

Where Search Training

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Where Search Training

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Where Search Training

Overview

Where Searches create dynamic SQL (the language used to access the database) based upon your input. SQL stands for Structured Query Language.

Where searches are available in both the Stockitem and Borrower module, and specific results are determined by the user defined criteria.

The search results can be:

- **Counts** - Displays the number of matching records
- **Query** – View the records contained in the query
- **Queried to a File** – Performs the query and saves the result into a file

Where searches created can also be saved for future use.

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WHERE SEARCH BASICS

Accessing Where Search

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

Stockitem Where Search - STAFF at Eastville

Main Application

F1 Clear F2 Insert F3 Update F4 Select F5 Query F6 Count F7 QtoFile F8 Order

1 Choose Search Column

Item No
Cat Ref No
Title
Author
Subject
Series
Publ. Details
Call Number
Vol
Ed
Sts Code
Form
Call Set Reference
Description

2 Choose Operator

LIKE LIKE IN IN
 = ≠
 < ≤ > ≥

3 Type the Where Condition and Press Paste

OR Press Special

Paste
Special

Query Description:

(	Column	Operator	Where)

Delete
()
AND
OR
NUM

Note: There is also a short cut by pressing the **Ctrl + W** key on the keyboard to open the Where search screen. This can be utilised when in the *Stockitem* or *Borrower* module.

Where Search Training

Creating a Where Search

1. In the *Stockitem* and *Borrower* modules by selecting **Application > Where...**
2. **Choose Search column:** it can be helpful to have a look at the main Stockitem (or Borrower) screen if you're confused about which fields contain what information
3. **Choose Search column:** it can be helpful to have a look at the main Stockitem (or Borrower) screen if you're confused about which fields contain what information

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

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

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

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Note:

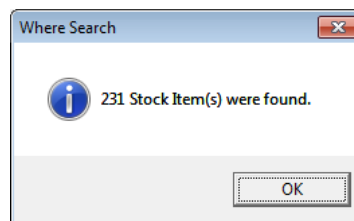
- If you wanted to find ALL of something (for example: Borrower, StockItem, items on loan) then you could run a query such as:
 - a. **BarCode IS NOT NULL** (all Borrowers)
 - b. **ItemNo IS NOT NULL** (all StockItems)
 - c. **Issue Due Date Back IS NOT NULL** (all items on loan)

Query Description:

(	Column	Operator	Where
	Item No	IS NOT	NULL

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

5. Once your Where condition is set up you can either:
 - a. Count the number of results by clicking the **F6 Count** button:



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

A screenshot of a 'Stockitem List - 200 rows' window. The window has a menu bar with 'Main', 'Table', 'References', and 'File'. Below the menu bar is a table with the following columns: Seq, Title, Author, Call No, Form, Stats, On Loan, Due Back, Rsv, Perm Loc, Process, On Ord, Series, Process Date, and Ec. The table contains 7 rows of data, each with a different title and author.

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

- c. Perform the query and saves the result into a file by clicking the **F7 QtoFile** button:

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The screenshot shows a window titled "Stockitem Saved Query Results" with a menu bar containing buttons: F1 New, F2 Empty, F3 Save, F4 Delete, F5 Query, F6 Print, F7 Copy, F8 Paste, and F9 Select. Below the menu bar, there are "Sort" options (Asc, Desc) and an "Operator:" dropdown menu set to "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 has one row highlighted in yellow with the following data: "New Items in the last month", "Y", "0", and "07/03/2008 1:36:32 PM".

Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
New Items in the last month	Y	0	07/03/2008 1:36:32 PM	

If a new file is required, click the **F1 New** button. Type the File Name and select the **F3 Save** button. Then to use this new File, ensure the file is highlighted and press the **F9 Select** Button.

Note: If the file already contains data the new records will be added to the file and existing data remains. It is possible to empty the content by selecting the **F2 Empty** button.

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Special Button

The Special Button contains options, which will change according to the column chosen.

For example, choosing the column Last Active enables the Report to use a date that is relative to the current date. This saves having to add a date each time the report is run. For example to find all those borrowers who are over the age of 12.

The display in the top window will calculate the date in relation to today's current date. This will appear only if the column chosen is a date field. There is an option for Start of the Week and Start of the Month.



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AVAILABE FIELDS IN COLUMN 1 FOR WHERE SEARCHES

Stockitem

ITEM NO	BOR NAME
CAT REF NO	BOR BARCODE
TITLE	ISSUE LOCATION
AUTHOR	ISSUE DATE ISSUED
SUBJECT	ISSUE DATE DUE BACK
SERIES	ON ORDER
Publisher	RES DATE
CALL NUMBER	LAST CHANGED
VOL	WHO LAST CHANGED
ED	LAST ACTIVE
STS CODE	DATEDUEDMMYY
FORM	TIMES BORROWED
CALL SET REFERENCE	TIMES RESERVED
DESCRIPTION	TIMES RENEWED
COPY NO/ CONVERT	STOCK TAKE DATE
LOCATION PERM	ORIGINAL COST
LOCN TEMP	LAST DEPR DATE
FLOOR	MEMO TYPE
ORIGIN/SOURCE	MEMO DATE
FOR LOAN (Y/N)	MEMO END DATE
LOAN TYPE	RES DATE
OPAC (Y/N)	RES STATUS
ALERT (Y/N)	RES STATUS DATE
PROCESS	RES COLLECT LOCN
PROCESS DATE	RES PLACED LOCN
RECEIVED	ILL STATUS
ACCESSIONED	ILL STATUS DATE
CURRENT COST	ILL SUPPLIER ONE
ILL LIBRARY	ILL SUPPLIER TWO
ILL REN	ILL SUPPLIER THREE
ILL DUE	ILL BOR BARCODE
ITEM TYPE	STK HISTORY DATE
ON LOAN	STK HISTORY COMMENTS
STK HISTORY TYPE	GROUP
STK HISTORY VALUE	

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Borrower

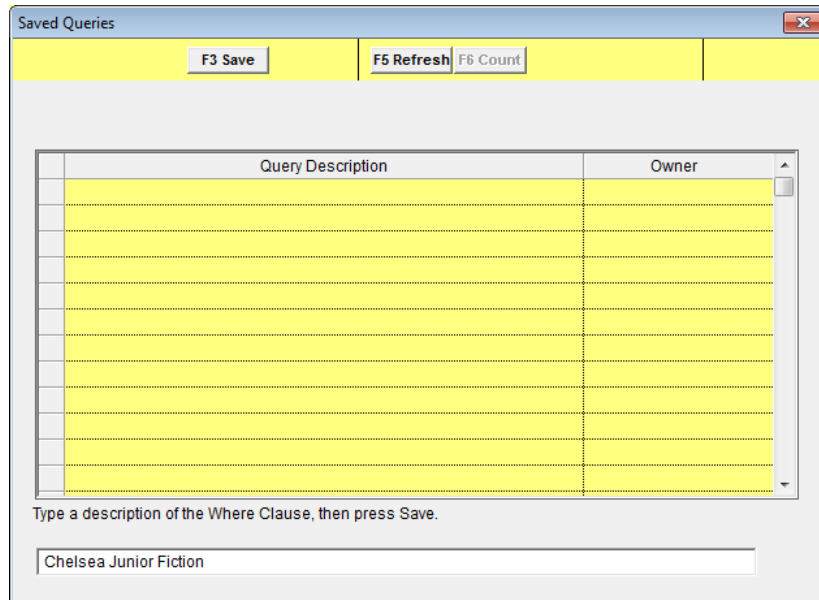
BARCODE	TOTAL # OF VISITS
PIN	TOTAL # OF OPAC VISITS
SURNAME	TOTAL # OF RESERVES
GIVEN NAME	TOTAL # OF RENEWS
MIDDLE NAME	TOTAL # OF LOANS
TITLE	OPERATOR
SEX	LAST CHANGED
BALANCE	AREA CODE
BIRTHDATE	WARD CODE
TYPE	SUBURB CODE
GROUP	POST/ZIP CODE
CLASS	TELEPHONE #
STATUS	MEMO TYPE
LOCATION	MEMO DATE
REF1	MEMO END DATE
REF2	ISSUE DATE DUE
EMAIL	ILL STATUS
USE FOR NOTICES	ILL STATUS DATE
REG EXP.	HISTORY DATE
LAST ACTIVE	HISTORY TYPE
JOINED	HISTORY REPORT
AT	

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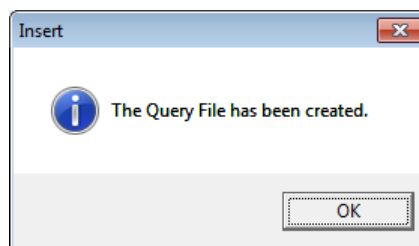
SAVING WHERE SEARCHES

Where searches can be saved to be used at a later stage

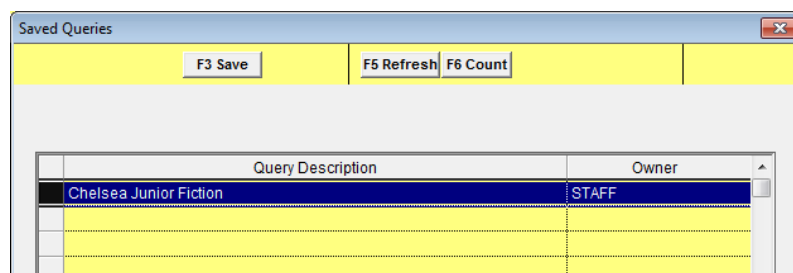
1. In the *Stockitem* and *Borrower* modules select **Application > Where...**
2. Create the Where search parameter
3. Click the **F2 Insert** button – the Saved Queries table will display:



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



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



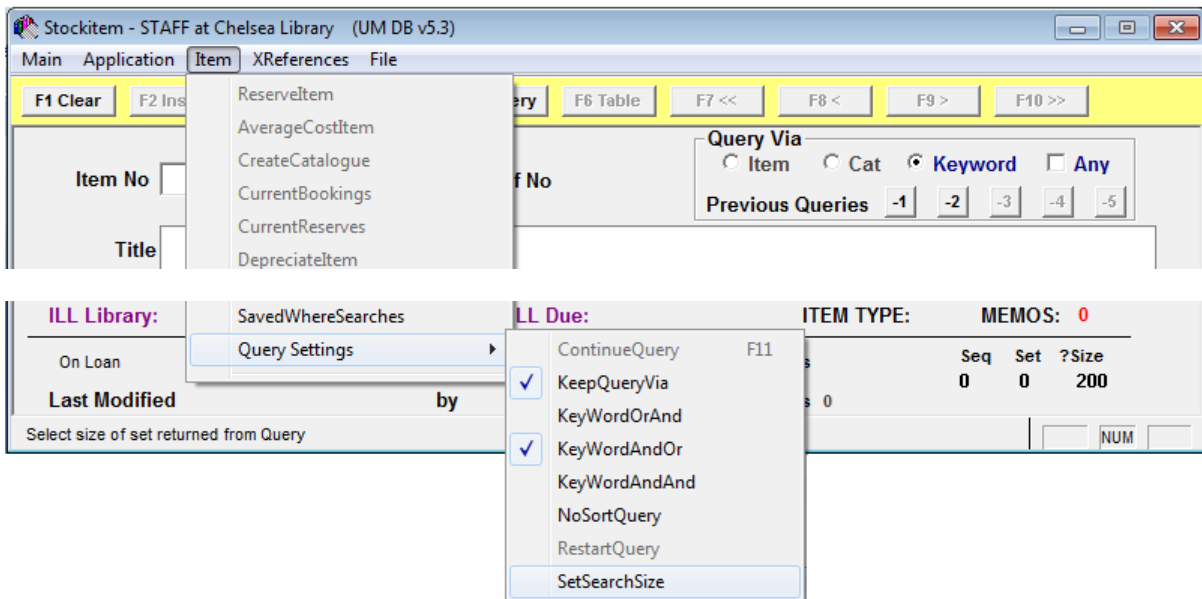
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SEARCH SIZES

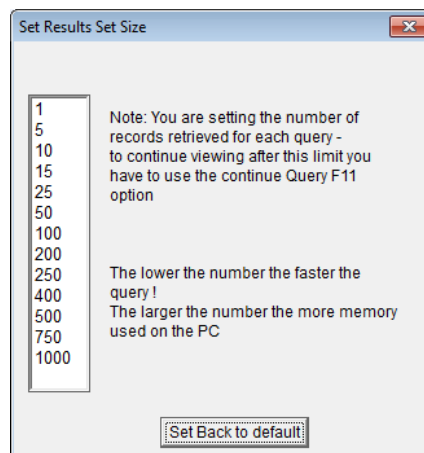
The Number of Stock items or Borrowers that display in a Table are dependent on the Search Size set. Once the search size has been reached, more items can be seen by selecting the **F11** button or **Table > Continue Query**

Set the Search Size

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



2. The Set Results Search Size screen will display:

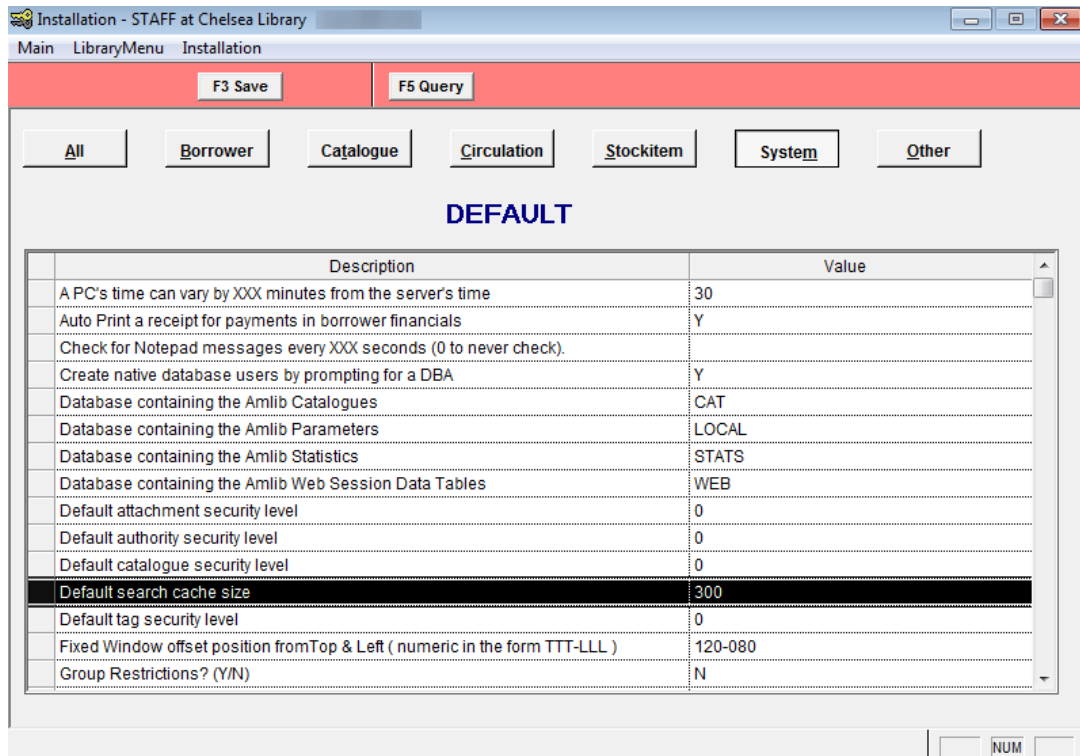


3. Select a search size from the list

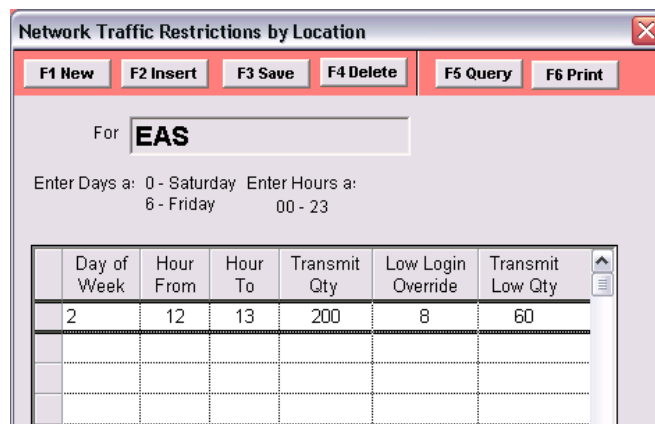
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Set the Default Search Size

The default settings can be changed in the **Main > Supervisor > Installation – System** tab Default search cache size setting



Note: If the Search Sizes are to be set differently for different hours of the day, this can be set in the **Main > Supervisor > Locations**, select the **F7NetWK** Button.



The **F7NetWK** option can be used to restrict the number of search results returned at a Location in combination with the Hours of the Day. Once this limit is reached, the Continue Query button would need to be clicked [**F11**] continue the search. You are able to restrict search results at busy times for example.

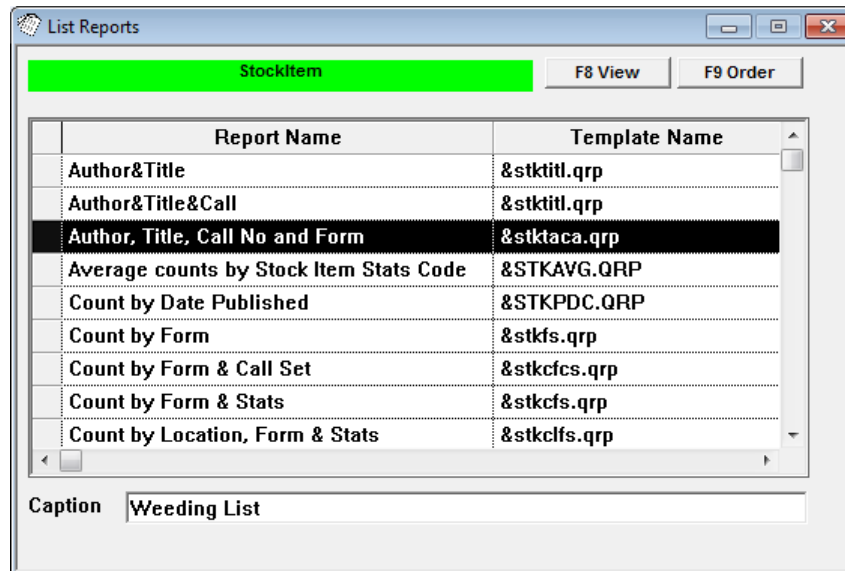
The hours can be selected and the Transmit Quantity either increased or decreased for searches. The example shows that at EAS Location, on a Monday, between the Hours of 12pm and 1pm, the Searches are restricted to only 200. At other times, it is set by the Installation parameter setting.

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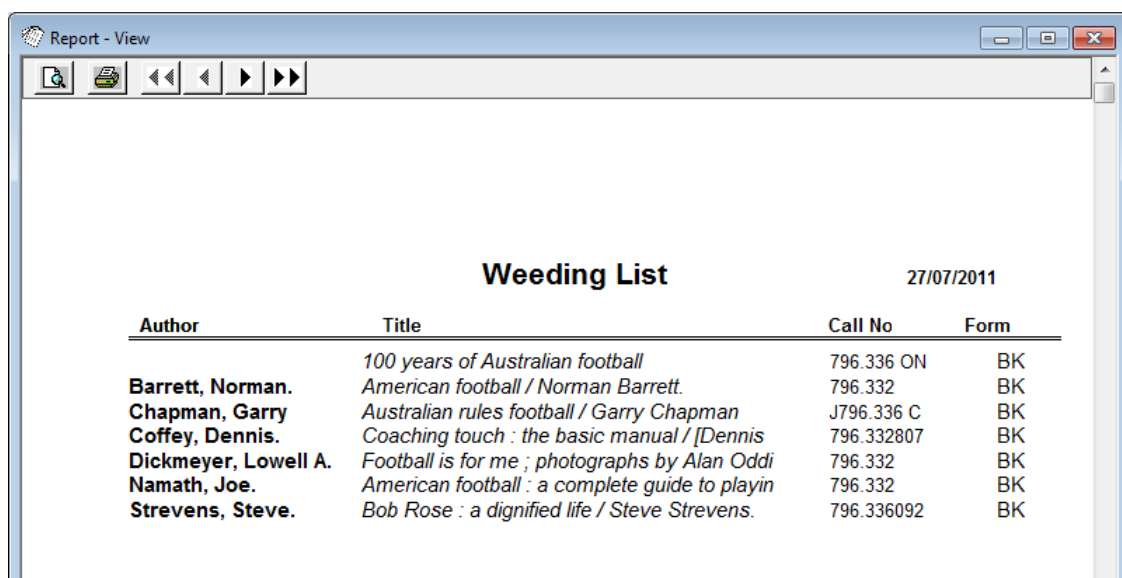
CREATE REPORTS FROM A TABLE

Once the Where Search has been queried into a table, it is possible to print a report from the resulting Table.

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



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



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

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STOCKWAND CHANGE

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

- Individually from the Barcode (select Start and begin wandling the Item Numbers) [F6]
- From a File [F7]
- From a Saved Where Search [F8]

Setting Values to Change

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

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

Stockitem Wand Change - STAFF at Library

Main Application

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

1 Choose Column to Change

Date Accession
CurrentCost
Process
Process Date
Call Set Reference
Last Stock Take
Item Origin
Item Loan Code
Title

2 Type the New Value and Press Paste

OR Press Special

Paste
Special

Update Description: Delete

Column		New Value
Process	=	IN PROCESS
For Loan (Y/N)	=	Y
Alert Oper (Y/N)	=	Y
Show Opac (Y/N)	=	N
Process Date	=	Current Date

Item No: Last Changed By

NUM

5. Click the **Paste** Button
6. The values to change will display in the Columns at the base of the screen

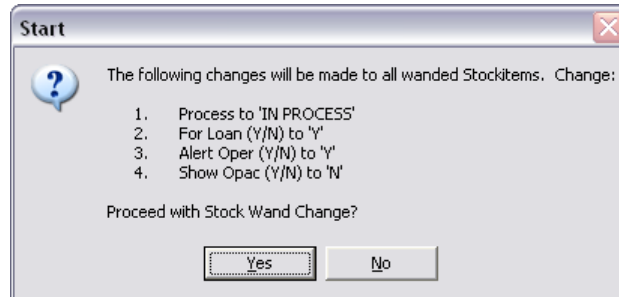
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Executing the Changes

The changes can be applied in one of 3 methods:

Individually from the Barcode:

- a) Click the **F6 Start** button – the Start prompt will display containing a confirmation message:



- b) To proceed, click the **Yes** button
- c) Begin wandng the Items into the Item No field for the changes to be applied

From a Saved File:

- d) Click the **F7 FrFile** button – the Stockitem Saved Query Results screen will display
- e) Highlight the relevant File (saved previously) and click the **F9 Select** button – the Mass Change from file prompt will display with the number of items to change defined as well as the File selected:



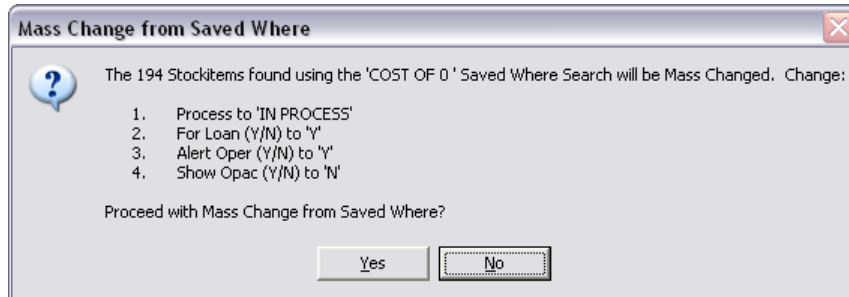
- f) Review the message and if the information is correct click the **Yes** button to proceed
- g) A prompt with the following message will display when complete:
The XX Stockitems have been Updated



Where Search Training

From a Saved Where Search:

- h) Select the **F8 FrWhere** button – the Saved Queries screen will display
- i) Highlight the relevant saved Where Search (Saved previously) and click the **F9 Execute** button – the Mass Change from Saved Where prompt will display with the number of items to change defined as well as the Where Search selected:



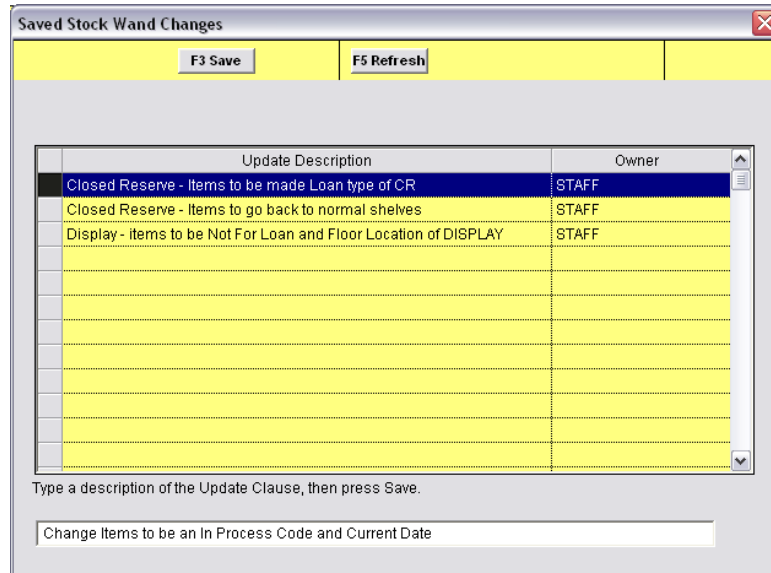
- j) Review the message and if the information is correct click the **Yes** button to proceed
- k) A prompt with the following message will display when complete:
The XX Stockitems have been Updated



Saving a StockWandChange

A Stockwand Change can be saved for future use:

1. With the Stockwand Change parameters displayed click the **F2 Insert** button – the Saved Stock Wand Changes screen will display:



2. Type a Description in the field at the bottom of the screen
3. Click the **F3 Save** button

Reusing a StockWandChange set of Parameters

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

BORROWER CHANGES

Borrower changes can be made globally by:

- Import from an Administration system via a Borrower Import
- Changes from an Administration SQLServer database using Borrower Online Change
- Borrower Where searches to files for Mass changes
- Report for Borrower change using the More buttons

Where Search to Files can be useful for both Public Libraries and Schools to Query the database for Borrowers who need to be changed e.g. For Juniors who need to be changed to Young Adult and for Students who need to be changed to different Year Groups and Classes.

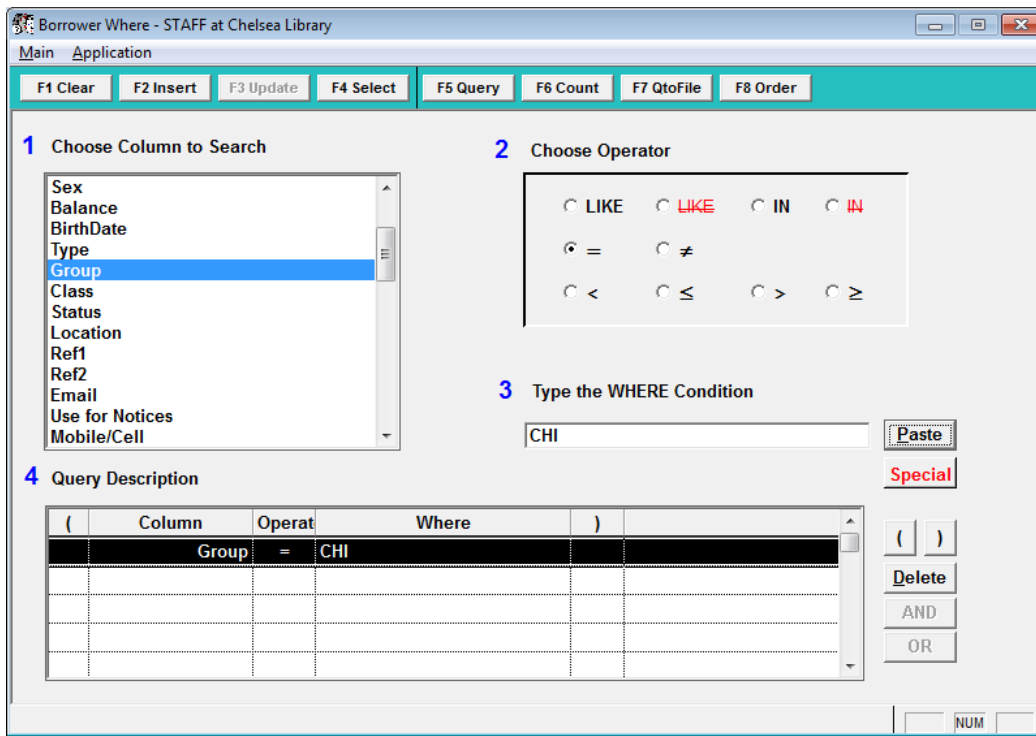
If a school does not import changes from an Administration system e.g. MAZE, changes from one year and one class to another can take place using Where Searches and Mass change.

Mass Borrower Change

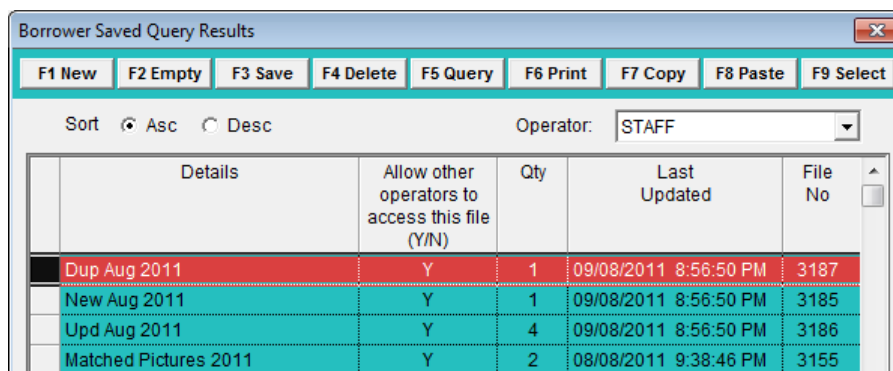
This process can be used to change Borrower Group, Type, Class, etc. The example used here is **Borrower Group**.

1. Launch the *Amlib* client
2. Go to **Main > Borrowers > BorrowerWhere** – the Borrower Where screen will display
3. Create a Where clause – for example: Group = **CHI** (this will search for all Borrowers who are in that particular group)
 - a. Highlight the field to search on: **Group**
 - b. Choose Operator: =
 - c. Enter the Where condition, or the exact data you want to find – for example: **CHI**
 - d. Click the **Paste** button to insert the clause into the table

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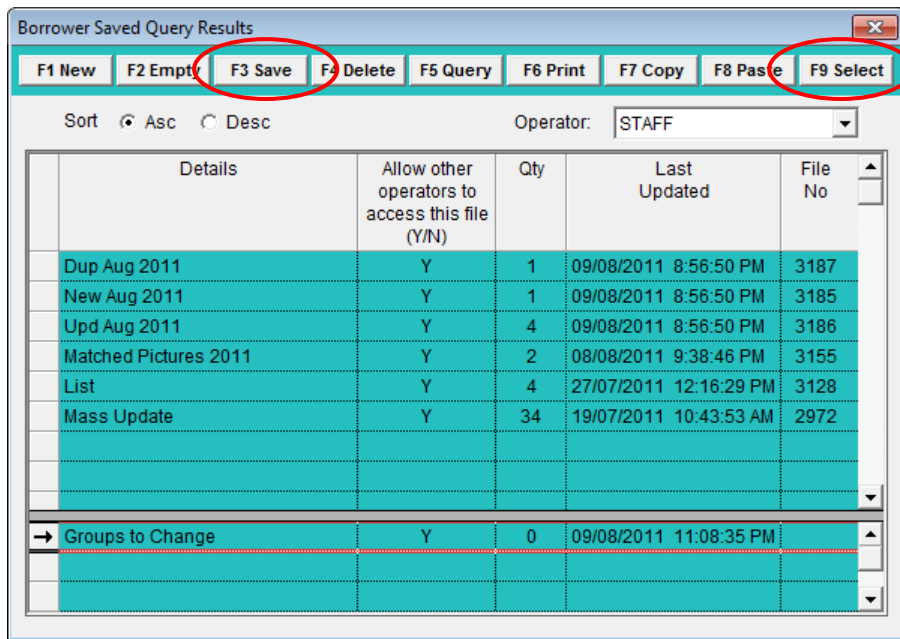


- Click on the **F7 QtoFile** button – the Borrower Saved Query Results screen will now display:

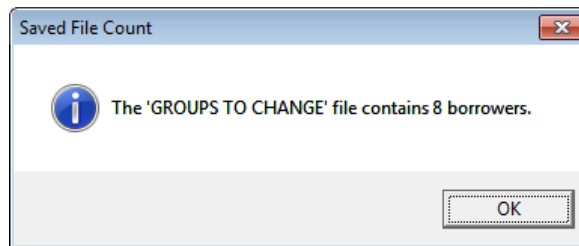


- Click on the **F1 New** button to create a new Saved File
- Type in a name for the file in the Details column – for example: **Groups to Change**
- Click on **F3 Save** button
- Highlight the new Saved File and click on the **F9 Select** button to save results to this file

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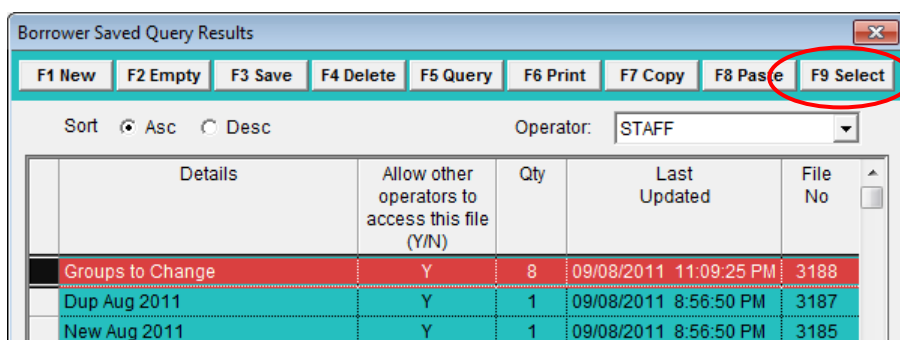
9. A prompt will display noting the number of borrowers contained in the file



10. Click the **OK** button

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

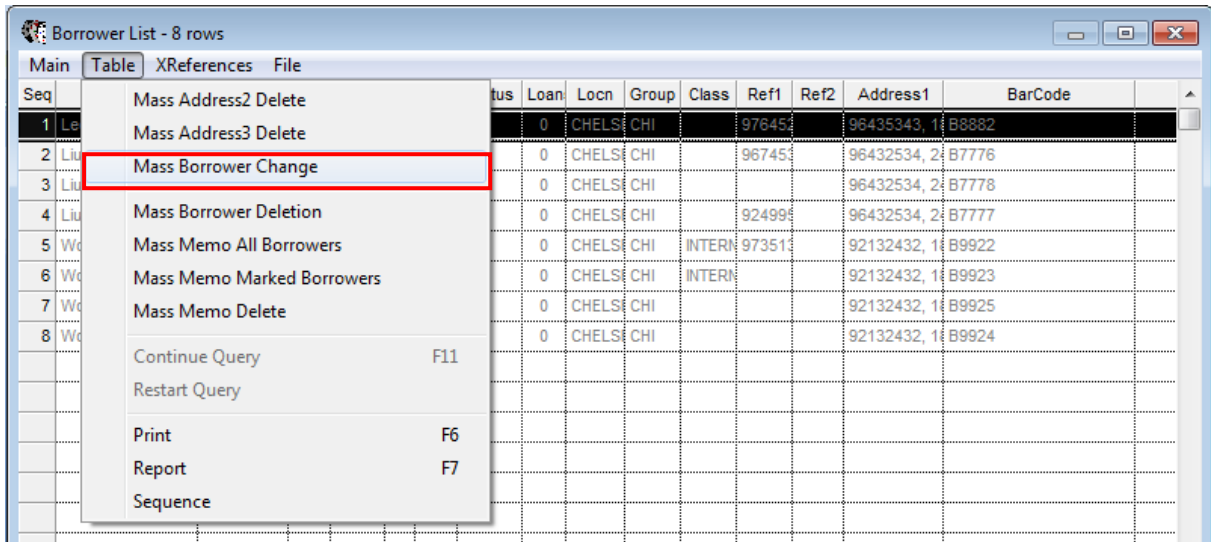
12. Select **File > DisplayFile** – the Borrower Saved Query Results file screen will display



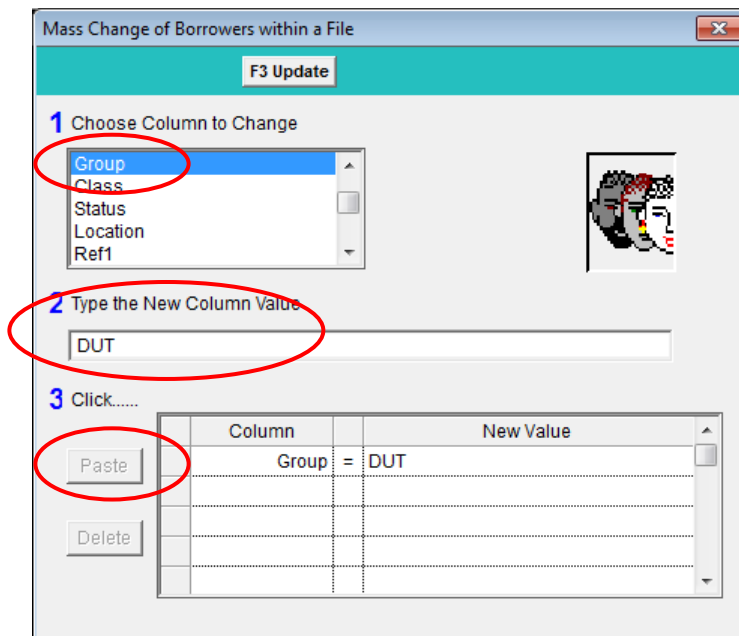
13. Highlight the required Saved File and click on the **F9 Select** button to display the file

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

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6. The Mass Change of Borrowers within a File screen will display:



7. Enter the following settings:

- a) Select the field you wish to change for all stockitems in the file example - **Group**
- b) Type in the new value example, which is what you are changing all stockitems to be – for example: **DUT**
- c) Click on the **Paste** button to insert the new criteria into the bottom table
- d) Click on the **F3 Update** button to start the mass change
- e) This will change all the Borrower Groups in this file so that they are now Dutch

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Borrower List - 8 rows

Main Table XReferences File

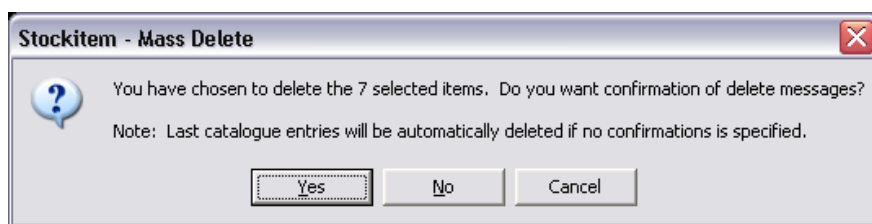
Seq	Surname	Name	Title	Middle	Sex	Type	Status	Loan	Locn	Group	Class	Ref1	Ref2	Address1	BarCode
1	Leong	Nelson	Mr		M	A	OK	0	CHELS	DUT		97645		96435343, 1	B8882
2	Liu	Ding	Mr		M	A	OK	0	CHELS	DUT		96745		96432534, 2	B7776
3	Liu	Xaio	Miss		F	12	OK	0	CHELS	DUT				96432534, 2	B7778
4	Liu	Zichun	Mrs		F	A	OK	0	CHELS	DUT		92499		96432534, 2	B7777
5	Wong	Bill	Mr		M	A	OK	0	CHELS	DUT	INTERN	97351		92132432, 1	B9922
6	Wong	Grace	Mrs		F	A	OK	0	CHELS	DUT	INTERN			92132432, 1	B9923
7	Wong	James	Mast		M	12	OK	0	CHELS	DUT				92132432, 1	B9925
8	Wong	Sam	Mast		M	12	OK	0	CHELS	DUT				92132432, 1	B9924

MASS DELETE

Stockitems and Borrower can be deleted “en masse” by creating a table of Stockitems or Borrowers.

Stockitem

1. From the Stockitem or Borrower screen, perform a query from a relevant field or wand into a file.
2. From a resulting table, select the Stockitems to be deleted by highlighting the rows. To highlight more than one Stockitem, press the **Control key** and click with the left mouse button
3. From the Table menu, select **Table > MassItemDelete**. You will be given the option to receive a confirmation at each deletion:

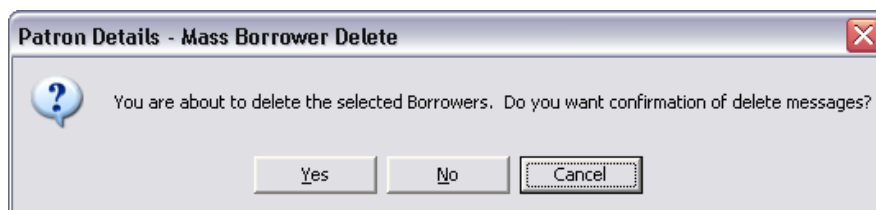


- **No:** All items highlighted in the table will be deleted, unless the item is on loan, has reservations or memos. If the Stockitem is the last for the catalogue, the catalogue will also be deleted. No messages display.
- **Yes:** Each item’s ID will display. Messages will also display if the item cannot be deleted (e.g. the item is on loan, has reservations or memos).
- **Cancel:** No deletion will take place. You will be returned to the Table View.

Borrower

Borrowers can also be deleted from a Table. In the Table View, highlight all the Borrowers in the Table. From the Table menu, select **Table > Mass Borrower Deletion**.

A dialogue box will display, requesting whether confirmation messages are required each time a Borrower is to be deleted.



Note: Any Borrower who has items on loan, reservations or memos cannot be deleted until the loans, reservations or memos are deleted.

APPENDICES

Appendix 1: Sample Where Searches

Stockitem

All Stockitems

- a) **Item No IS NOT NULL**

All Stockitems at a certain location

- a) **Perm Loc = LIB**

All Stockitems with a particular Stats code e.g. to get a tally of all Adult Fiction items

- a) **Sts Code = AF** (Type Stats Code)

All Junior Items

- a) **Sts Code LIKE J**

All Stockitems with a particular Form code e.g. to get a tally of all Videos.

- a) **Form = VID**

All Stockitems at a particular Location

- a) **Location Perm = EAS** (Location Code)

Add PermLoc to set it to just Videos at a Location or a Stats code to get just Fiction Videos

- a) **Form = VID**
- b) **Sts LIKE F**

Missing items, with a Process Date of more than 6 months

- a) **Process LIKE MIS** (Type beginning of process code)
- b) **Process Date < Current Date – 6 months** (via Special button) – this can be altered to suit your particular needs

Items where cost is over \$500

- a) **Current Cost > 500**

Items with no cost

- a) **Current Cost = 0** or **Current Cost IS NULL**

Where Search Training

Items never borrowed

- a) **Times Borrowed = 0**

Items borrowed more than 50 times

- a) **Times Borrowed > 50**

Items that do not have a valid barcode

- a) **Item No NOT LIKE 36450** (or whatever the beginning of the barcode is)

Items that should appear in an account, for example between 28 and 35 days overdue

- a) **DateDueDDMMYY > Current Date – 5 Weeks** (via Special button)
- b) **IssueDateDuBack ≤ Current Date – 4 Weeks** (via Special button)

Issues on a certain day

Useful to find all items issued on a certain day

- a) **Issue Date Issued = 07/03/2012** (Type the date into column 3 and press Paste)

All Items with Memo Type of RESRET

- a) **MemoType = RESRET**

Claimed Returns

- a) **MemoType LIKE Claim**

Call No Ranges (e.g. Art books to change for a weekly loan for a short period of time)

- a) **Call Number ≥ 700**
- b) **Call Number < 760**
- c) **Form = BK**

Items overdue by 3 months e.g. Ready to use for Accounts

A Shelf check could also be done based on a report printed in Call No order from the resulting table.

- a) **IssueDateDeuBack < Current Date – 3 months** (via Special button)

Items without Catalogue records

- a) **Cat Ref No IS NOT NULL**

Where Search Training

Select **F6Count** for a quick count of the Stockitems without Catalogue. This could then be modified to indicate for example, those items which are not Periodicals, or just Books.

InterLibrary Loans not received yet

- a) **Item No LIKE ILL**

InterLibrary Loans not available for renewal

- a) **ILL Ren = N**

Items with more than 3 reserves

- a) **Res > 3**

Items not available for loan

- a) **For Loan (Y/N) = N**

Items with an Item Type of Master (M)

For those sites that are set up as a Master and have Subsidiary items attached. For example a kit or a Video with Multiple programs

- a) **Item Type = M**

Items on loan at present

- a) **Issue Date IS NOT Null**

Items e.g. Videos available i.e. Not on loan

- a) **Issue Date IS NOT Null**
- b) **Form = VID**

Items that have been received within a certain period e.g. last financial year etc.

- a) **Received \geq 01/07/2012**
- b) **Received < 01/07/2013**

Items not active since a certain date or period e.g. within the last 12 months

- a) **Last Active < Current Date – 12 months**

Where Search Training

Items that have an edition date to check

For Libraries who show the publishing date in the Stockitem Edition Field. For example Items published prior to 1980

- a) **Ed < 1980**

These can then be checked from a Table e.g. To see if there could be dubious content e.g. Science based books

Reserved items are to be collected at other than the Reserve placed location

- a) **Res Collect Locn ≠ Res Placed Locn**

Items with a Memo but do not have a Memo Type

- a) **Memo Type IS NULL**
- b) **Memo Date > 0**

Reservations Printed more than two weeks ago

- a) **Res Status LIKE PR**
- b) **Res Status Date < Current Date – 2 Weeks**

Where Search Training

Borrower

All Borrowers

- a) **Barcode IS NOT NULL**

All Year 7s

- a) **Type = Y07**

All juniors active in the last 2 years

(Useful in setting up and saving for SLOWA statistics for Public Libraries – do this for Juniors, Adults)

- a) **Type = J**
- b) **Last Active \geq Current Date – 2 years**

All Adults active in the last 2 Years

(Useful in setting up and saving for SLOWA statistics for Public Libraries – do this for Juniors, Adults)

- a) **Type IN YA,A,HB,ST**
- b) **Last Active \geq Current Date – 2 years**

All Young Adults

Not all Public Libraries use the code of Young Adult and include them in either Juniors or Young Adults

- a) **Type = YA**

All Students (not Staff)

- a) **Type ~~IN~~ T,N,A** (Whatever your codes are staff e.g. Teacher, Non Teacher, Admin)

All Institutions

Check to see how these have been set up at the Library

- a) **Type IN E,SCH,ILL**

Borrowers with Memos

- a) **Memo Date > 0**

Claimed Returns

- a) **Memo Type LIKE CLAIM**

Where Search Training

Borrowers who have lost their card

- a) **Status = LC** (Whatever your status code is)

Borrowers with Financials

- a) **Owing > 0**

Borrowers who have joined e.g. in the last 3 months

- a) **Joined > Current Date – 3months**

Borrowers who have overdue

- a) **Issue Date Due < Current Date**

Borrowers not active for a year (or 3 years) etc.

- a) **Last Active < Current Date – 3 years**

Borrowers who have never borrowed

- a) **Total # of Loans = 0**

Borrowers whose registration has expired

- a) **Reg Exp. < Current Date**

Accounts sent in this month

- a) **History Type LIKE ACC**
- b) **History Date ≥ Start of Month**

Borrowers with Email addresses

- a) **Bor Email > 0**

Borrowers who live locally in the district

- a) **Post/Zip Code IN 6017,6018,6019** (or appropriate Postcode for the district)

Borrowers who DO NOT live locally in the district

- a) **Post/Zip Code ~~IN~~ 6017,6018,6019** (or appropriate Postcode for the district)

Where Search Training

Appendix 2: Other Useful Reports

Borrower

Borrower Counts including Borrower Type and Location: &bct.qrp or for schools &bctsch.qrp

- Count by Borrower Type and Location
- Count by Borrower Gender and Type
- Count by Borrower Suburb and Location
- School report includes Class as well.

Where parameters could be:

COUNT BY BORROWER TYPE AND LOCATION

	EAS	NOR	SOU	WES	Total
A	123	70	85	40	318
I	2	1	0	0	3
J	14	1	2	6	23
LS	2	0	4	0	6
YA	0	2	0	0	2
Total	141	74	91	46	352

COUNT BY BORROWER GENDER AND TYPE

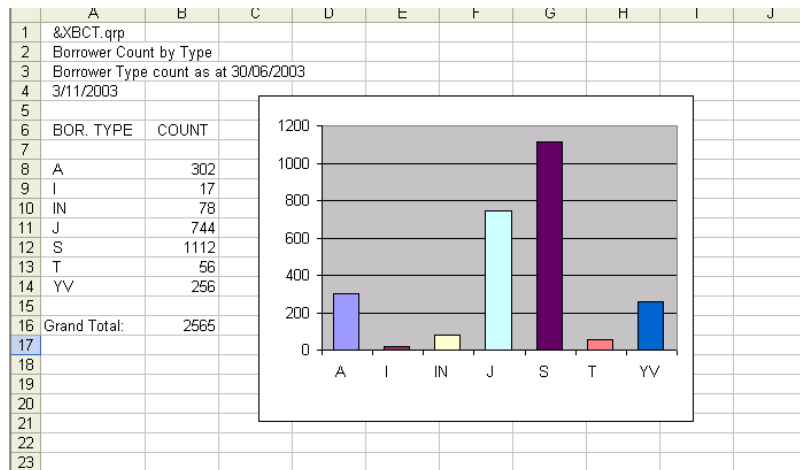
	A	I	J	LS	YA	Total
	1	3	0	5	0	9
F	159	0	13	1	1	174
M	158	0	10	0	1	169
Total	318	3	23	6	2	352

COUNT BY BORROWER SUBURB AND LOCATION

	EAS	NOR	SOU	WES	Total
	139	73	91	46	349
E	1	0	0	0	1
EC	1	0	0	0	1
SJ	0	1	0	0	1
Total	141	74	91	46	352

Where Search Training

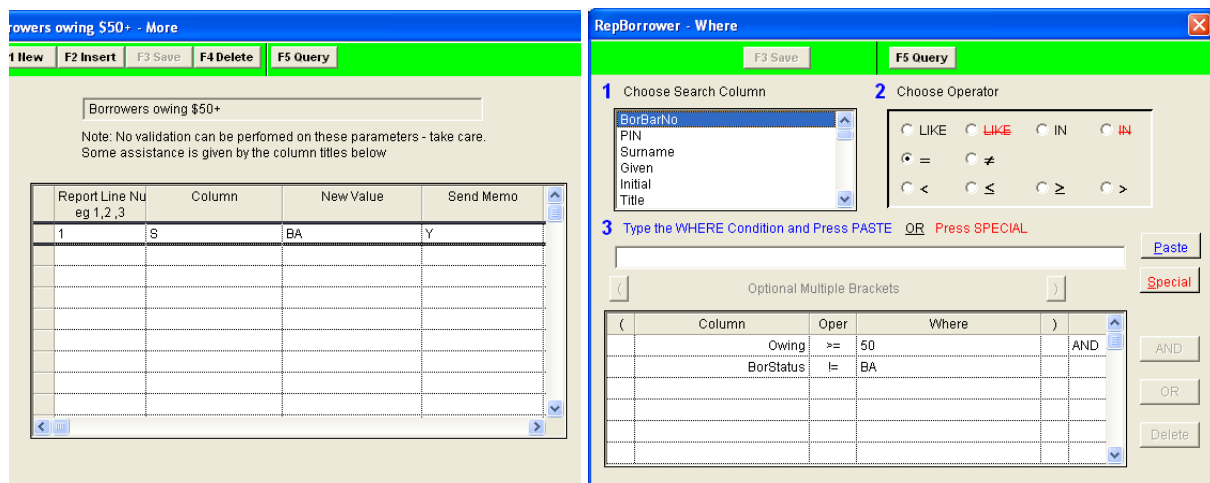
MS Excel Report - Counts by Borrower Type: &xbct.qrp



Automatic Borrower Field Update: &BORUPD.QRP

The Automatic Borrower Field Update enables mass changing of Borrower Types, Classes, Groups and Status' through the Report module. Details are changed through the **[F10] More** page.

You are able to change more than one area at once by adding these to the **[F10] More** page, each area to change will need a new Report Line Number (e.g. 1, 2, 3 or 4). The Column field determines which field you wish to change (T = Types, C = Classes, G = Groups and S = Status'). The New Value column features the changed data. There is also an option to attach a system generated memo to the Borrower record, the text for this is determined via the **Text for Letter** button on the RepBorrower screen.



The above screens show a way of changing the status of a Borrower who owes \$50+ into Banned.

Another use would be to change a Junior member into an Adult member when they turn 18. The More statement would list – Report Line: 1, Column: T, New Value: A, Send Memo: Y (The Text for Letter could say to Recheck address details and get borrower to resign acceptance of library rules). The Where statement would list – BorType = J AND BirthDate <= CurrentDate – 18 years. The memo generated will have a type of AUTOUPDATE.

Where Search Training

Value of the Collection

Count by Form, Stats: &stkfs.qrp

&stkfs.qrp		Stockitems by Stats					5/05/2003
Stock Item counts by form and stats code.							
Form	BK	COUNT	UNIQUE	ISSUES	RESERVES	RENEWALS	VALUE
Stats Code	AF	818	818	0	0	0	\$12,270.00
Stats Code	ANF	3301	3296	2	2	0	\$49,515.00
Stats Code	E	1	0	1	1	0	
TOTAL	BK	4120	4114	3	3	0	\$61,785.00
GRAND TOTALS		4120	4114	3	3	0	\$61,785.00

High Usage

There are 3 new report templates to count Stockitem usage within a time period specified with the 'where' statement. The report templates are designed to show items used more than 5, 10 or 20 times within a specified period. The report templates will list the title and the number of times used within the specified period.

- **&STKH5.QRP** - Shows items where count > 5
- **&STKH10.QRP** - Shows items where count > 10
- **&STKH20.QRP** - Shows items where count > 20

The reports are run against the Stock History table. Users that delete data from the Stock History table need to be aware of the limitations of results.

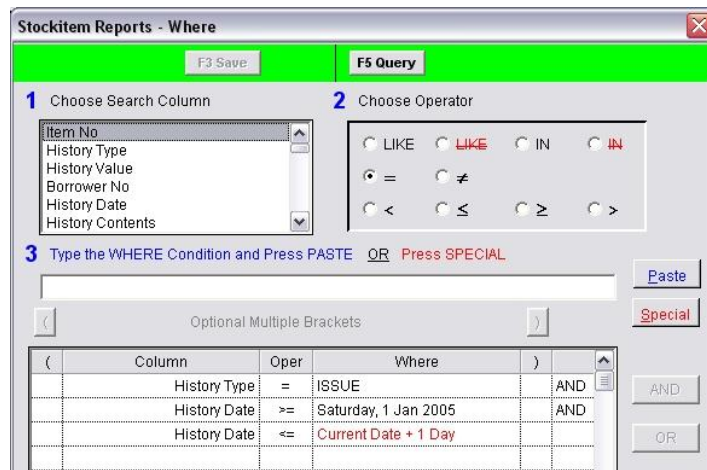
1. Set up the report in Stockitem Reports

The screenshot shows a window titled "RepStockitem - TREVOR at Chelsea Library (sqlbase 5.0) (B43 DB v5.0 INSTANCE:3)". The window has a menu bar with options: F1 New, F2 Modify, F3 Save, F4 Delete, F5 Query, F6 Print, F7 Where, F8 View, F9 Order. Below the menu bar is a table with the following columns: Report Stats Code, Create Fin (Y/N), Report Description, Report Type, and Template.

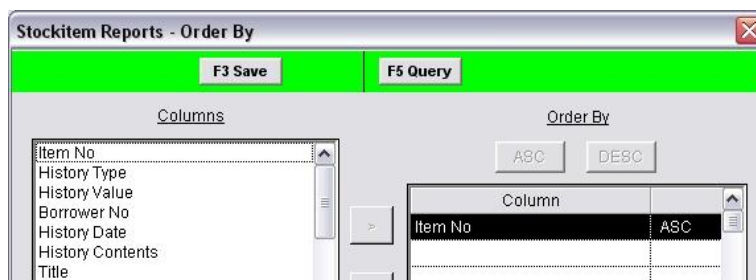
Report Stats Code	Create Fin (Y/N)	Report Description	Report Type	Template
	N	0,6,T,B	Spine Labels 3 Wide	&spine3.qrp
	N	6,8,T,B	Spine Labels 6 Wide	&spine6.qrp
	N	A11	PLAIN Item Debits (Barcode)	&stkpldb.qrp
	N	Cricket	Subject List	&stksubj.qrp
	Y	Delete History > 2 Years	Delete Item History (With)	&stkhisu.qrp
	N	High Usage Titles 1/1/2005 to 30/6/2005	Usage count >5	&STKH5.QRP
	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

2. Set up the **F7Where** search parameter

Where Search Training



3. Set up the **F9Order** (NOTE: MUST SORT BY Item No)



Sample Report

Stockitem No	Title	Issues
16904	Harry Potter and the Goblet of Fire / J.K. Rowling .	8
76156	International football book. No. 15 / edited by Stratton Smith.	8
980175221	Carol Bowen's microwave cooking for one & two / Carol Bowen	5
980187361	The best-kept secret / Emily Rodda	9
980223027	Prince Caspian: The Return to Narnia / C. S. Lewis	7
980384947	Possum Goes to School / Melanie Carter	5
980385501	Discovering worms / Jennifer Coldrey	10

Where Search Training

Location, Title, # No of items, Author Call No, Form &stkltln.qrp

Useful when listing multiple items e.g. Reading collections

Reading Room Resources			9/09/2004	
L				
Title	# items	Author	Call No.	Form
The ultimate Noah's Ark.	5	<i>Wilks, Mike.</i>	591 WIL	BK
The ultimate opponent.	1	<i>Raven, James.</i>	RAV	BK
The ultimate skateboard book.	1	<i>Cassola, Albert.</i>	796.22 CAS	BK
The ultimate wok & stir-fry cookbook : the best-ever step-by-step collection of wok and stir-fry recipes	7		641.5 ULT	BK

Where Search Training

Statistics

The Statistics that Amlib collect are selected from the Stats Params table, in Amlib navigate to **Main > Supervisor > StatsParams**. You may change descriptions and collection flags for any of these items but you may not alter the intrinsic value of a code i.e. 05 is always an issue even though you may give it a description of “loan” rather than “issue” The issue program has been set to add 1 to the 05 code set every time an issue is made.

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)	Hour (Y/N)
4	Foreign Iss	Y	N	Y	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y
5	Issues	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y
6	Renewals	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	N	Y	Y	Y	Y
7	Borrower V	Y	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y
10	Returns	Y	N	Y	Y	N	N	N	Y	Y	N	N	Y	Y	Y	Y
11	Foreign Re	Y	N	Y	Y	N	N	N	Y	Y	N	N	Y	Y	Y	Y
15	Reservation	Y	N	Y	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y
16	Satisfied Re	Y	N	Y	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y
17	Expired Re	Y	N	Y	Y	Y	Y	Y	Y	Y	N	N	Y	Y	Y	Y

The report names themselves will give you an indication of the report order parameters. The report template will explain the contents of the report.

TEMPLATE CODES
<ul style="list-style-type: none"> • &STAT1 – Summary by Year, Form • &STAT2 – Summary by Year, Month • &STAT3 – Summary by Year, Month, Day • &STAT4 – Summary by Year, Month, Day, Hour • &STAT5 – Details by Borrower Type • &STAT6 – Count by Location, Type, Borrower • &STAC – Location, Borrower Class, Form • &STAG – Location, Borrower Group, Form

Where Search Training

Where Parameters

These are set accordingly to the date range required. For example, just for the Month, for the Financial Year, for a Calendar Year etc.

- To set the dates for a Financial Year (e.g. 2002/2003 Financial Year)

The screenshot shows the 'Statistics Reports - Where' dialog box with the following configuration:

- 1 Choose Search Column:** Location, Trans Type (Issue,Ret), Trans Date, Trans Year, Trans Month, Trans Day.
- 2 Choose Operator:** LIKE, LIKE, IN, IN, =, ≠, <, ≤, ≥, >.
- 3 Type the WHERE Condition and Press PASTE OR Press SPECIAL:** A text input field with 'Paste' and 'Special' buttons.
- Optional Multiple Brackets:** ()
- Table:**

(	Column	Oper	Where)	
	Trans Date	>=	Sunday, 1 Jul 2007		AND
	Trans Date	<	Tuesday, 1 Jul 2008		AND
	Trans Type (Issue,Ret)	=	05		

- For a Calendar Year

The screenshot shows the 'Statistics Reports - Where' dialog box with the following configuration:

- 1 Choose Search Column:** Location, Type(Issue,Ret), Act. Date, Year, Month, Day.
- 2 Choose Operator:** LIKE, LIKE, IN, IN, =, ≠, <, ≤, ≥, >.
- 3 Type the WHERE Condition and Press PASTE OR Press SPECIAL:** A text input field with 'Paste' and 'Special' buttons.
- Optional Multiple Brackets:** ()
- Table:**

(	Column	Oper	Where)	
	Year	=	2002		AND
	Type(Issue,Ret)	IN	05,06,10,80		

- For a month

(	Column	Oper	Where)	
	Type(Issue,Ret)	=	05		AND
	Year	=	2003		AND
	Month	=	06		

Where Search Training

- For several months e.g. a Quarter the Operator IN could be used e.g. January, February, and March of 2003.

(	Column	Oper	Where)
	Type(Issue,Ret)	=	05	AND
	Year	=	2003	AND
	Month	IN	01,02,03	

Design Statistics Report

These depend on what format the report is to be displayed. Some examples are below:

Sample Statistics Reports

Counts – These can be gathered by Saved Where Searches (e.g. Stockitem/Item/Saved Where Searches) or from the Report Module - e.g. Borrower Counts or Stockitem Counts

Summary of the Total for all Statistics on the system (e.g. Total ILLs)

- Details: Sort by Location, Stats Type (Iss,Ret), Year - **&stat101.qrp**

EAS - Eastville		3/07/2001 to 28/06/2002	
	2001	2002	Total
004 - Foreign Issues	9	10	19
005 - Issues	27	28	55
006 - Renewals	3	9	12
007 - Borrower Visits	50	39	89
010 - Returns	31	28	59
011 - Foreign Returns	10	7	17
015 - Reservations	2	5	7
016 - Satisfied Reserves		2	2
018 - Cancelled Reserves		1	1
019 - Foreign Reserve		3	3
020 - Locn Transfers	3		3
050 - All Enquiries	177	204	381
051 - Opac Author Enq		1	1
056 - Opac Borrower		1	1
061 - Borrower Enquiries	86	66	152
062 - Stock Enquiries	78	116	194

- Details: Sort by Location, Type (Iss,Ret), Stats Code (Loans by Stats Code only) - **&stat620.qrp**

Where Search Training

<small>&stat620.qrp</small>	Details by Location, TransType, ItemStats	<small>29/07/2003</small>
Annual 2002		
<hr/>		
EAS - Eastville		
05 - Issues		
AF	Adult Fiction	21
ANF	Adult Non Fiction	25
ANFL	Adult Non Fiction Local	2
JF	Junior Fiction	1
JK	Junior Kindergarten	2
JNF	Junior Non Fiction	2
SP	Special Sample Collection	2
		Issues Total: 55
Eastville Total: 55		

Other Useful Statistics

- Summary by Month order by Location, Type (Iss, Ret), Year, Month: **&stats200.qrp**

EAS - Eastville			
05 - Issues			
	2002	2003	Total
March		20	20
September	5		5
October	4		4
November	3		3
Total	12	20	32

- Details by Location, Statistical Type, Borrower and Stats Code: **stat520.qrp**

EAS - Eastville				
05 - Issues				
A - Adult	AF	Adult Fiction		10
	ANF	Adult Non Fiction		10
	JF	Junior Fiction		2
	JK	Junior Kindergarten		1
	SP	Special Sample Collection		1
				Total: 24
J - Junior	AF	Adult Fiction		1
	JF	Junior Fiction		1
				Total: 2
YA - Young Adult	AF	Adult Fiction		1
				Total: 1
				Issues Total: 27
Eastville Total:				27

- Details by Location, Statistical Type, Stats Code & Form Code: **&stat526.qrp**

Where Search Training

EAS - Eastville			
91 - Del. Items			
BK - Books	AF	Adult Fiction	49
	ANF	Adult Non Fiction	42
	JF	Junior Fiction	19
	JK	Junior Kindergarten	12
	JNF	Junior Non Fiction	4
	Total:		126
CAS - Cassette	AF	Adult Fiction	4
	ANF	Adult Non Fiction	1
	JF	Junior Fiction	2
	Total:		7
LP - Large Print Books	AF	Adult Fiction	8
	ANF	Adult Non Fiction	1
	Total:		9
VID - Videorecording	AF	Adult Fiction	4
	ANF	Adult Non Fiction	1
	JF	Junior Fiction	2
	JK	Junior Kindergarten	1
	Total:		8
Del. Items Total:			150
Eastville Total:			150

Daily Stats

A useful report that shows the activity for the week by the hour is &stat4i.qrp. This will display the activity, showing hours and totals for each day.

EAS - Eastville (005 - Issues)								15/01/2002 to 9/07/2003
	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Totals
10:00 - 11:00			3					3
11:00 - 12:00	2	2		1	4	3	5	17
13:00 - 14:00				3				3
14:00 - 15:00			1					1
15:00 - 16:00		1	5	2		2		10
16:00 - 17:00		1	5	21	1	5		33
Total for Day	2	4	14	27	5	10	5	67

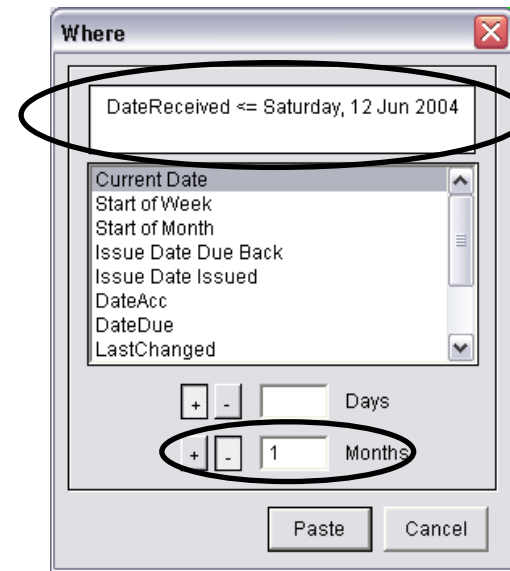
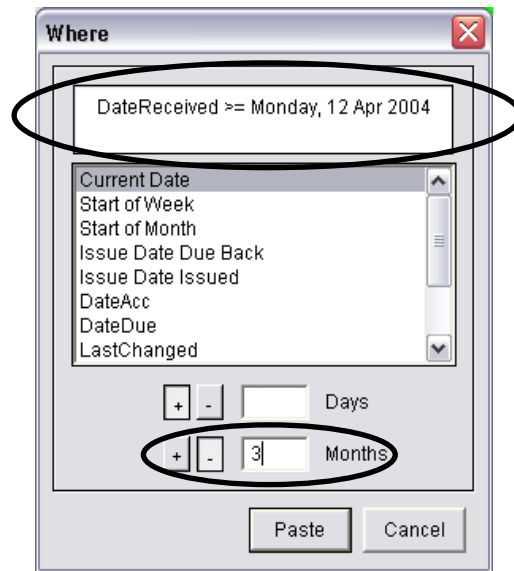
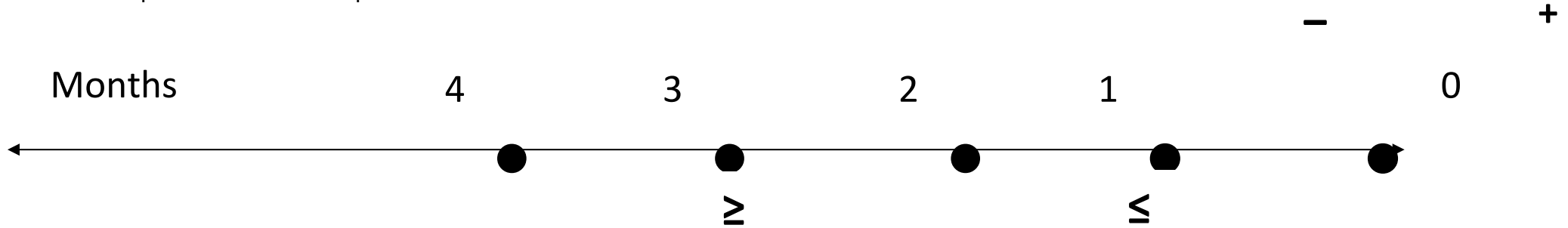
Once your Statistics Reports are set correctly, each time you then run the report in the future it is just a simple matter of altering the Where parameters for the current Month or current Financial year etc., Viewing, and Printing!

- Summary by Location, TransType, Year (&xstat10.qrp), Summary by Location,TransType, Year, Month, Day: **&xstat30.qrp**
- Details by Location, TransType, BorType, ItemForm: **&xstat50.qrp**
- Summary by Location, TransType, Year, Month: **&xstat20.qrp**

Appendix 3: Sample Date Line

(When using the **Special** Button)

For example: To create a report to extract data between the month 1st and 3rd month.



Where Search Training

<u>OPERATORS</u>	LIKE	LIKE	IN	IN	=	≠	<	<=	>	>=	F12
For Reports & Where Searches	Begins with	Does not begin with	Include these multiple codes e.g. J,A	Do not Include these multiple codes	Equal to...	Not Equal to...	Less than	Less than or Equal to	Greater than	Greater than or Equal to	PRINT SCREEN