

# Hot Tips Training

Last Updated: 25 February 2013

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# Hot Tips Training

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**Amlib Help Desk (TOPDesk):**

<https://servicedesk.oclc.org/tas/public/>

**OCLC Amlib Document Portal:**

<https://www.oclc.org/support/services/amlib.en.html>

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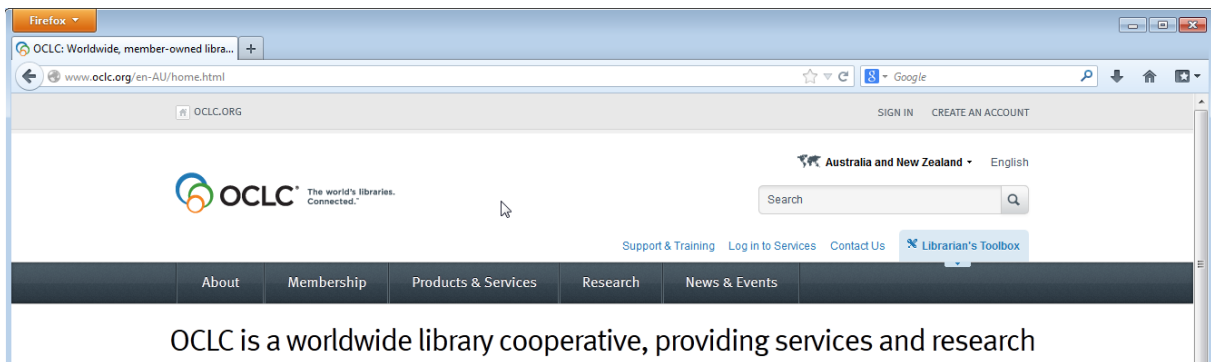
## GENERAL

### OCLC Website/ Document Portal

OCLC's Support and Training website contains help documentation, training manuals, updates and patches, training information, and user group meeting information for our products.

Each person will have their own login to the OCLC Support and Training website. If you do not know your login to the website please log a TOPdesk call requesting this information. If you are unsure of your TOPdesk login you may email the support email contact above for the OCLC product you use and we will send it to you.

1. Navigate to <http://www.oclc.org/en-AU/>
2. Click on the **SIGN IN** link



3. Enter your username and password and click **Sign in**.

### Helpdesk

All support questions or enquiries should be logged via the TOPdesk system.

Please let us know are unable to access TOPdesk.

You should be able to login using a special Username and Password. If you have forgotten or have not been allocated login details please contact Support ([support-amlib@oclc.org](mailto:support-amlib@oclc.org) or 1300 260 795)

### Help Pages

- Can be accessed using **Ctrl - H** from any module
- Can be set up as Favourites in an Internet Browser (for example *Internet Explorer*, *Firefox*). Open the Help folder for the module and link to the file with the frame – for example: **Borframe.htm**
- Use the edit/find to locate keywords within the text

## New Releases

- Make sure you get access to the *Release Notes* on the website as they contain a wealth of information about the new programs
- Ensure that new Menus you wish to use with the new release have been granted permissions
- Check to see if any changes need to be made to existing reports – for example: New Input items

## Current Applications

- To see what date and version you are running go to: **Main > Base > AboutRelease**

## Take a Screen Dump

- To make a copy of any screen, press the **Alt** key and the **PrtScn** key. This will not appear to do anything but it is copying the *active* screen to the Computer's Clipboard. It will then be available to paste (for example: **Ctrl - V**) into a text document – for example: *MS Word, WordPad or Notepad, etc.*

## Highlighting Tables

- Highlight items by clicking with the mouse
- To highlight a **range**, click the first item and find the last item in the range and hold down the **Shift** key and click with the mouse
- To highlight **several** individual items from the list, hold down the **Ctrl** key and click with the mouse
- To **eliminate** some from the table, highlight all the Table, hold down the **Ctrl** key and click with the mouse to take the highlight off

## Copy and Paste Amlib Tables

Did you know that you can quickly copy search results displayed in tables (for example: Stockitem List, Borrower List, Code listing – ie: Opac Form Descriptions, etc.) to a *MS Excel* worksheet or *MS Word* document?

- From the List of results screen (for example: Stockitem List) highlight the selected records
- From the menu, select **Main > Base > Copy**
- Open an empty *MS Excel* Worksheet and from the menu, select **Edit > Paste** (or **Ctrl - V**)

From a table of search results highlight the items for the report. Press **Ctrl + Insert** to copy the text (if you have *Amlib* Shortcuts) or **Ctrl - C** (if you have Windows Shortcuts) or from the menu, select **Main > Base > Copy**. In *MS Excel* or *MS Word*, paste the data in – all the columns will come across but you can delete those items you do not want:



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Stockitem List - 20 rows

Main Table XReferences File

Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Ec
1	Exploring Harry Potter / by Elizabeth D. Schafer,	Schafer, Elizabeth	823/.914	BK	JNF	N		0	CHELSEA		Y	Beacham's sourcebo		20
2	Harry Potter and the chamber of secrets	Rowling, J.K.	F ROW	BK	ANF	Y	21/03/2002	1	CHELSEA		N	978-0-7475-3848-6		19
3	Harry Potter and the chamber of secrets	Rowling, J.K.	F ROW	BK	J	Y	10/08/2006	2	BELMONT		N	978-0-7475-3848-6		19
4	Harry Potter and the chamber of secrets	Rowling, J.K.	F ROW	BK	J	N		0	CHELSEA		N	978-0-7475-3848-6		19
5	Harry Potter and the chamber of secrets	Rowling, J.K.	F ROW	BK	J	N		0	CHELSEA		N	978-0-7475-3848-6		19
6	Harry Potter and the Deathly Hallows	Rowling, J.K.	ROW	BK	J	N		0	CHELSEA		Y			
7	Harry Potter and the Deathly Hallows	Rowling, J.K.	ROW	BK	J	N		0	HASTINGS		Y			
8	Harry Potter and the Goblet of Fire	Rowling, J.K.	F ROW	BK	AF	Y	17/05/2011	0	CHELSEA		N			19
9	Harry Potter and the Goblet of Fire	Rowling, J.K.	F ROW	BK	J	N		0	CHELSEA		N			19
10	Harry Potter and the half-blood prince	Rowling, J.K.	F ROW	BK	AF	N		3	BELMONT		N	Harry Potter v 6.		20
11	Harry Potter and the half-blood prince	Rowling, J.K.	F ROW	BK	AF	N		3	CHELSEA		N	Harry Potter v 6.		20
12	Harry Potter and the Order of the Phoenix	Rowling, J.K.	F ROW	BK	J	N		4	CHELSEA		Y	978-0-439-35111-1		20
13	Harry Potter and the Order of the Phoenix	Rowling, J.K.	F ROW	BK	J	N		4	CHELSEA		Y	978-0-439-35111-1		20
14	Harry Potter and the Order of the Phoenix	Rowling, J.K.	F ROW	BK	J	N		4	CHELSEA		Y	978-0-439-35111-1		20
15	Harry Potter and the philosopher's stone	Rowling, J.K.	F ROW	BK	J	N		5	HASTINGS		N	978-0-7475-3848-6		19
16	Harry Potter and the philosopher's stone	Rowling, J.K.	F ROW	BK	J	N		5	CHELSEA		N	978-0-7475-3848-6		19
17	Harry Potter and the prisoner of Azkaban	Rowling, J. K.	F ROW	BK	AF	N		0	CHELSEA		N	978-0-7475-7238-8		20
18	Harry Potter and the prisoner of Azkaban	Rowling, J. K.	F ROW	BK	AF	N		0	CHELSEA		N	978-0-7475-7238-8		20



Book1 - Microsoft Excel

Home Insert Page Layout Formulas Data Review View Add-Ins

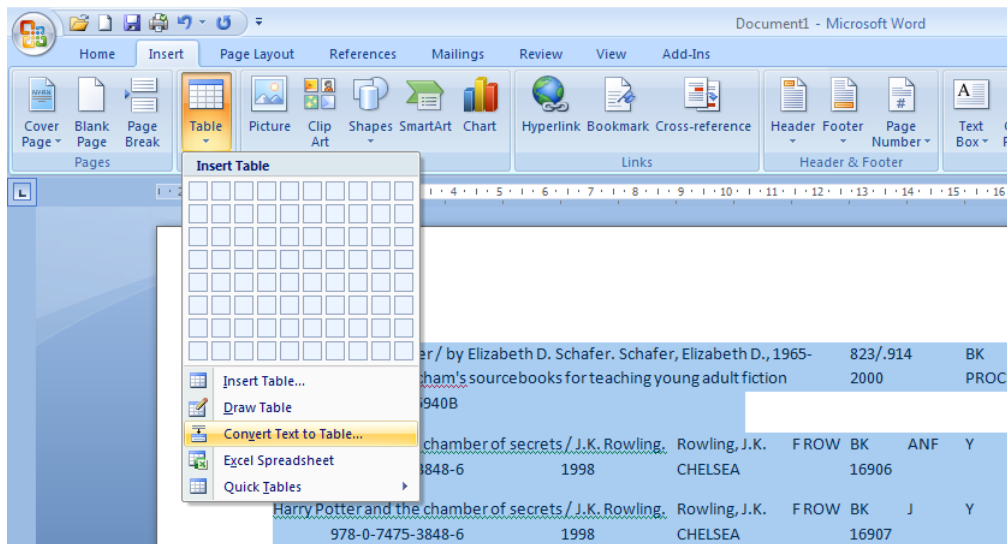
Clipboard Font Alignment Cell Styles Editing

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1	Exploring	Schafer, E	823/.914	BK	JNF	N			0	CHELSEA	Y	Beacham's sourcebo		2000	PROCESSING		ORDER0005940B			OF
2	Harry Pott	Rowling, J	F ROW	BK	ANF	Y	21/03/2002		1	CHELSEA	N	978-0-7475-3848-6		1998	CHELSEA		16906			B2
3	Harry Pott	Rowling, J	F ROW	BK	J	Y	10/08/2006		2	BELMONT	N	978-0-7475-3848-6		1998	CHELSEA		16907			B3
4	Harry Pott	Rowling, J	F ROW	BK	J	N			0	CHELSEA	N	978-0-7475-3848-6		1998	PROCESSING		STOCK00368849B			ST
5	Harry Pott	Rowling, J	F ROW	BK	J	N			0	CHELSEA	N	978-0-7475-3848-6		1998	PROCESSING		STOCK00368857B			ST
6	Harry Pott	Rowling, J	ROW	BK	J	N			0	CHELSEA	Y				PROCESSING		ORDER0006149B			OF
7	Harry Pott	Rowling, J	ROW	BK	J	N			0	HASTINGS	Y				PROCESSING		ORDER0006157B			OF
8	Harry Pott	Rowling, J	F ROW	BK	AF	Y	17/05/2011		0	CHELSEA	N			1999	CHELSEA		16904			B9
9	Harry Pott	Rowling, J	F ROW	BK	J	N			0	CHELSEA	N			1999	CHELSEA		16905			
10	Harry Pott	Rowling, J	F ROW	BK	AF	N			3	BELMONT	N	Harry Potter v 6.		2005 V 6	BELMONT		STOCK00363723B			ST

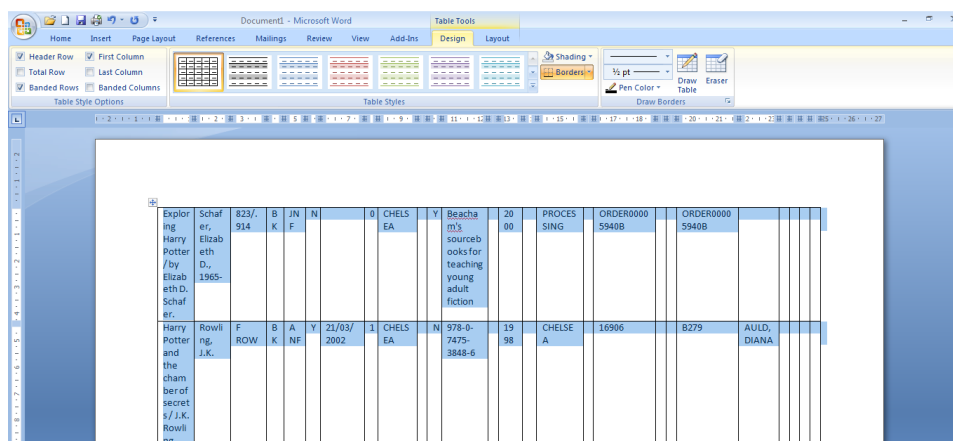
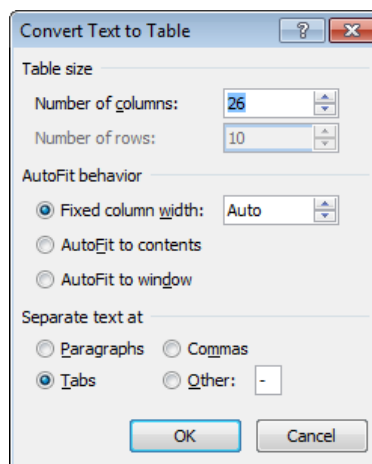
In MS Word:

1. Make the page a Landscape (**Page Layout** tab > **Orientation** > **Landscape**)
2. Paste (**Home** tab > **Paste** or **Ctrl - V**)
3. Select All (**Home** tab > **Select** > **Select All**)
4. Select Convert Text to Table (**Insert** tab > **Table** > **Convert Text to Table**)

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5. The Convert Text to Table screen will display – click the **OK** button




6. It is therefore easier to delete columns
7. After deleting columns, it is possible to edit the text in the columns – for example: Titles – make **bold** and *italic*. When completed, the table can be converted back to text and Portrait layout if preferred. Pictures or symbols can be added if required and extra formatting done etc.

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*Beastly weekend / Rose Inserra ; illustrated by Boris Silvestri.*  
 Inserra, Rose. F INS BK SP EAS 1996



*The care of the family puppy / Robert C. White.*  
 White, Robert C. (Robert Charles), 1923-1982 636.708 BK ANF EAS



*Cats / Errol Broome.*  
 Broome, Errol J636.8 BRO BK JNF SOU

- Code list – for example: Opac Form Descriptions can be highlighted, copied (**Main > Base > Copy**) and then pasted into *MS Excel* where different columns can be sorted, etc.

	A	B	C	D	E
1	AC	AF	1	ADULT FICTION CASSETTE	
2	AC	AVNF	23	CASSETTE	
3	AC	CAS	102	AUDIO CASSETTE	
4	AC	JCAS	13	JUNIOR CASSETTE	
5	AC	JSW	90	JUNIOR CASSETTE	
6	AC	JTB	1	JUNIOR CASSETTE	
7	AC	JTT	1	JUNIOR CASSETTE	
8	AC	LIT	74	AUDIO CASSETTE	
9	AC	LP	1	AUDIO CASSETTE	

## Shortcuts

- **Main > Supervisor > Installation > Other** tab: Use Windows keyboard shortcuts instead of Amlib shortcuts (Y/N)

It is possible to use *Amlib* or *Windows* shortcuts. However, this is a system setting so all staff will have to use the option set.

SHORTCUT	AMLIB	WINDOWS
Ctrl - A	Authority	Authority
Ctrl - B	Borrower	Borrower
Ctrl - C	Catalogue	Copy
Ctrl - D	Not used	Not used
Ctrl - E	Not used	Exit <i>Amlib</i>
Ctrl - F	Finance	Finance
Ctrl - G	Not used	Not used
Ctrl - H	Invoke Help Word Document	Invoke Help Word Document

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<b>Ctrl - I</b>	Issues	Issues
<b>Ctrl - J</b>	Not used	Not used
<b>Ctrl - K</b>	Stockitem Keyword	Stockitem Keyword
<b>Ctrl - L</b>	Log Off Application	Log Off Application
<b>Ctrl - M</b>	Marc Take Up	Marc Take Up
<b>Ctrl - N</b>	Notepad	Notepad
<b>Ctrl - O</b>	Orders	Orders
<b>Ctrl - P</b>	Periodicals	Periodicals
<b>Ctrl - Q</b>	Reservations	Reservations
<b>Ctrl - R</b>	Returns	Returns
<b>Ctrl - S</b>	Stockitems	Stockitems
<b>Ctrl - T</b>	Transfers	Transfers
<b>Ctrl - U</b>	Not used	Not used
<b>Ctrl - V</b>	Not used	Paste
<b>Ctrl - X</b>	Exit <i>Amlib</i>	Cut
<b>Ctrl - Y</b>	Not used	Not used
<b>Ctrl - Z</b>	Chute Returns	Chute Returns
<b>Alt + Backspace</b>	Not used	Undo typing
<b>Shift + Delete</b>	Cut	Cut
<b>Ctrl + Insert</b>	Copy	Copy
<b>Shift + Insert</b>	Paste	Paste

### Hot Keys

Menus can be accessed using Hot Keys – for example: to quickly go to New Borrower creation mode:

- In the Borrower Details screen hold down **Alt - BN**. This will do the same as selecting **Borrower > EnterNewBorrower** in the *Borrower* module. Holding down the **Alt** key will show which Menu items have the Hot Keys assigned.

### Greyed Out Menu

- Can be that they are not relevant at present – for example: **Borrower History** is *grey* until a Borrower is displaying on the screen
- It can also mean that you do not have permissions to use that particular Menu. If the Menu is to be activated this is to be done in: **Main > Supervisor > UserNames**
- Buttons are also controlled in this way. Any **red** buttons showing in the Viewing Menu of User Names, indicate that they will not display for the User

### Entering Dates

- No need to enter the slashes as you type!!

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- In most modules, dates can be entered as **ddmmyy** and the dates will automatically be entered as **dd/mm/yyyy** – for example: in the Borrower Details screen, BirthDate can be added into the field as **030599** and the system will auto-adjust it to be **03/05/1999**

### Where Searches

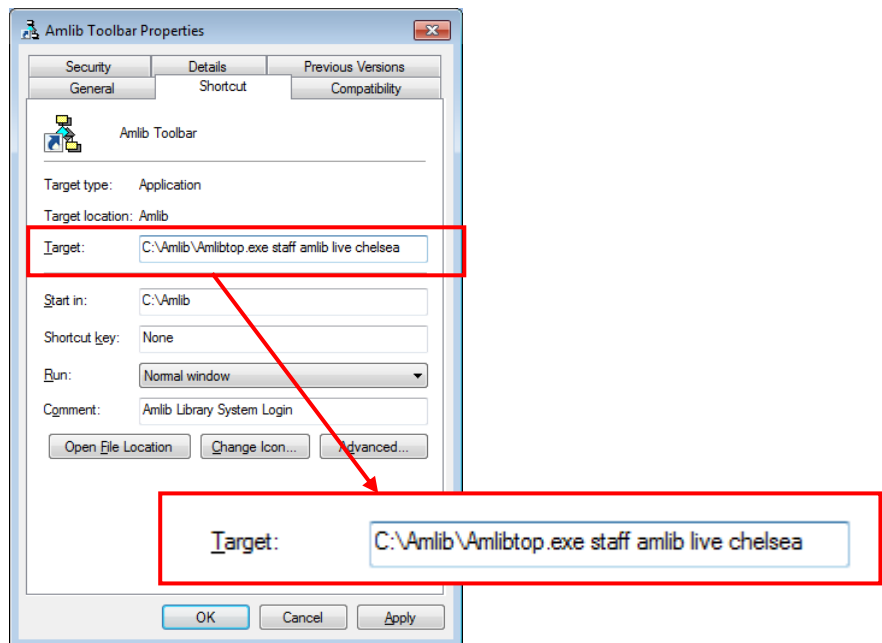
- Typing in a *letter* at box 1 will find the first occurrence of what was typed – for example: in Borrower Where (**Main > Borrowers > BorrowerWhere**), you need to find *Last Active*, just type **L** and it will find *Location* in the list. Type **L** twice more and it will find *Last Active*.
- Also available in Stockitem Where Searches (**Main > StockItems > StockitemWhere**) – for example: Need to find *Received*? Type **R** and it will find it immediately! Typing **R** again will jump to the next field starting with **R**.
- This only applies in the Where searches (this functionality has not been implemented in the *Reports* module)

## LOGON

### Automatic Login

It is possible to set up *Amlib* to bypass the Login requirements to save time:

1. Right-click on the *Amlib* icon (this may be on the desktop or the **Start** menu) and select **Properties**
2. In the Target: field put a space after **Amlibtop.exe** and type **username <space> password <space> database name** (for example: **Live**) <space> and **Location Code**



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

For example:

- **C:\Amlib\Amlibtop.exe staff amlib live chelsea**

Therefore when you double-click on the *Amlib* icon, the login process will bypass the Login screen.

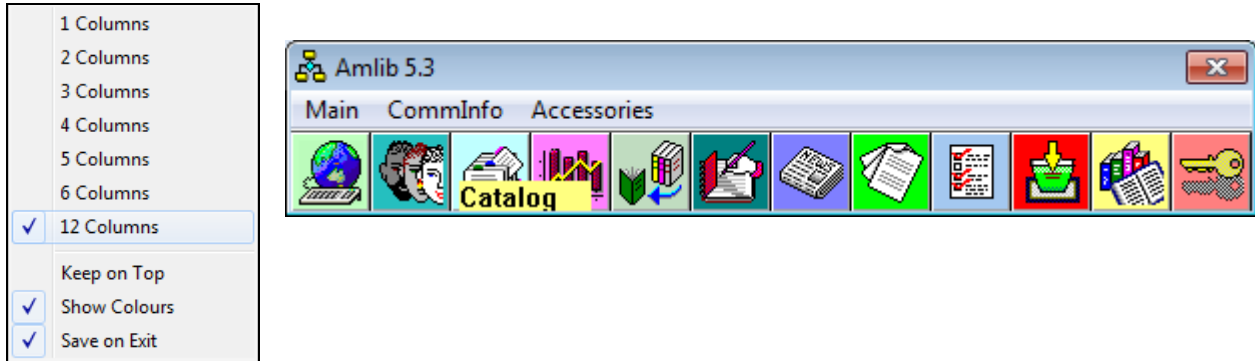
Using this function you could have several icons for the various *Amlib* users – for example: if computer out the back is for four (4) different people, have four (4) icons - **John's Login**, **Ed's Login**, **Gaye's Login**, **Fiona's Login**, etc.

**Please Note:** If the Database Description (as seen in the **Windows/Amlib.ini** configuration file has spaces in its description – for example: **Test 5.3**, the Target field will need to include quotes around the text:

- **C:\Amlib\Amlibtop.exe fiona fiona "Test 5.3" Chelsea**

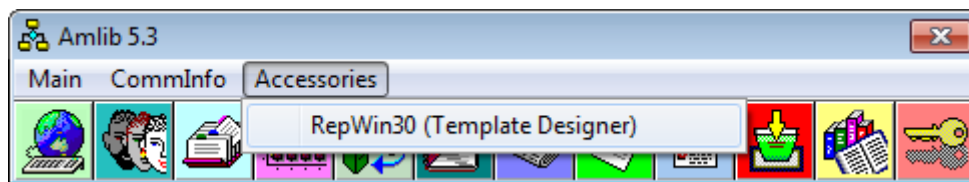
## Colours on the Toolbars

1. Right-clicking on the Toolbar gives some options – to **Show Colours**, the number of **Columns**, **Save on Exit**
2. Floating your mouse cursor over the icons reveals the module name



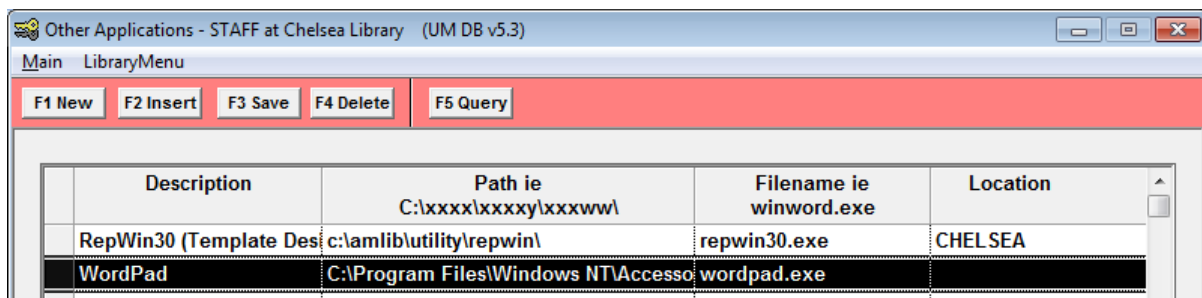
## Accessories Window

The Accessories menu can give access to other Applications – for example: **Report Writer (RepWin30)**.



To set up which accessories (programs appear):

1. Open the *Supervisor* module
2. Select **LibraryMenu > MainMenuApps** – the Other Applications screen will display:



3. Click the **F1 New** or **F2 Insert** button
4. Type in the following details:
5. Description (this will appear in the Accessories menu) – for example: **WordPad**
6. File Path – for example: **C:\Program Files\Windows NT\Accessories\**
7. Filename – for example: **wordpad.exe**

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8. Location (to restrict use to a particular Location) – for example: **Chelsea**
9. Click the **F3 Save** button when complete
10. Exit and restart the *Amlib* client for the changes to take effect



## BORROWER

- **Main > Borrowers > Borrower**

### Borrower Address Window

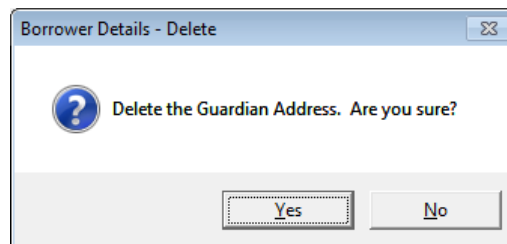
1. Select **Borrower > Address** – the Borrower Address screen will display
2. Typing in a Suburb code can bring in the Suburb into the Postal address text box in the correct case and also add the correct Post Code

The screenshot shows the 'Borrower Address' window. At the top, there are buttons for F1 Clear, F3 Update, F4 Delete, F5 Query, F6 LinkTo, and F7 Links. The main area displays the name 'Anderson, Alana' and a 'Wand From' field with the value '1'. Below this, there are several input fields: 'Tel.' with '9929-2809', a 'Postal' checkbox which is checked, a 'New' radio button, and an 'All' radio button which is selected. The address text box contains '16 Greaves Street' and 'Hallam'. To the right, there are fields for 'Area' (IS), 'Suburb' (HAL), and 'P/Z Code' (3803). There are also 'plus' and 'N' buttons, and a 'Popup ? Type' section with 'N' and 'Y' radio buttons. A 'Check' button is at the bottom left, and a 'Postal Barcode' field is at the bottom right.

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

### Deleting a Guardian Address

1. Ensure the Borrower Type is altered first (as a Guardian Address may be mandatory for junior Borrower Types)
2. Select **Borrower > Address** – the Borrower Address screen will display
3. **Tick the Guardian** box and click the F4 Delete button – a prompt will display with the following message: **Delete the Guardian Address. Are you sure?**



4. Click the **Yes** button

The Guardian Address will be deleted.

## Search for Address

- Address row 1 can be searched in the address box – for example: Phone No., Street name, Suburb, Postcode, etc.

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

Main Application Borrower XReferences File

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

BarCode [ ] Pin [ ] Previous Queries -1 -2 -3 -4 -5

Scope 'LIBRARY','MOBILE' Given Name [ ] Middle Name [ ]

Surname [ ] Title [ ] Sex  Balance: [ ] Picture [ ]

BirthDate [ ] < = > Potential Charges?  Always Show

Type [ ] Group [ ] Class [ ]

Status [ park ]

Status Date [ ] Location [ ]

## Random PIN Number

When entering a new Borrower (or updating a Borrower record), a random PIN number option is available when a question mark (?) is entered in the Pin field.

1. Enter ? in the Pin field
2. Click the **F3 Update** button – a screen will display of a series of Random PIN Numbers

Select

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

Code	Description
60061	Random Pin Number
85545	Random Pin Number
06931	Random Pin Number
98082	Random Pin Number
31234	Random Pin Number
25919	Random Pin Number
14684	Random Pin Number
41979	Random Pin Number
59522	Random Pin Number
01589	Random Pin Number

3. Double-click on the PIN you would like to use
4. The PIN will be inserted and the automatically saved

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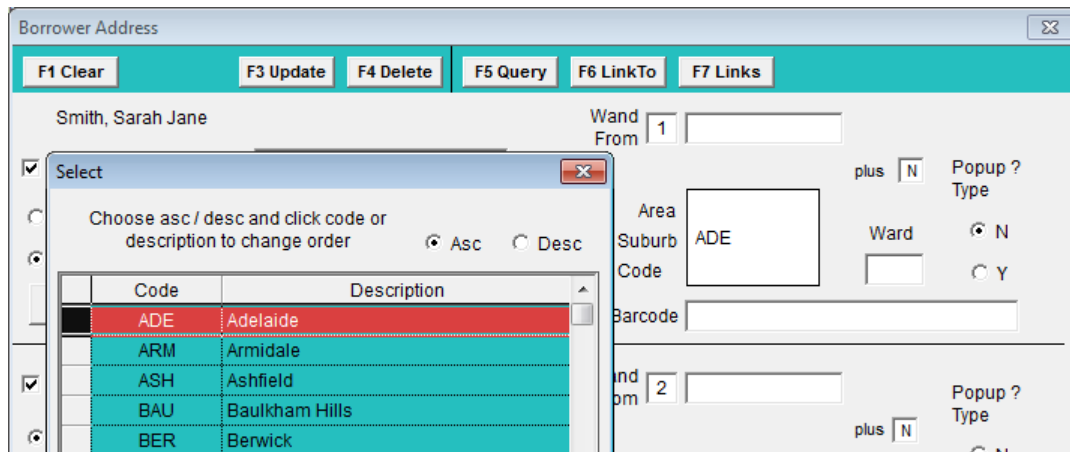
## Sorting

- Most Codes and Descriptions Can Be Sorted

### Codes and Descriptions

For example: Suburb name and Code can be sorted in *Ascending* or *Descending* order.

1. Select **Borrower** > **Address** – the Borrower Address screen will display
2. Put a **<Tab>** in the Suburb field to bring up the list of Suburbs
3. Select the **Asc** or **Desc** radio button and click on the column heading



### Financial Transactions

1. Select **Borrower** > **Financial** – the Borrower Financial Transactions screen will display
2. Financial Transactions are displayed by TransDate (Transaction Date) in *Descending* order. If any other order is required, this can be done by selecting the **Desc** (or **Asc**) radio button and clicking on the column heading

The screenshot shows the 'Borrower Financial Transactions' window. At the top, there are function buttons: F1 New Charge, F5 Query, F6 Prt, F7 Alloc'tn, and F8 Paym'ts. The main area displays 'B9988', 'Ms Sarah Smith', '\$0.00', and 'Asc' radio button. The 'Outstanding Only' checkbox is unchecked. The table below shows the following data:

Type	TransDate	Date Mod	Loc	Comme	Item	Title	Qty	Charge (Debit)	Inv_No	Inv Date	Paid (Credit)	Recd No
PAYILL	26/06/2011	26/06/2011	CH	Alloc by STAFF Interlibr			1	\$0.00			\$2.00	6
ILL	26/06/2011	26/06/2011	CH	Alloc by STAFF Interlibr			1	\$2.00			\$0.00	6
DAM	23/06/2011	23/06/2011	CH	Alloc by STAFF Damag	16905	Harry Potter and the	1	\$5.00			\$0.00	5
CARD	23/06/2011	23/06/2011	CH	Alloc by STAFF Replac			1	\$1.00			\$0.00	4

## Borrower Types

# Hot Tips Training

- Go to **Main > Borrowers > BorrowerTypes** – the Borrower Types screen will display

If the Age >= and Age <= ranges are entered on the Borrower Types screen against the relevant Types, then the correct Code will automatically be entered the BirthDate is entered on the Borrower Details screen – for example: Junior Students (J) will be entered if the date is entered less than 12 years.

Type	Description	Keep House Bound Borr History (Y/N)	Include In Stats (Y/N)	Max Items On Loan	Max No. Of Reserves	Return By Date	Age >=	Age <=	Exp Days	Exp Date	G
A	Adult	Y	Y	50	20		18	125	0		
B	Branch	Y	Y	100	999						
H	Housebound	Y	Y	24	50						
I	Interlibrary loan	Y	Y	100	10						
J	Junior Students	Y	Y	10	20		0	12			

## Default Gender can be added to Title

- Select **Application > BorrowerTitles** – the Borrower Titles screen will display

This can save a small amount of time when entering new users, as the Sex will automatically be inserted in accordance with the selected Title.

Valid Titles	Default Sex
Dr	
Master	M
Miss	F
Mr	M
Mrs	F
Ms	F
Prof	
Rev	
Sir	M
Sister	F

## Subject Interests

- Go to **Main > Reports > RepBorrower** – the Borrower Reports screen will display
- &BORINT.QRP** (Borrower interests) or **&BORINEM.QRP** (Borrower interests via email)

## Hot Tips Training

These can now be emailed/printed out for Borrowers from Borrower Reports which will automatically pick out new items for their Subject Interests if they exist!

- Subject Interests can be entered via the *NetOpacs* or from *Borrower* module **XReference** menu

### Wand into File

It is possible to wand Borrowers into a Saved File in a similar way that items can be wanded into a Saved File.

1. Select **File > WandIntoFile** – the Wand Into File screen will display:

Barcode	SurName	Given
B9988	Smith	Sarah

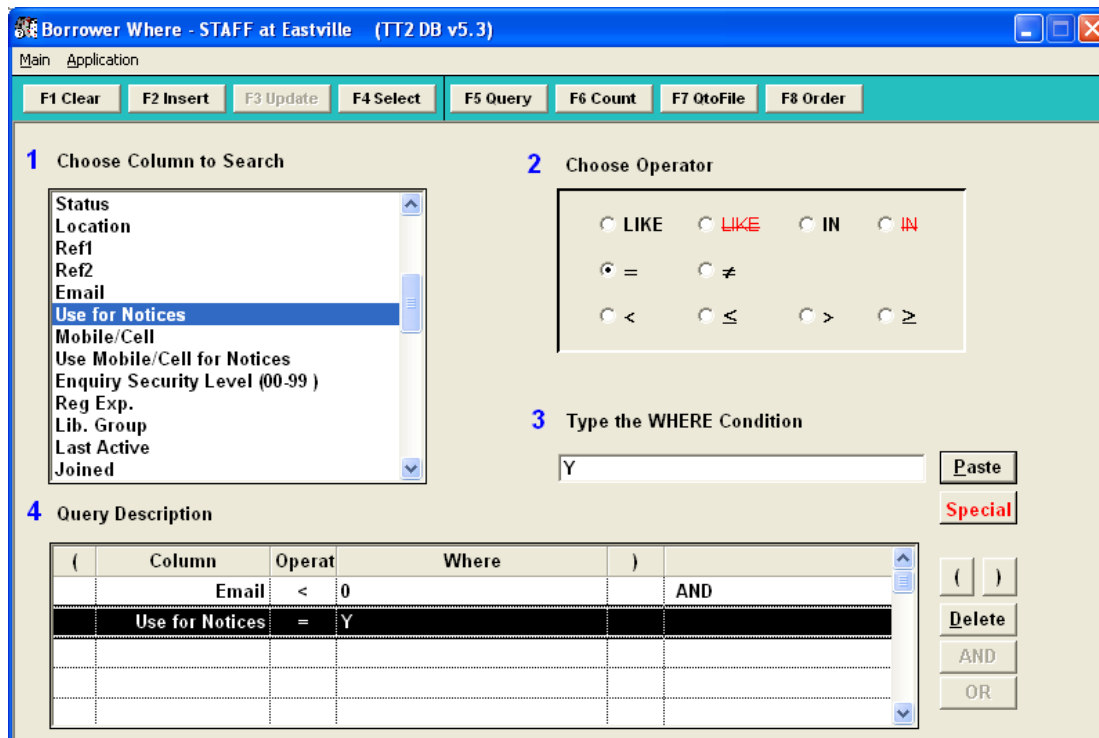
2. Click the **F4 Select** button – the Borrower Saved Query Results screen will display
3. Highlight a File and click the **F9 Select** button (alternatively, click the **F1 New** button, enter a Description, click the **F3 Save** button and then the **F9 Select** button)
4. Barcodes can then be scanned into the Barcode field (and automatically saved into the selected Saved File)

### Checking of Email Addresses

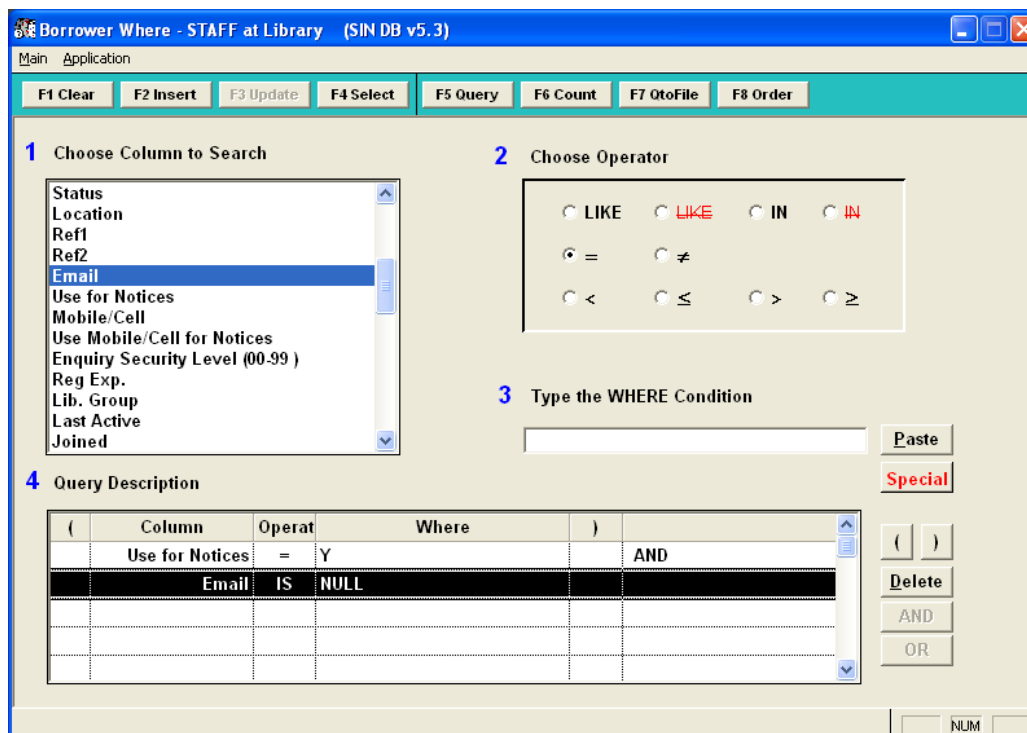
There are Email validation rules that apply when entering emails. However, occasionally it is advisable to ensure that there are no incorrect Email addresses or no emails but the Use for Notices is set to Y, by doing a Where search.:

1. Email Address < 0 AND Use for Notices = Y

# Hot Tips Training



2. Email Address IS NULL AND Use for Notices = Y



# Hot Tips Training

## CIRCULATION

- **Main > Circulation > Issues**

### Item Title / Author / Call No Display

- The user can view the Full Title entry and Item Call Number by clicking in the item Title / Author / Call No field on the Issues screen

Form	Rsv	Title / Author / Call No	Item No	Due Back	T.Loc	P.Loc	Ren
BK	0	Doctor Who and the auton invasion / Terr	980387259	07/06/2011	CHELSEA	CHELSEA	1
BK	0	4.50 from Paddington / Agatha Christie / CHRISTIE, AGATHA, 1890-1976. / PB CHRI	0215342	07/07/2011	CHELSEA	CHELSEA	0

### In-House Circulation Option

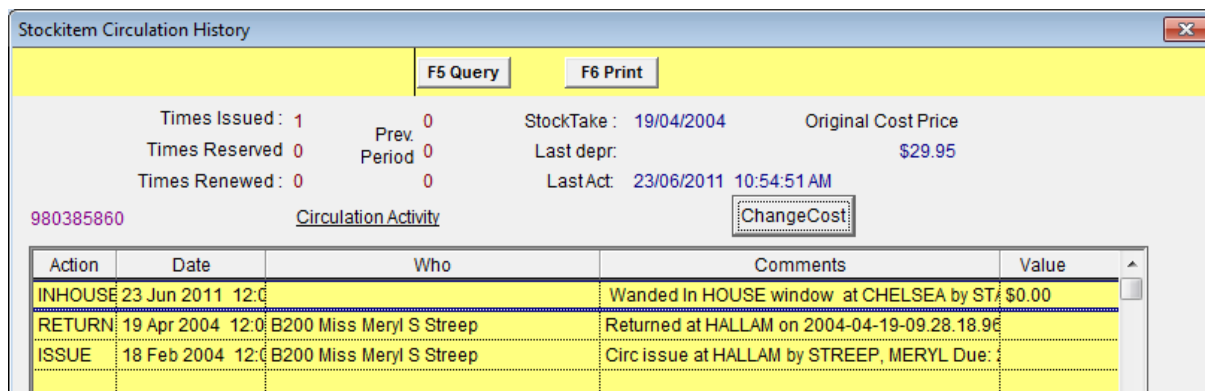
- Select **Application > Process In House** – the In House Processing screen will display:

Form	Stats	Rsv	Title	Perm	Temp	Item No
→ BK	AF	0	After the Funeral / Agatha Christie	CHELSEA	CHELSEA	980365172
→ BK	REF	0	The Dictionary of Performing Arts in Australia	CHELSEA	CHELSEA	980385860

The In House process allows libraries to report and to keep statistics on items used within the Library but not borrowed. Wanding a stockitem into the In House Processing screen updates the Last Activity

# Hot Tips Training

date for that Stockitem, puts an **INHOUSE** entry in the Stockitem Circulation History (History Type = INHOUSE) and is counted in *Amlib* statistics.



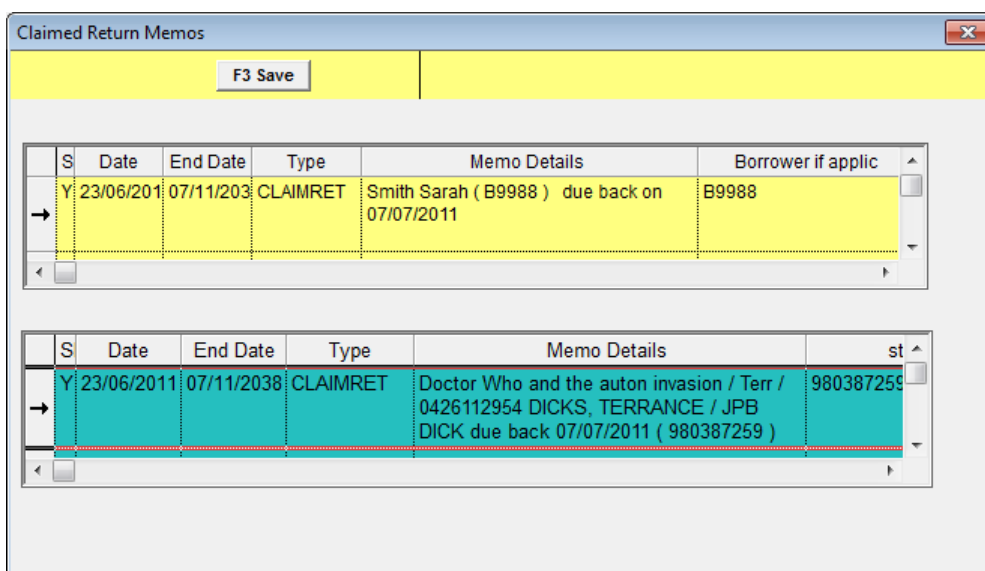
A Stockitem Where Search (**Main > StockItems > StockitemWhere**) can then be run with a Where parameter that includes **History Type = INHOUSE** and **History Date –** for example: **History Date >= Current Date - 7 Days**.

Statistics can be counted for InHouse use (Stats Type = 25).

## Claimed Returns

Item and Borrowers can have a Memo automatically generated. There also a process that can be automatically applied to Stockitems (set in the Supervisor>Installation>Circulation parameters for the Location)

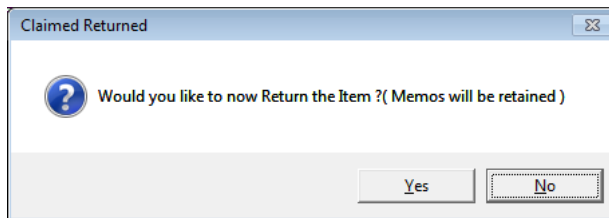
1. Highlight the item to be returned
2. Select **Items > Item ClaimedRet** – the Claimed Returned Memos screen will display:



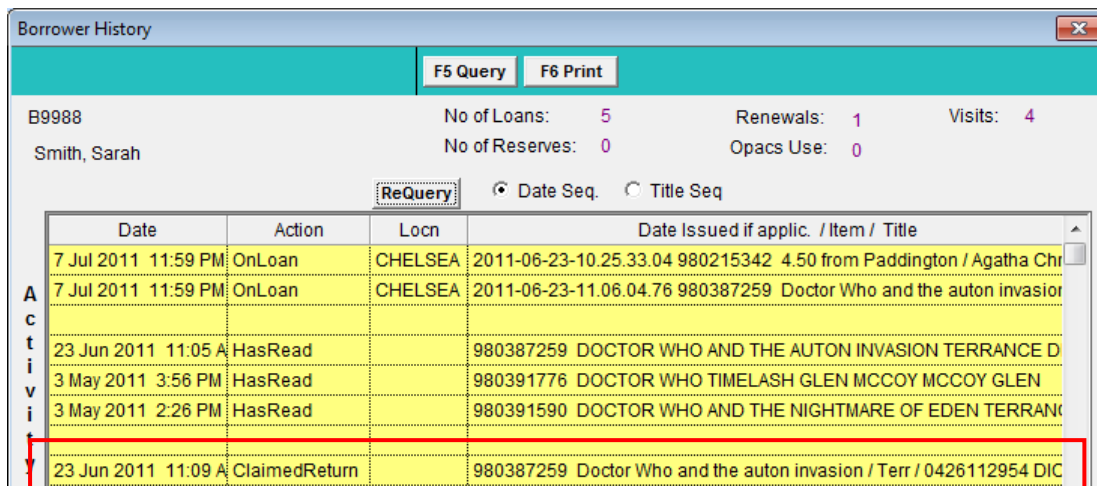
3. Click the **F3 Save** button to insert the memos
4. You will then prompted if you would like to return the item:



# Hot Tips Training



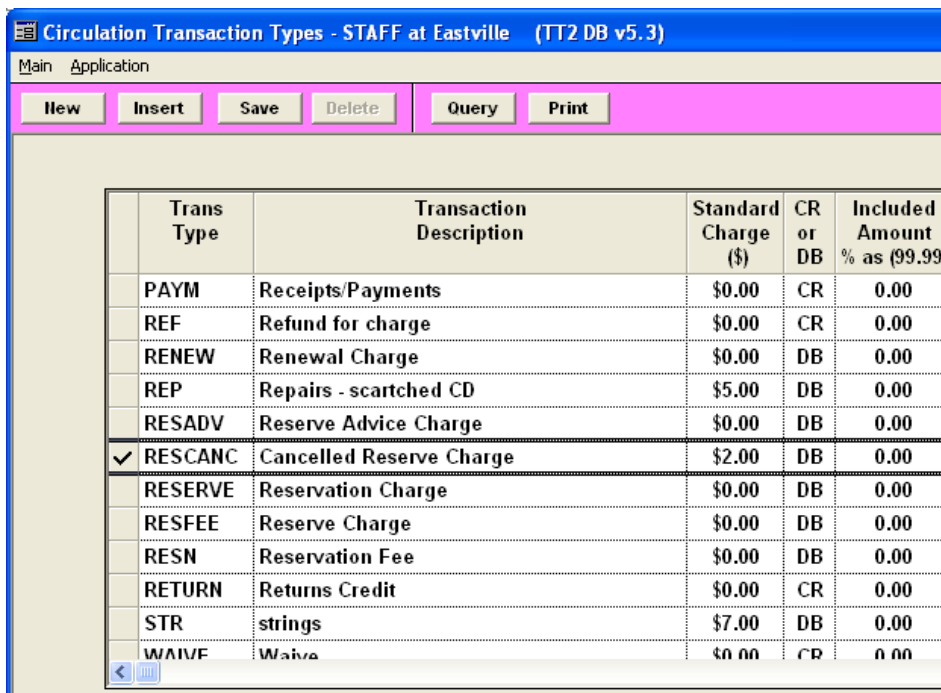
5. Click the **Yes** button (to return the item) or the **No** button (to leave it on the Borrower record)
6. An entry will be made in the Borrower (and Stockitem) History:



7. The Stockitem will be allocated a Process if a Process is defined in the Installation parameters

## Applying a Charge to Reserve Cancellations

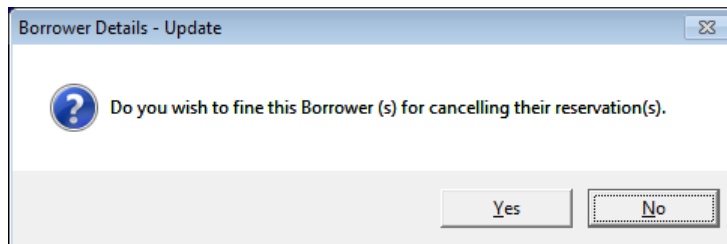
1. Go to **Main > Finance > CircFinTypes** – the Circulation Transaction Types screen will display:



# Hot Tips Training

2. Find the standard Circulation Fin Type for RESCANC
  - a. Enter a Standard Charge: type in a charge – for example: 2.00 (**do not** enter the \$ in the Value – just tabbing to the next Column adds the \$ sign)
3. Click the **Save** button
4. Exit and restart the *Amlib* client for the new settings to take effect

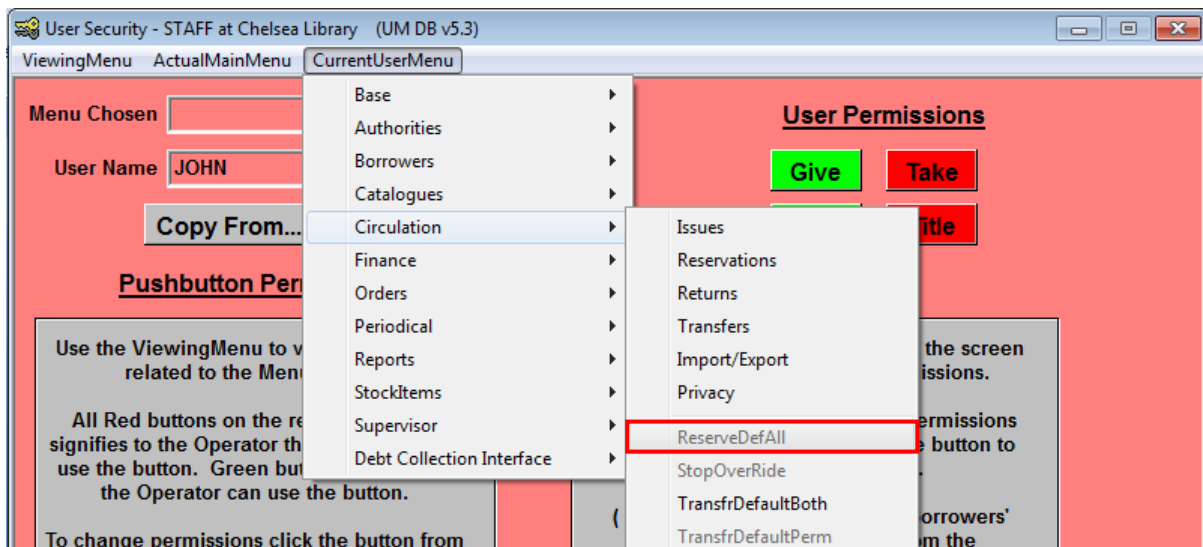
Once this has been done, when a reservation is cancelled you will be prompted with the following message: **Do you wish to fine this Borrower (s) for cancelling their reservation(s).**



## Reservation Default - First Available (Any) or All (Every)

*Amlib* uses the Logon Name to set the defaults for the *Reservations* module.

1. Go to **Main > Supervisor > UserNames** – the User Names screen will display
2. Highlight the User Name you wish to check and select the **F8 Choose** button – the User Security screen will display
3. From the menu, select **CurrentUserMenu > Circulation**



4. Check the **ReserveDefAll** option - *grey* means this is inactive – therefore the Satisfy On setting in the Reservations screen defaults to **Any Item** (first available). If the **ReserveDefAll** option is active (**bold**), the Satisfy On setting defaults to **Every Item** (all copies):

# Hot Tips Training

## Memo Types

1. Open the *Supervisor* module
2. From the menu, select **LibraryMenu** > **MemoTypes** – the Memo Types screen will display

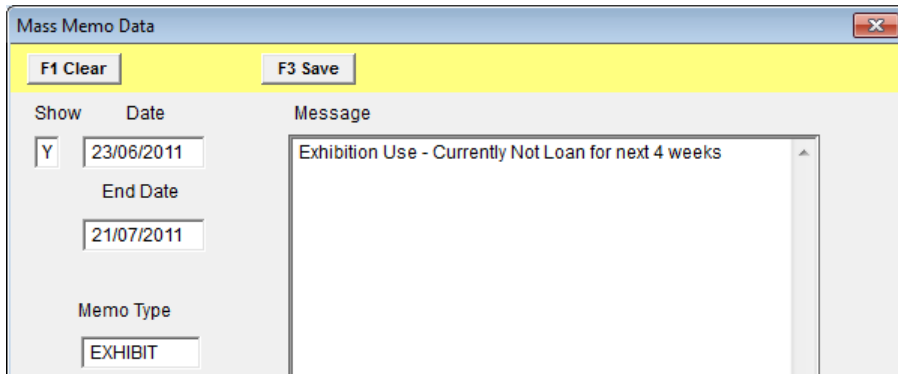
Memo Type	Description	Valid for Holdings	Valid for Members	Show As Default	Expires n days time
BARCODE	Borrower's old barcode	N	Y	N	
BORCHGDETS	A borrowers change of details has been acknowledged	N	Y	N	28
CLAIMRET	Claim Return	Y	Y	Y	
CNH	Claims Never Had	Y	Y	Y	
COMMINFO	Note:	Y	N	N	9999
EXHIBIT	Exhibition Use - Currently Not Loan for next 4 weeks	Y	N	Y	28
FILEISSUE	Item issued from Saved File	Y	N	Y	
HOMEREAD	Home Reading Preference	N	Y	N	999
LOSTCARD	Borrower Lost Card	N	Y	Y	
MERGED	Merged borrower details	N	Y	N	

Memo Types can be set for Borrower and/or Stockitem.

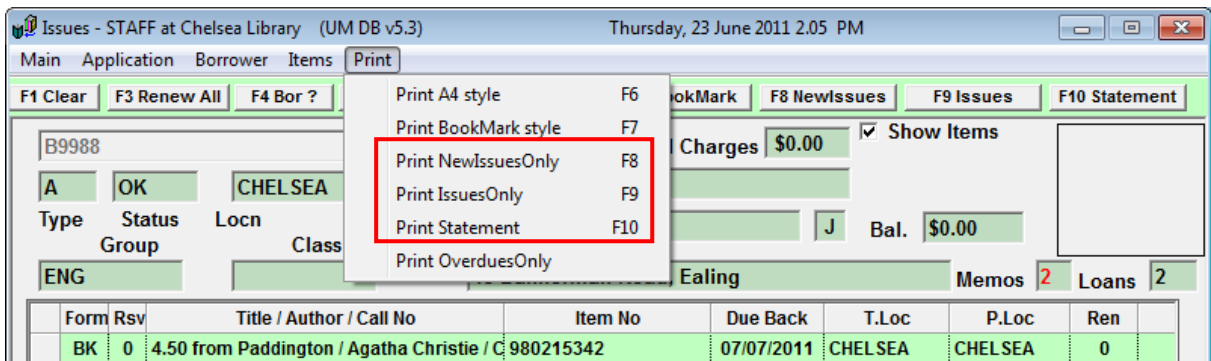
These can be used when:

- Adding an individual Memo (supplies the Text automatically)
- Mass Memo (from a Borrower or Stockitem Table)
- Mass Memo Deletion (from a Borrower or Stockitem Table)
- Where Searches and reporting

# Hot Tips Training



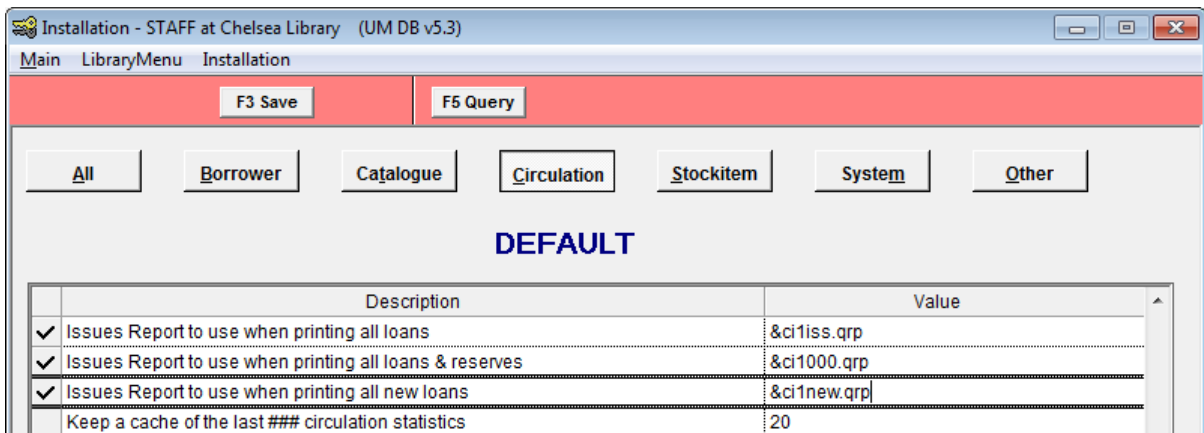
## Printing Options in Circulation



MENU OPTION	DEFAULT REPORT	FUNCTION KEY
Issues Report to use when printing all loans	&CISS.QRP	F9
Issues Reports to use when printing all loans & reserves	&CI1000.QRP	F10
Issues Reports to use when printing all new loans	&CINEW.QRP	F8

Templates can be customised and saved as different file names – for example: for slip (receipt) printers or to add custom information on the template – ie: Library Name/Opening hours, etc.

1. **Main > Supervisor > Installation > Circulation** tab: Issues report to use when printing options



## OverRide

1. Go to **Main > Supervisor > UserNames** – the User Names screen will display
2. Highlight the User Name you wish to check and select the **F8 Choose** button – the User Security screen will display
3. From the menu, select **CurrentUserMenu > Circulation**
4. Check the **StopOverRide** option - *grey* means this is inactive – therefore the operator is able to override stops. If the **StopOverRide** option is active (**bold**), the operator will be unable override stops

The option is available in Issues and Reservations. For example: if a Borrower type has a limit of 5 items and the operator decides to allow 100 items, activating the Override functions allows these loans to be issued without further warning messages.

**Please Note:** Messages not related to the Privileges of the borrower still display – for example: Overdue items, Financial, Reservations, etc.

## Set a Date Prior to Wanding Items

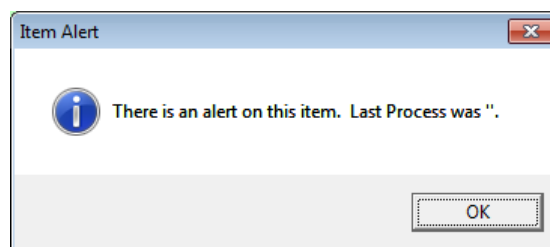
It is possible to set a different due date prior to wanding in items.

1. Go to **Main > Circulation > Issues** – the Issues screen will display
2. Bring up a borrower record
3. Select **Borrower > Set Date Due For All New Issues for Borrower** – the Issue Date Due prompt will display
4. Type in New Due date and click the **OK** button

Any item issued after this point will use this new due date.

## Item Alert Message without a Process

Sometimes in Issues or Returns a message comes up that looks incomplete. This indicates that a Stockitem has the Alert set to **Y**, but there is no corresponding Process – for example: Missing, Damaged, etc.



# Hot Tips Training

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

Main Application Item XReferences File

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

Item No: 980174157 Cat Ref No: 33847

Query Via:  Item  Cat  Keyword  Any

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

Title: Doctor in the soup / Richard Gordon

Author: Gordon, Richard, 1921-

Publisher: London : Century Hutchinson, 1986

Series/ISBN: 978-0-7126-9481-0 Vol Ed 1986

Subject

Call Number: AF GORD Sts Code AF Form BK Call Set

Description

Location Perm: CHELSEA Temp: CHELSEA Floor Origin/Source

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

Received: 19/03/1997 Accessioned: 19/03/1997 Current Cost: 20.00

Group: LIBRARY

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

Usually Alerts are set in relation to a Process:

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

Main Application

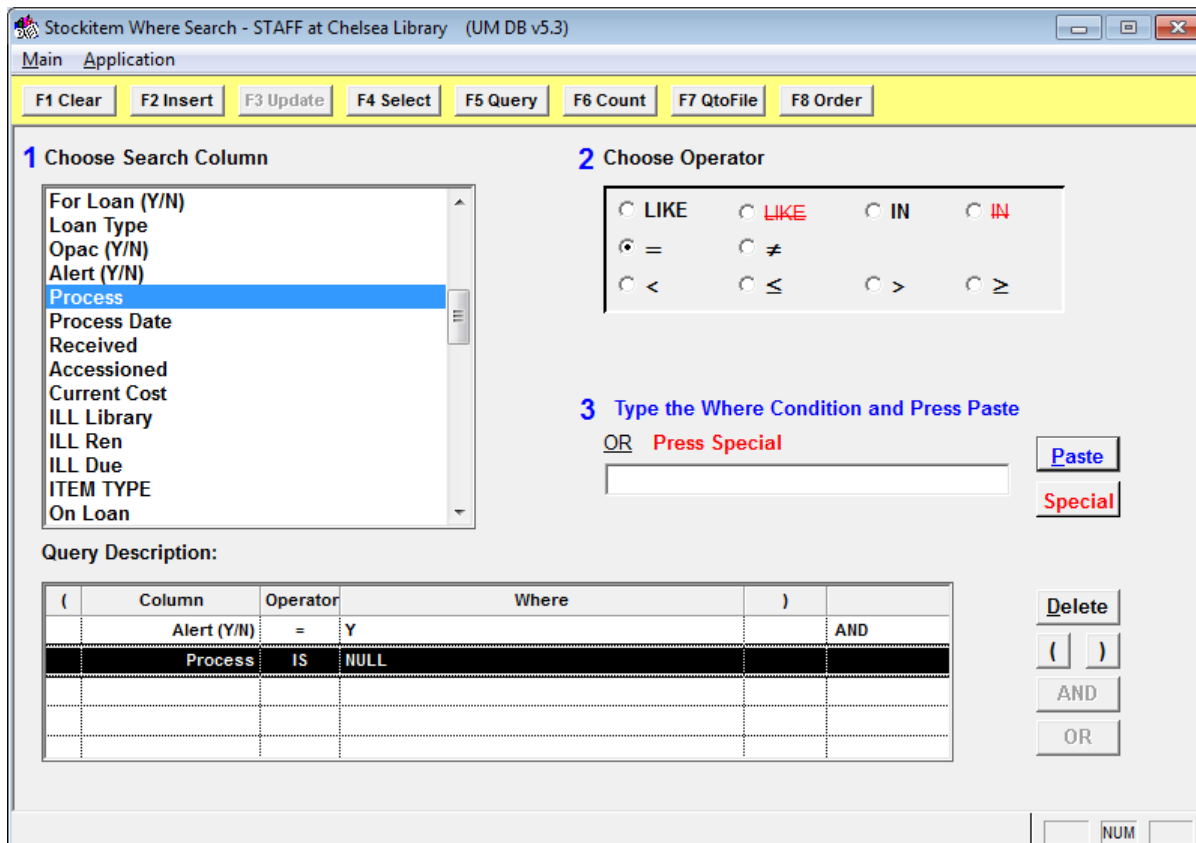
F1 New F2 Insert F3 Save F4 Delete F5 Query F6 Print

Process	Show in Opac (Y/N)	Operator Alert (Y/N)	For Loan (Y/N)	Remove on Return ( Y / N / P(prompt) )
AWAITING PROCESSING	Y	Y	Y	P
BINDING	Y	Y	N	P
CLAIMED RETURNED	N	Y	N	P
DELETE PENDING	N	Y	N	P
INTER LIBRARY LOAN	N	Y	Y	P
MISSING	N	Y	N	P
ROTATION BELMONT	Y	N	Y	P
ROTATION CHELSEA	Y	N	Y	P
ROTATION HASTINGS	Y	N	Y	P

You can find all the items with an Alert but no Process through a Stockitem Where Search:

1. Go to **Main > StockItems > StockitemWhere** – the Stockitem Where Search screen will display
2. Enter the following parameters:
  - a. **Alert = Y**
  - b. **Process = NULL (Paste without entering a value in 3)**

# Hot Tips Training



## Change of Due Dates

1. On the Stockitem List results screen
2. *Highlight* the items to be altered
3. Select **Table > Change Due Dates**
2. **WARNING:** This is bypassing the usual system way of renewing the loan or changing the date due, so the links and history will not be valid. Useful when a set of items need altering at the same time - for example, when schools want to change the Date due for certain Classroom sets

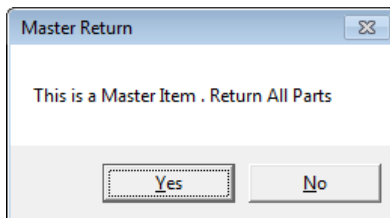
Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Ec
6	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	Y	07/07/20	0	CHEL		N	978-0-7475-3		19
7	Harry Potter and the Deathly	Rowling, J.K.	ROW	BK	J	N		0	CHEL		Y			
8	Harry Potter and the Deathly	Rowling, J.K.	ROW	BK	J	N		0	HAST		Y			
9	Harry Potter and the Goblet of	Rowling, J.K.	F ROW	BK	AF	Y	17/05/20	0	CHEL		N			19
10	Harry Potter and the Goblet of	Rowling, J.K.	F ROW	BK	J	N		0	CHEL		N			19
11	Harry Potter and the half-bloo	Rowling, J.K.	F ROW	BK	AF	N		3	BELM		N	Harry Potterv		20
12	Harry Potter and the half-bloo	Rowling, J.K.	F ROW	BK	AF	N		3	CHEL		N	Harry Potterv		20
13	Harry Potter and the Order of	Rowling, J.K.	F ROW	BK	J	N		4	CHEL		Y	978-0-439-35		20
14	Harry Potter and the Order of	Rowling, J.K.	F ROW	BK	J	N		4	CHEL		Y	978-0-439-35		20
15	Harry Potter and the Order of	Rowling, J.K.	F ROW	BK	J	N		4	CHEL		Y	978-0-439-35		20
16	Harry Potter and the philosop	Rowling, J.K.	F ROW	BK	J	N		5	HAST		N	978-0-7475-3		19
17	Harry Potter and the philosop	Rowling, J.K.	F ROW	BK	J	N		5	CHEL		N	978-0-7475-3		19
18	Harry Potter and the prisoner	Rowling, J.K.	F ROW	BK	AF	N		0	CHEL		N	978-0-7475-7		20
19	Harry Potter and the prisoner	Rowling, J.K.	F ROW	BK	AF	Y	07/07/20	0	CHEL		N	978-0-7475-7		20

## Returning Multi-Part Items

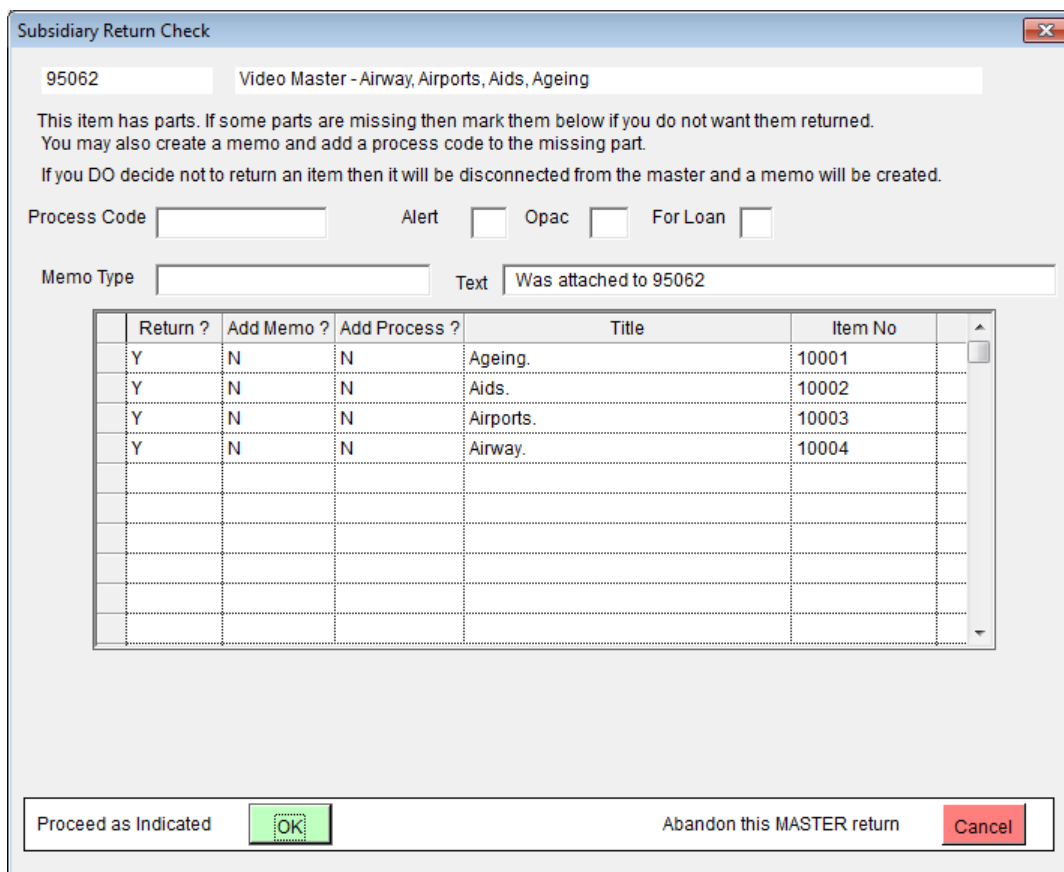
# Hot Tips Training

This procedure applies to returning any items that have been set up with a Master-Subsidiary relationship (for example: kits with several parts or boxes of books and other library items).

1. When returning an item – a prompt will display with the following message: **This is a Master Item . Return All Parts**



2. To check all items in:
  - Click the **Yes** button and the returned item will display in the returns screen
3. To return only some parts of the box or set:
  - Click the **No** button – a list of the parts or contents of the box will display:



95062 Video Master - Airway, Airports, Aids, Ageing

This item has parts. If some parts are missing then mark them below if you do not want them returned.  
You may also create a memo and add a process code to the missing part.  
If you DO decide not to return an item then it will be disconnected from the master and a memo will be created.

Process Code  Alert  Opac  For Loan

Memo Type  Text

Return ?	Add Memo ?	Add Process ?	Title	Item No
Y	N	N	Ageing.	10001
Y	N	N	Aids.	10002
Y	N	N	Airports.	10003
Y	N	N	Airway.	10004

Proceed as Indicated  Abandon this MASTER return



## Hot Tips Training

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Use the list to check if all contents are present. If not, use the options on the screen (pictured above) to process these items according to your library procedures:

- Items that were marked as **Y** for Return will display on the returns screen
- If some items were marked as **N** for Return, these will display as on loan to the original borrower
- Items that were marked with a **Y** for Process Code, will contain the process as set which will display in the stockitem record
- If items were marked with a **Y** for Memo Type, the memo will display on the stockitem record
- Once the columns and fields are filled in as required, click on the green **OK** button at the bottom of the screen

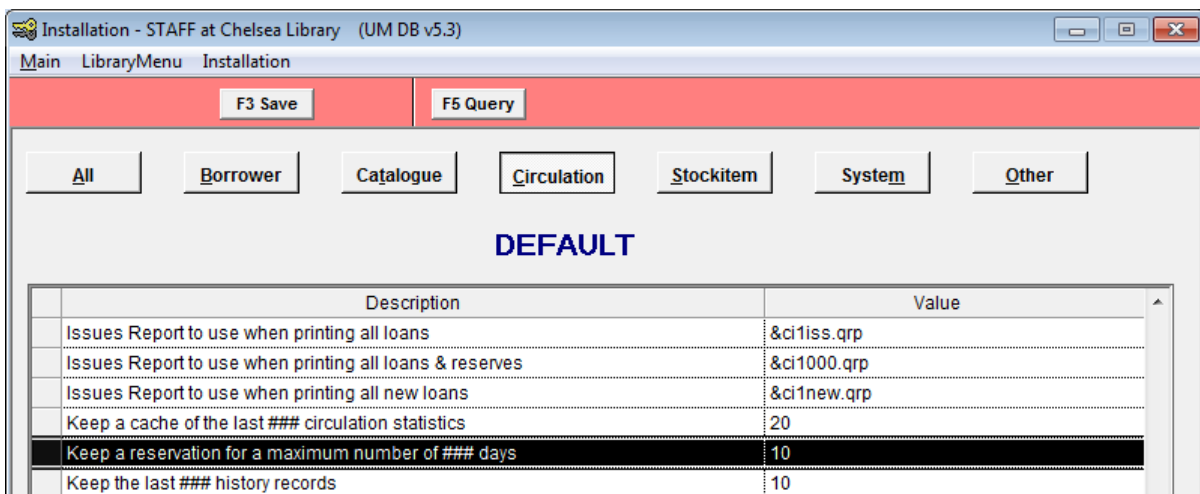
## RESERVATIONS

### Mass Cancelling of Reservations

Sites may wish to cancel reserves *en masse*. For example: at the end of each School Year (or for the Year 12s when they leave) or other Libraries may wish to delete after the expiry dates of the Reservations.

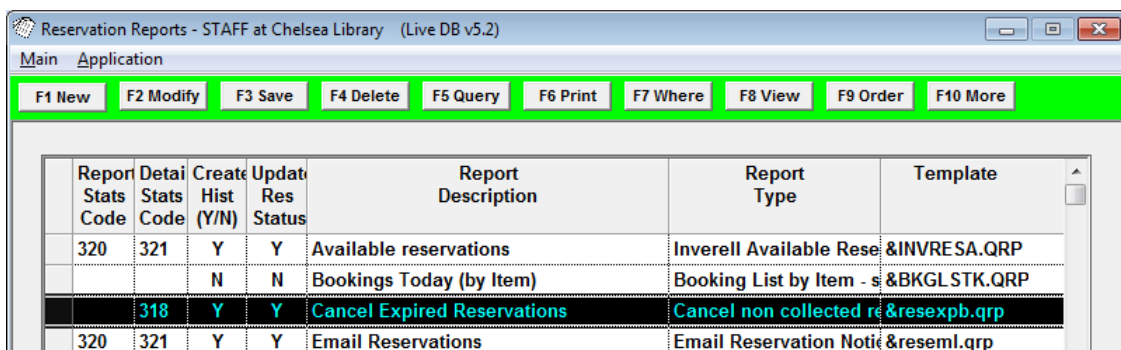
The expiry date for the number of days that an item should remain on the reservation shelf is set in:

- **Main > Supervisor > Installation > Circulation** tab: Keep a reservation for a maximum number of ### days



It is possible to cancel large numbers of reserves by running a 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 **&RESEXPB.QRP** template (Cancel no collected res) and click the **Select** button
4. Type in a Report Description
5. Ensure that the Update Res Status = **Y**
6. Click the **F3 Save** button



## Hot Tips Training

7. Click the **F7 Where** button and enter your Where statement – for example:
  - a. **Res Expiry Date < Current Date** (select via the **Special** button)
  - b. **BorType = Y12**
8. Click the **F3 Save** button when complete

Reservation Reports - Where

F3 Save F5 Query

1 Choose Search Column

Bor Sex  
Bor Birth Date  
Bor Type  
Bor Status  
Bor Location  
Bor Group

2 Choose Operator

LIKE  LIKE  IN  IN  
 =  ≠  
 <  ≤  ≥  >

3 Type the WHERE Condition and Press PASTE OR Press SPECIAL

Y12

( Optional Multiple Brackets )

(	Column	Oper	Where	)
	Res Expiry Date	<	Current Date	AND
	Bor Type	=	Y12	

AND  
OR  
Delete

9. Click the **F8 View** button and check carefully that this list is **exactly** what you want to delete (click **No** to the Saved File prompt)
10. If you are happy with the report results, close the Report – View window and click the **F6 Print** button run the report through the *Scheduler*
11. From the menu, select **Application > RepStartSchedule** and click the **OK** button on the prompt
12. The progress of report can be viewed by selecting **Application > RepPrintProgress**
13. When the report enters Printed tab, then the reservations should be all cancelled

**WARNING:** Once reserves have been deleted they cannot be retrieved. Please use this process with caution.

## STOCKITEM

### Stockitem List

Once the Stockitem List has been displayed, the columns can be moved by stretching from the heading:

- Click the heading just on the line until an icon displays with the two arrows – when this displays the column can be dragged and dropped where required

Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Ext
1	Exploring Harry Potter / by Eli...	Schafer, Elizabeth	823/914	BK	INF	N		0	CHEL		Y	Beacham's sq		20
2	Exploring nature in forests, w...	Recher, Harry F.	574.994	BK	ANF	N		0	CHEL		N	978-0-7301-0		19
3	Harry Potter and the chamber...	Rowling, J.K.	F ROW	BK	ANF	Y	21/03/2	1	CHEL		N	978-0-7475-3		19
4	Harry Potter and the chamber...	Rowling, J.K.	F ROW	BK	J	Y	10/08/2	2	BELM		N	978-0-7475-3		19
5	Harry Potter and the chamber...	Rowling, J.K.	F ROW	BK	J	N		0	CHEL		N	978-0-7475-3		19
6	Harry Potter and the chamber...	Rowling, J.K.	F ROW	BK	J	Y	07/07/2	0	CHEL		N	978-0-7475-3		19
7	Harry Potter and the Deathly	Rowling, J.K.	ROW	BK	J	N		0	CHEL		Y			

The Stockitem List columns themselves can be set permanently on the Supervisor Installation screen:

1. Go to **Main > Supervisor > Installation – Stockitem** tab
2. Locate the Order of columns to display within Stockitem setting
3. Type the fieldnames for the columns you wish to have displayed first – for example:  
**STK\_LINE6, STK\_LINE1, STK\_FORM, STK\_STATS\_CODE**

Description	Value
Default Item Form	BK
Default Item Stats Code	
Delete a stockitem memo when it is ### days old	9999
Deprec. Items on straight line basis	Y
Description of Stockitem Convert Value	Copy No / Convert
Description of Stockitem Description	Description
Description of Stockitem Process	Process
Enter Item Line Numbers to refresh on Cat Changes	12345
Keep History record of price changes	Y
<b>Order of columns to display within Stockitem</b>	<b>STK_LINE1, STK_LINE2, STK_LINE6, ST</b>
Show Memos in Stockitem automatically (Y/N)	N

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

TITLE IN LIST	COLUMN NAME	TITLE IN LIST	COLUMN NAME
---------------	-------------	---------------	-------------

## Hot Tips Training

Title	STK_LINE1	Volume	STK_VOLUME
Author	STK_LINE2	Temp Location	STK_LOC_TEMP
Call No	STK_LINE6	Floor Location	STK_LOC_FLOOR
Form	STK_FORM	Item No (barcode)	STK_ITEM_NO
StatsCode	STK_STATS_CODE	Convert Val.	STK_CONVERT_VALUE
On Loan?	STK_IS_ON_LOAN	Description	STK_DESCRIPTION
On Order?	STK_IS_ON_ORDER	Borrower barcode	STK_BOR_BAR_NO
Reserved?	STK_IS_RESERVED	Borrower Name	STK_BOR_NAME
Due Date	STK_ISS_DUE	ILL Supplier	STK_ILL_SUPP
Perm Location	STK_LOC_PERM	ILL Renew	STK_ILL_RENEW
Process	STK_PROCESS	ILL Due Date	STK_ILL_DUE
Edition	STK_EDITION	Call Set	STK_CALL_SET

### Stockitem Form and Stats Cat Definitions

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

#### Form Codes

1. Go to **Main > StockItems > StockitemForms** – the Form Codes screen will display:

The screenshot shows a window titled 'Form Codes - STAFF at Chelsea Library (UM DB v5.3)'. The window has a menu bar with 'Main', 'Application', and 'Window'. Below the menu bar is a toolbar with buttons: 'F1 New', 'F2 Ins', 'Cat Defs', 'delete', 'F5 Query', 'F6 Print', 'F7 Loan', 'F8 Validtn', and 'F9 Display'. The main area contains a table with the following data:

Form	Description	Allow Loan	Floating ?	Cat Def Defined
AC	Audio Cassettes	Y	N	N
BK	Books	Y	N	N
BR	BookRoom	Y	N	N
CD	Music Compact Disks	Y	N	N
CI	Community Information	N	N	N
CR	CD ROMs	N	N	N
EQ	Equipment	Y	N	N

# Hot Tips Training

- From the menu, select **Window > Cat Defs** – the Form Codes for Catalogues screen will display:

Form Codes for Catalogues

F3 Save F5 Query

Form Code: AC

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

Tag

246  
247  
250  
260  
300  
310  
362  
440

Must Contain SOUND CASSETTE

Must Not

Paste Delete

Description

Tag 300 contains 'SOUND CASSETTE'

- Select a Tag, type in the Must Contain and/or Must Not text and click the **Paste** button
- Click **F3 Save** when complete

## Stats Codes

- Go to **Main > StockItems > StockitemStatsCodes** – the Stats Codes screen will display:

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

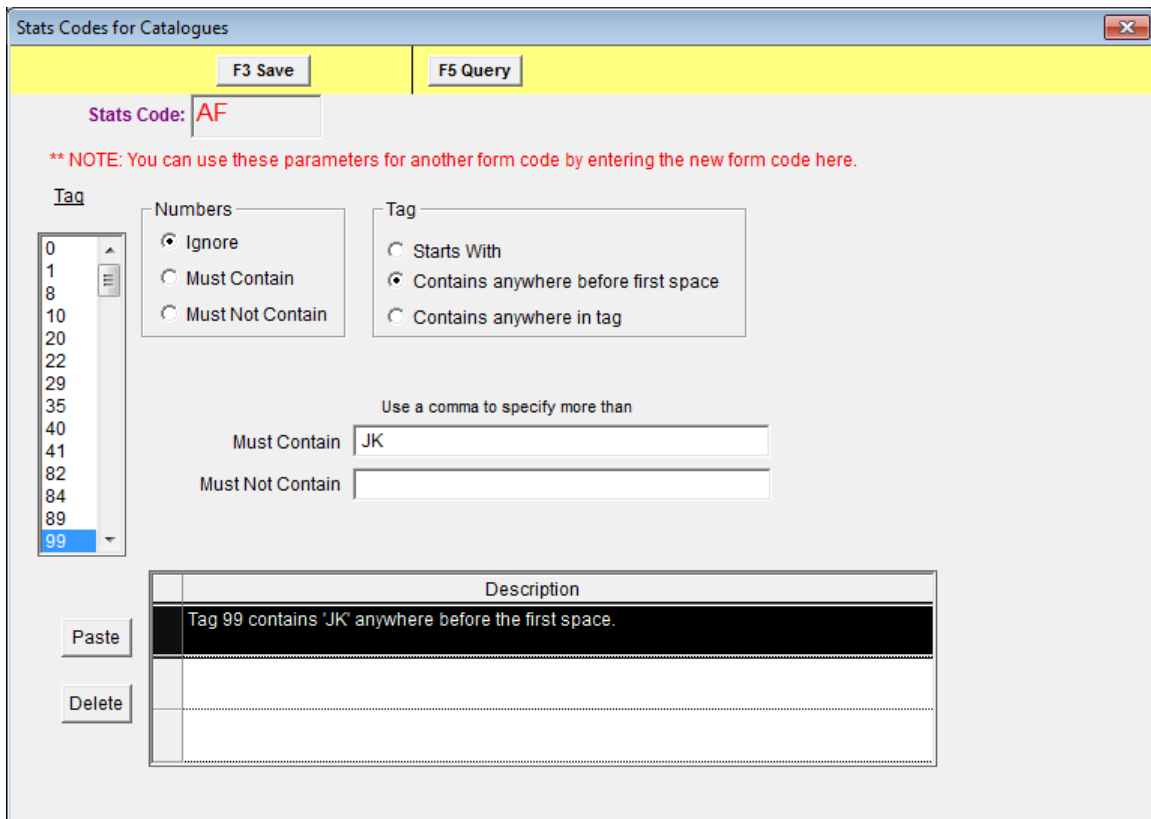
Main Application

F1 New F2 Insert F3 Save F4 Delete F5 Query F6 Print F7 Loan F8 Cat Def

Stats Code	Allow Loan	Floating ?	Stats / Collection Description	Price Group Code	Cat Def Defined
AF	Y	N	Adult Fiction	FIC	N
AFSTA	Y	N	Adult Fiction Stack	FIC	N
ANF	Y	N	Adult Nonfiction	ANF	N
ANFSTA	Y	N	Adult Nonfiction Stack	ANF	N
AVNF	Y	N	Audio Visual Nonfiction	ANF	N
CAS	Y	N	Music Cassette	NB	N
CD	Y	N	Music CD	NB	N
CDR	N	N	CD Rom	NB	N
CI	N	N	Community Information	NB	N
CL	Y	N	ClickView On Demand Video	NB	N
DF	N	N	Digital Files	NB	N
DVD	Y	N	DVD	NB	N
E	Y	N	Picture Book	JUN	N

- Highlight the Stats Code and click the **F8 Cat Defs** button – the Stats Codes for Catalogues screen will display:

# Hot Tips Training



3. Select a Tag, select Numbers or Tags definitions, type in the Must Start With and/or Must Not Start With text and click the **Paste** button
4. Click **F3 Save** when complete

A setup for Schools might be:

<b>NF</b>	DEFAULT as set up in <b>Supervisor &gt; Installation &gt; Stockitem</b> tab or set in Marc Take up
<b>F</b>	<b>Tag 82 must not contain numbers.</b>

A setup for Public Libraries might be:

<b>ANF</b>	DEFAULT as set up in <b>Supervisor &gt; Installation &gt; Stockitem</b> tab or set in Marc Take up
<b>AF</b>	<b>Tag 99 must not contain numbers. Must contain F but not contain J before the first space.</b>
<b>JK</b>	<b>Tag 99 Must contain JK before the first space</b>
<b>JNF</b>	<b>Tag 99 must contain numbers Must contain J but not contain JK before the first space.</b>
<b>JF</b>	<b>Tag 99 must not contain numbers Must contain J but not contain JK before the first space.</b>

## Stockitem Display

Determines which Tags from the Catalogue will display in the Stockitem Display Lines.

# Hot Tips Training

1. Go to **Main > StockItems > StockitemForms** – the Form Codes screen will display:

Form	Description	Allow Loan	Floating ?	Cat Def Defined
AC	Audio Cassettes	Y	N	Y
BK	Books	Y	N	N
BR	BookRoom	Y	N	N
CD	Music Compact Disks	Y	N	N
CI	Community Information	N	N	N
CR	CD ROMs	N	N	N
<b>EQ</b>	<b>Equipment</b>	<b>Y</b>	<b>N</b>	<b>N</b>
LH	Local History	N	N	N
NP	Newspapers Special Lib's	N	N	N

2. **Highlight** a Form and click the **F9 Display** button – the Stock Display Tags screen will display:

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

This can be useful when setting up non-book stockitems – for example: Equipment may have Manufacturer instead of a Publisher, or Website stockitems may have the URL displaying.

Item No  Cat Ref No 35634

Query Via  
 Item  Cat  Keyword  Any

Previous Queries

Equipment	Sharp PG-MX15X Multimedia Projector
Model No	XGA Microo portable projector, 1100 ANI Lumens brightness
Manufacturer	Sharp.
Description	Digital light processing technology, with expanded
Subject	
Call Number	EQUIP

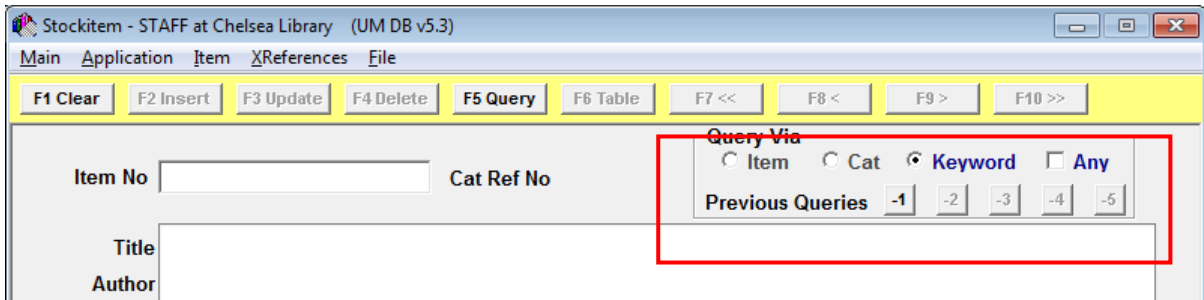
Sts Code EQ Form EQ Call Set

## Stockitem Search Defaults

It is possible to set the Stockitem screen Query Via search defaults which display when the screen is first opened – for example: some sites may want it set to **Item**, some to **Keyword**. This depends who logs into the *Amlib* client.

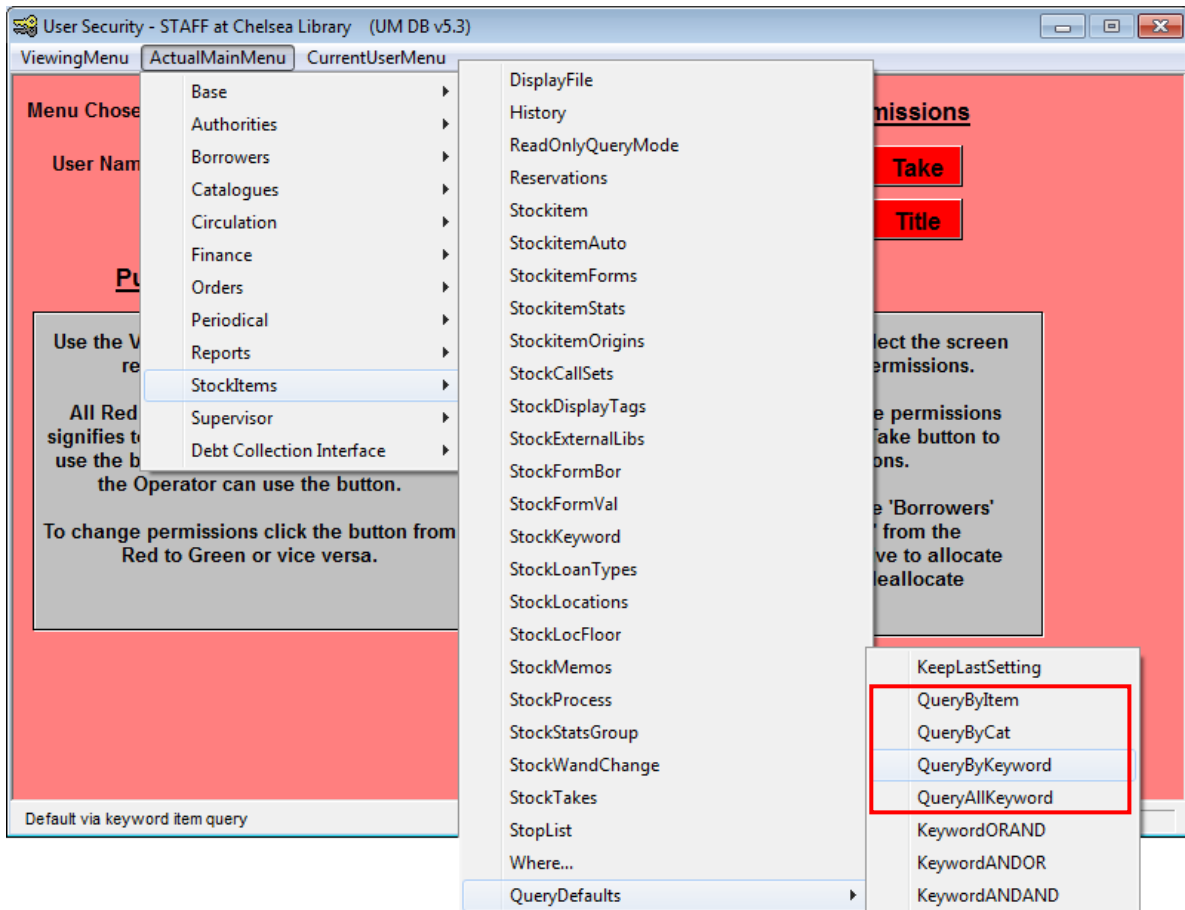


# Hot Tips Training

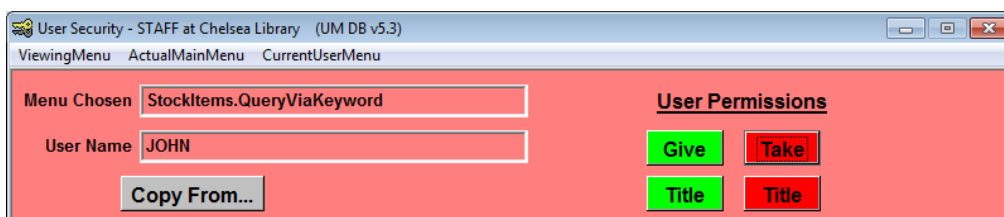


To set the default:

1. Go to **Main > Supervisor > UserNames** – the User Names screen will display
2. Highlight the User Name you wish to check and select the **F8 Choose** button – the User Security screen will display
3. From the menu, select **ActualMainMenu > StockItems > QueryDefaults**

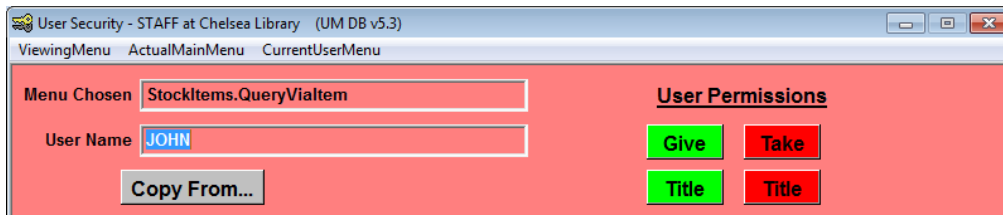


4. Select the *current QueryBy* option – the Menu Chosen will display to the selected **QueryBy** option – for example: **StockItems.QueryViaKeyword**

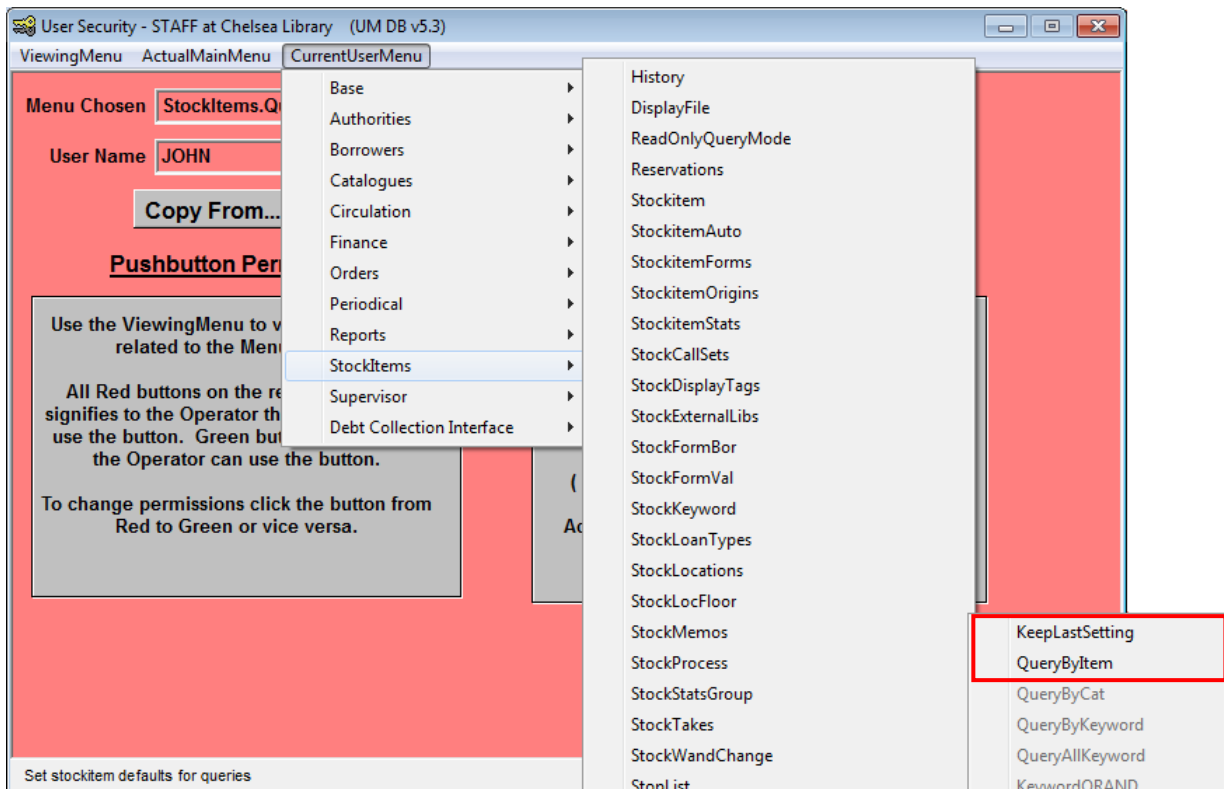


# Hot Tips Training

5. Click the red **Take** button – this will *delete* the option from the CurrentUserMenu list
6. From the menu, select **ActualMainMenu > StockItems > QueryDefaults** and the *new QueryBy* option – the Menu Chosen will display to the selected **QueryBy** option – for example: **StockItems.QueryVialtem**



7. Click the green **Give** button – this will *add* the option to the CurrentUserMenu list
8. To check the new settings, go to the CurrentUserMenu and ensure only one of the **QueryBy** options is selected (we recommend also having the **KeepLastSetting** option selected as well).



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

## Stock Wand Change

- **Main > StockItems > StockWandChange**

Stockwand change is a facility that allows mass changes to item by:

- Wanding the items
- All items from a selected File
- Items resulting from a selected Where Search

# Hot Tips Training

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

Main Application

F1 Clear F2 Insert F3 Update F4 Select F6 Start F7 FrFile F8 FrWhre

1 Choose Column to Change

Stats Code  
Form  
Perm Location  
Temp Location  
Floor Location  
For Loan (Y/N)  
Alert Oper (Y/N)  
Is On Order (Y/N)  
Show Opac (Y/N)

2 Type the New Value and Press Paste  
OR Press Special

Paste  
Special

Update Description: Delete

Column	New Value

Item No Last Changed By

NUM

- Ensure these buttons (**F2 Insert** , **F7 FrFile** and **F8 FrWhre**) are available
- Searches can be saved by using the **F2 Insert** button

## Stock Call Sets

Setting up of Call Sets is completely optional. It enables items within a particular call number range to be easily linked together for reporting purposes. It's a great method of keeping detailed 'holdings' information of your library collection. For example check on the number and value of Science items received in the current Financial year. You can customise the Stock Call sets table to cover the whole collection or only target a particular collection area. Call sets work only with numeric values in Line 6 of the Stockitem.

Once the Call Sets are established it is possible to quickly search or report on Call Sets using **Main > Reports > RepStockitem**, rather than having to specify a separate call number ranges.

To setup Call Sets:

1. Go to **Main > StockItems > StockCallSets** – Stock Call Numbers screen will display
2. User the **F1 New** (or **F2 Insert**) button to enter ranges
3. Click the **F3 Save** button when complete
4. Click the **F7 Set** button to set all the items to the Call Sets defined in the table

# Hot Tips Training

Stock Call Numbers - STAFF at Chelsea Library (UM DB v5.3)

Main Application

F1 New F2 Insert F3 Save F4 Delete F5 Query F6 Print F7 Set

**Stock Call Number Ranges**

These are set by for all locations or just current group if applic.

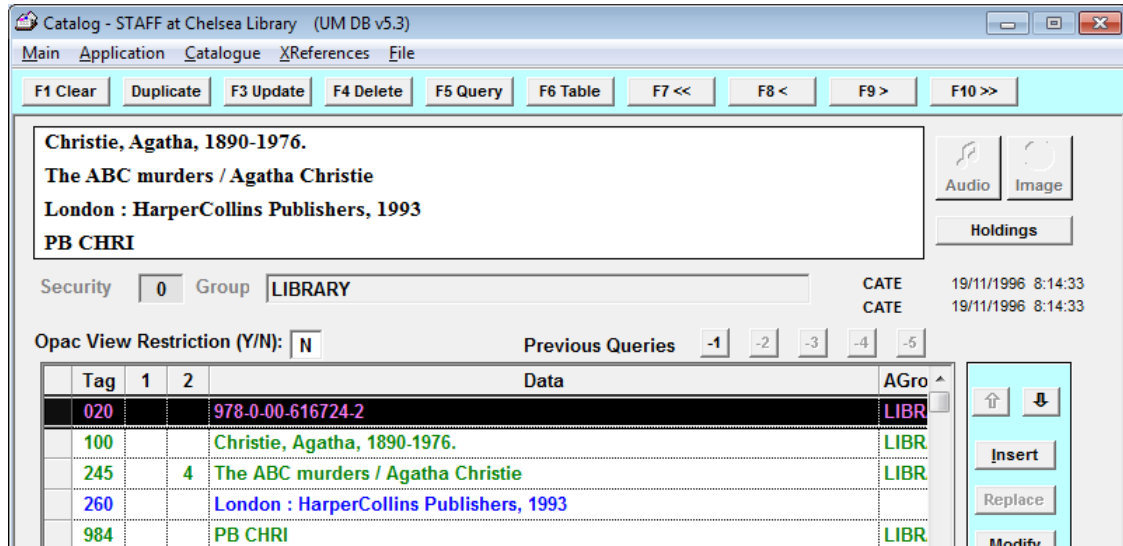
Range Id	Call From ( Greater or Equal )	Call To ( Less than )	Description
GEN	000	002	Generalities
COMP	003	006	Computers
DICT	019	019	Dictionaries
LIB	020	030	Libraries
ENC	030	040	Encyclopaedias
GEN	040	100	Generalities
PHIL	100	200	Philosophy & Psychology
REL	200	300	Religion
SOC	300	370	Sociology
EDUC	370	380	Education
COMM	380	390	Communication
CUST	390	398	Custom & Folklore
FOLK	398	399	Folklore

NUM

## CATALOGUE

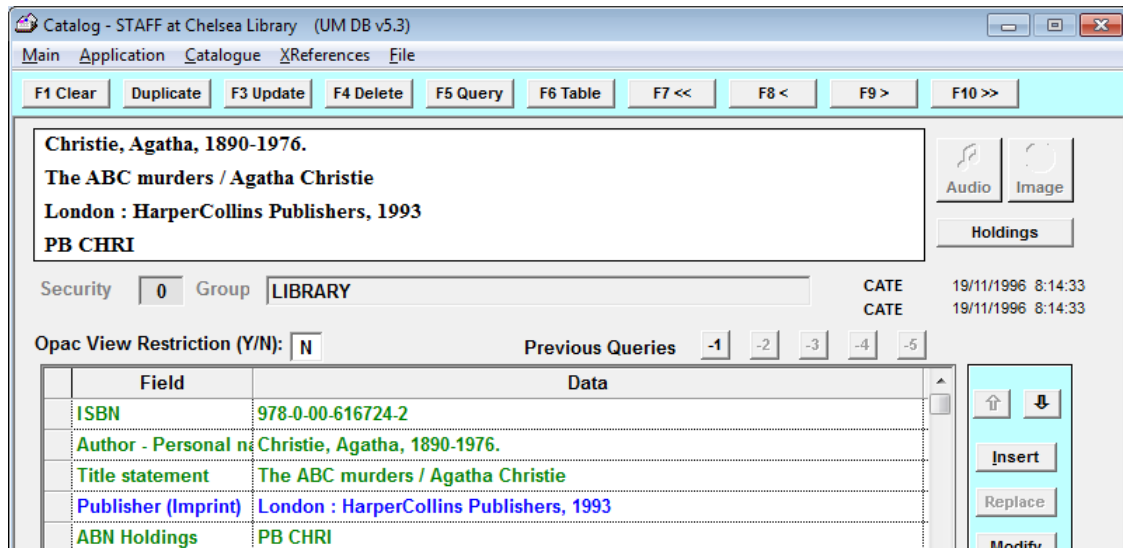
### Blue/Green Text

The Data displays in either **Green** (Tags that are Authorities within Amlib) and **Blue** (Non-Authority Tags within *Amlib*).



### Display

- Clicking on the heading for Tag displays the Tag numbers or the Field descriptions



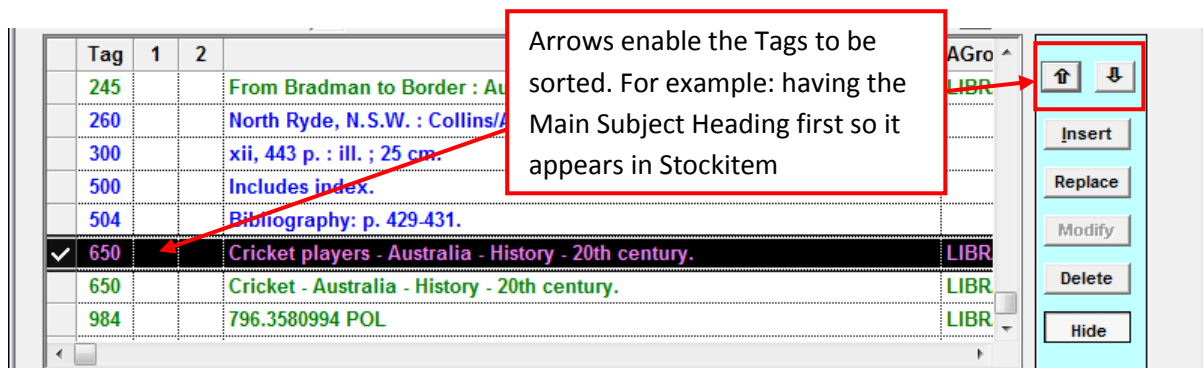
To set the default as Tag or Description:

- Go to **Main > Supervisor > Installation > Catalogue** tab
- Set the Display Tag Description in Catalogue instead of Tag No to **Y** or **N**
- Exit and restart the *Amlib* client for the settings to take effect

### Sequence of Tags within a Catalogue Record

# Hot Tips Training

1. Highlight the Tag to move and use the arrow keys to move the Tags up or down
2. Click the **F3 Update** button when complete



This sequencing possible within the record depends on what is set in the *Supervisor* settings:

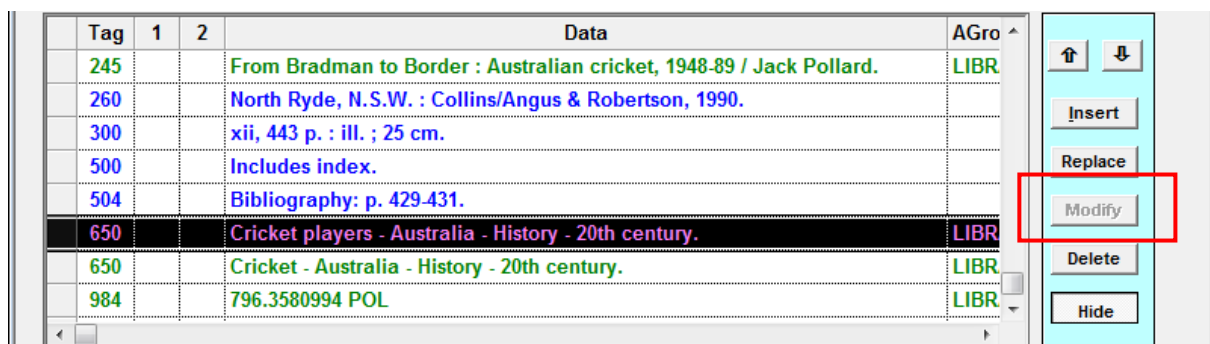
1. Go to **Main > Supervisor > Installation > Catalogue** tab
2. Set the Allow tags to be sequenced anywhere within a Catalogue (Y/N) to **Y** or **N**
3. Exit and restart the *Amlib* client for the settings to take effect

If it is left at the default **Y**, staff will be able to use the ↓ and ↑ arrow buttons on the Catalogue record to reposition any Marc Tag within that record.

If it is changed to **N**, this will then restrict the ability for adjusting the sequence of a Marc tag in a specific record to its specific range only. This means that if there is only one Marc tag to that record it cannot be moved, but if there is more than one Marc tag (for example: subject headings) then these can be moved within this group only.

## Catalogue Modify Options

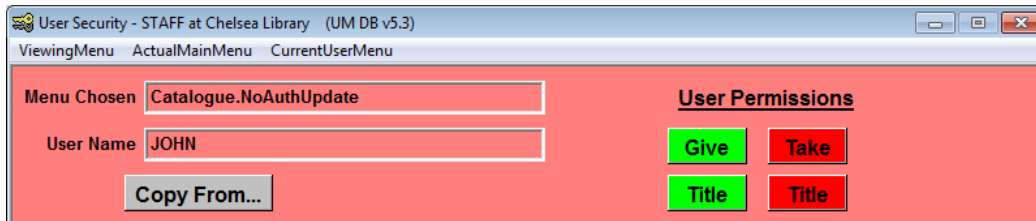
These are controlled by the Supervisor/User Names setting for No Shared Authority Update. Staff will **NOT** be able to modify any shared authorities from the Catalog screen. The **Modify** button to the right will be *greyed out*.



# Hot Tips Training

To set the default:

1. Go to **Main > Supervisor > UserNames** – the User Names screen will display
2. Highlight the User Name you wish to check and select the **F8 Choose** button – the User Security screen will display
3. From the menu, select **ActualMainMenu > Catalogues > NoSharedAuthUpdate** – the Menu Chosen will display the selected option: **Catalogue.NoAuthUpdate**

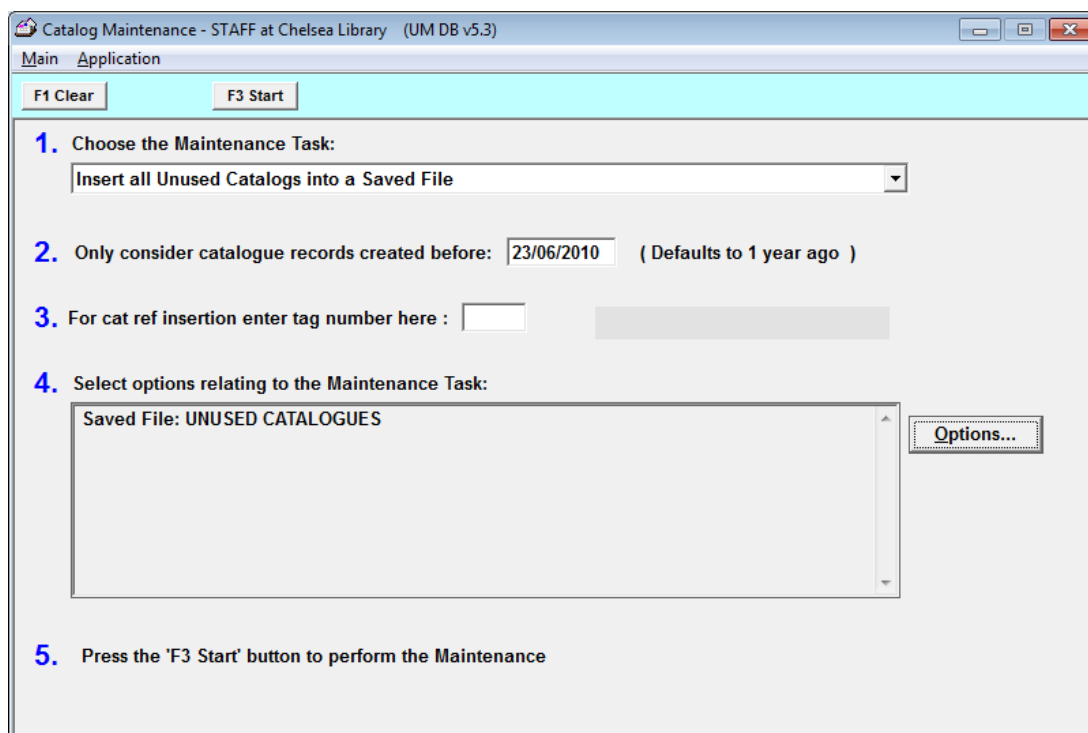


4. Click the green **Give** button – this will *add* the option to the CurrentUserMenu list
5. To check the new settings, select **CurrentUserMenu > Catalogues – NoSharedAuthUpdate** should be **bolded**
6. Exit and restart the *Amlib* client for the new settings to take effect

## Purging Catalogues from a Saved File

- **Main > Catalogue > CatMaintenance**

This option will delete only those catalogues that have been saved to a particular File in the Catalogue Saved Query Results screen.

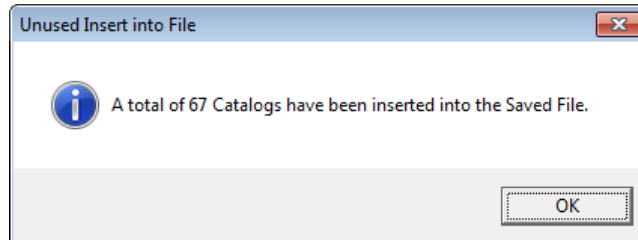


1. Create a Saved File of Unused Catalogue Records:

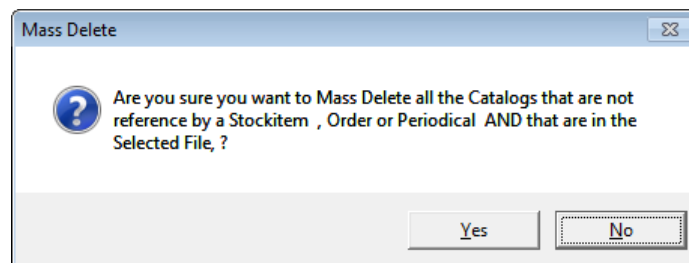
## Hot Tips Training

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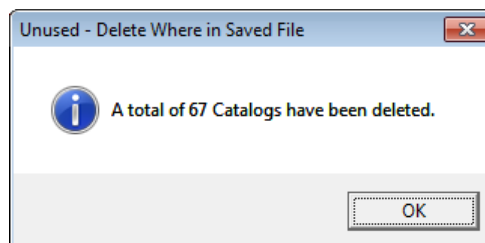
- a. Choose the Maintenance Task = **Insert all Unused Catalogs into a Saved File**
- b. Only consider catalogue records created before = insert date (defaults to 1 year ago)
- c. Click the **Options...** button– the Catalogue Saved Query Results screen will display
- d. Highlight a File and click the **F9 Select** button (alternatively, click the **F1 New** button, enter a Description, click the **F3 Save** button and then the **F9 Select** button)
- e. Click the **F3 Start** button – the unused catalogue records will be inserted into the selected Saved File:



- f. Click the **OK** button when complete
2. Delete the Unused Catalogue Records:
    - a. Choose the Maintenance Task = **Delete all Unused Catalogs that are in a Saved File**
    - b. Click the **Options...** button– the Catalogue Saved Query Results screen will display
    - c. Highlight the relevant Saved File and click the **F9 Select** button
    - d. Click the **F3 Start** button – a prompt with the following message will display: **Are you sure you want to Mass Delete all the Catalogs that are not reference by a Stockitem, Order or Periodical AND that are in the selected File?**



- e. Click the **Yes** button to confirm the deletion – the unused catalogue records will be deleted:



- f. Click the **OK** button when complete

### Cat Z39.50 Search



# Hot Tips Training

Other Libraries can be set up to be searched – the listing of available Libraries with relevant details can be found in the *Australian National Library* webpage:

<http://www.nla.gov.au/librariesaustralia/services/search/z3950/database-connection-details>. Other listings are available – easily accessible on the Internet.

## CatKeyword/StockKeyword

- Catalog screen: **Application > CatKeyword**
- Stockitem screen: **Application > StockKeyword**

Shows the results of the search showing the Keyword Types found – for example: **N** (for Notes), **S** (for Subject), etc.

The screenshot shows the 'Keyword Enquiry - STAFF at Chelsea Library (UM DB v5.3)' application window. The interface includes a search bar with 'SPORT' entered, a results table, and a summary table.

Type	Word	Count
N	SPORT	2
P	SPORT	6
T	SPORT	12
Z	SPORT	1

Where	Cat. Count
Where keyword is in N.'SPORT' P.'SPORT' T.'SPORT'	19

Legend: Y = Must Have, N = Must Not Have, Space = Don't Care

4 AND: Stockitems  And Periodicals  And Orders

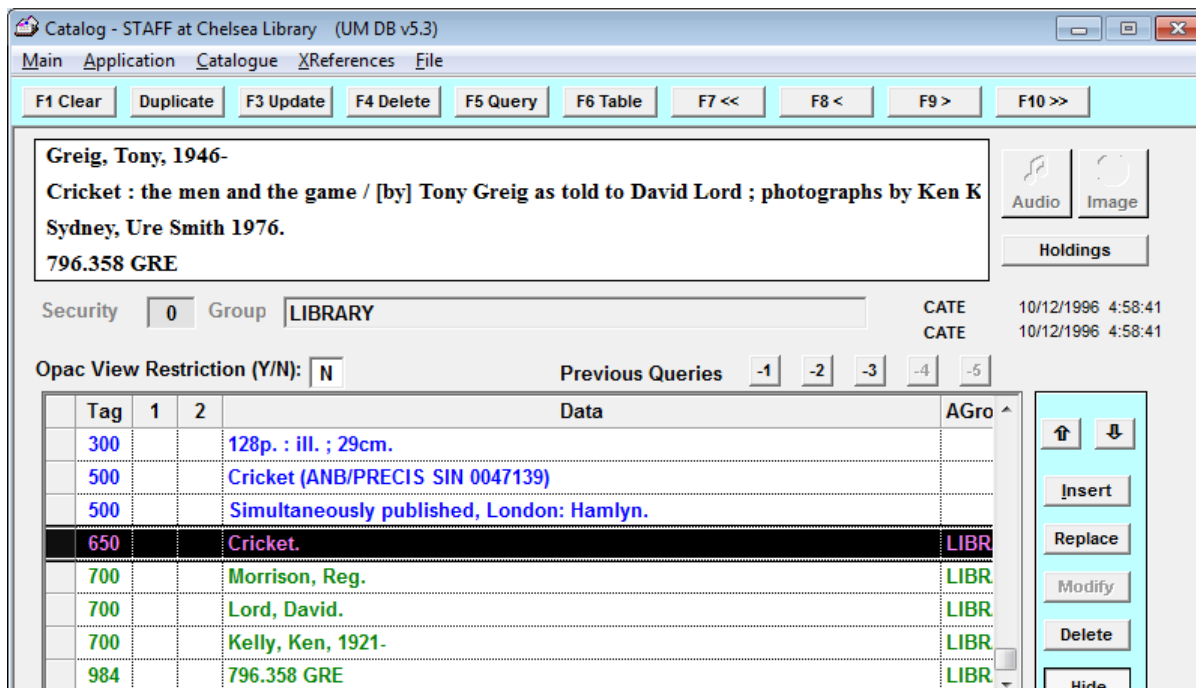
A list of the Keyword codes can be found in:

- *Authorities* module: **Application > KeywordDesc**

# Hot Tips Training

## Cross Query

Once a catalogue record is displayed in the Catalog screen:



1. Highlight an Authority tag (for example – Subject (650): **Cricket**)
2. From the menu, select **Catalogue > Cross Query**
3. A Catalogue List will display with all the other catalogue records using the same Authority term

## General Searches

When not using the equal sign anything like the term will be returned. You may add a wildcard ‘%’ anywhere in the term. The system automatically adds one to the end of the search term.

TERM	DESCRIPTION
ABCD	will return anything starting with ABCD
=ABC	will only return ABC
AB%D	will return anything starting with AB and containing a D
ABC\ABD	will return anything starting with ABC or with ABD. The slash means OR and may be repeated
=ABC\ABD	will return ABC plus anything starting with ABD

Keyword terms may be prefixed with a Library defined restrictor. For example, **t.ABC \ s.ABD** = title having **ABC** or subject having **ABD** (**t.** being the restrictor for **Title** and **Series**, **s.** being the restrictor for **Subject**).

## Lead Thru Sets

# Hot Tips Training

- Catalog screen: **Application > CatLeadThruSets**

These are merely frameworks for the Worksheet manual entry into which the information is entered for the Catalogue. Up to nine (9) different sets can be included.

Tag	Description
000	Leader information
001	Control number
008	Fixed Length Data Elements
010	LC Control Number
020	ISBN
022	ISSN
029	ANDB ID (Australian National Bibliographic Database)
035	Local system control number

To change or add tags:

1. Type the Tag number in the field adjacent to the Heading (which can also be added/changed) – type the tags in order of priority, separated by a space
2. The available Tags can be checked in the table at the bottom of the screen
3. Click the **F3 Save** button when complete

## ILL from Catalogue Record

It is possible to create an inter-library loan record using a Catalogue record as its basis.

1. In the Catalog screen, search and locate the record to be used
2. From the menu, select **XReferences > CreateILL** – the InterLibrary Loans screen will display:

# Hot Tips Training

- The InterLibrary Loans screen has a **F10 Upper** button which allows all the text to be altered to be Upper Case

## Making More Room for Data - for example: Notes

### Worksheet

- Position your cursor over a dividing line in the sidelines and drag the line down to create a larger writing space

Tag No	1	2	1 - a Control number
500			Cricket (BNB/PRECIS)
504			Includes index.

# Hot Tips Training

## Catalogue Screen

- When entering Tag Data (using the **Insert** button on the Catalog screen), drag down the Data field to view more.....

The screenshot shows a window titled "SubFields" with a toolbar containing buttons for F1 New, F2 Insert, F3 Update, F4 Delete, F5 Format, F6 Table, and F7 Modify. Below the toolbar is a "Note" field. Underneath is a "Tag" field with the value "500" and two checkboxes for "Ind1" and "Ind2". The main area is a table with three columns: "Seq", "SubF", and "Data". The first row is highlighted in cyan and contains the values "10", "a", and "A very long note can be added in here. Please feel free to keep reading this, and other exciting notes." A mouse cursor is pointing to the first row. The table has a vertical scrollbar on the right side.

Seq	SubF	Data
10	a	A very long note can be added in here. Please feel free to keep reading this, and other exciting notes.

## PERIODICALS

- **Main > Periodicals > Periodical**

### Getting a List of all Periodicals

- From the menu, click the **F5 Query** button (without typing anything into any of the other fields) – the Periodicals screen will appear with a complete list of Periodicals

You can copy all (**Main> Base> Copy**) and paste into *MS Word* or *MS Excel* if required, as mentioned in the [General](#) section.

### Stock Defaults

Stock defaults are the defaults that are used when creating the Stockitem when the item is received, - for example: Show in Opac, For Loan and the Cost for the items (which may be different to the Subscription cost).

Accessing the defaults:

1. In the Periodical screen, search for and locate a periodical
2. From the menu, select **XReferences > Subscriptions** – the Periodical Subscriptions & Issues screen will display
3. From the menu, select **Subscription > StockDefaults** – the Stockitem creation defaults ex creation from copies screen will display

Stockitem creation defaults ex creation from copies

F1 Clear F3 Update F5 Query F6 Ref<Cat

Doctor Who magazine

Copy Number 1 of 1 For Subscription Lib Group: LIBRARY

Use this window to set stockitem defaults for periodical copies. If a field is 'ticked' then the periodical copy value is used.

Title

Author

Publisher Panini UK Ltd

Series/SBN 0957-9818

Subject Science fiction - television

Call Number   Stats Code   Form

Additional Desc  Floor Loc DISPLAY

Perm Loc CHELSEA  Temp Loc

For Loan N Show in Opac Y Alert Oper N

Cost \$9.00 Process Code

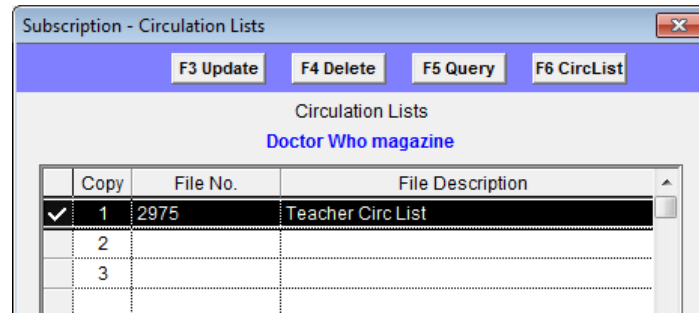
4. The Stock defaults can be set differently for the Copies of the Subscription – for example: Copy 1 can be for one Location and Copy 2 goes to another (select from the Copy Number drop-down)

### Circulation Lists

# Hot Tips Training

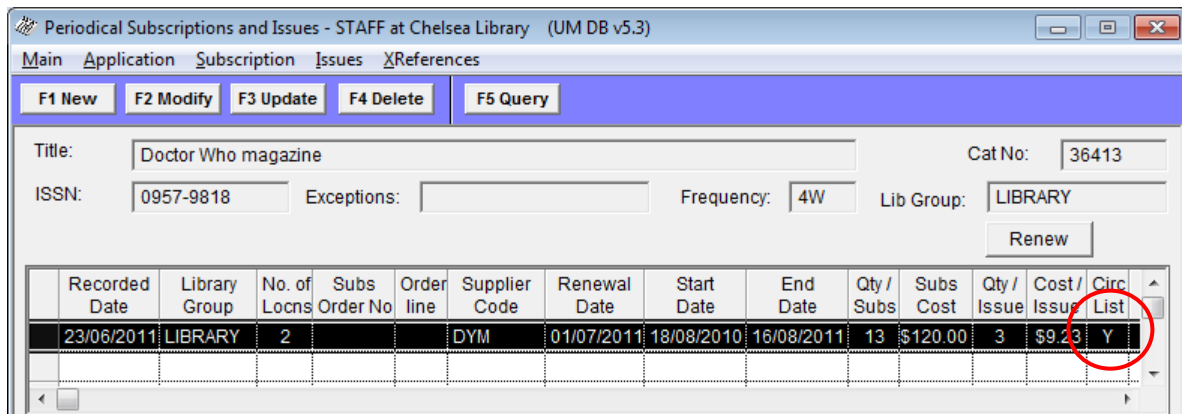
A Circulation list is formed from a Borrower Saved File. It enables a listing of patrons to be attached to a Periodical Subscription so that they can have first priority to Reserve the items or enables a Printed list to be created when a copy is received.

1. In the Periodical screen, search for and locate a periodical
2. From the menu, select **XReferences > Subscriptions** – the Periodical Subscriptions & Issues screen will display
3. From the menu, select **Subscription > CirculationLists** – the Subscription – Circulation Lists screen will display



Each individual subscription can have a different circulation list attached.

At the Periodical Subscriptions & Issues screen each subscription will display a **Y** (for **Yes**) or **N** (for **No**) if that subscription has Circulation List attached:

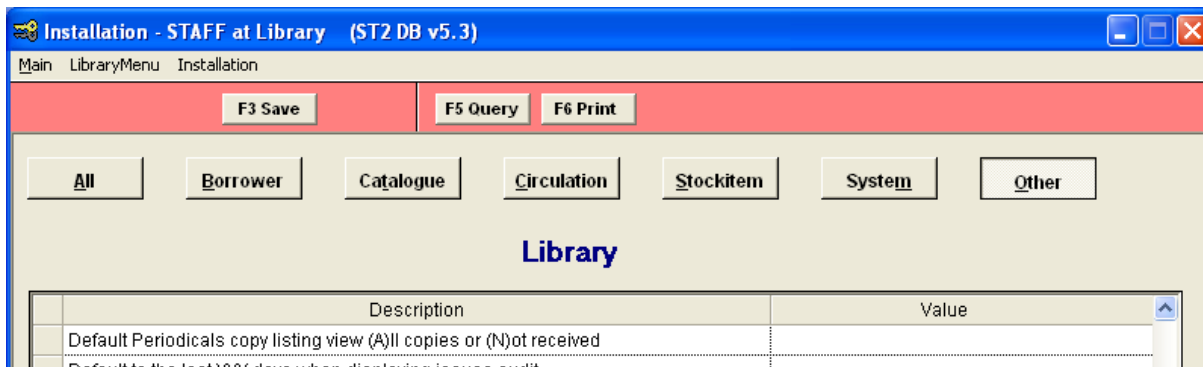


## View of the Main Periodical page in relation to copies

From **Main>Supervisor>Installation – Other** tab - A parameter exists to request the Copies to default to All Copies or Not Received

The Copy closest to the current date will be highlighted but whether it defaults to All or just those yet to be received is now able to be customised.

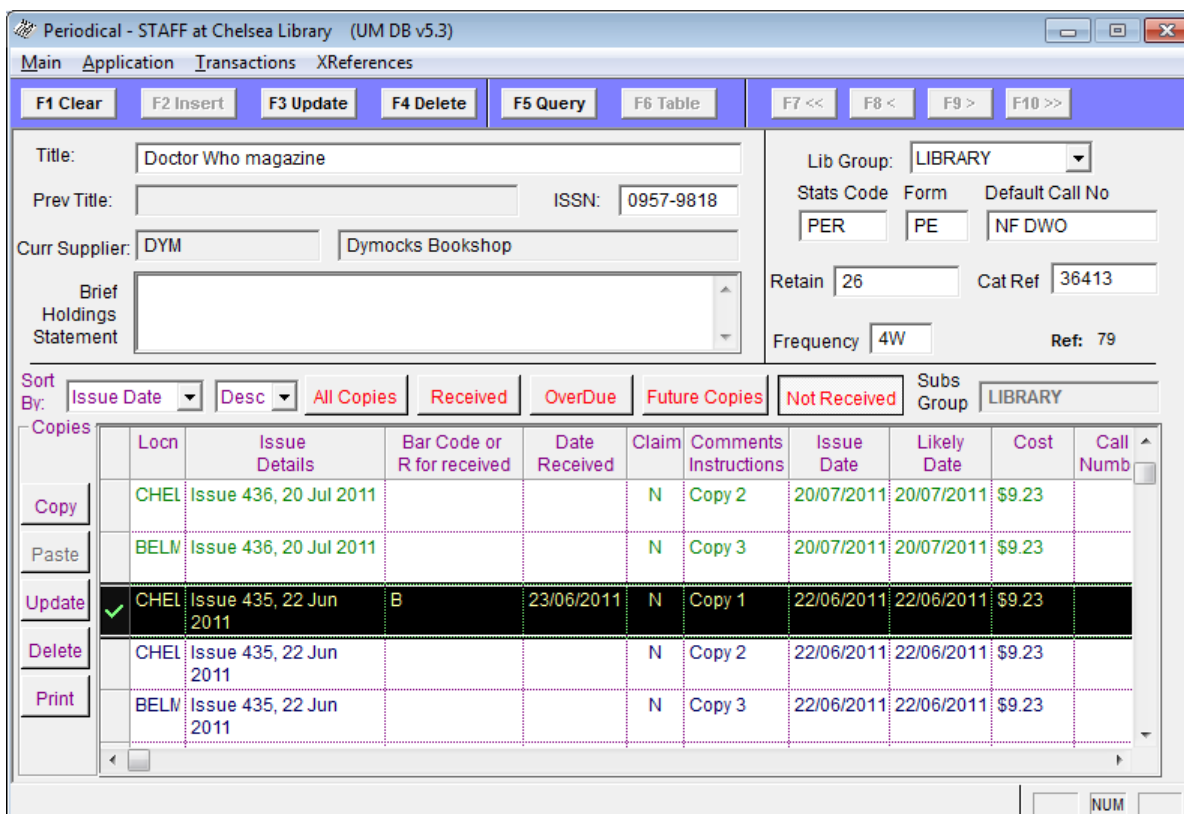
# Hot Tips Training



## Receiving Copies

When receiving copies of a periodical, it is possible to enter (or generate) a Bar Code, which will then generate a Stockitem record, which will enable the copy to be borrowed.

- Wand the barcode into the Bar Code or R for Received field and click the **<Tab>** key (this will generate a Stockitem record using the wanded barcode), or
- Type **B** in Bar Code or R for Received and click the **<Tab>** key (this will generate a Stockitem record with a system-generated barcode)





# Hot Tips Training

## Use Cat worksheet for periodical cataloguing

There is a parameter in Supervisor>Installation>Other which allows any cataloguing in the Periodical module to use the Worksheet. If set to Y:

1. When cataloguing the Main entry or Issues, the Worksheet will be used for creating the catalogue. For example, to catalogue a specific Issue, select **Issues > Attach** or the **Attach** button in the middle of the screen

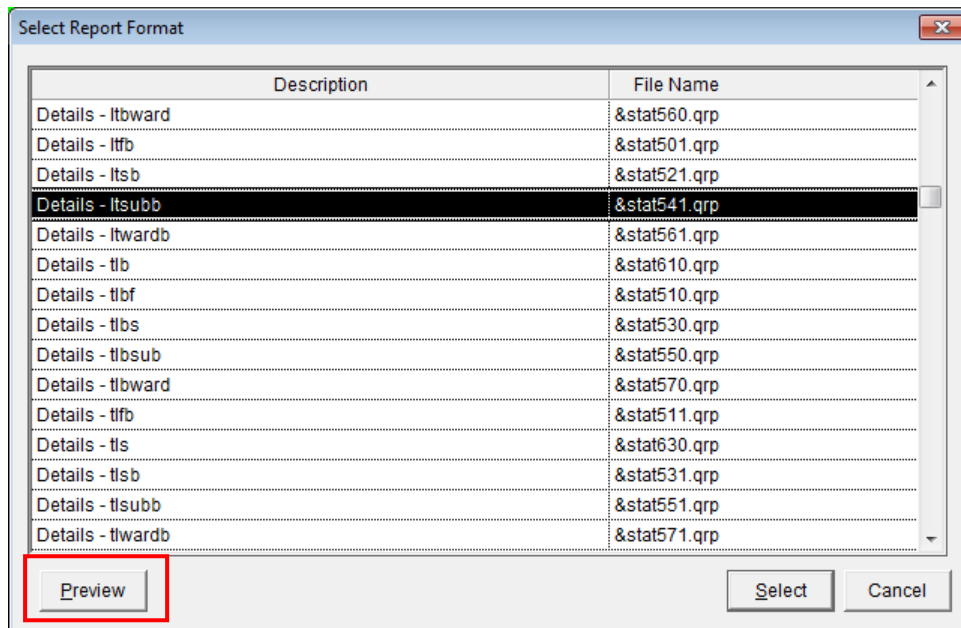
2. A Worksheet window will display with the information already entered into the Main Catalogue, but with the specific Title of the Issue

# Hot Tips Training

- To add additional subject headings or other tags to the catalogue record, Insert other 650 (Subject) Tags or use the Notes (500) tags to add Keywords or notes about the articles contained in the Periodical.

## REPORTS

When a report is to have a new or modified Template it is sometimes possible to preview the format prior to selecting the report. If a report has an Image associated with it, the **Preview** button will show – if there is no image, it will remain *greyed out*. The **Order** button will also be *greyed out* if the Order has been preset for you.



### Not just Printing

- Reports can be sent via *Emails* or *SMS*. They can be saved as a file and open in another application – for example: *MS Excel*

### Borrower Reports

- Send letter via Email (**&N1ADDEM.QRP**)
- Send interest lists via Email (**&BORINT.QRP**)
- Counts by Type to Excel (**&XBCT.QRP**)
- Counts by Location & Type to Excel (**&XBCLT.QRP**)

### Circulation Reports

- Send reminders via Email (**&ODEMAIL.QRP**)
- Send file to SMS provider to send messages to customers. The field format requirements of the templates being used will differ between SMS messaging providers – generally the file is required to be in **.TXT** format. May need to be customised fit the specifications of a particular provider):
- &ODSMS.QRP**                      Circulation Module

## ILLs Reports

- ILL Email Reminder (**&ILLEREM.QRP**)
- ILL Email Reminder – All Suppliers (**&ILLERMS.QRP**)
- ILL Email Request (**&ILLEREQ.QRP**)
- ILL Email Request – All Suppliers (**&ILLERQS.QRP**)

## Orders Reports

- Email Order GST (**&OREGST.QRP**)
- Email Order including Tax (**&OSEMAIL.QRP**)
- Order Status Notice via Email (**&ORSIE.QRP**)
- Order Returns Notice via Email (**&ORSIER.QRP**)
- Cancellation Notice via Email (**&ORSIECL.QRP**)
- Claims Notice via Email (**&ORSIECL.QRP**)

## Periodical Reports

- Claims Notice via Email (**PICLE.QRP**)

## Reservation & Bookings Reports

- Email notification of Reserve (**&RESEML.QRP**)
- Email notification of Booking (**&BKGEML.QRP**)
- SMS file to third party messaging provider (**&RESSMS.QRP**)

## Statistics Reports

- To Excel - Details by Location, TransType Item Form Code (**&XSTAT53.QRP**)
- To Excel - Details by Location, TransType Item Stats Code (**&XSTAT52.QRP**)
- To Excel - Details by Location, TransType Year BorType Form Code (**&XSTAT50.QRP**)
- To Excel - Summary by Location, TransType Year (**&XSTAT10.QRP**)
- To Excel - Details by Location, TransType Year Month (**&XSTAT20.QRP**)
- To Excel - Details by Location, TransType Year Month Day (**&XSTAT30.QRP**)

## Stockitem Reports

- To Excel – Count by Form (**&XSTKFS.QRP**)
- To Excel – Count by Location & Stats (**&XSTKCLS.QRP**)
- To Excel – Count by Stats Code (**&XSTKCS.QRP**)
- To Excel – Stockitem List – Title Author Call No Form Stats (**&XSTCSV.QRP**)

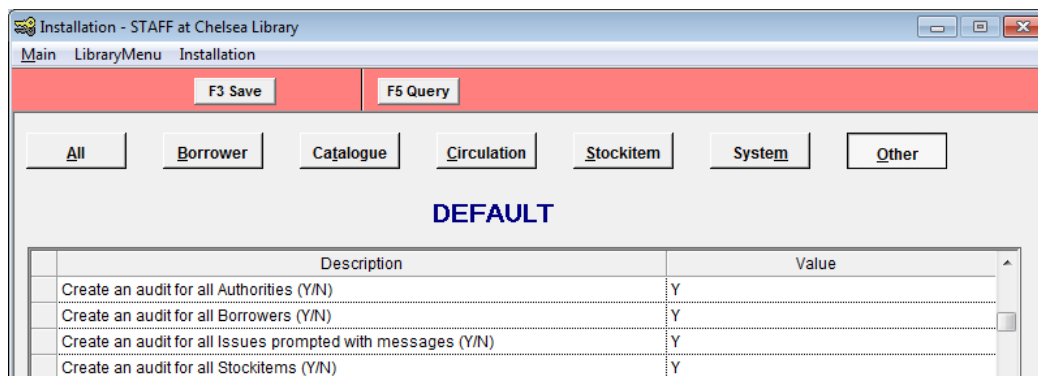
## Audit Reports

### System Settings

The Audit must be switched on first, before the data can be collected. To check this:

1. Go to **Main > Supervisor > Installation > Other** tab
2. There are several types of audit:
  - Create an audit for all Authorities (Y/N)
  - Create an audit for all Borrowers (Y/N)
  - Create an audit for all issues prompted with messages (Y/N)
  - Create an audit for all Stockitems (Y/N)
3. If you would like to keep audit details, ensure that these are set to **Y** (particularly the last)
4. Make sure you also check your settings by individual Location:
  - a. Select **Installation > Choose Location**
  - b. Select location and click on the **OK** button
  - c. Select the **Other** tab

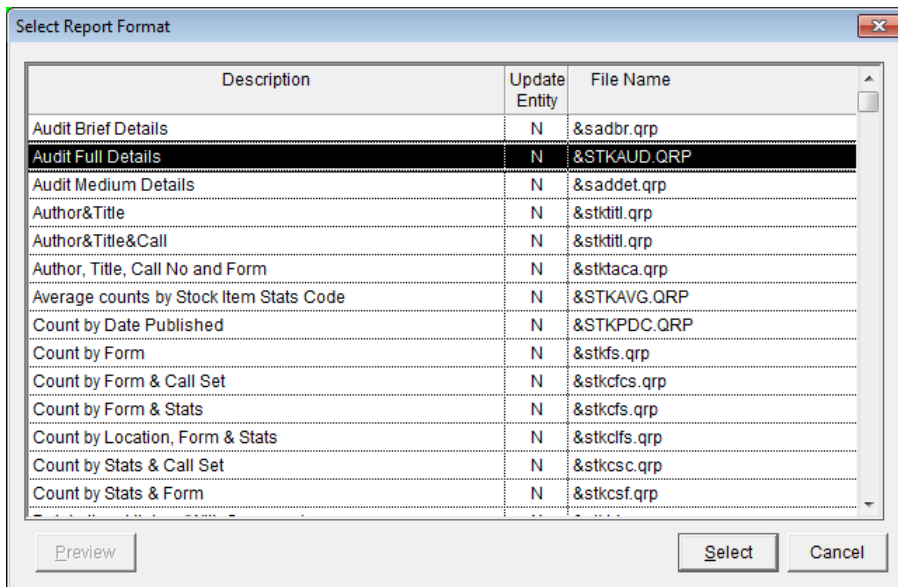
**Please Note:** Any record/s that were deleted, inserted or updated prior to the audit being switched on will not be recorded.



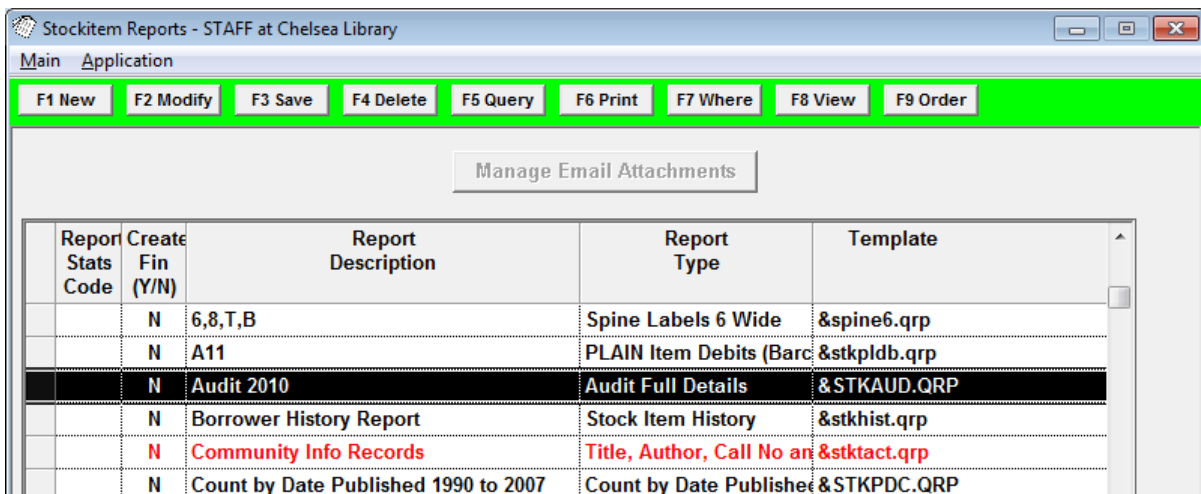
### Creating a Stockitem Audit Report

1. Go to **Main > Reports > RepStockitem** – the Stockitem Reports screen will display
2. Click the **F1 New** button
3. Highlight an audit **template** – brief (**&SADBR.QRP**), medium (**&SADDET.QRP**) or full details (**&STKAUD.QRP**) – and click the **Select** button

# Hot Tips Training



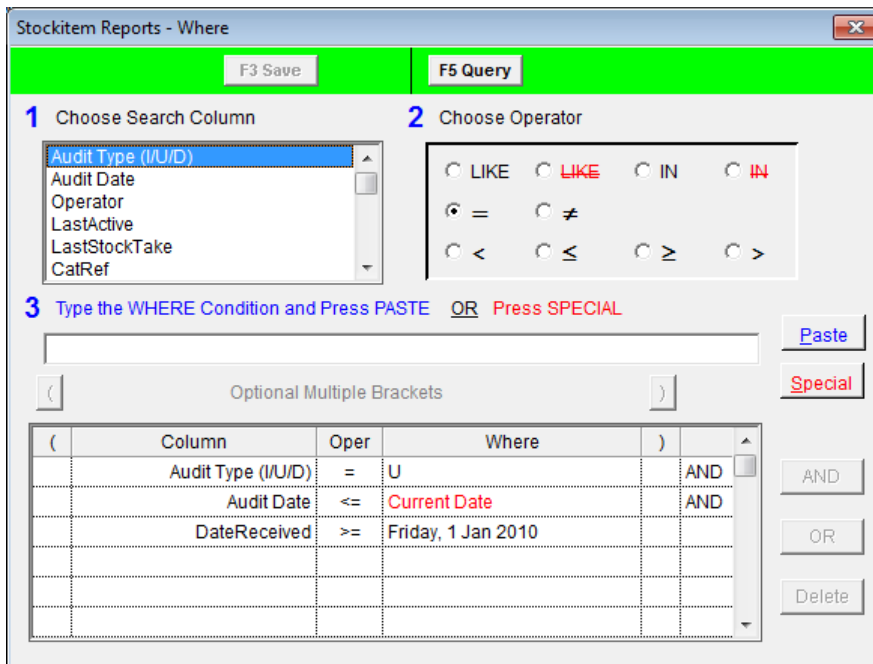
4. Type in a Report Description – for example: **Audit 2010**
5. Ensure the Create Fin (Y/N) column is set to **N**
6. Click the **F3 Save** button



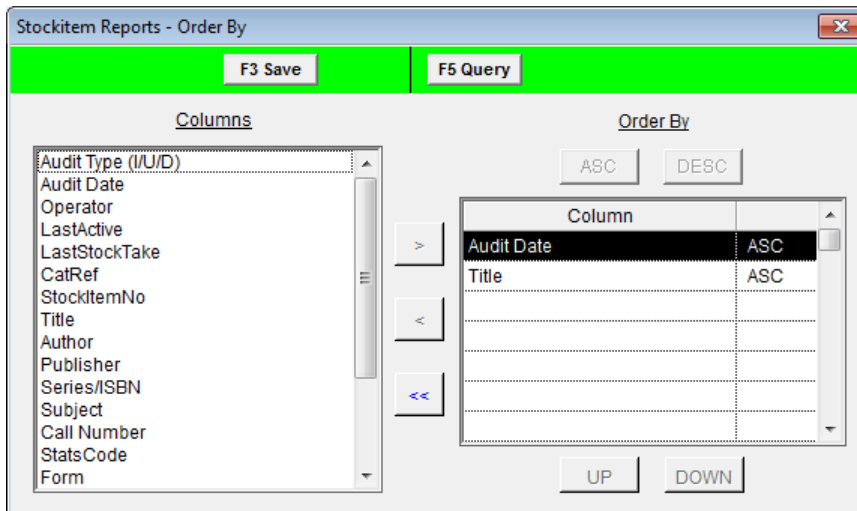
7. Highlight the report and click the **F7 Where** button – the Stockitem Reports – Where screen will display
8. Enter your Where parameters – there are three audit types:
  - **D:** Deleted
  - **I:** Inserted
  - **U:** Updated

The Where parameters will depend on what you are after. Typically you would set the **Audit Date** and **Audit Type (I/U/D)** parameters, and perhaps **PermLoc** (Permanent Location).

# Hot Tips Training



9. Select the **F3 Save** button when complete
10. (Optional) Click the **F9 Order** button – you can then set the order for the report to print in. You can sort by **Audit Date** and **Title** (or vice versa if you're looking for a particular item). Click the **F3 Save** button when complete.



11. Click **F8 View** to view the report
12. Select the **print** icon to print the report

## Items Not Used Recently (Dusty Items)

### Create Report

1. Go to **Main > Reports > RepStockitem** – the Stockitem Reports screen will display
2. Select the **F1 New** button – the Select Report Format screen will display

## Hot Tips Training

3. Highlight the report template you would like to use – if you want to use Last Active date then try **&STKTITL.QRP**. If you would like to search against the History Type/Date then use one of the history count templates (**&STKHCC.QRP** or **&STKHCS.QRP**)
4. Click the **OK** button
5. Type in a Report Description – for example: **Items Never Borrowed**
6. Ensure the Create Fin (Y/N) column is set to **N**

The screenshot shows the 'Stockitem Reports - STAFF at Chelsea Library (UM DB v5.3)' application window. It features a menu bar with function keys (F1-F9) and a 'Manage Email Attachments' button. Below is a table of report templates:

Report Stats Code	Create Fin (Y/N)	Report Description	Report Type	Template
	N	History - 3 Mths Issue By Locn	Stock Item History By Locn	&STKHIS3.QRP
	N	History - 3 Mths Issue Summary	Stock Item History Summary	&STKHIS2.QRP
	N	Items Never Used	Author&Title	&stktitl.qrp
	N	Junior Videos	Author&Title	&stktitl.qrp
	N	Large Print	Full Dtls	&stkfull.qrp
	N	Library CD List By Artist	Author, Title, Call No and	&stktaca.qrp
	N	Long Overdue List	Author&Title&Call	&stktitl.qrp
	N	New Items This Month	Author&Title	&stktitl.qrp
	N	On Loan	Stockitem Count by Stat	&STKCS.QRP
	N	Reservation > 5	Reservation and Copies	&stkres.qrp
	N	Reserves on Shelf	Author&Title&Call	&stktitl.qrp
	N	Stockitem Count by History	Usage by Call No using	&stkhcc.qrp
	N	Stocktake Not Found	Author&Title&Call	&stktitl.qrp
	N	Turnover by Author	Turnover By Author - St	&stktur4.qrp
	N	Turnover Summary	Turnover Summary By	&stktur3.qrp

7. Click the **F3 Save** button

### Where Search and Order By Parameters

1. Highlight the report and select the **F7 Where** button – the Stockitem Reports – Where screen will display
2. Never Borrowed: enter the following Where search:
  - a. **Item No IS NOT NULL**
  - b. **Times Borrowed < 1**
  - c. **IsOnLoan = N**
  - d. **PermLoc = (optional)**
  - e. **Form = (optional)**
  - f. **StatsCode = (optional)**

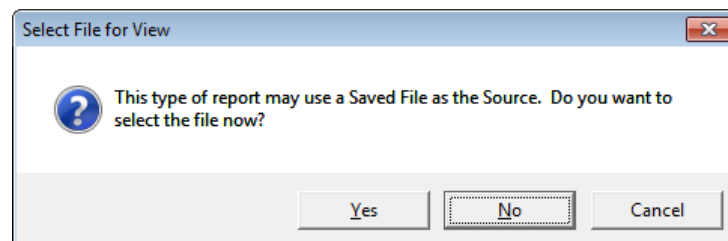
## Hot Tips Training

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3. Last Borrowed: enter the following Where search:
  - a. **Item No IS NOT NULL**
  - b. **LastActive <= Current Date – 12 Months** (via the **Special** button)
  - c. **PermLoc =** (optional)
  - d. **Form =** (optional)
  - e. **StatsCode =** (optional)
4. Last Borrowed by History: enter the following Where search:
  - a. **Item No IS NOT NULL**
  - b. **History Type IN ISSUE,RETURN** (or **History Type = ISSUE** if you just want to count when an item last went out)  
You can use **ISSUE, RENEW OR RETURN**
  - c. 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**
  - d. **History Date <= Current Date – 12 months** (via the **Special** button)
  - e. **PermLoc =** (optional)
  - f. You can further restrict your list to a particular **Form** or **Stats Code** - for example:  
**Form = DVD** or **StatsCode = FIC**
5. Click the **F3 Save** button when complete
6. Select the **F9 Order** button –the Stockitem Reports – Order By screen will display
7. Use the **arrow keys** to enter the following Order By statement (**&STKTITL.QRP** only):
  - a. **Call Number ASC**
  - b. Click the **F3 Save** button when complete

### View Report

1. Highlight the report you wish to run and select the **F8 View** button
2. A prompt with the following message will display: **This type of report may use a Saved File as the Source. Do you want to select the file now?**



3. If you would like the report to run using the entire database (rather than a Saved List) then select the **No** button



- The report will then display:

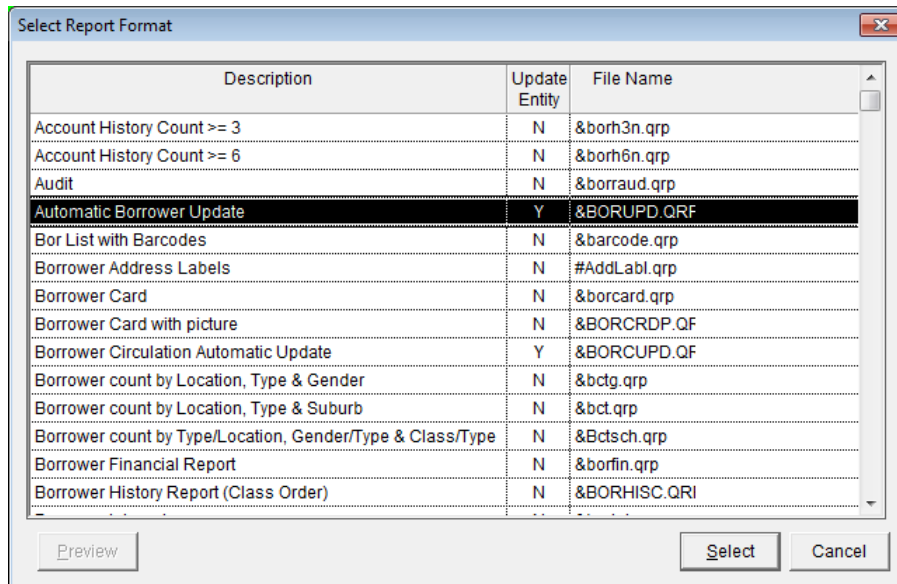
<b>&amp;stktitl.qpp</b>	<b>Items Never Borrowed</b>	<b>11/01/2011</b>
	Stockitem Title, Author, Call Number, Stats Code and Form	
<b>Item Number:</b> 980470394	<b>Arabian nights' entertainments / edited with an introduction by Robert L. Mack</b>	
398.22 ARAB	<b>Sts Code:</b> ANF	<b>Form:</b> BK
<b>Item Number:</b> 980472349	<b>Help your child with reading and writing : A parents' handbook / Lesley Clark</b>	
Clark, Lesley 428.43 CLAR	<b>Sts Code:</b> ANF	<b>Form:</b> BK
<b>Item Number:</b> 980475101	<b>Teach yourself Turkish / G.L. Lewis</b>	
Lewis, G.L. 494.35 LEWI	<b>Sts Code:</b> ANF	<b>Form:</b> BK
<b>Item Number:</b> 980471370	<b>Macquarie Aboriginal naming book : an Australian guide to naming your home or boa</b>	
499.15 MACQ	<b>Sts Code:</b> ANF	<b>Form:</b> BK

- Select the **print** button to print the report

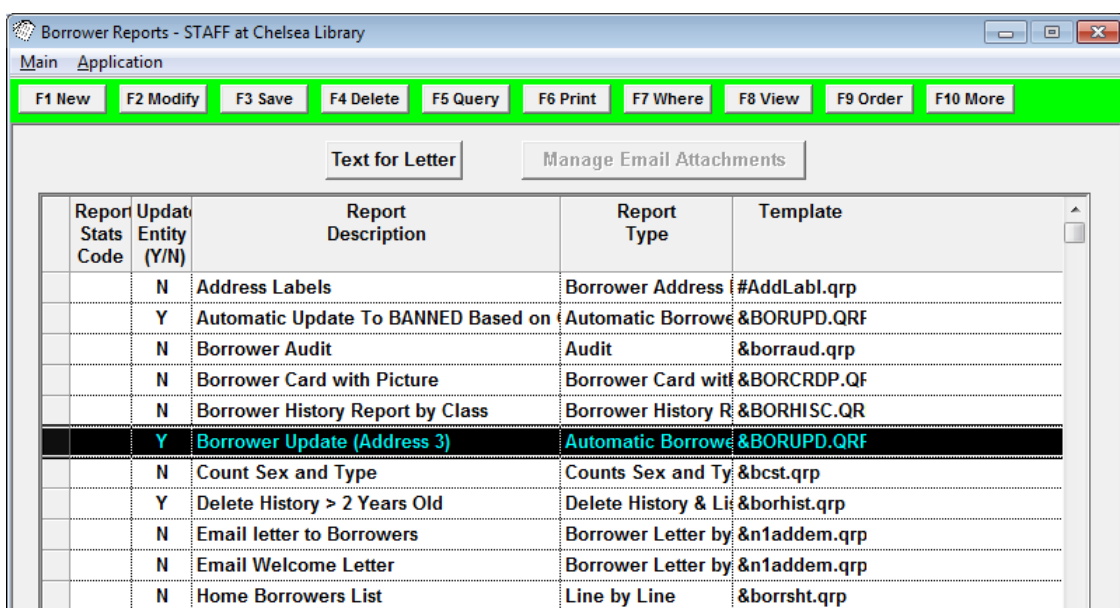
## Borrower Update Reports

### Create the Report

1. Go to **Main > Reports > RepBorrower** – the Borrower Reports screen will display
2. Click the **F1 New** button – the Select Report Format list will display:



3. Highlight the **&BORUPD.QRF** template and click the **Select** button
4. A new report will be added to the list of reports
5. Type in a Description – for example: **Update Borrower Address 3**
6. The Update Entity (Y/N) column setting *must* be set to **Y**
7. Click the **F3 Save** button when complete



### Set Where Parameters

## Hot Tips Training

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

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

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

**Borrower Reports - Where**

F3 Save F5 Query

**1** Choose Search Column

BirthDate  
BorType  
BorGroup  
BorClass  
BorEAddrAddr  
BorUseEmail

**2** Choose Operator

LIKE  LIKE  IN  IN  
 =  ≠  
 <  ≤  ≥  >

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

Paste

Special

Optional Multiple Brackets ( )

(	Column	Oper	Where	)
	BorType	=	YA	AND
	BirthDate	<=	Current Date - 18 Years	

AND

OR

Delete

3. Enter the following details:
  - a. **BorType** – for example: **BorType = YA**
  - b. **BirthDate** – for example: **BirthDate <= Current Date – 18 Years** (use the **Special** button to insert Current Date – **216** months)
4. Click the **F3 Save** button when complete

# Hot Tips Training

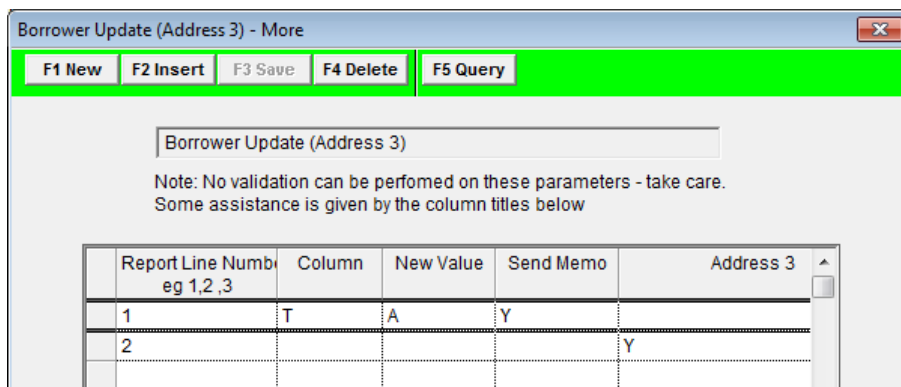
## Update Parameters (F10 More)

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

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

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

1. **Highlight** the report
2. Click the **F10 More** button – the More screen will display
3. Click the **F1 New** or **F2 Insert** button
4. Enter the following Line 1 parameters (see Notes below):
  - a. Report Line Number = **1**
  - b. Column = **T**
  - c. New Value = **A** (for **Adult**)
  - d. Send Memo = **Y** (optional)
5. Click the **F3 Save** button when complete
6. Enter the following Line 2 parameters (see Notes below):
  - a. Address 3 = **Y** (this will delete the Borrower’s Guardian Address)
7. Click the **F3 Save** button when complete



## Notes

# Hot Tips Training

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

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

Type	Description	Keep House Bound Borr History (Y/N)	Include In Stats (Y/N)	Max Items On Loan	Max No. Of Reserves	Return By Date	Age >=	Age <=	Exp Days	Exp Date	G
A	Adult	Y	Y	50	20		18	125	0		
B	Branch	Y	Y	100	999						
H	Housebound	Y	Y	24	50						
I	Interlibrary loan	Y	Y	100	10						

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

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

## Memos

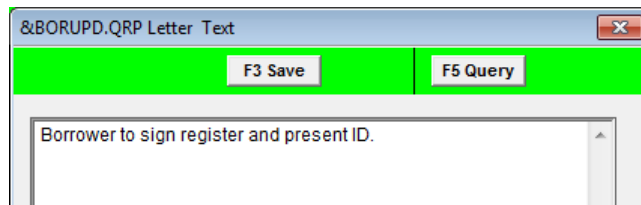
If you have placed a **Y** in the Send Memo column, then the Memo text must then be set up.

1. **Highlight** the report

Report Stats Code	Update Entity (Y/N)	Report Description	Report Type	Template
	N	Address Labels	Borrower Address	#AddLabl.qrp
	Y	Automatic Update To BANNED Based on	Automatic Borrower	&BORUPD.QRF
	N	Borrower Audit	Audit	&borraud.qrp
	N	Borrower Card with Picture	Borrower Card with	&BORCRDP.QF
	N	Borrower History Report by Class	Borrower History R	&BORHISC.QR
	Y	Borrower Update (Address 3)	Automatic Borrower	&BORUPD.QRF

2. Click the **Text for Letter** button – the Letter Text screen will display:

# Hot Tips Training

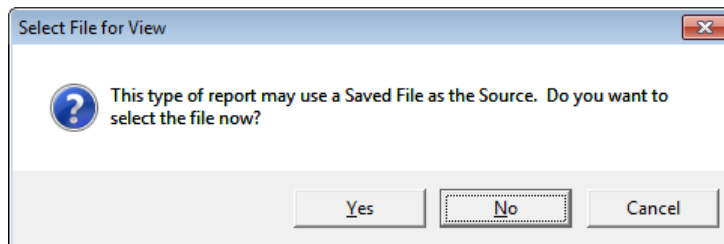


3. Type in the text that you would like to see in the Borrower Memo – for example: **Borrower to sign register and present ID.**
4. Click the **F3 Save** button when complete
5. Click on the **[X]** to close the screen

## View Report

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

1. Highlight the report and click the **F8 View** button – a prompt with the following message will display: **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 to run this report against all borrowers
3. The report will open in the Report – View window:

Bar Code:	Name:	Field:	New Value:	Memo:
B270	NORMAN, Peter D	T	A	Y
B201	MATTHEWS, John A	T	A	Y
B202	LOWE, Andrew J	T	A	Y
B203	RENSHAW, Kim L	T	A	Y
B204	GILES, Michael J	T	A	Y

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

## **Stockitem Report - Most Recent Return (Damaged Item Notice)**

- Letter: **&STKMRR.QRP** (can be customised)

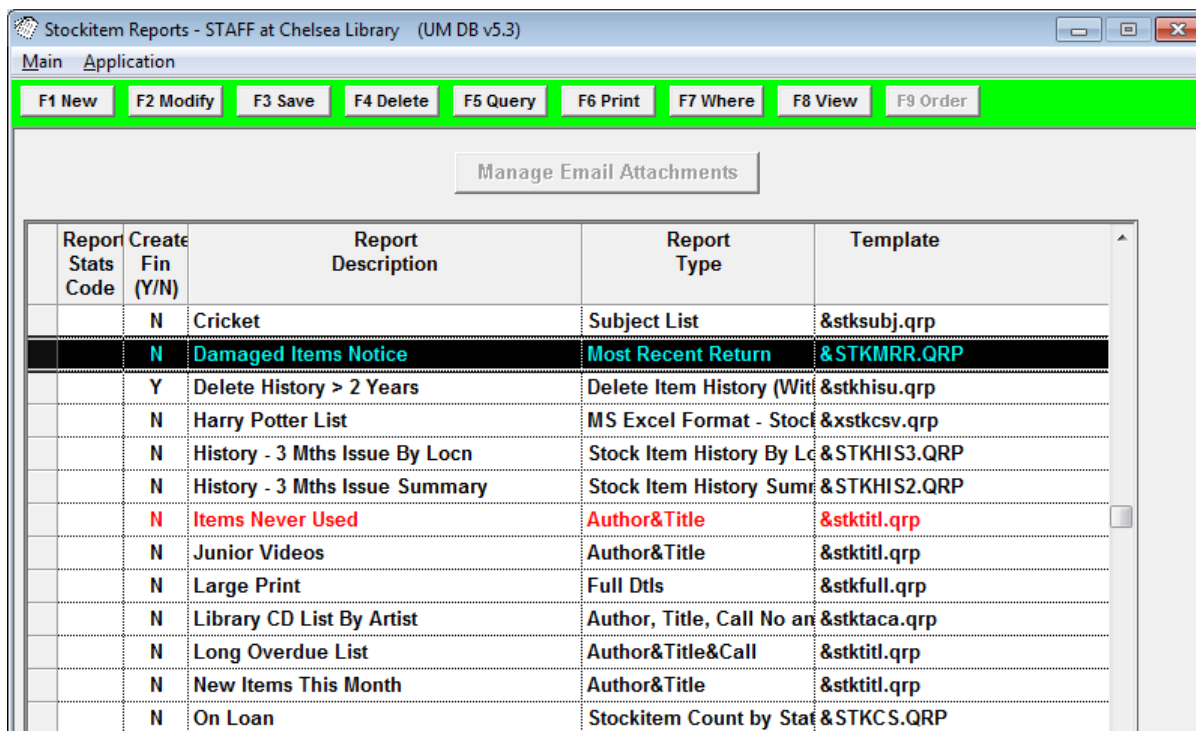
# Hot Tips Training

- Email: **&STKMRE.QRP** (can be customised)

These reports are for sites who return items from the Borrower's records when they are damaged but still want to bill people for the costs of the damaged item. It will display the LAST borrower who had the item. If a site does not return the item when it is damaged (and keeps the item on loan), then Circulation reports can still be used.

## Create Report

1. Go to **Main > Reports > RepStockitem** – the Stockitem Reports screen will display
2. Select the **F1 New** button – the Select Report Format screen will display
3. Highlight the report template you would like to use: **&STKMRR.QRP** (Letter) or **&STKMRE.QRP** (Email)
4. Click the **OK** button
5. Type in a Description – for example: **Damaged Items Notice**
6. Ensure the Create Fin (Y/N) column is set to **N**



7. Click the **F3 Save** button

# Hot Tips Training

## Where Search

1. Highlight the report and select the **F7 Where** button – the Stockitem Reports – Where screen will display
2. Example Where search:
  - a. **Process = RETURNED DAMAGED** (or similar Stockitem Process)
  - b. **Process Date < Current Date – 1 Day**

Stockitem Reports - Where

F3 Save F5 Query

1 Choose Search Column

2 Choose Operator

3 Type the WHERE Condition and Press PASTE OR Press SPECIAL

Optional Multiple Brackets

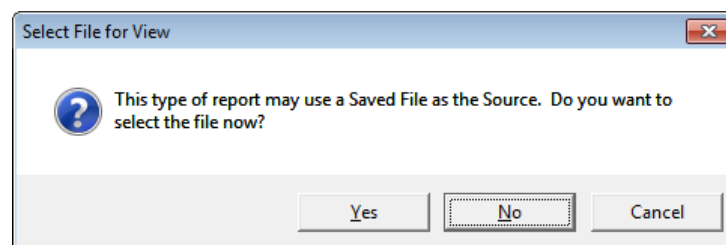
(	Column	Oper	Where	)
	Process	=	RETURNED DAMAGED	AND
	Process Date	=	Current Date - 1 Day	

AND OR Delete

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

## View Report

1. Highlight the report you wish to run and select the **F8 View** button
2. A prompt with the following message will display: **This type of report may use a Saved File as the Source. Do you want to select the file now?**



3. If you would like the report to run using the entire database (rather than a Saved List) then select the **No** button



4. The report will then display:

23/06/2011			
Ms Sarah Jane Smith			
<b>DAMAGED ITEM NOTICE</b>			
Re: Membership No. B9988			
The item below has been returned damaged. Should you wish to inspect the damage please contact the library. Please forward the replacement cost to the library to restore borrowing privileges.			
<b>Item Barcode</b>	<b>Title</b>	<b>Returned</b>	<b>Replacement cost</b>
980391776	Doctor Who Timelash / Glen McCoy	03-May-2011	\$20.00
<b>Total Replacement Cost</b>			<b>\$20.00</b>

5. Select the **print** button to print the report

Notes:

- This report can be scheduled to run once a day in using the **F6 Print** button and *RepStartSchedule*
- The e-mail template **Most Recent Return E-mail** must be run using the **F6 Print** button and *RepStartSchedule*

## AUTHORITY

- **Main > Authorities > Authority**

### Searching for Incorrect Headings

- We recommend using a **Browse** (not **Keyword**) search and look for one or two letters at a time – for example: look for Authors beginning with **AB**

### Define your own Browse Searches

- From the Authorities screen menu, select **Application > AuthQueryOptions** – the Heading Query Options Setup screen will display:

Description	Stoplist (Y/N)	WHERE a.AUTH_TAG_NO = nnn AND/O ^
Any Authority	N	WHERE A.AUTH_TAG_NO > 0
Author ( 100 or 700 )	N	WHERE A.AUTH_TAG_NO IN (100,700)
Authors and Corporate ( 100,700,110,710)	N	WHERE A.AUTH_TAG_NO IN (100,700,110,710)
Awards	N	WHERE A.AUTH_TAG_NO = 586
Corporate Authors ( 110 , 710 )	N	WHERE A.AUTH_TAG_NO IN (110,710 )

**NOTE:** Browse Searches can also be set up in a similar way in **Catalogue > Application > CatQueryOptions**

### Change Tag Option

From the Authority menu it is possible to change a single Authority Marc Tag and a File of Authorities. This would be particularly useful in the situation where a Subject Heading has been created using the incorrect Marc Tag.

For example: a country Subject Heading (ie: **Spain**) has been used for a **650 - Topical Term Subject Heading** instead of the correct **651 - Geographic Subject Heading**.

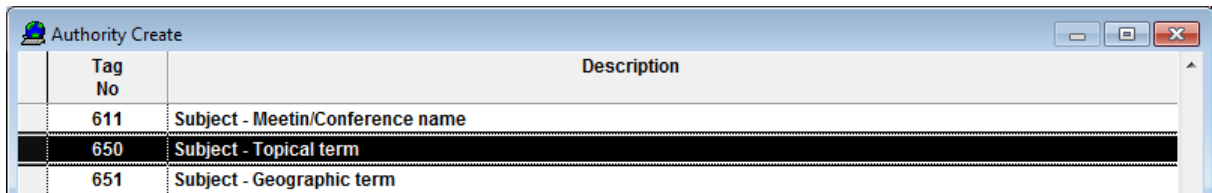
1. In the Authority screen, search for the incorrect Marc Tag – for example: **Spain**

Seq	Authority	Cat	Note	Tag	Operator
1	Spain - Civilization - 20th century.	1	N	651	TREVOR
2	Spain - Description and travel.	1	N	651	TREVOR
3	Spain, Hensley Reid, 1950-.	1	N	100	TREVOR

2. Double-click on the chosen tag to display the Authority record

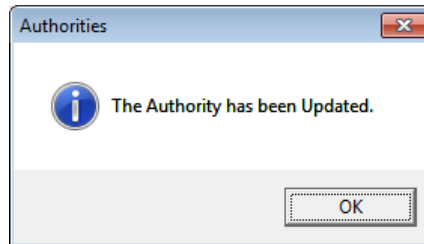
## Hot Tips Training

- From the menu, select **Authority > AuthorityChangeTag** – the Authority Create screen will display:



Tag No	Description
611	Subject - Meetin/Conference name
650	Subject - Topical term
651	Subject - Geographic term

- Scroll through and double-click the desired (correct) Marc tag to select it – for example: **650**
- The Authority will automatically be updated to use the correct Marc tag:

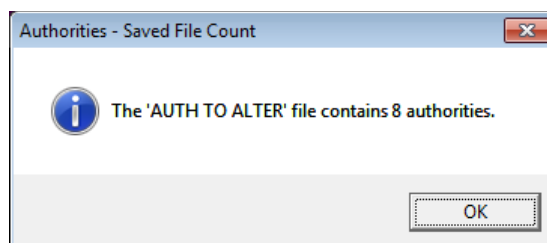


- Click the **OK** button

Any catalogues associated with the Marc Tag will also be updated.

### Changing the Tag using a Saved File

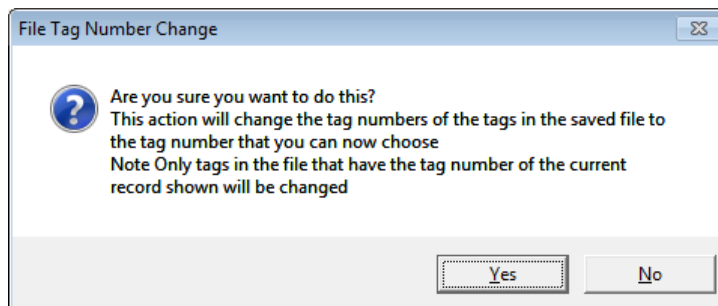
- Go to **Main > Authorities > Authority** – the Authority screen will display
- Enter the Search Term – for example: **Sport**
- Click the **F5 Query** button – the results will display in an Authority List
- Highlight the Authorities to be altered
- From the menu, select **File > Save Marked** – the Authority Saved Query Results screen will display
- Highlight a File and click the **F9 Select** button (alternatively, click the **F1 New** button, enter a Description, click the **F3 Save** button and then the **F9 Select** button)
- The Authorities will then be saved to the selected File:



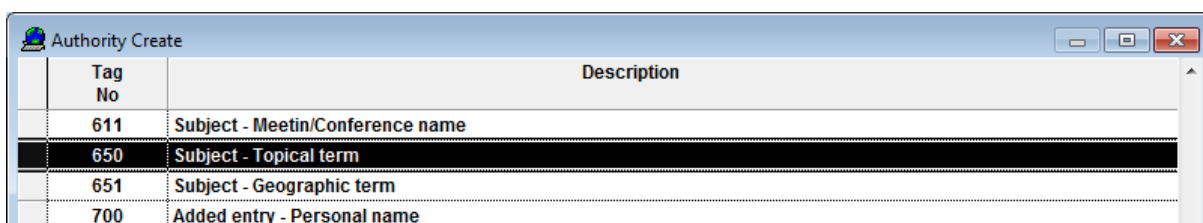
- Click the **OK** button
- Select an item in the list by double-clicking on it – the item will display in the Authority screen

## Hot Tips Training

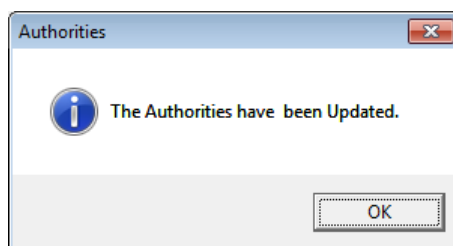
- From the menu, select **Authority > AuthorityChangeTagInFile** – the following warning prompt will display: **Are you sure you want to do this?**  
**This action will change the tag numbers of the tags in the saved file to the tag number that you can now choose**  
**Note Only tags in the file that have the tag number of the current record shown will be changed**



- Click the **Yes** button to proceed – the Authority Create screen will display:



- Scroll through and double-click the desired (correct) Marc tag to select it – for example: **650**
- The Authorities will automatically be updated to use the new Marc tag:



- Click the **OK** button

Any catalogues associated with the Marc Tags will also be updated.

### Stoplist for Use with Keywords

These words will not be searched in Keyword searches.

# Hot Tips Training

## Marc Tag List

- **Main > Authorities > MarcTags**

Tag No	Tag Description	Defa Ind 1	Defa Ind 2	Can the Tag be Repeated in a Catalogue (Y/N)	Is the Tag an Authority that is only used in 1 Catalogue (Y/N)	Keyword Search Code	Default Catalogue Show Sequence	Allow Tag Xrefs with these comma sep list
246	Varing Title		0	N	N	T	24600	246
247	Former title			Y	N	T	24700	247
250	Edition statement			N	N	T	25000	250

- Extremely important as sets the Keyword Search code.
- Tags not included will not be imported from data files
- Use the **F6 Log** button after a Marc Import to check if there are any important Tags not coming into *Amlib*

## See and See Also References across MARC tags

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

1. Go to **Menu > Authorities > MarcTags** – the Marc Tags Within the System table will display
2. Search for and select an Authority using the **F5 Search** button
3. From the menu, select **Authority > See & See Also** – the See & See Also screen will display:

Cross References			2-Way	Operator	Cat
Animals.			N/A	TREVOR	1

Browse List				USE	SA	Cat	Tag
Birds - Australia				No	No	1	650
Birds - Australia				No	No	0	651

Subject - Topical term: BIRDS

Includes 650,651

# Hot Tips Training

4. Type for the linking term in the search box at the bottom of the screen, the tag(s) to be searched in the Includes box and click the **F5 Query** button – a list of matching terms will display in the Browse List

To search for multiple tags, simply add a comma (,) and the next tag number in the Includes box – for example: to search through **Subject – Topical Term** and **Subject – Geographic Term**, the search phrase would be: **650,651**

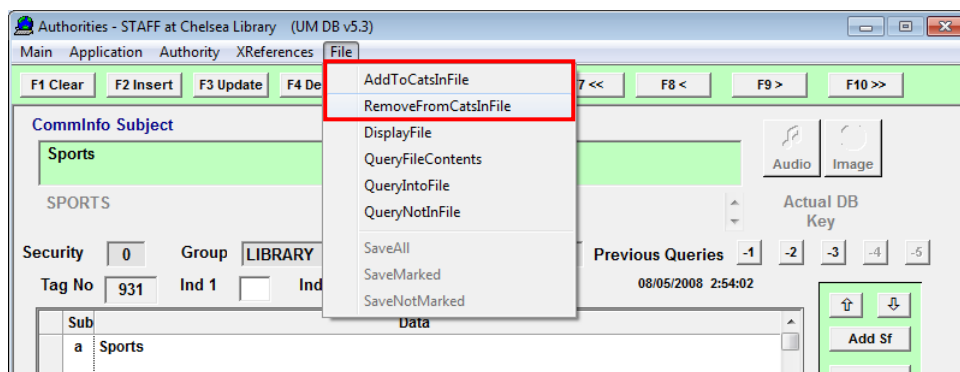
SEE ALSO	SEEN BY	SEE
BT (Broader Term) NT (Narrower Term) RT (Related Term)	Use For	Use

5. Highlight the term to be used and click on the relevant button
6. Click the **F3 Update** button when complete

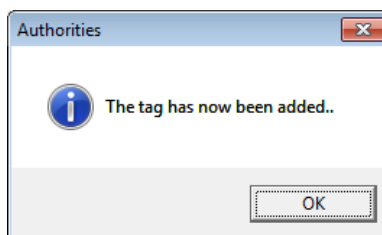
## Adding / Removing Subject Headings from Multiple Catalogues

It is possible to add and remove subject headings from catalogues in a Saved File.

1. In *Authority* module, search for and select an Authority you wish to add/remove
2. From the menu, select **File > AddToCatsInFile** or **RemoveFromCatsInFile**



3. The Catalogue Saved Query Results screen will display
4. Select the relevant File and click the **F9 Select** button
5. The tag will then be added/removed:



6. Click the **OK** button

# Hot Tips Training

## SUPERVISOR

- New parameters for the current version are identified by the **blue text** in the **Main > Supervisor > Installation** screen.

## Statistics Parameters

- In-house Circulation (Stats Type: **25**)
- Web Join Online (Stats Type: **531**)
- Web Requests (Stats Type: **532**)
- Web Change Details (Stats Type: **533**)
- Customised Report Statistics parameters can be entered in the **300s** for use in Reports

Stat 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)	Day (Y/N)	H (Y)
310	1st Overdue	Y	Y	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	Y	Y
312	Final overdue	Y	Y	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	Y	Y
314	1st Odue Email	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
315	1st Odue Email	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y

These can then be entered in the relevant columns of Reports – for example: you can get statistics on how many times a Report run was performed (Report Stats Code) and how many actual notices were sent out (Detail Stats Code):

Report Stats Code	Detail Stats Code	Create Hist (Y/N)	Create Acct (Y/N)	Report Description	Report Type	Templa
		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	Email Overdue	Email - Continuous	odemail.qrp
		N	N	HomeLib On Loan by Route	Overdue List by Class (with	&odlstoc.qrp
		N	N	Hourly Equipment on Loan	Circulation List with Address	&odlst.qrp
		N	N	Offline Export	Offline Files Export	&offline.qrp
310	311	Y	N	Overdue Letter	Overdue Notice (Letter)	&ODLET.QRP
		N	N	Overdue with Cost	Overdue Letter with Item C	#CostLet.qrp

## Fixed Window Offset Position from Top & Left

- **Main > Supervisor > Installation > System** tab: Fixed window offset position from Top & Left (numeric in the form TTT-LLL)

This relates to the pixel settings for window display. If this is anything other than 800 by 600 the parameter can be set to arrange the module window display. If this is set as a value of 001-001 the windows for each module will overlay each other in the top left hand corner. This means that the windows will not cascade as each module is opened. If this parameter is left blank, windows will cascade.

## Opac Form Descriptions

- **Main > Supervisor > Opacs > OpacFormDesc**

Is your *Opac* (or *NetOpacs*) displaying the Form and Stats Codes (for example: **BK AF**) instead of Description (**Adult Fiction Book**) when displaying Items?

If so, you can configure a description of each Form/Stats combination to be displayed in the Opac Form Descriptions screen in the *Supervisor* module. *Amlib* will display a list of all combinations of Form and Stats Codes currently used for Items in the database, and enables you set the description to be displayed in the *Opac/NetOpacs* (which can be different to the description seen by staff in the *Stockitem* module). You can even display an image if preferred.

- Replacing the Opac Description with the html code `` (where **picture.jpg** is the name of the picture) allows the *NetOpacs* to show the format as a picture
- For the images to display, they need to be saved within the virtual directory for the *NetOpacs*
- We recommend the **/images** folder – for example: **C:/Netopacs/Amlibweb/images**

	Form	Stats	Item Count	Opac Description
	RE	LS	2	REFERENCE
	RE	PAM	10	REFERENCE
	RE	REF	29	REFERENCE
	RP	AF	1	REFERENCE PAPER
	RP	ANF	6	REFERENCE PAPER
	RP	RP	6	REFERENCE PAPER
✓	VI	ANF	1	
✓	VI	AVNF	2	
✓	VI	CL	73	
✓	VI	DVD	14	
✓	VI	JVID	22	
✓	VI	VID	87	



# Hot Tips Training

12. [Basketball basics \[videorecording\] : "offensive drills"](#).

Basketball - Coaching.

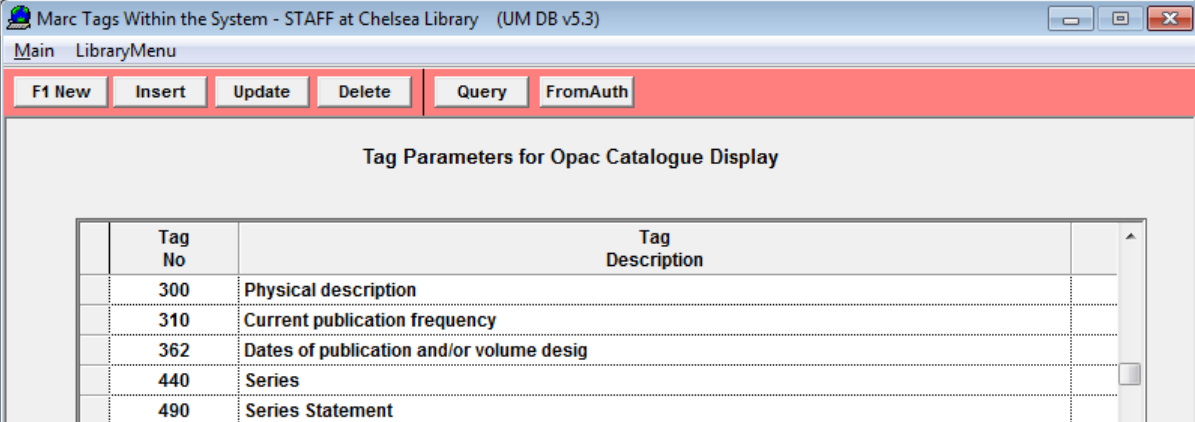
Item Type:	Home Location:	Currently:	Call No:	Status:	Reserve Title:
	Southtown	Southtown	796.3232 BAS	Available with 0 reserves	<a href="#">Reserve Title</a>

## Opac Display Tags

- Supervisor module: **LibraryMenu** > **Opacs** > **OpacDisplayTags**

Display of the Catalogue details in *Opac* and *NetOpac*.

The headings can be customised as well as selecting which Tags to actually show – for example: Tag **440 - Series Area (Traced)** maybe a confusing Heading for users of the *NetOpac*. This can be edited to be just *Series*.



Tag No	Tag Description
300	Physical description
310	Current publication frequency
362	Dates of publication and/or volume desig
440	Series
490	Series Statement

**Please Note:** The *NetOpacs* have to be *Stopped* and *Restarted* to refresh the pages to use this parameter and if using *Opac*, the module needs to be logged off and logged back on to refresh parameters.

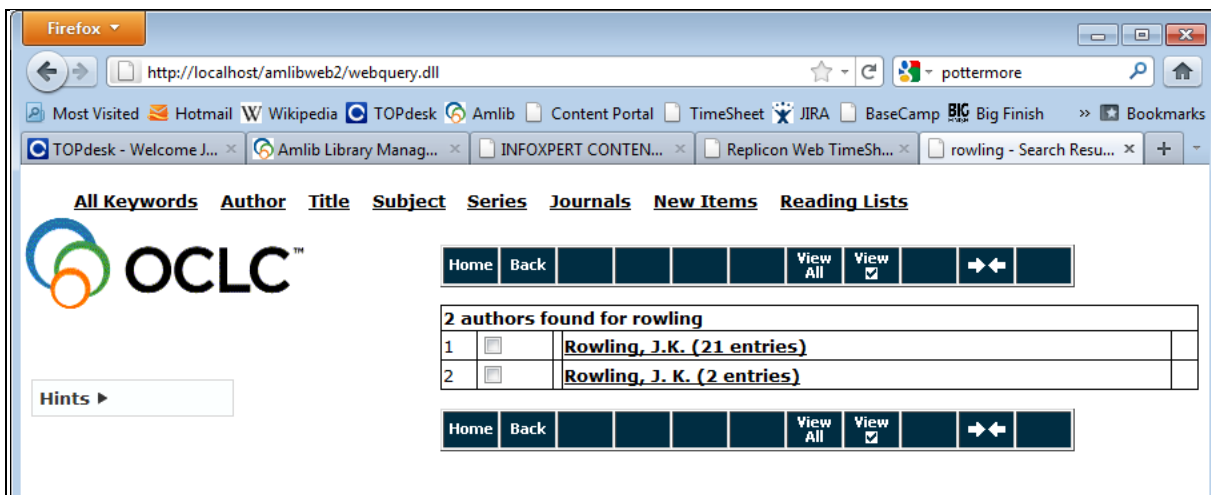
## To Merge Tags in Marc List

It is possible to display tags linked by keyword codes as one authority in the Authority list (**Marclist.htm**).

Authorities linked by keyword codes (keyword search) or tag numbers (browse search) will be merged. The authority keys of each authority must be identical for the merge to work.

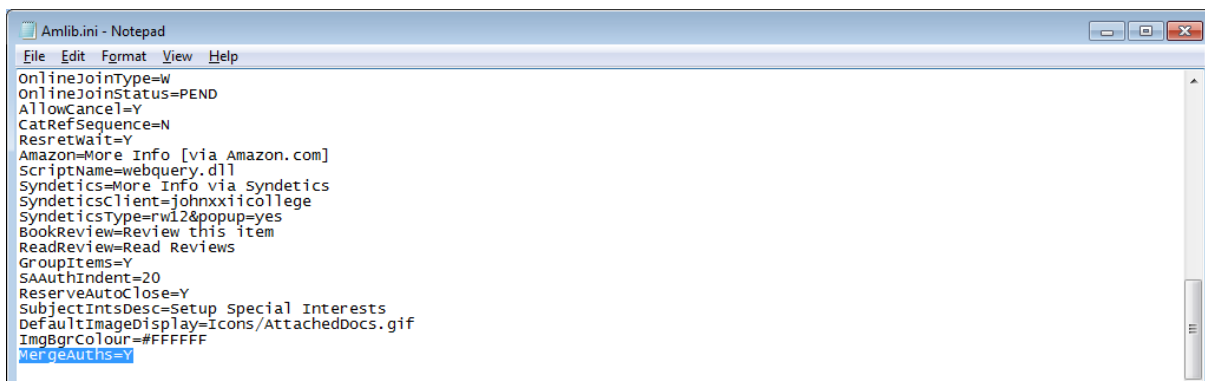
For example: if the same author is entered in a **100** and **700** tag, the author's name is only displayed once. If a topical subject heading **650** and a geographic subject heading **651** are in the same record, the subject heading is only displayed once:

# Hot Tips Training



1. In the `amlib.ini` file in `Drive:/NetOpac` folder on the *NetOpacs* server, anywhere after `[NetOpacs]` add the line:

- `MergeAuths=Y`



2. Save the changes
3. Restart *WebConsole* (or the *FireDaemon Service Manager*)
4. The *NetOpac* results will show only one link to the authority keyword:



For example: instead of seeing **Rowling, J.K. (21 entries)** and **Rowling, J.K. (2 entries)** as in the earlier screenshot, there will only be **Rowling, J.K. (23 entries)**

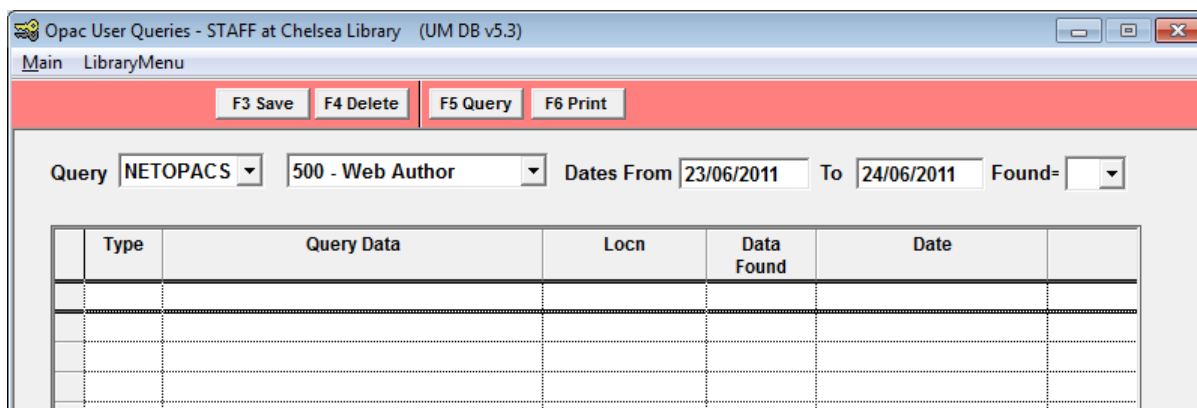
## Log of Successful / Unsuccessful Searches

- *Supervisor* module: **LibraryMenu**> **Opacs** >**OpacQueries**

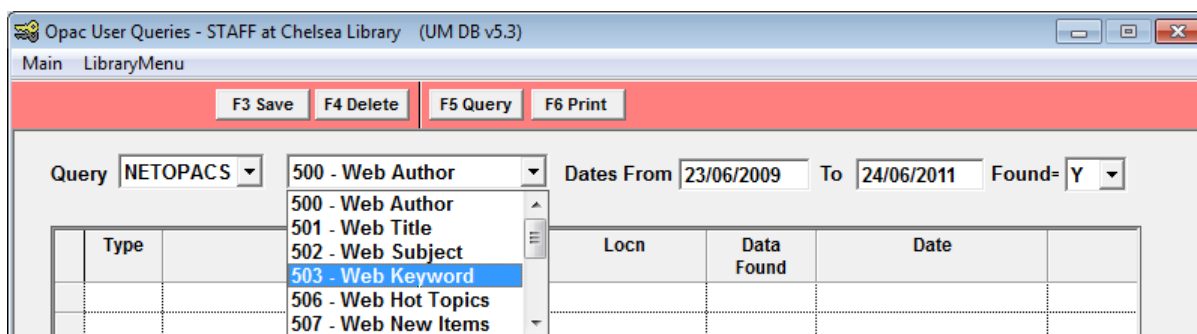
*Amlib* now retains a log of successful and unsuccessful searches conducted via the *NetOpacs* (and *Opacs*).

The results of searches can be analysed on the Opac User Queries screen. This list where the search was unsuccessful can be used as a basis for adding *See* and *See Also* references to increase the success rates of searches for commonly typed words – for example: **Cooking** was not successful so add a *See* reference to **Cookery**.

1. Open the *Supervisor* module
2. From the menu, select **LibraryMenu**> **Opacs** >**OpacQueries** – the Opac User Queries screen will display:



3. Set the Query to be either **NETOPACS** or **OPACS**
4. Set the Query option required – for example: **WebKeyword**



5. Enter the Dates From and the Dates To for the required date range
6. Enter the Found = **Y** (successful searches) or **N** (unsuccessful searches) or leave blank to show all
7. Click the **F5 Query** button to see the results – the actual search terms entered by the user will be displayed:

# Hot Tips Training

Opac User Queries - STAFF at Chelsea Library (UM DB v5.3)

Main LibraryMenu

F3 Save F4 Delete F5 Query F6 Print

Query NETOPACS 503 - Web Keyword Dates From 23/06/2007 To 24/06/2011 Found= Y

Type	Query Data	Locn	Data Found	Date
503	HARRY POTTER	WEB	Y	29/04/2011 3:38:00 PM
503	SOCCER	WEB	Y	19/03/2010 3:34:26 PM
503	SOCCER	WEB	Y	19/03/2010 3:33:23 PM
503	DANCE	WEB	Y	18/11/2009 11:47:09 AM
503	FOOTBALL	WEB	Y	18/11/2009 11:45:12 AM
503	FOOTBALL	WEB	Y	18/11/2009 11:44:44 AM
503	BALLET	WEB	Y	18/11/2009 11:43:57 AM
503	MAORI	WEB	Y	18/11/2009 10:55:36 AM

- If the traditional style of OPACs are used the same procedure can be used. The Numbers for the query are relative to the **buttons** on the Search screen:

Opac User Queries - STAFF at Chelsea Library (UM DB v5.3)

Main LibraryMenu

F3 Save F4 Delete F5 Query F6 Print

Query OPAC 5 Dates From 23/06/2000 To 24/06/2011 Found= Y

Type	Query Data	Locn	Data Found	Date
5	COO	CHELSEA	Y	20/11/2002 6:46:07 AM
5	CRO	CHELSEA	Y	20/11/2002 6:45:40 AM
5	ACC	HASTINGS	Y	11/04/2002 10:51:04 AM
5	SOCC	HASTINGS	Y	11/04/2002 10:51:00 AM
5	HOLI	HASTINGS	Y	11/04/2002 10:50:54 AM

## APPENDICES

### Appendix 1: Saved Files

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

This includes the following:

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

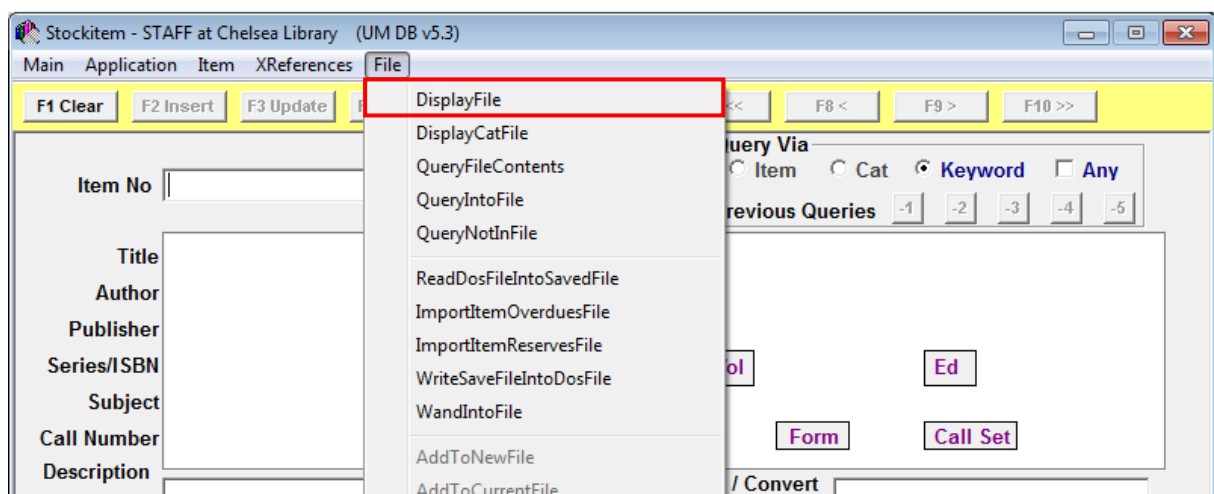
Saved Files can be created in the following modules:

- Authorities
- Borrower
- Catalogue
- Stockitem

#### Create a Saved File

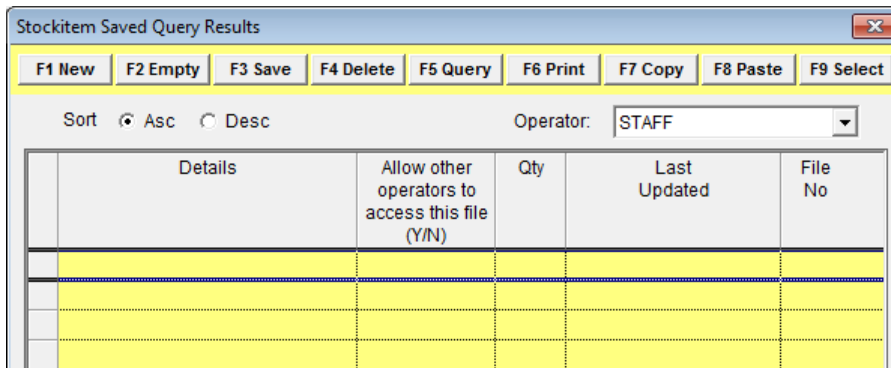
**Please Note:** Many saved files are created as part of another process. The following shows you how to create a Saved File independently of a process.

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

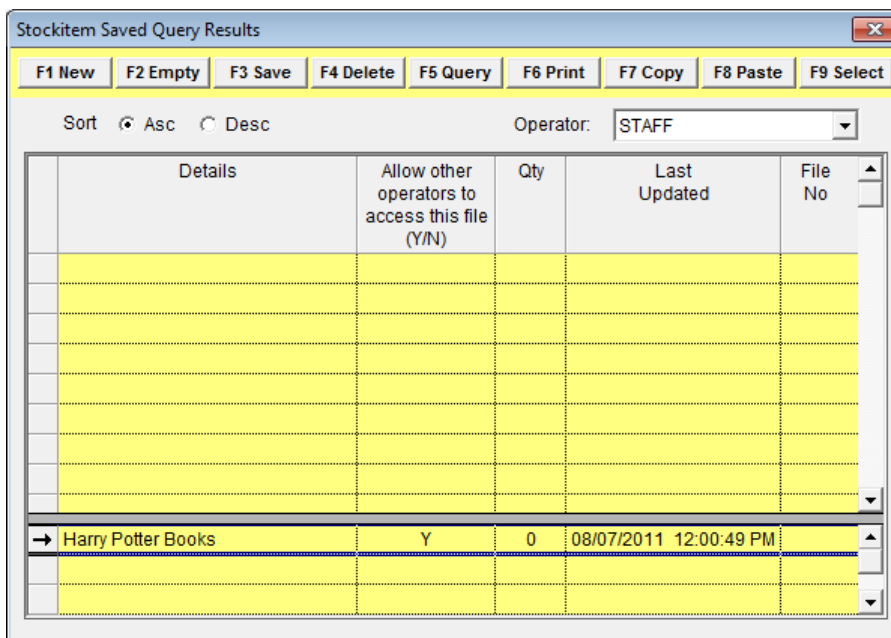


# Hot Tips Training

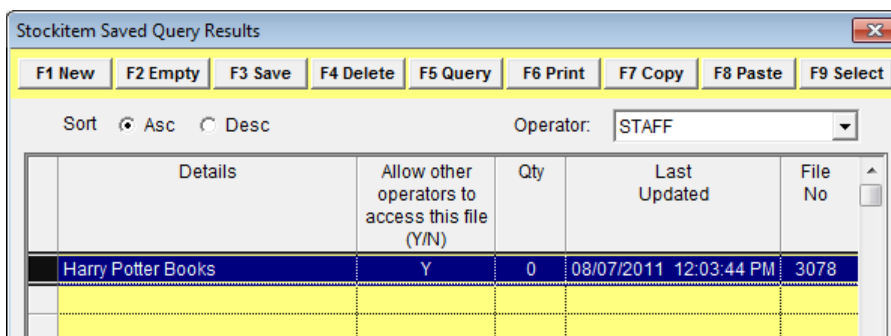
- The Stockitem Saved Query Results screen will display:



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



- Click the **F3 Save** button when complete



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

# Hot Tips Training

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

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

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

The screenshot shows the 'Stockitem - STAFF at Chelsea Library (UM DB v5.3)' window. The 'F5 Query' button is highlighted. The search parameters are as follows:

- Item No: [ ] Cat Ref No: [ ]
- Query Via:  Item  Cat  Keyword  Any
- Previous Queries: -1, -2, -3, -4, -5
- Title: harry potter
- Author: [ ]
- Publisher: [ ]
- Series/ISBN: [ ] Vol: [ ] Ed: [ ]
- Subject: [ ]
- Call Number: [ ] Sts Code: [ ] Form: [ ] Call Set: [ ]
- Description: [ ] Copy No / Convert: [ ]
- Location: [ ] Temp: [ ] Floor: [ ] Origin/Source: [ ]
- Perm: [ ]
- For Loan (Y/N):  Loan Type: [ ] Opac?:  Alert:  Process: [ ]
- Received: [ ] Accessioned: [ ] Current Cost: [ ]
- Group: [ ]
- ILL Library: [ ] ILL Ren: [ ] ILL Due: [ ] ITEM TYPE: [ ] MEMOS: 0
- On Loan: [ ] Due: [ ] On Order: [ ] Res: [ ] Seq: 0 Set: 0 ?Size: 200
- Last Modified: [ ] by: [ ] Issues: 0

4. The results will display in a List:

The screenshot shows the 'Stockitem List - 20 rows' window. The table displays the following data:

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

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

# Hot Tips Training

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

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

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

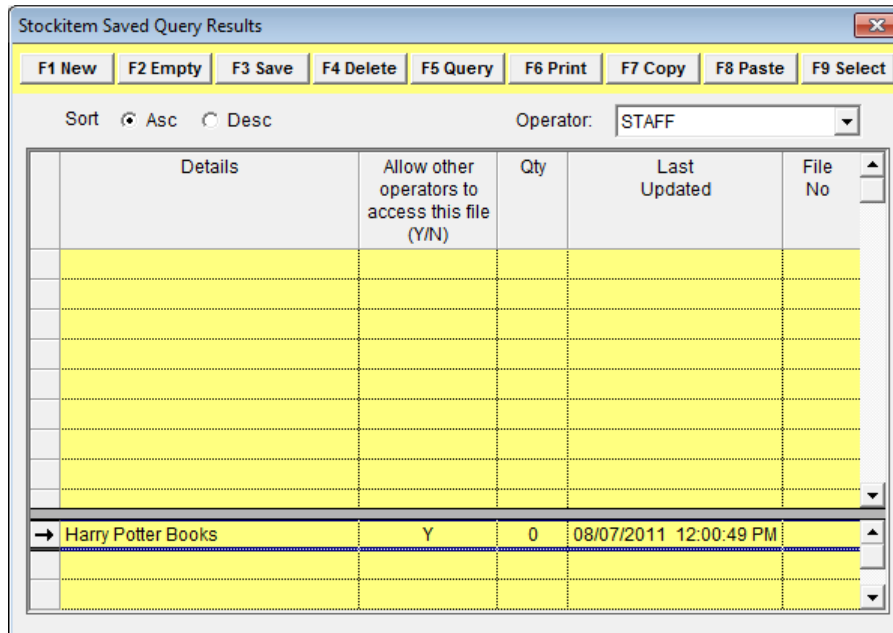
- The Stockitem Saved Query Results screen will display:

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

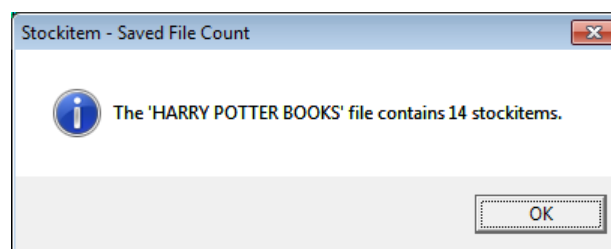


## Hot Tips Training

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



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



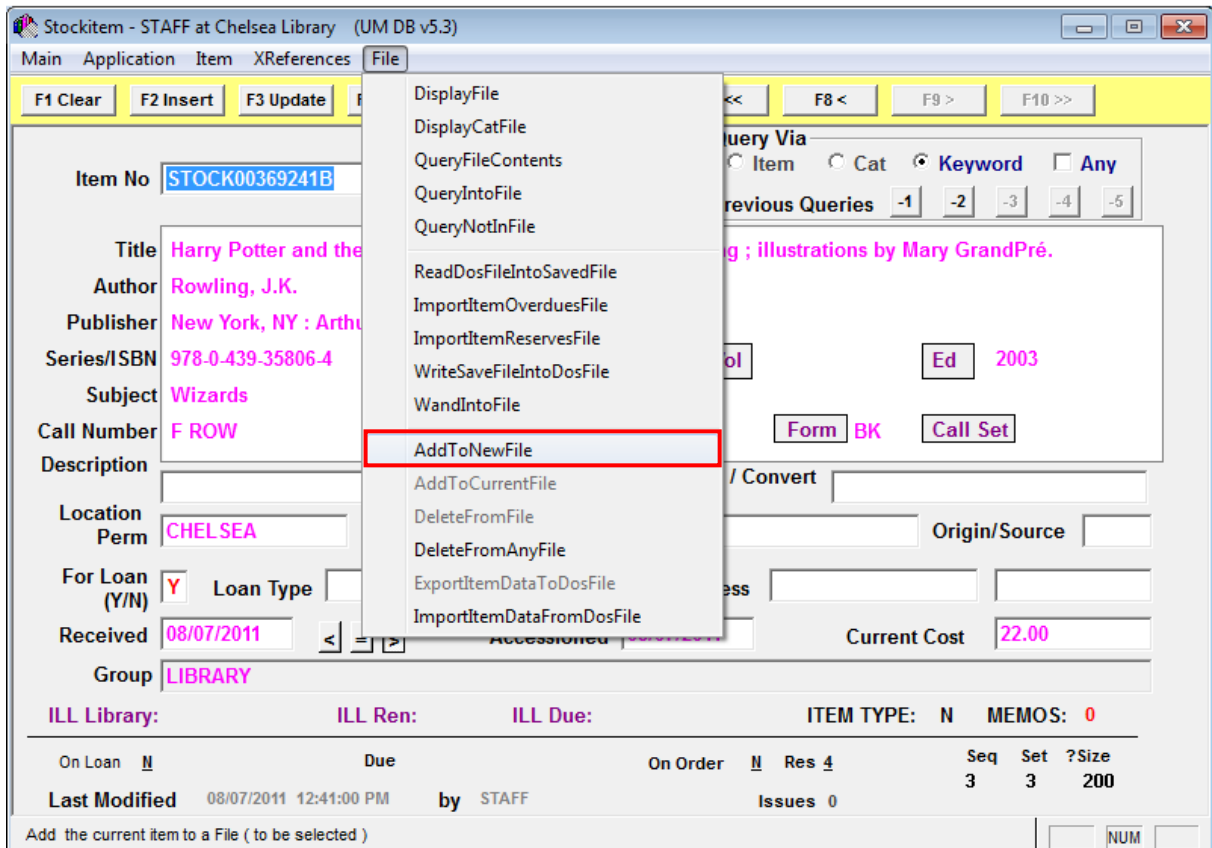
The selected items have now been saved to file.

# Hot Tips Training

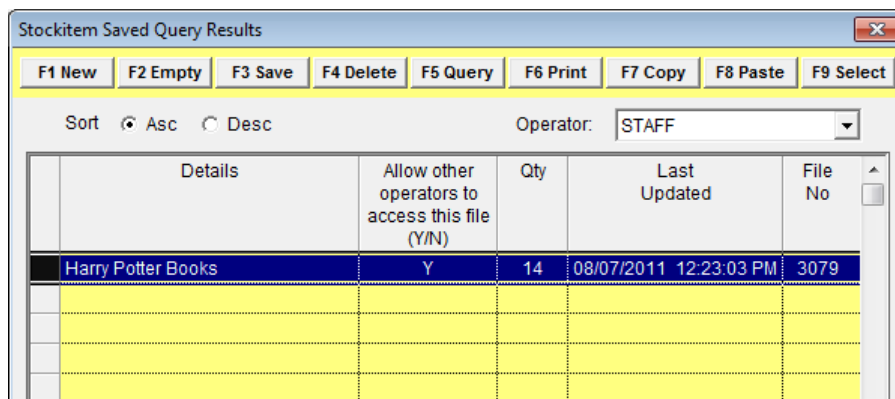
## Save a Single Item/Borrower to File

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

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



5. The Stockitem Saved Query Results screen will display:



6. It is possible to add the selected items to an existing Saved File or to create a new Saved File as follows:
  - a. Click the **F1 New** button

## Hot Tips Training

- b. Type a description in the Details column – for example: **Harry Potter Books**
- c. Allow other operators to access this file (Y/N): enter a **Y** (for **Yes**) or **N** (for **No**) – the default is **Y**

The screenshot shows a window titled "Stockitem Saved Query Results" with a toolbar containing buttons for F1 New, F2 Empty, F3 Save, F4 Delete, F5 Query, F6 Print, F7 Copy, F8 Paste, and F9 Select. Below the toolbar, there are options for "Sort" (Asc selected, Desc unselected) and "Operator" (STAFF). The main area is a table with the following columns: Details, Allow other operators to access this file (Y/N), Qty, Last Updated, and File No. The table contains one row with the following data: Harry Potter Books, Y, 0, 08/07/2011 12:00:49 PM. The row is highlighted in yellow.

Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
→ Harry Potter Books	Y	0	08/07/2011 12:00:49 PM	

- d. Click the **F3 Save** button when complete
7. Highlight the Saved File you would like to use and click the **F9 Select** button  
**Please Note:** If selecting an existing Saved File, it is possible to delete the pre-existing saved items from the file by clicking the **F2 Empty** button

The selected item has now been saved to file.

# Hot Tips Training

## View an Existing Saved File

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

Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
Harry Potter Books	Y	20	08/07/2011 11:46:12 AM	3077

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

Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Ec
1	Harry Potter and the Deathly H	Rowling, J.K.	ROW	BK	J	N		0	CHEL		Y			
2	Harry Potter and the Deathly H	Rowling, J.K.	ROW	BK	J	N		0	HAST		Y			
3	Harry Potter and the half-bloo	Rowling, J.K.	F ROW	BK	AFIC	N		3	BELM		N	Harry Potterv	20	
4	Harry Potter and the half-bloo	Rowling, J.K.	F ROW	BK	AFIC	N		3	CHEL		N	Harry Potterv	20	
5	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	ANF	Y	21/03/2	1	CHEL		N	978-0-7475-3	19	
6	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	Y	10/08/2	2	BELM		N	978-0-7475-3	19	
7	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	N		0	CHEL		N	978-0-7475-3	19	
8	Harry Potter and the chamber	Rowling, J.K.	F ROW	BK	J	Y	07/07/2	0	CHEL		N	978-0-7475-3	19	