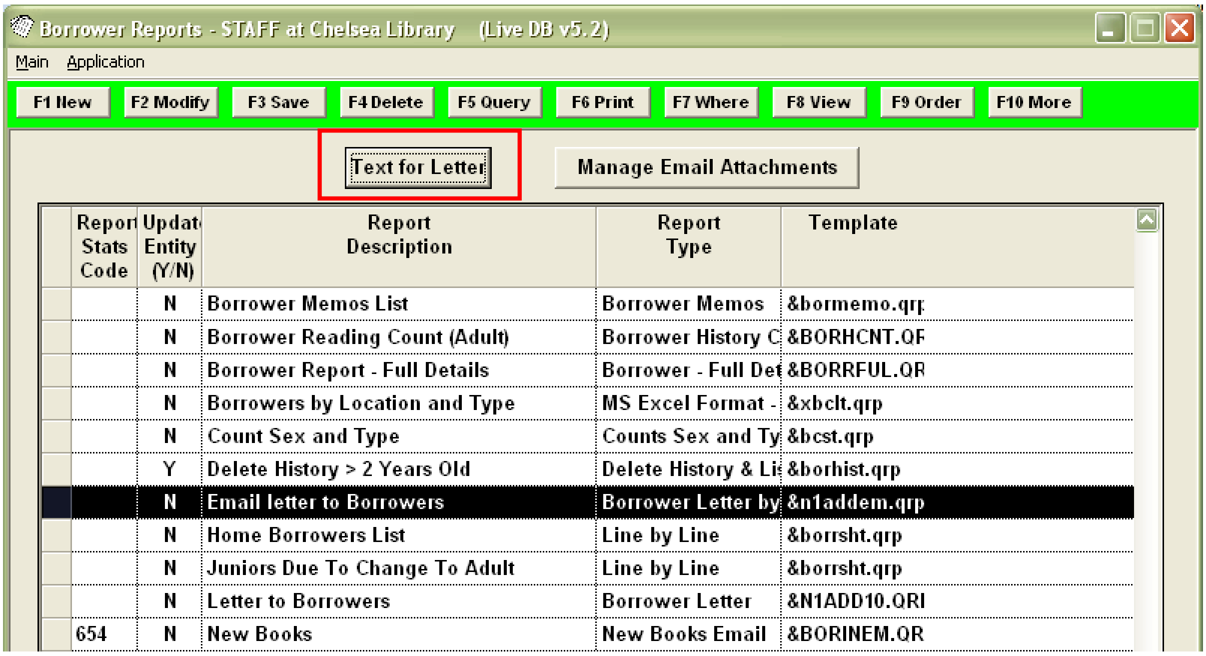
Running the Report

- This report MUST be run via the *Scheduler*

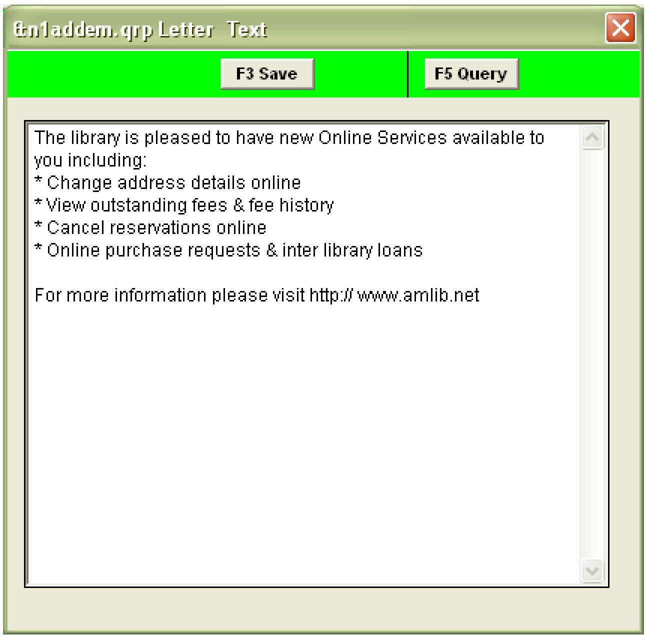
Appendix 8: Text for Letter (RepBorrower)

The **Text for Letters** button can be used to add text to the Letter to Borrower (**&N1ADD10.QRP**) and Email Letter to Borrower (**&N1ADDEM.QRP**) templates. The Text for Letters function can also be used to populate borrower update memos.

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



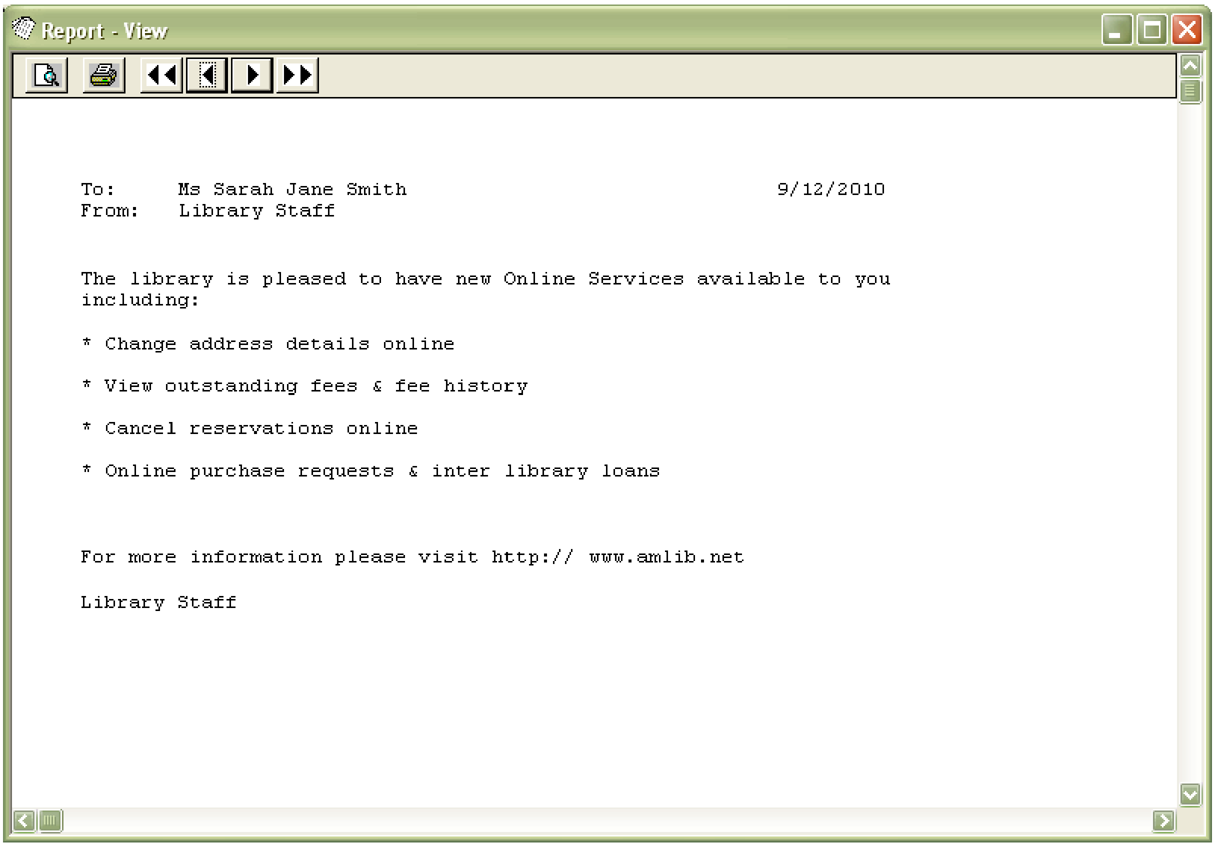
2. Highlight the report you are using, and select the **Text for Letter** button – the Letter Text dialogue box will display:



3. **Type** (or copy and paste) in your text

4. Select the **F3 Save** button when complete – then close out of the screen by clicking on the red cross

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



Appendix 9: List of Report Templates in Amlib

For a full list of Report Templates available please refer to the 'List of Amlib Reports Installed with New Versions' guide available on the OCLC Website,

Amlib>Documentation>How to Guides Documentation>Reports, Miscellaneous

https://www.oclc.org/support/services/amlib/documentation/how-to-guides-documentation/reports.en.html

(Contact Amlib Support if you require a login to this website or assistance with the selection of a report template)

Appendix 10: Operators

OPERATORS	LIKE	~~LIKE~~	IN	~~IN~~	=	$\neq$	$<$	$\leq$	$>$	$\geq$	F12
For Reports & Where Searches	**Begins with**	**Does not begin with**	**Include these multiple codes e.g. J,A**	**Do not Include these multiple codes**	**Equal to…**	**Not Equal to…**	**Less than**	**Less than or Equal to**	**Greater than**	**Greater than or Equal to**	**PRINT SCREEN**