

Periodicals Manual

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Periodicals Manual

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OVERVIEW

Periodicals are publications that are produced on a regularly scheduled basis. The frequency of publication varies with each title but most are published on a daily (for example: newspapers), weekly, monthly, bi-monthly, quarterly or annual basis. Some periodicals are published on an irregular basis (for example: 5 times a year), although this tends to be the exception.

Periodicals may also be referred to as serials, journals or magazines. Technically however, serials are continuing publications (whereas a periodical need not be). However, in general, any of these terms may be used interchangeably.

Subscriptions

Amlib has the ability to set up subscriptions on a variation of frequencies and also enables a site to receive unexpected periodicals. Using the system to keep track of subscriptions enables sites to be more accountable for the ever increasing funding directed to periodical acquisition.

Bibliographic Details

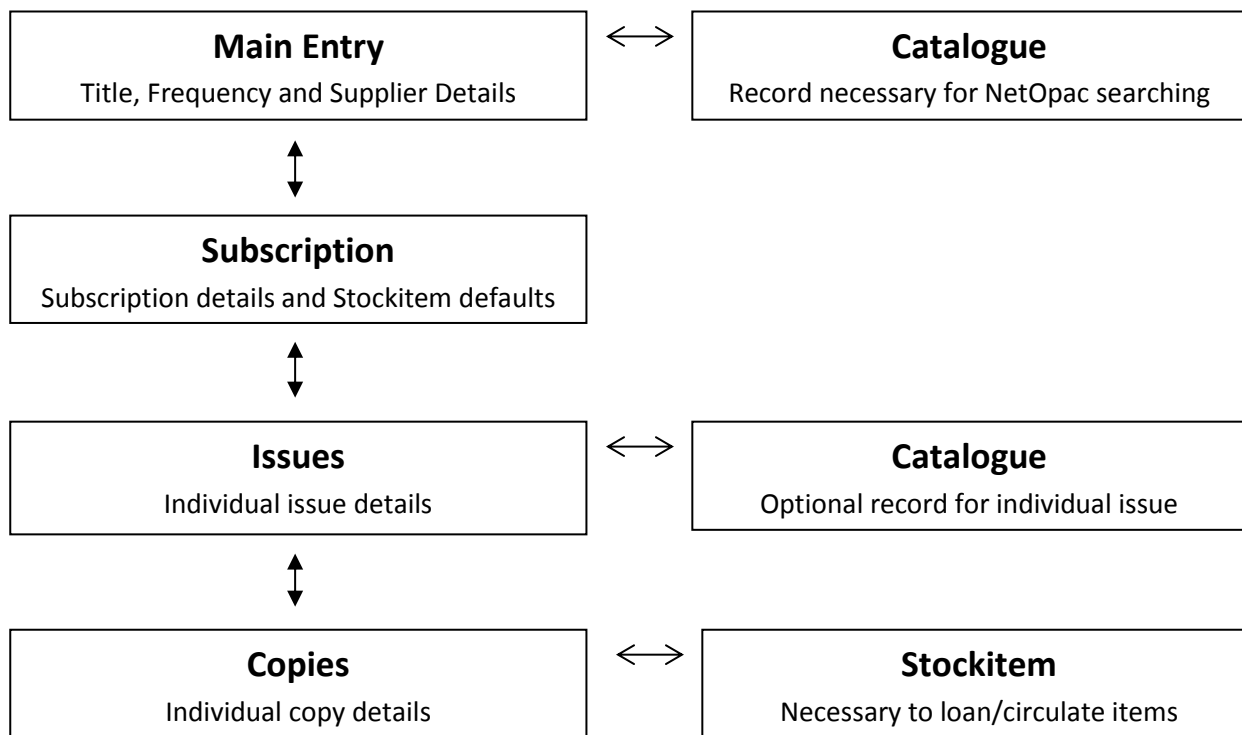
It also gives the site the ability to fully catalogue and enter Stockitem information on each issue so that they can be searched effectively. The level of this data entry depends very much on the periodical itself. Some periodicals are extremely important to certain clients, providing current information and must be able to be accessed efficiently by our membership. Other periodicals may be for recreational reading purposes with the main priority being circulation. You may decide not to create a catalogue entry and just circulate the item using a barcode provided at the time the publication was received. However, for a periodical to be searched within the *NetOpacs*, the Main Entry of the periodical must be attached to a catalogue record.

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PERIODICAL APPLICATION

Periodical entry is different to normal data entry in that the main entry usually contains subscription information and handles a hierarchy of entry at the periodical master, issue and copy level.

Catalogue entries can be created for the main entry record as well as separate catalogue entries for each issue if required. Copies are created automatically as they are received.



Periodicals can be viewed as having for (4) components:

Main Entry

This contains information common to all issues. This would include:

DESCRIPTION	EXAMPLE
Title and Previous Title Information	Time magazine
Brief holdings statement	Copies held since November 1999
Frequency of issues	The frequency/intervals at which the publication appears – for example: M (for Monthly)
Subject and notes pertaining to every issue of the periodicals. This is created through an attached Catalogue record	Wheels may have the subject heading of MOTOR CARS, as it is common for all issues, Time may have CURRENT EVENTS etc. It is advisable to have a subdivision of PERIODICALS – for example: MOTOR CARS - PERIODICALS

Subscriptions

Each periodical requires a Subscription line to be set up for each Subscription period.

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DESCRIPTION	EXAMPLE
Subscription information – for example: number of copies expected	2 copies of Wheels magazine, subscription starting 1 January 2010 and finishing 31 December 2010
Supplier information	EBSCO
Stockitem Defaults	Formatting of title, volume/issue and date details

Issues

These are the individual publications that relate to the Main Entry. They may have specific content information related to:

DESCRIPTION	EXAMPLE
Issue Description	Vol.1 No 1 January 1998
Subjects	An issue of Time may have an article on a useful topic (for example: Solar power) so subject headings can be added to an individual issue catalogue record

Copies

These are the items that members read, borrow, etc. They can be issued with barcodes to allow for easy circulation. There can be more than one copy of individual issues:

DESCRIPTION	EXAMPLE
Barcodes	356025557431
Status	N for Loan
Location	Resource Centre
Cost	\$4.00 Replacement cost
Floor Location	Display
Circulation Lists	Can be set to allow Reservations

NOTE: *NetOpac searches are usually set up as Keyword searches which require a Catalogue record to allow keyword creation. If Periodicals are set up without a Catalogue entry, they will not appear in NetOpac search results.*

Periodical Main Screens

The Periodical module has two (2) main screens for creating, searching and maintaining Periodical records. When a new Periodical Main Entry is created and inserted, the Subscription window then displays. Once the Subscription has been created, the Issue Details will display. Once the Issue Details are saved/updated, the Copy Details window will display.

SCREEN 1: PERIODICAL & COPY/RECEIPTS SCHEDULE

SCREEN 2: PERIODICAL SUBSCRIPTION & ISSUES

PARAMETERS

Before entering periodicals for the first time, certain tables, defaults and parameters can be checked/setup so that the subscription details and receipt of Periodicals is successful.

These include:

DEFAULT/TABLE	APPLICATION
Default Periodicals copy listing view (A)ll copies or (N)ot received	Supervisor
Use Cat worksheet for periodical cataloguing	Supervisor
Opac Form Descriptions	Supervisor
Form	Stockitem
Stats	Stockitem
Floor Location	Stockitem
Suppliers	Periodical/Finance
Publication Frequency Tables	Periodical
Stockitem Defaults	Periodical
Catalogue Defaults	Periodical

Supervisor

Installation: Default

It is possible to create Catalogue records for Periodical items in one of two ways: via the Worksheet or using the new Issue >> Catalogue Additions screen in the Periodicals module. The Default setting for this parameter is the Issue >> Catalogue Additions screen (**N**) but it can be changed to **Y** to reinstate the Worksheet as the primary method by which periodical Catalogue records are created:

The setting for this is contained in the Installation settings:

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

Description	Value
Only show reports for: (L)ocation, (G)roup, (O)perator, Show (A)ll	A
Path of spreadsheet	"c:\program files\microsoft office\office\exr
Reservation prompt on order placement (Y/N)	Y
Reservation prompt on order receipt (Y/N)	Y
SMTP Blind Carbon Copy e-mail address	john.smith@oclc.org
SMTP sender e-mail address	library@amlib.org
SMTP server login	
SMTP Server name or IP address	brick.oclc.com.au
SMTP server password	
SMTP server requires a login?	N
Spreadsheet: (E)xcel	E
System Language (ENGLISH or RUSSIAN Only)	ENGLISH
System supplied Order No (Y/N)	Y
<input checked="" type="checkbox"/> Use cat worksheet for periodical cataloguing	Y
Use Windows keyboard shortcuts instead of Amlib shortcuts (Y/N)	Y

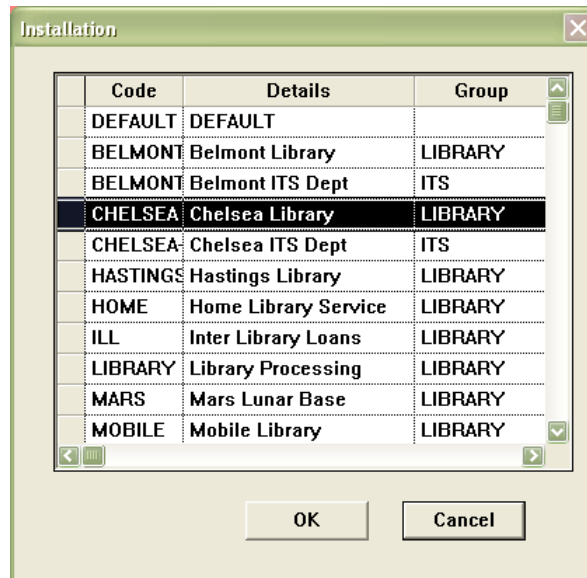
4. Scroll down and adjust the following settings:
 - a. **Default Periodicals copy listing view (A)ll copies or (N)ot received** – defaults to **N**
 - b. **Use cat worksheet for periodical cataloguing** – defaults to **N**
5. Type the desired setting into the Value column
6. Click the **F3 Save** button
7. Exit and restart the *Amlib* client for these settings to take effect

It is also possible to adjust these settings by individual Location.

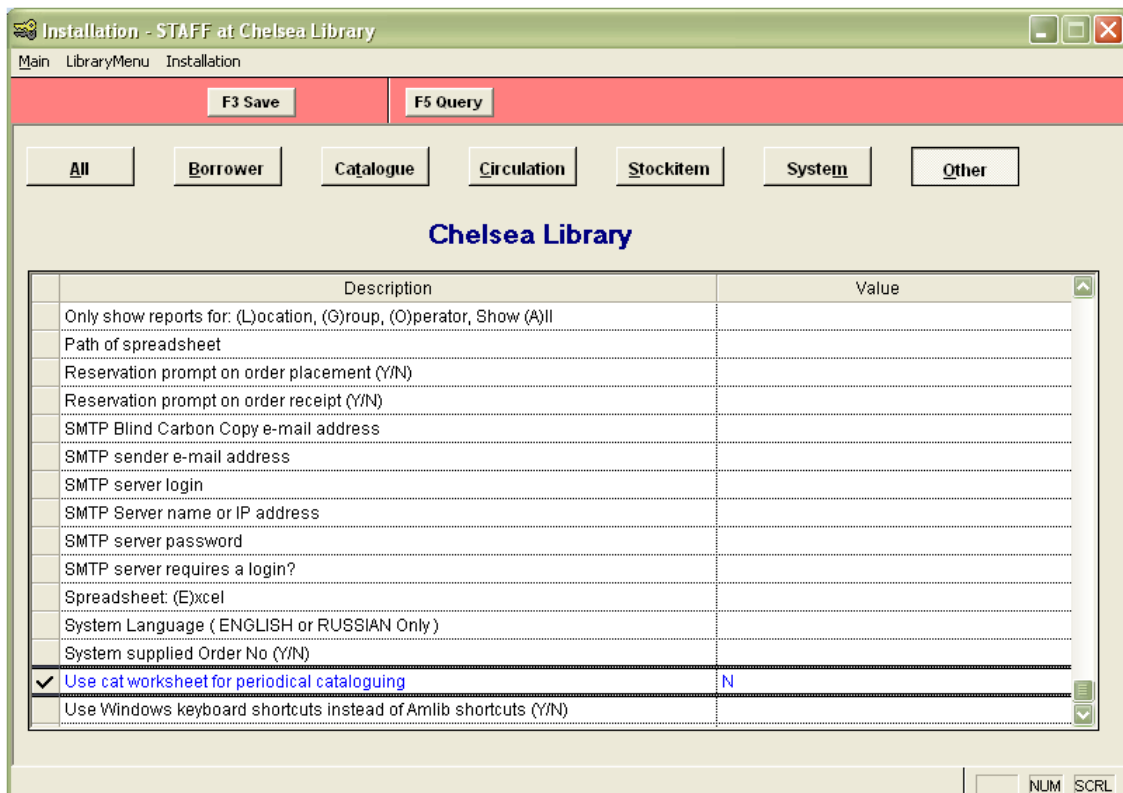
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Installation: By Individual Location

1. From the *Supervisor* module Installation screen, from the main menu, select **Installation > Choose Location** – the Installation location prompt will display:



2. Select a location (for example: **Chelsea Library**) and click the **OK** button
3. The Installation screen for that location will then open
4. Select the **Other** tab



5. Scroll down and adjust the following settings:

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- a. **Default Periodicals copy listing view (A)ll copies or (N)ot received** – defaults to **N**
- b. **Use cat worksheet for periodical cataloguing** – defaults to **N**

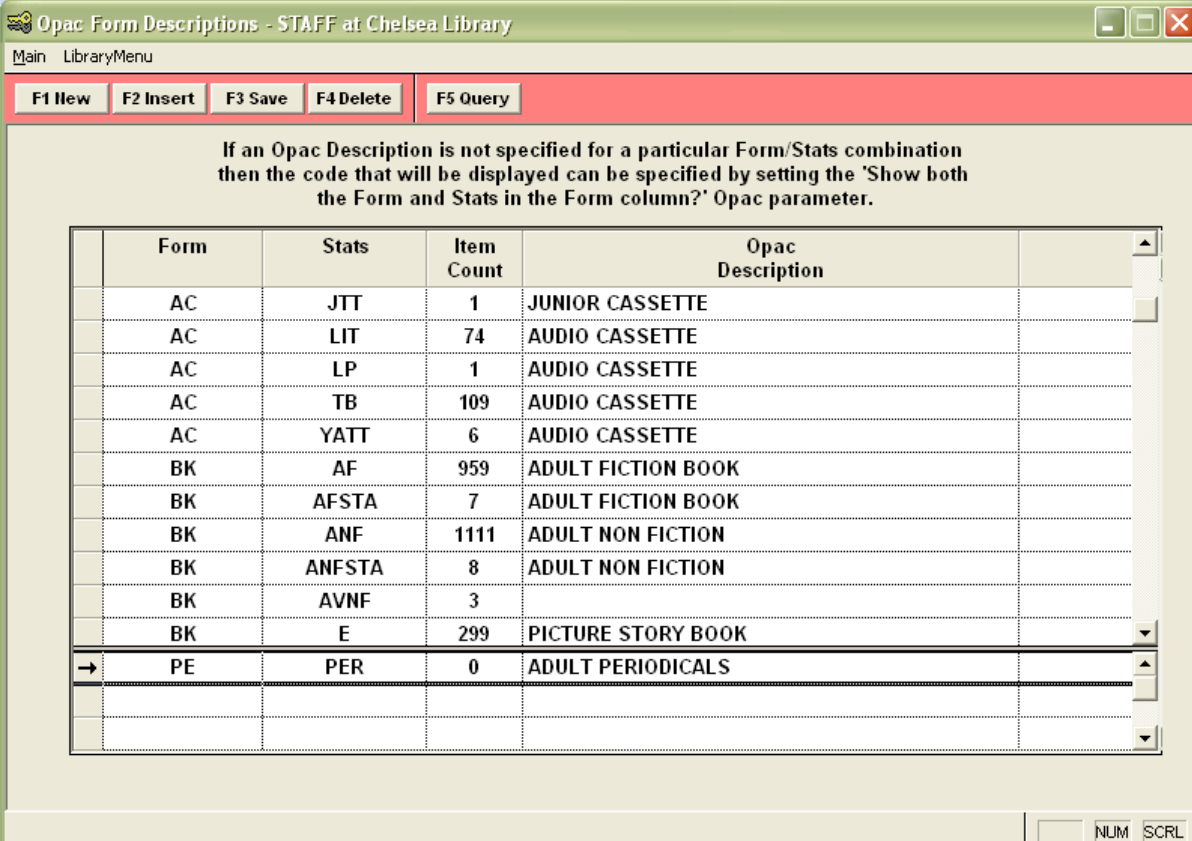
If you would like to use the DEFAULT setting for this parameter, then you can leave the setting in this table blank, otherwise adjust the setting as follows (these settings will apply only to that location)

6. Type the desired setting into the Value column
7. Click the **F3 Save** button
8. For these settings to take effect you must exit and restart the *Amlib* client

Opac Form Descriptions

If a new Stats Code or Form code has been created for Periodicals, a “user friendly” description can be added in the Opac Form Descriptions table to identify or locate the items.

1. Launch the *Amlib* client
2. Go to **Main > Supervisor > Opacs > OpacFormDesc** – the Opac Form Descriptions table will display:



If an Opac Description is not specified for a particular Form/Stats combination then the code that will be displayed can be specified by setting the 'Show both the Form and Stats in the Form column?' Opac parameter.

Form	Stats	Item Count	Opac Description
AC	JTT	1	JUNIOR CASSETTE
AC	LIT	74	AUDIO CASSETTE
AC	LP	1	AUDIO CASSETTE
AC	TB	109	AUDIO CASSETTE
AC	YATT	6	AUDIO CASSETTE
BK	AF	959	ADULT FICTION BOOK
BK	AFSTA	7	ADULT FICTION BOOK
BK	ANF	1111	ADULT NON FICTION
BK	ANFSTA	8	ADULT NON FICTION
BK	AVNF	3	
BK	E	299	PICTURE STORY BOOK
→ PE	PER	0	ADULT PERIODICALS

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To set a new Opac Form Description:

1. Click with the **F1 New** or **F2 Insert** button
2. Type in the following parameters:
 - a. Form code – for example: **PE**
 - b. Stats code – for example: **Four Weekly**
 - c. Opac Description – for example: **Adult Periodicals**
3. Click the **F3 Save** button when complete
4. Exit and restart the *Amlib* client for these settings to take effect

If an Opac Description is not specified for a particular Form/Stats combination, the code that will be displayed can be specified by setting the Opac Enquiry Option: **Show both the Form and Stats in the form columns?** parameter.

1. Go to **Main > Supervisor > Opacs > OpacEnqOptions** – the Opac Enquiry Options table will display:

Button	Description	Auth List Browse	Auth List Keyword	Direct Limit	Auth List Limit
F2	Title	Y	N/A	150	150
F3	Title	N/A	Y	150	150
F4	Subject	Y	N/A	150	150
F5	Subject	N/A	Y	150	150
F6	Combination	N/A	N	200	150
F7	Periodical	N/A	Y	150	150

Description	Value
Show an item as 'In Transit' if the Perm/Temp locations differ? (Y/N)	Y
Show both the Form and Stats in the Form column? (Y/N)	Y
Show the date due back for daily items on loan? (Y/N)	N
Show the following tag data in the Opac Item Display window	500
Show the last ### days of received items for Bor-Interest (Max Value)	365

2. Scroll down to the **Show both the Form and Stats in the form columns? (Y/N)** parameter

Form Descriptions can be set to display a User Friendly description. If set to N, only the Form code will display.

3. Set to **Y** or **N**
4. Click the **F3 Save** button when complete
5. Exit and restart the *Amlib* client for these settings to take effect

Stockitem

Stockitem - STAFF at Chelsea Library

Main Application Item References File

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

Item No: 32128 Cat Ref No: 35431

Query Via: Item Cat Keyword Any

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

Title: Vogue : January 2005.

Author:

Publisher: Greenwich, N.S.W. : Conde Nast, [1965?]-

ISBN/ISSN: 0042-8019 Vol Ed

Subject: Fashion - Periodicals.

Call Number: PER 646.305 Sts Code PER Form PE Call Set

Description:

Location: Perm CHELSEA Temp CHELSEA Floor Origin/Source

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

Received: 13/01/2005 Accessioned: 13/01/2005 Current Cost: 5.00

Group: LIBRARY

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

On Loan: II Due On Order: II Res: 0 Seq: 53 Set: 132 ?Size: 200

Last Modified: 03/06/2005 9:40:27 AM by TREVOR Issues: 0

Floor Location: NUM

Form codes, Stats codes and Floor Location usage can be set up on a site-by-site basis.

Form Code

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

Form Codes - STAFF at Chelsea Library

Main Application Window

F1 New F2 Insert F3 Save F4 Delete F5 Query F6 Print F7 Loan F8 Validtn F9 Display

Form	Description	Allow Loan	Floating ?	Cat Def Defined
DV	Digital Video	N	N	N
EQ	Equipment	Y	N	N
IDK	Desktop (ITS)	Y	N	N
ILP	Laptop (ITS)	Y	Y	N
IMO	Monitor (ITS)	Y	N	N
IP	ipad	Y	N	N
IPR	Printer (ITS)	Y	N	N
LH	Local History	N	N	N
NP	Newspapers Special Lib's	N	N	N
PA	Pamphlets	Y	N	N
PE	Periodicals	Y	N	N
RE	Reference	N	N	N
RP	Reports	Y	N	N
VI	Videos and DVDs	Y	N	N

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You would need to create a Periodical or Magazine Form code if it does not exist. Usually the loan rules governing an item are governed by the Stockitem Form code in conjunction with Borrower Type of the patron (this can vary between Locations).

To set a new Form code:

1. Click with the **F1 New** or **F2 Insert** button
2. Type in the following parameters:
 - a. Form = **PER**
 - b. Description = **Periodicals**
 - c. Allow Loan = **Y** (if periodicals are never to be borrowed, then set to **N**)
 - d. Floating = **N** (**Y** for periodicals with no fixed Permanent Location)
3. Click the **F3 Save** button when complete

You may want to consider having a separate Form code for Bound Periodicals if you bind them. Some libraries also have a separate Form code for Year Books.

Stats Code

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

Stats Code	Allow Loan	Floating ?	Stats / Collection Description	Price Group Code	Cat Def Defined
JPER	Y	N	Junior Periodical	PER	N
JREF	N	N	Junior Reference	REF	N
JSTA	Y	N	Junior Fiction Stack	JUN	N
JSW	Y	N	Junior Spoken Word	NB	N
JTB	Y	N	Junior Talking Book	NB	N
JTT	Y	N	Junior Tape And Text	NB	N
JVID	Y	N	Junior Video	NB	N
LH	Y	N	Local History	ANF	N
LIT	Y	N	Literacy	NB	N
LP	Y	N	Adult Large Print	FIC	N
LS	N	N	Local Studies	LS	N
NF	Y	N	Newspaper File	NB	N
PAM	N	N	Pamphlets	REF	N
PB	Y	Y	Adult Paperback	FIC	N
PER	Y	N	Adult Periodical	PER	N
PERSTA	Y	N	Periodical Stack	PER	N

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The Stats code for an item can be used for statistical gathering purposes. For example: **Periodicals**, **General Interest Periodicals**, **Informative Periodicals**, etc. The Stats code may also be used to indicate the intended target group of the periodical – for example: **Adult Periodical**, **Senior Periodical**, **Junior Periodical** and so forth.

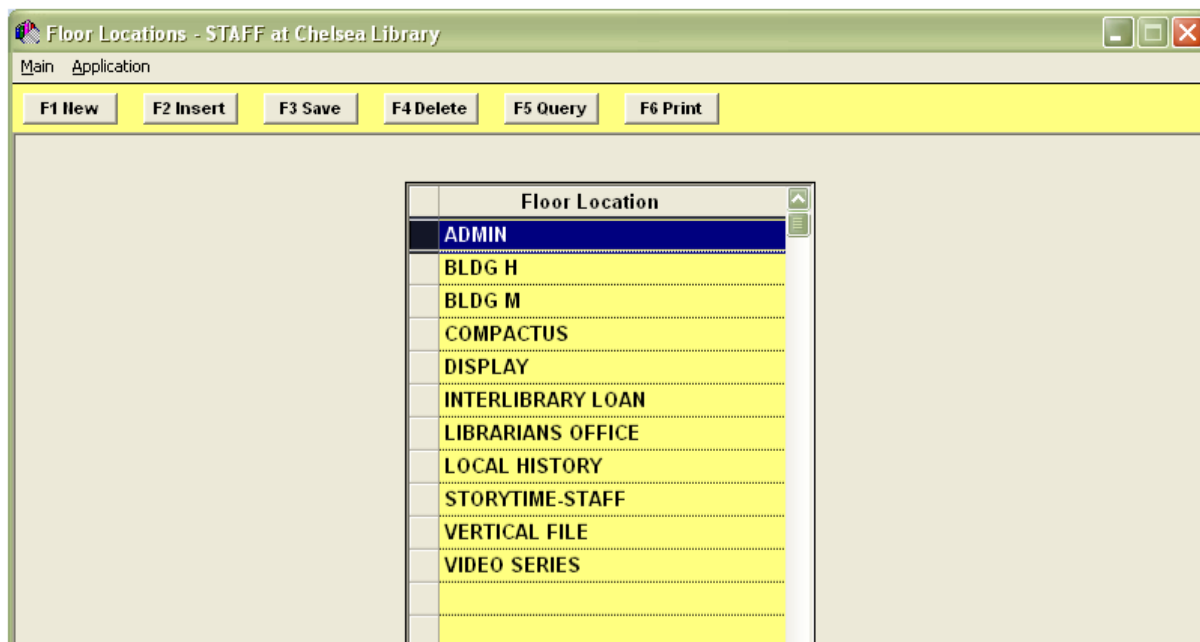
As such, the Stats code may also be used to govern the loan rules for an item.

To set a new Stats code:

1. Click with the **F1 New** or **F2 Insert** button
2. Type in the following parameters:
 - a. Stats Code = **PER**
 - b. Allow Loan = **Y** (if periodicals are never to be borrowed, then set to **N**)
 - c. Stats / Collection Description = **Adult Periodicals**
 - d. Price Group Code: Used to assign items with this Stats Code to a particular group for pricing and depreciation purposes (select: **Application** > **StockStatsGroup** to view/set Stats Group codes).
3. Click the **F3 Save** button when complete

Floor Locations

1. Launch the *Amlib* client
2. From any Stockitem module screen, select **Application** > **StockLocFloor** – the Floor Locations table will display:



Additional information can then be entered to assist in the location and access of materials – for example: **Periodical Display**, **Periodical Boxes**.

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Please Note: You are able to set up the Stockitem defaults so that codes are automatically inserted into the copies when they are received.

To set a new Floor Location:

1. Click with the **F1 New** or **F2 Insert** button
2. Type in the Floor Location – for example: **Periodical Boxes**
3. Click the **F3 Save** button when complete

Periodical

Suppliers

1. Launch the *Amlib* client
2. Go to **Main > Periodicals > Suppliers** – the Suppliers screens will display:

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To see a complete list of current Suppliers:

1. Select the **F5 Query** button – the Supplier List will display:



The screenshot shows a window titled "Supplier List - 18 rows" with a menu bar containing "Main", "Table", and "References". The window displays a table with the following columns: Supplier No, Company, Lead Time (days), Payment Terms, and Postal Address. The table contains 18 rows of data, including suppliers like ALIA, AMAZ, AUSLIB, AUST, AUSTGEO, DON, DYM, INFOVISION, JAMBEN, LIB, MARS, MASON, NATI, PCW, QLD, SEVEN, UNK, and WALS.

Supplier No	Company	Lead Time (days)	Payment Terms	Postal Address
ALIA	ALIA - Australian Library and Information Assoc.	30	365	P.O. Box E441, Kingston , ACT, 2604
AMAZ	Amazon.com, LLC	28	30	1111 Any Street, Any Town, Nebraska, 353535
AUSLIB	Auslib Press Pty Ltd	60	365	P.O. Box 622, Blackwood , South Australia, 5051
AUST	Australian Book Review	30	365	Suite 3, 21 Drummond Place, Carlton, 3053
AUSTGEO	Australian Geographic	120	365	Subscriptions Department, P.O. Box 321, Terry Hill
DON	Donation	1	1	Donation
DYM	Dymocks Bookshop	4	30	PO 1253, MELBOURNE
INFOVISION	InfoVision Technology Pty Ltd	1	7	1/27 Melverton Drive, HALLAM VIC
JAMBEN	James Bennett Pty Ltd	2	21	Locked Bag 537, FRENCHS FOREST NSW
LIB	Libros Library Supplies	4	30	4/46 Harries Road, Coorparoo, Queensland, 4151
MARS	Marshall Cavendish	30	30	5/19 Rodborough Road, French's Forest
MASON	Mason's Book Centre	2	30	Subscriptions Department, 5 Hercules Street, Tull
NATI	National Library of Australia	30	365	Canberra, ACT
PCW	PC World Enterprises	30		10 Smith Street, TOORAK
QLD	Quality Library Distributors	4	30	P.O. Box 66, Noosa Heads, Queensland, 4567
SEVEN	SEVEN SEAS STAMPS	30	30	11/98 Old Pittwater Road, Brookvale , NSW, 2100
UNK	Unknown	1	1	Unknown
WALS	B.H. Walshe & Son	30	30	7 Lewis Street, Coburg, Victoria, 3058

2. To print a Report on your suppliers, from the Supplier List menu select **Table > Report** – the list will display in the Report View screen
3. Click the **print** button to print the list

To search for a particular supplier:

1. Type the relevant information into any of the fields
2. Click the **F5 Query** button

Once a Supplier record is displayed, it is possible to edit the existing contact information:

1. Alter the details as required
2. Click the **F3 Update** button

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To create a new supplier for the system:

1. From the main menu, select **Supplier > New Supplier** – this will place the screen into creation mode (the **F2 Insert** button will become active)
2. Enter all the information that you have for the supplier – some of the details that can be entered include: address, telephone number, fax, email address, contact person, number of days for lead-time and payment
3. Click the **F2 Insert** button when complete

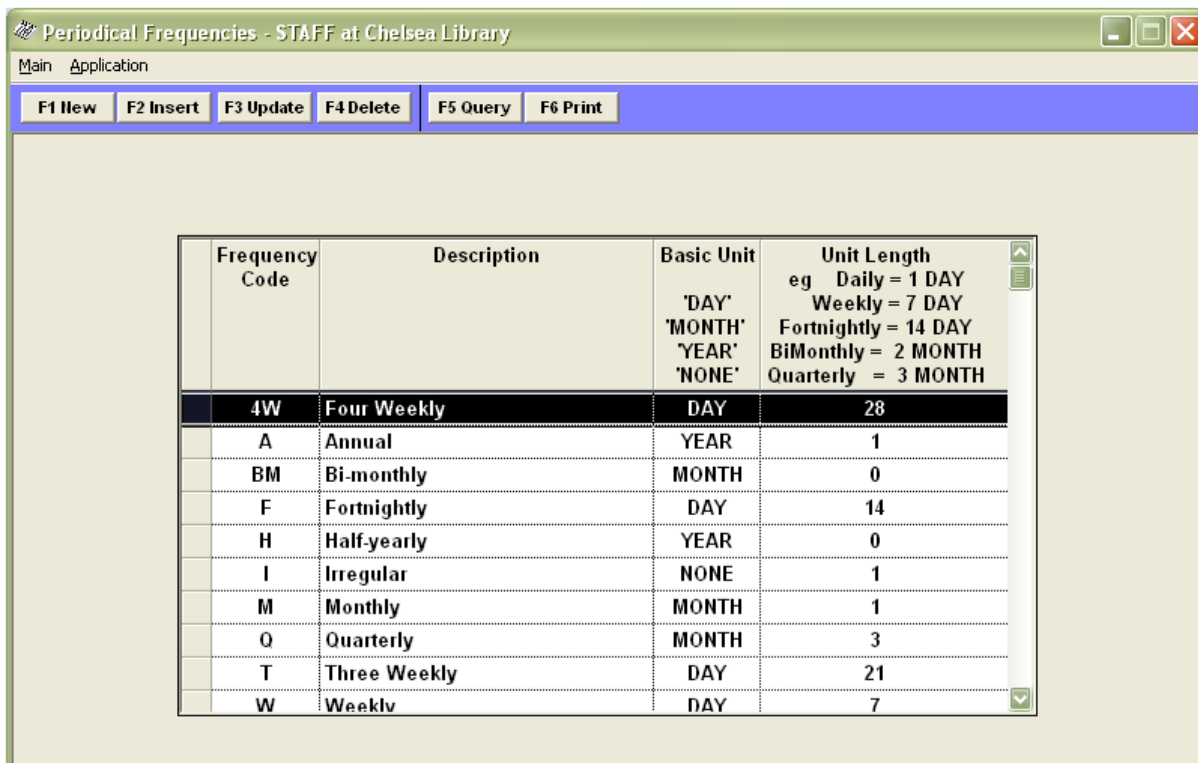
Please Note: These suppliers are available for both the Order and Periodical applications.

Periodical (Publication) Frequency

The Periodical (Publication) Frequency table is used when the system calculates the number of Issues to generate, when saving the Subscription details. If the table is not setup properly, the number of Issues generated will be incorrect.

1. Launch the *Amlib* client
2. Open the Periodicals module
3. From the main menu, select **Transactions > Pub Frequency** – the Periodical Frequencies table will display

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To set a new Frequency Code:

1. Click with the **F1 New** or **F2 Insert** button
2. Type in the following parameters:
 - a. Frequency Code – for example: **4W**
 - b. Description – for example: **Four Weekly**
 - c. Basic Unit – for example: **DAY**
 - d. Unit Length – for example: **28**
3. Click the **F3 Save** button when complete

FREQUENCY	DESCRIPTION	BASIC UNIT	UNIT LENGTH
Annual	Occurring once a year	YEAR	1
Biennial	Occurring every 2 years	YEAR	2
Bimonthly	Occurring every 2 months	MONTH	2
Fortnightly	occurring every 14 days	DAY	14
Quarterly	Occurring every three months or alternatively set to be received .25 of a year	MONTH	3
Irregular	Set number of issues throughout the year	NONE	1

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Catalogue Defaults

This screen allows you to set the MARC Tags that will be used when creating a brief catalogue record from the Periodicals module. Once the defaults are set, this screen is usually accessed only if the defaults need to be changed.

1. Launch the *Amlib* client
2. Open the Periodicals module
3. From the main menu, select **Transactions** > **CatalogueDefaults** – the Periodical Catalogue Creation Defaults screen will display:

This screen allows the tags to be altered so as to be consistent with other catalogue records on the system – for example: Notes Tag being **500** or **520**.

4. Alter tags to be used for the **Title**, **Class**, **Subject Heading**, **Number (ISSN)** and **Notes** fields – a list of Tags and their Descriptions appears in a table on the right-hand side of the screen
5. Click the **F3 Update** button when complete

Stockitem Defaults

Set when creating a Subscription for the Periodical. It can be set at the Copy Level. This ensures that when the copy is received the correct Stockitem Details are displayed – for example: **Cost**, **Location**, etc.

- See [Subscriptions](#) for more information

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MAIN ENTRY SCREEN

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

FIELD	EXPLANATION
Title	Enter the Title of the Main/Master Periodical
Prev	If the Title changes, the previous title displays in this field
ISSN	If the ISSN is known, enter it here.
Curr Supplier	Displays the Supplier of the current Periodical. (start date less than today and end date greater than today) It will not show a Supplier if there are no CURRENT subs, even if there are still other non-current subscriptions for the periodical.
Brief Holdings Statement	Available to Opac users. This can explain which issues are held or where they can be found. Search by single word only.
Lib Group	Displays the Library Group for the Periodical. If Group security is applied, permissions in relation to Periodicals need to be set. Most sites do not apply security and have the same Group for all locations.
Form	Enter the Form Type code, which will usually set the borrowing parameters. If the code is not known, press . <Tab> for a list of codes.

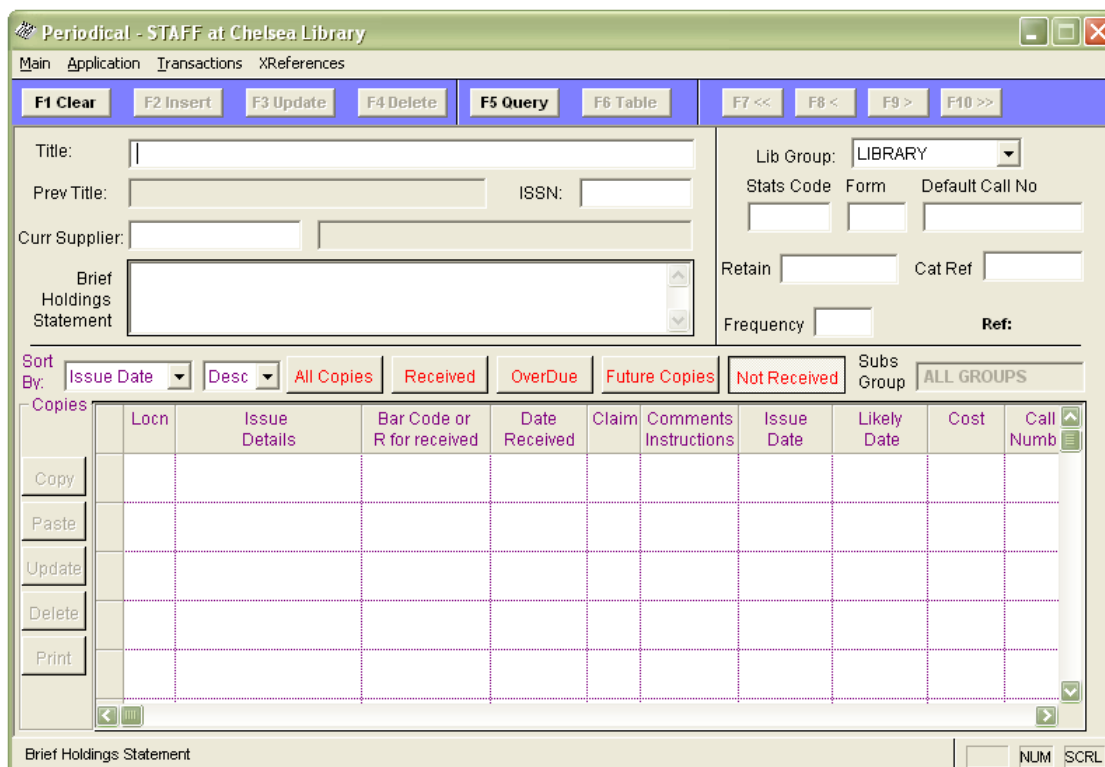
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Stats Code	Enter the Stats code. If the code is not known, press . <Tab> for a list of codes.
Default Call No	(Optional) The Stockitem will automatically receive this call number, unless a catalogue entry is created for the Main Entry or Issue.
Retain	How many issues to retain when the facility of mass deletions is included in the module. (For example: this particular monthly periodical you may wish to retain only the last two years, in which case enter: 24). You can type free text- for example: 3 months
Cat Ref	Catalogue Number from the Catalogue details, if created.
Frequency	The Frequency, which will determine when copies of issues are due to be received. If the code is not known, press . <Tab> for a list of codes.

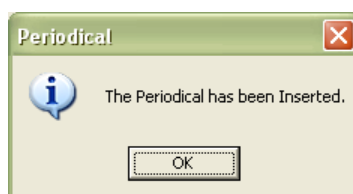
MAIN ENTRY CREATION (NO CATALOGUE RECORD)

Please Note: Periodical records that are not linked to a Catalogue record cannot be searched on the NetOpacs.

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



3. From the Periodical menu, select **Transactions >New Periodical** – the Periodical screen will go into creation mode (the **F2 Insert** button will become active)
4. Enter the main entry details – no Cat Ref to be entered
5. Click the **F2 Insert** button when complete – a prompt with the following message will display:
The Periodical has been Inserted.



6. Click the **OK** button

You will then automatically be transferred into the Subscription screen where details of the subscription can be entered.

MAIN ENTRY/CATALOGUE CREATION

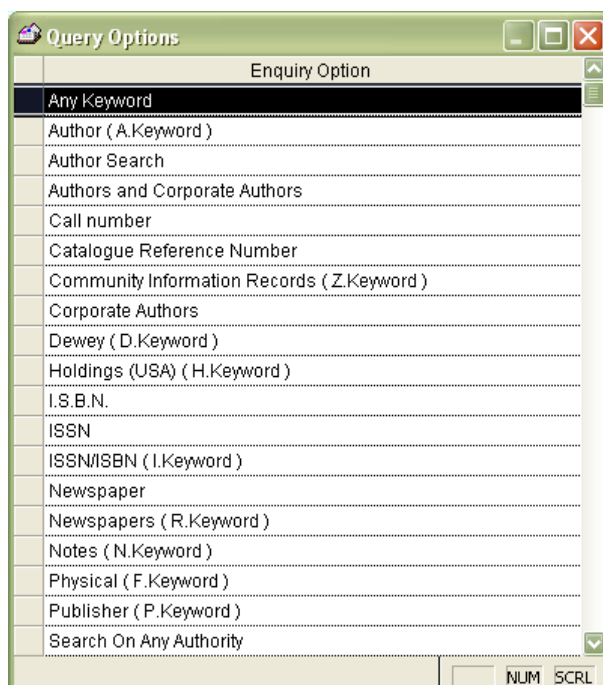
A Catalogue can be created for the Main/Master Periodical record in a variety of ways:

1. It can be created via an Import from a cataloguing agency (for example: *SCIS*, *KINETICA*, *Z39.50*)
2. It can be created in the Catalogue application as part of a manual record creation – for example: using Work Sheet/Lead Thru
3. It can be created in the Periodical module main menu: **Transaction** > **CreateCatalogue** (this can be brief details, which can then later be updated by Refreshing from Catalogue record using the **XReference** menu)

Option 1: From an Import/Catalogue Application

Use an Import/Catalogue application, to create a Catalogue record for the main Periodical record. This Catalogue record can then be used in the creation of the Periodical Main Entry. This method can also be used to create a Periodical Main Entry for any existing Catalogue record.

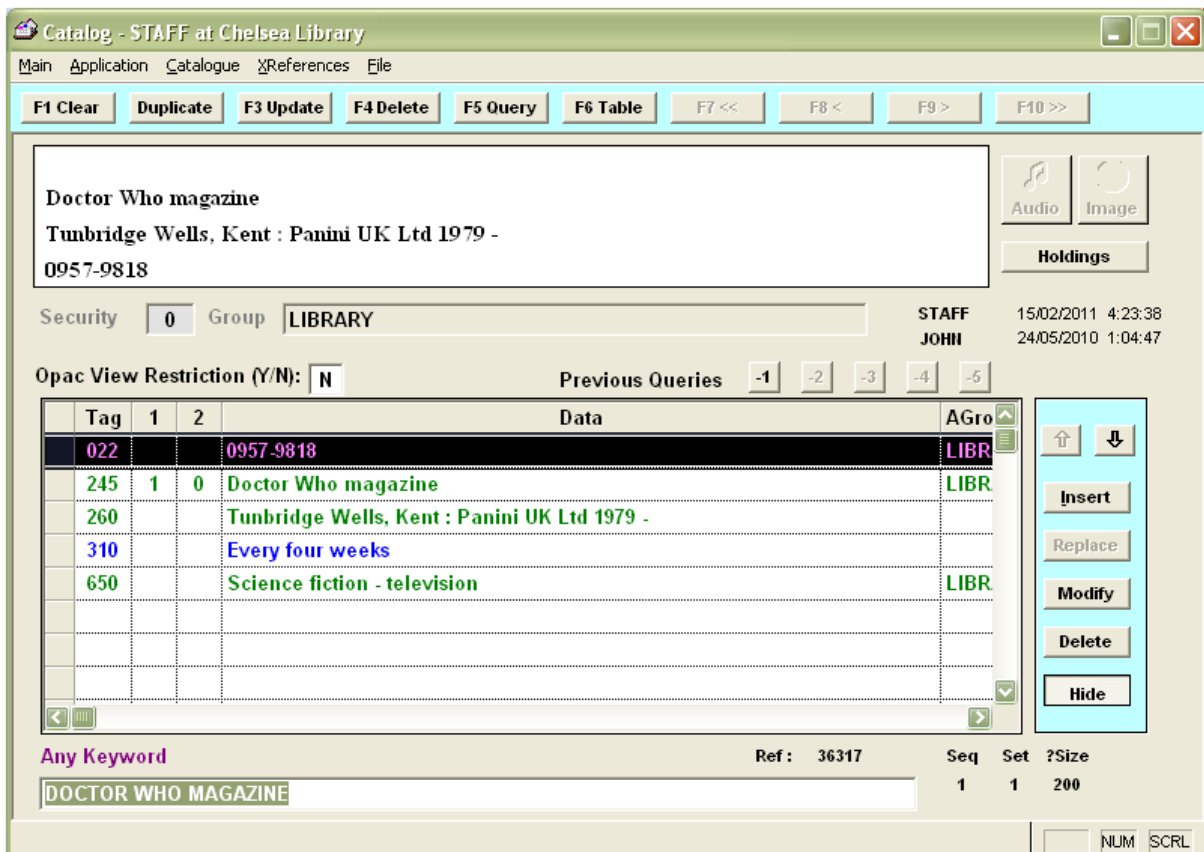
1. Launch the *Amlib* client
2. Import a catalogue record via the **Main** > **Authorities** > **MarcTakeUp** facility (see separate instructions)
3. Go to **Main** > **Catalogue** > **Catalogue** – the Catalogue screen will display
4. Type in a Search Term
5. Click the **F5 Query** button – the Query Options dialogue box will display:



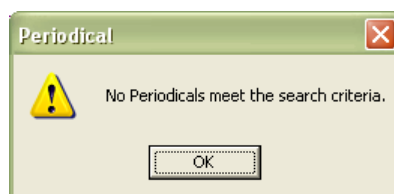
6. Select an Enquiry Option (using **double-click** or **click** and then **<enter>**) – for example: **Any Keyword**
7. A Catalogue List will then display

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- Double-click on an entry to bring up the actual Catalogue record (if there is only one matching record, the entry will display automatically)



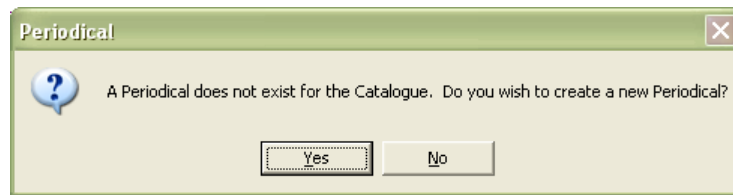
- From the Catalogue module main menu, select **XReference > Periodicals** – you will automatically be taken into the Periodical module
- If there is no Periodical record linked to this Catalogue record, a prompt will display with the following message: **No Periodicals meet the search criteria.**



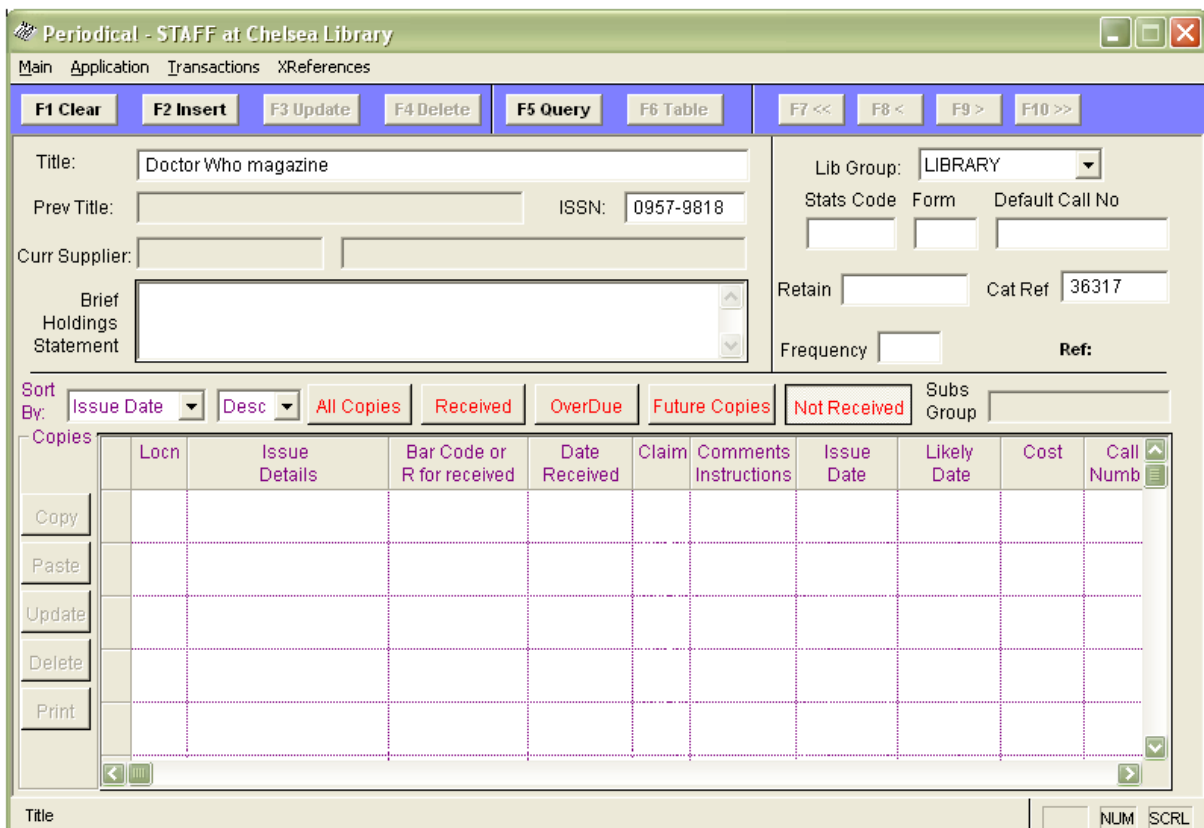
- Click the **OK** button

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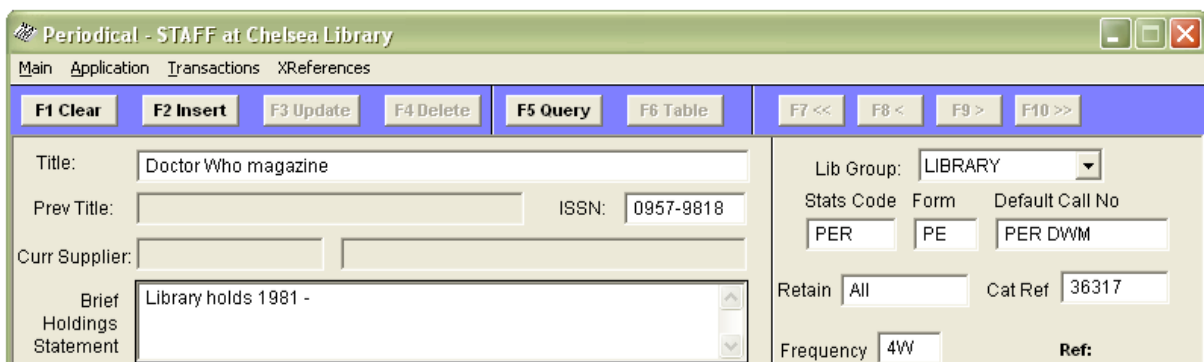
12. A prompt will display with the following message: **A Periodical does not exist for the Catalogue. Do you wish to create a new Periodical?**



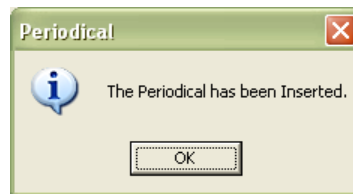
13. Clicking the **Yes** button will result in the display of the Periodical screen in creation mode with certain details already completed



14. Additional details may then be added including **Form, Stats Code and Frequency**:



15. Click the **F2 Insert** button when complete – a prompt will display with the following message: **The Periodical has been Inserted.**

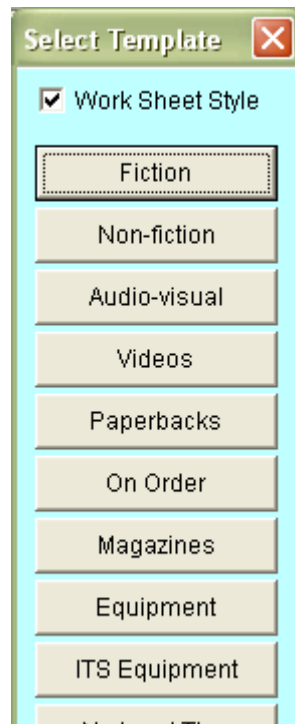


16. Click the **OK** button

You will then automatically be transferred into the Subscription screen where details of the subscription can be entered.

Option 2: Manual Catalogue Entry

1. Launch the *Amlib* client
2. Go to **Main > Catalogue > Catalogue** – the Catalogue screen will display
3. From the main Catalogue menu, select **Catalogue > CatalogueCreate** – the Select Template dialogue box will appear:

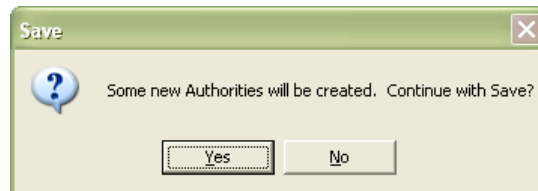


4. You may first wish to set the Catalogue Lead Thru (**Application > CatLeadThruSets**) for **Magazines** before entering your first periodical, if you plan to use Catalogue Lead Thru or Worksheet method of entering data
5. Create a manual Catalogue record as usual

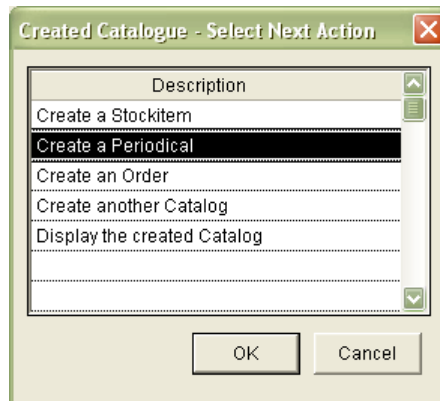
Amlib Periodicals Manual

Tag No	1	2	1 - a ISSN																	
022			0957-9818																	
245	1	0	Doctor Who magazine																	
260			Tunbridge Wells, Kent :	1979 -					Panini UK Ltd											
310			Every four weeks																	
650			Science fiction	television																

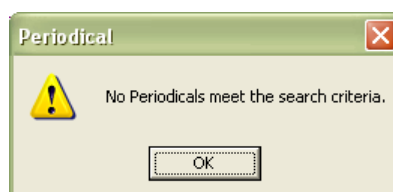
6. Click the **F3 Save** button when complete
7. At this point a prompt with the following message may display: **Some new Authorities will be created. Continue with Save?**



8. Click the **Yes** button – the Created Catalogue – Select Next Action prompt will then display:

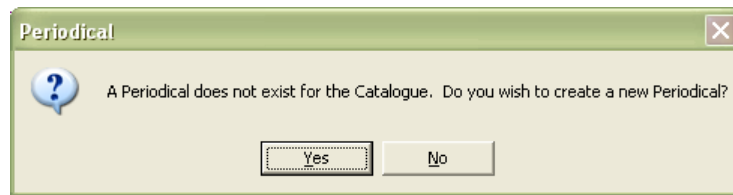


9. Select **Create a Periodical** and click the **OK** button – you will automatically be taken into the Periodical module
10. If there is no Periodical record linked to this Catalogue record, a prompt with the following message will display: **No Periodicals meet the search criteria.**

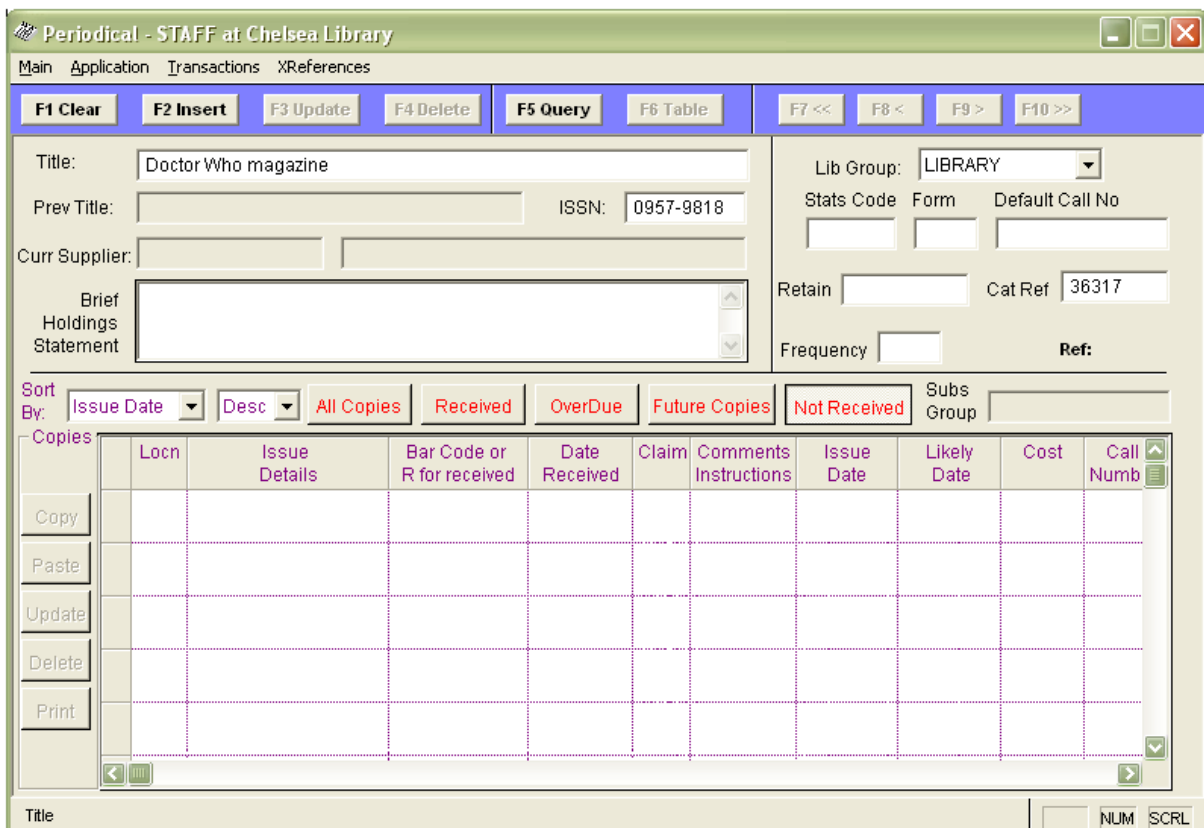


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11. Click the **OK** button – a prompt with the following message will then display: **A Periodical does not exist for the Catalogue. Do you wish to create a new Periodical?**

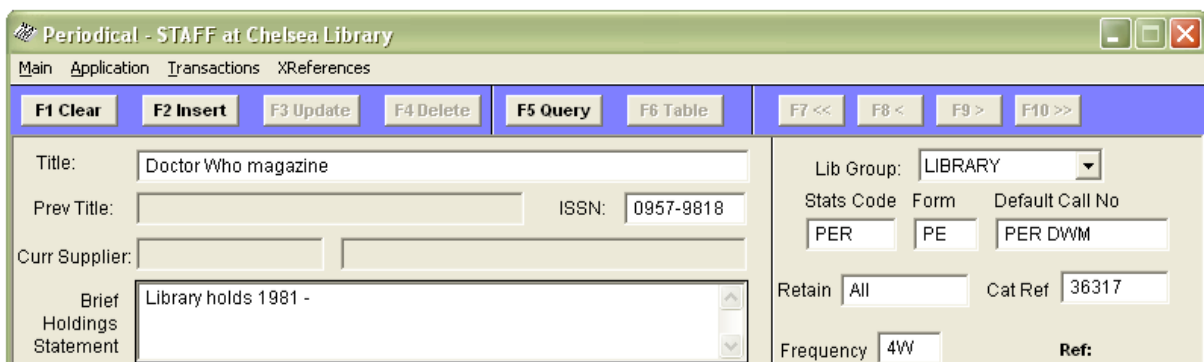


12. Clicking the **Yes** button will result in the display of the Periodical screen in creation mode with certain details already completed:

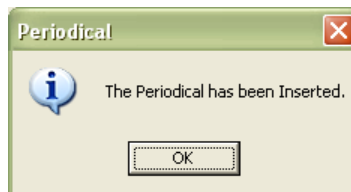


Copies	Locn	Issue Details	Bar Code or R for received	Date Received	Claim	Comments Instructions	Issue Date	Likely Date	Cost	Call Num
Copy										
Paste										
Update										
Delete										
Print										

13. Additional details may then be added including Form, Stats Code and Frequency:



14. Click the **F2 Insert** button when complete – a prompt with the following message will display: **The Periodical has been Inserted.**



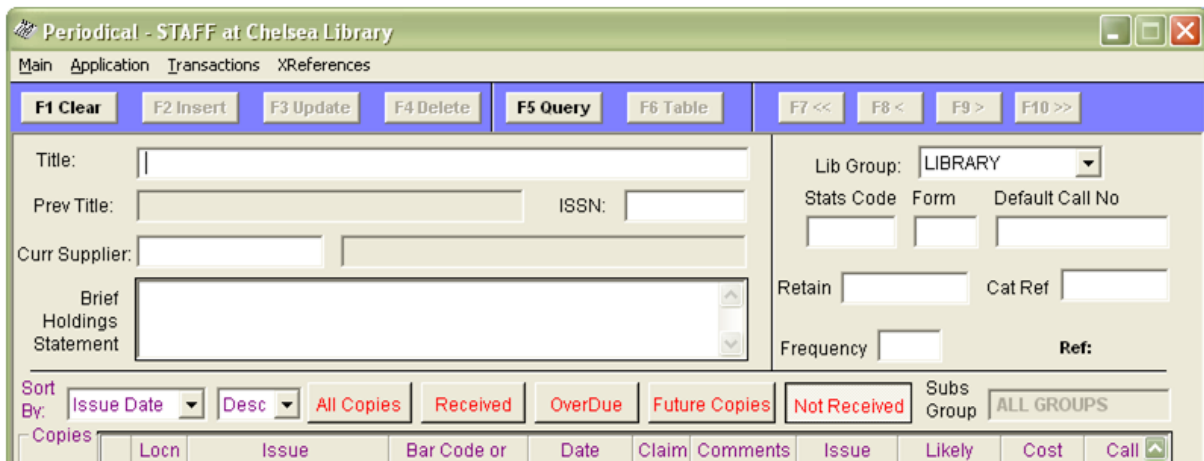
15. Click the **OK** button

You will then automatically be transferred into the Subscription screen where details of the subscription can be entered.

Option 3: From the Periodical Application

Create a Catalogue from within the Periodical module.

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



3. From the Periodical menu, select **Transactions > CreateCatalogue**
4. Depending on your Installation settings ([see above](#)), either a Issue >> Catalogue Additions screen will display or the Catalogue Work Sheet

Issue >> Catalogue Additions Method

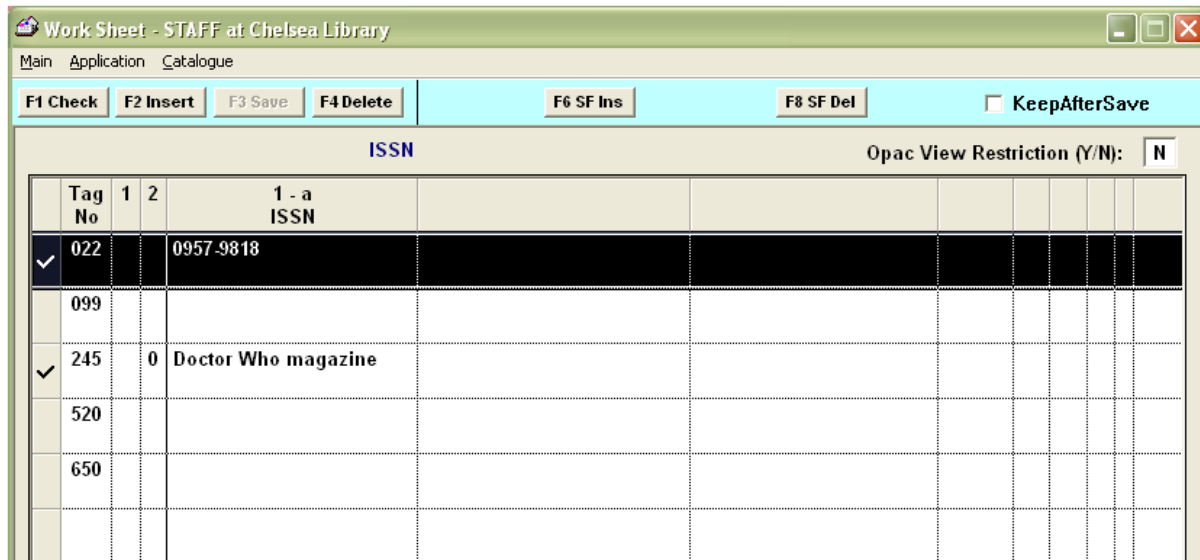
1. The Issue >> Catalogue Additions screen is displayed with the basic information from the periodical record
2. Additional tags may be entered by ticking the appropriate Use box and adding in the Data (this screen uses the [Catalogue Defaults settings created earlier](#))

DO NOT ENTER NEW SUBJECT HEADINGS HERE AS THIS SCREEN IS NOT LINKED TO THE AUTHORITY MODULE AND SUBJECT HEADINGS CANNOT BE CHECKED FROM HERE

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Work Sheet Method

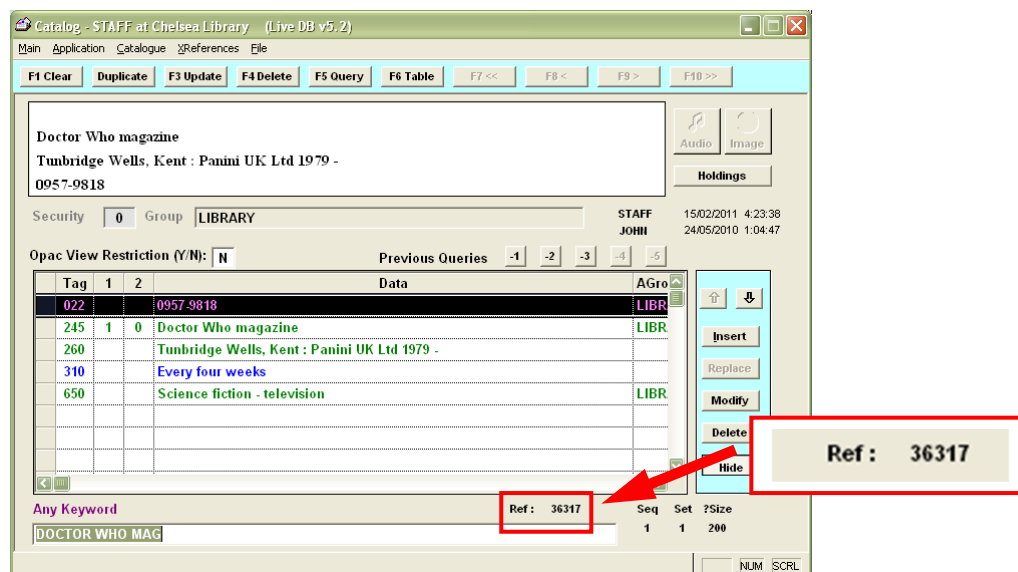
1. The catalogue worksheet is displayed with the basic information from the periodical record
2. Additional tags may be entered using the **F2 Insert** button
3. Click the **F3 Save** button when the record is complete



Linking the Periodical to the Catalogue

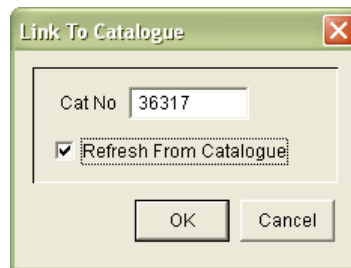
It is possible to link a previously created Periodical record to a previously created Catalogue record.

1. Launch the *Amlib* client
2. Go to **Main > Catalogue > Catalogue** – the Catalogue screen will display
3. Search for a catalogue record via **F5 Query** button
4. Take a note of the Catalogue record Ref number – in this example it is: **36317**

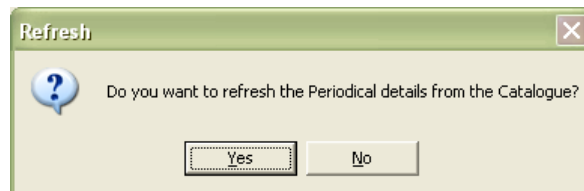


5. Go to **Main > Periodicals > Periodical** – the Periodical screen will display

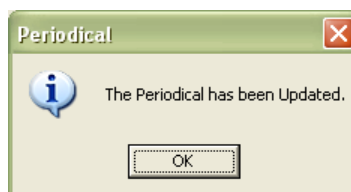
- From the main Periodical menu, select **Transactions > LinkToCat** – the Link to Catalogue prompt will display:



- Type in the Cat No noted earlier (the Ref in the Catalogue record) – for example: **36317**
- Select the **Refresh From Catalogue** option to update your Title and ISSN information*
- Click the **OK** Button
- The Cat No will be inserted as the Cat Ref in the Periodical Main Entry
- Click the **F3 Update** button when complete – a prompt with the following prompt will display: **Do you want to refresh the Periodical details from the Catalogue?**



- Click the **Yes** button – a prompt with the following message will display: **The Periodical has been Updated.**



- Click the **OK** button

* A Periodical Main Entry Title and ISSN details can also be updated by selecting **Transactions > RefreshFromCat** in the main Periodical menu.

SUBSCRIPTION

When the **F2 Insert** button is selected in the Periodical screen after creating a new Main Entry, you will automatically be transferred into the Periodical Subscriptions and Issues screen where details of the subscription are entered.

- Alternatively, the Periodical Subscriptions and Issues screen can be accessed from the main Periodical menu by selecting **XReferences > Subscriptions** – the Periodical Subscriptions and Issues screen will display:

Enter a New Subscription

1. Click the **F1 New** button – the Subscriptions - New screen will display:

2. Fill in the Subscription details:

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X
Subscriptions - New

F1 Clear
F3 Update
F5 Query
F6 StkDef
F7 Order
F8 CirclList

All Subscriptions for Doctor Who magazine

Library Group	Supplier Code	Renewal Date	Start Date	End Date	Issues per Subs	Copies per Issue	Subs Cost	Copies per Issue

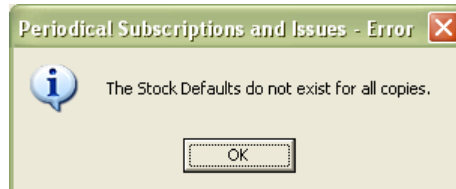
Order No: <input style="width: 80px;" type="text"/>	Line No: <input style="width: 80px;" type="text"/>	Lib Group: <input style="width: 100px;" type="text" value="LIBRARY"/>
Supplier: <input style="width: 150px;" type="text" value="DYM"/> <input style="width: 150px;" type="text" value="Dymocks Bookshop"/>		
Renewal Date: <input style="width: 80px;" type="text" value="15/12/2011"/>	Subs Start Date: <input style="width: 80px;" type="text" value="12/01/2011"/>	Subs End Date: <input style="width: 80px;" type="text" value="10/01/2012"/>
Issues per Subs: <input style="width: 40px;" type="text" value="13"/>	Copies per Issue: <input style="width: 40px;" type="text" value="2"/>	
Subs Cost: <input style="width: 80px;" type="text" value="\$90.00"/>	Cost per Issue: <input style="width: 80px;" type="text" value="\$3.46"/>	
Comments: <div style="border: 1px solid black; height: 30px; width: 100%;"></div>		

FIELD	DESCRIPTION
Order No (Subscription)	Enter Order Number ONLY IF linked to the <u>Finance</u> module. Otherwise press TAB to bypass this field. If the subscriptions are linked to the Orders module, an order must be created for every subscription prior to creating the periodical subscription (in order to ensure the Order Number and Line details link correctly).
Line No	Enter Order Line ONLY IF linked to the <u>Finance</u> module. Otherwise press TAB to bypass this field.
Supplier	Enter New Supplier for this subscription or press TAB to enter the default supplier from the Master record.
Renewal Date	Enter Date as per subscription invoice.
Subs Start Date	Start of subscription. The Subs Start date should match the cover date of the first issue released as part of the current subscription. The Issues listing will then use this in conjunction with the Frequency code entered to set ALL the Issue Dates in the subscription.
Subs End Date	End of subscription. Note that this date is NOT inclusive.
Issues per Subs	Total quantity expected for subscription. This is automatically calculated from the Frequency code entered and the Subs Start and End Dates, taking note of any Exceptions from the Title screen.
Copies per Issue	The number of copies expected for each issue.
Subs Cost	Total Cost for the entire Subscription. If the subscription is a donation, it is possible to enter a zero cost.

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Cost per issue	Automatically calculated by dividing the no. of issues (and copies per issue if the copies total greater than 1) by the subscription cost.
Comments	Any comments/reminders about the subscription

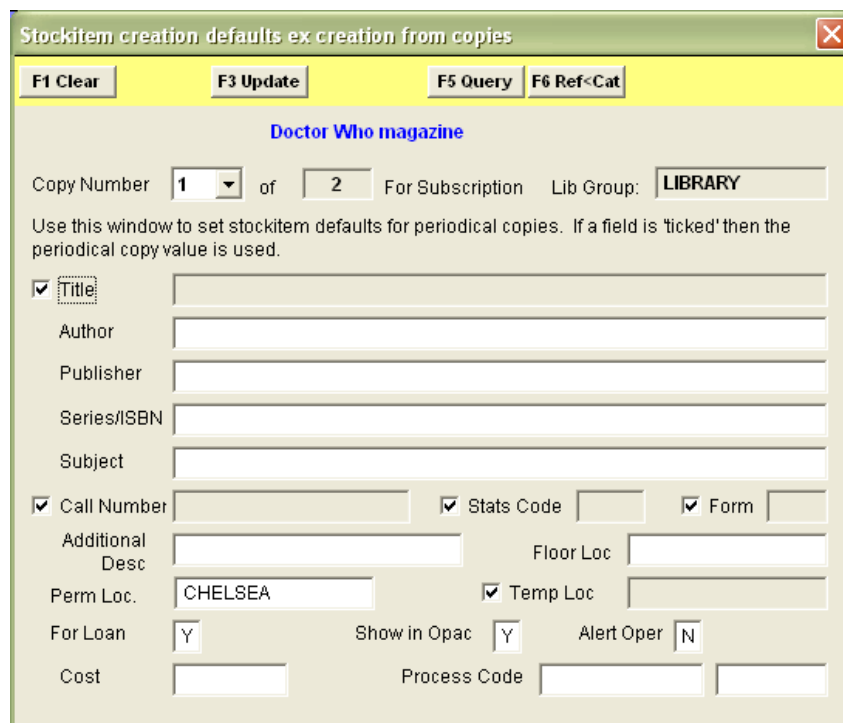
3. Click the **F3 Update** button when complete – the following message will display: **The Stock Defaults do not exist for all copies.**



4. Click the **OK** button the – the Stockitem creation defaults ex creation from copies screen will display

Stockitem Defaults

Stockitem defaults need to be set for each new subscription. It allows the user to configure the fields that will automatically be used when creating a Stockitem as part of the receiving process. Once created, they can be modified from the main Periodical Subscriptions and Issues menu: select **Subscription > StockDefaults.**

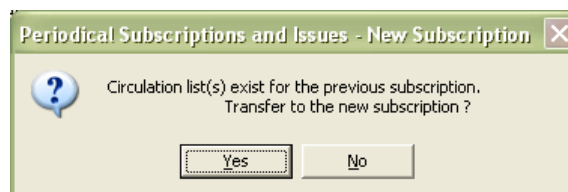


5. Fill in the details as required
6. Where a tick box appears, the field can pick up the data that has been previously entered in other screens (for example: Title from the Periodical Main Entry screen). *Untick* the box if you wish to enter something different to that of the previously entered data.

The screenshot shows a window titled "Stockitem creation defaults ex creation from copies" with a close button (X) in the top right corner. Below the title bar are four buttons: "F1 Clear", "F3 Update", "F5 Query", and "F6 Ref<Cat". The main content area is titled "Doctor Who magazine". It contains the following fields and controls:

- Copy Number: of For Subscription Lib Group:
- 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
- Series/ISBN
- Subject
- Call Number Stats Code Form
- Additional Desc Floor Loc
- Perm Loc. Temp Loc
- For Loan Show in Opac Alert Oper
- Cost Process Code

7. Select the **F3 Update** button when complete
8. If there is more than one Copy, you will be prompted to set separate Defaults for each copy
9. If Circulation lists were used for the last Subscription, a prompt with the following message will display: **Circulation list(s) exist for the previous subscription. Transfer to the new subscription?**



10. Click the **Yes** button if you wish to transfer the Circulation list to the new Subscription being created

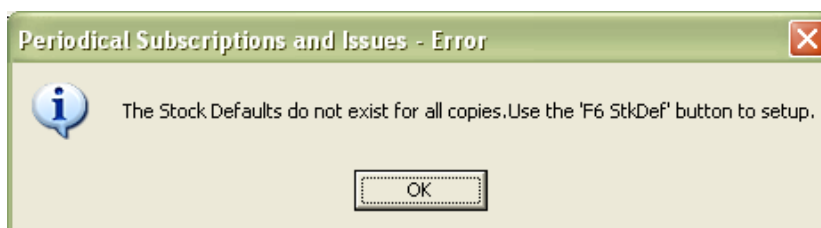
The Subscription is now complete and the Issue Details can now be setup.

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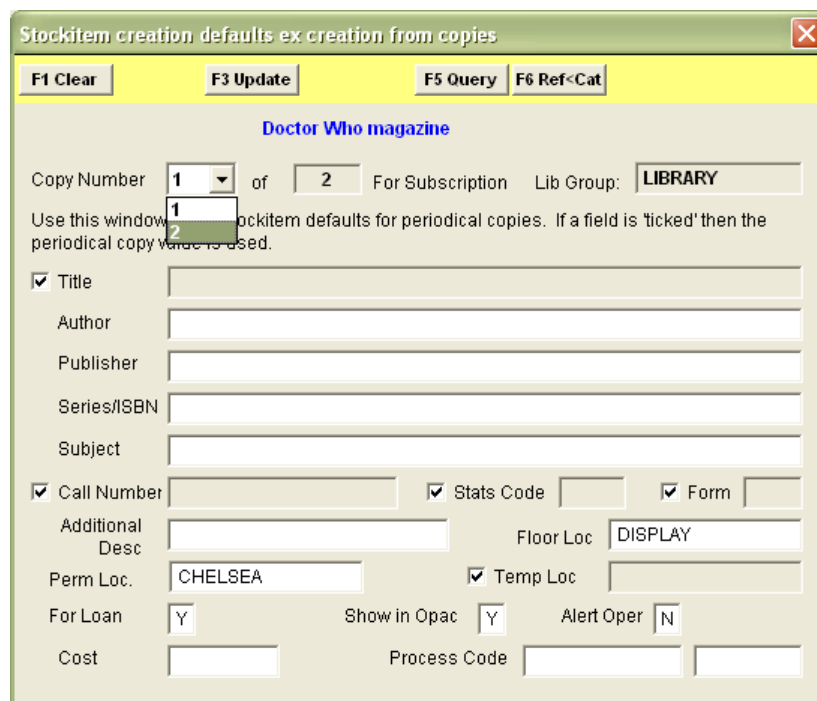
Modify Existing Subscription/Stockitem Defaults

To modify an existing Subscription:

1. Highlight the Subscription line
2. Click the **F2 Modify** button – the Subscriptions – Modify screen will display
3. Adjust the Subscription details
4. Click the **F3 Update** button when complete
5. If the number of Copies per Issue has been increased, a prompt with the following message will display: **The Stock Defaults do not exist for all copies. Use the 'F6 StkDef' button to setup.**



6. Click the **F6 StkDef** button to display the Stockitem creation defaults screen
7. Set the Defaults for each copy
8. Use the Copy Number drop-down box to select the relevant Copy and enter the details



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

Renewing Subscriptions

Please Note: If Subscriptions are on-going, it is possible to use **Renew** to enter most of the details for the next Subscription.

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1. Launch the *Amlib* client
2. Go to **Main > Periodicals > Periodical** – the Periodical screen will display
3. Search for a periodical record via **F5 Query** button
4. From the main Periodical menu select: **XReferences > Subscriptions** – the Periodical Subscriptions and Issues screen will display
5. Highlight the latest subscription line
6. Click the **Renew** button – the Subscriptions – New screen will display:

Library Group	Supplier Code	Renewal Date	Start Date	End Date	Issues per Subs	Copies per Issue	Subs Cost	Cost per Issue
LIBRARY	DYM	15/12/2011	12/01/2011	10/01/2012	13	2	\$90.00	\$6.92

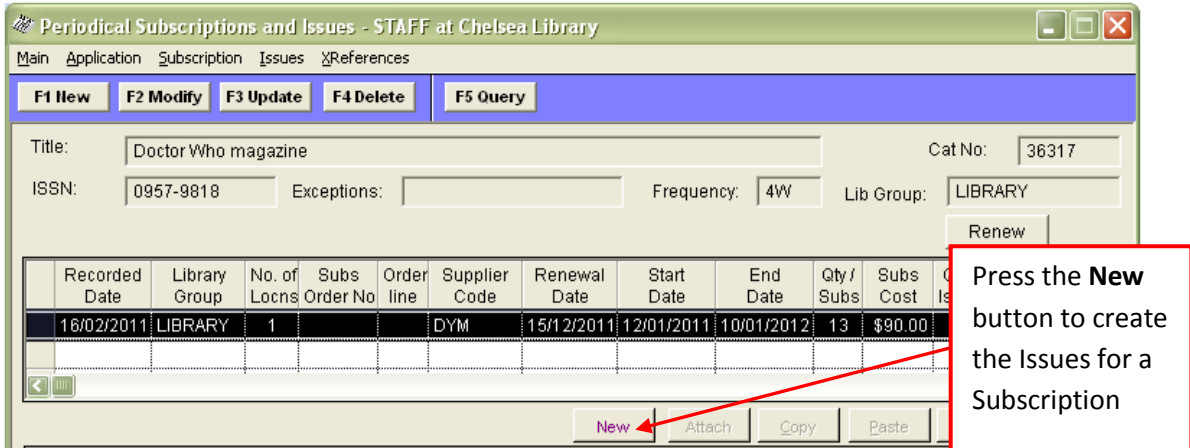
7. The system will use the previous subscription as the basis for the new subscription, altering the Subs Start and End Dates
8. Adjust the subscription as required, entering a new Renewal Date
9. Click the **F3 Update** button when complete

You can then set the new Stockitem Defaults.

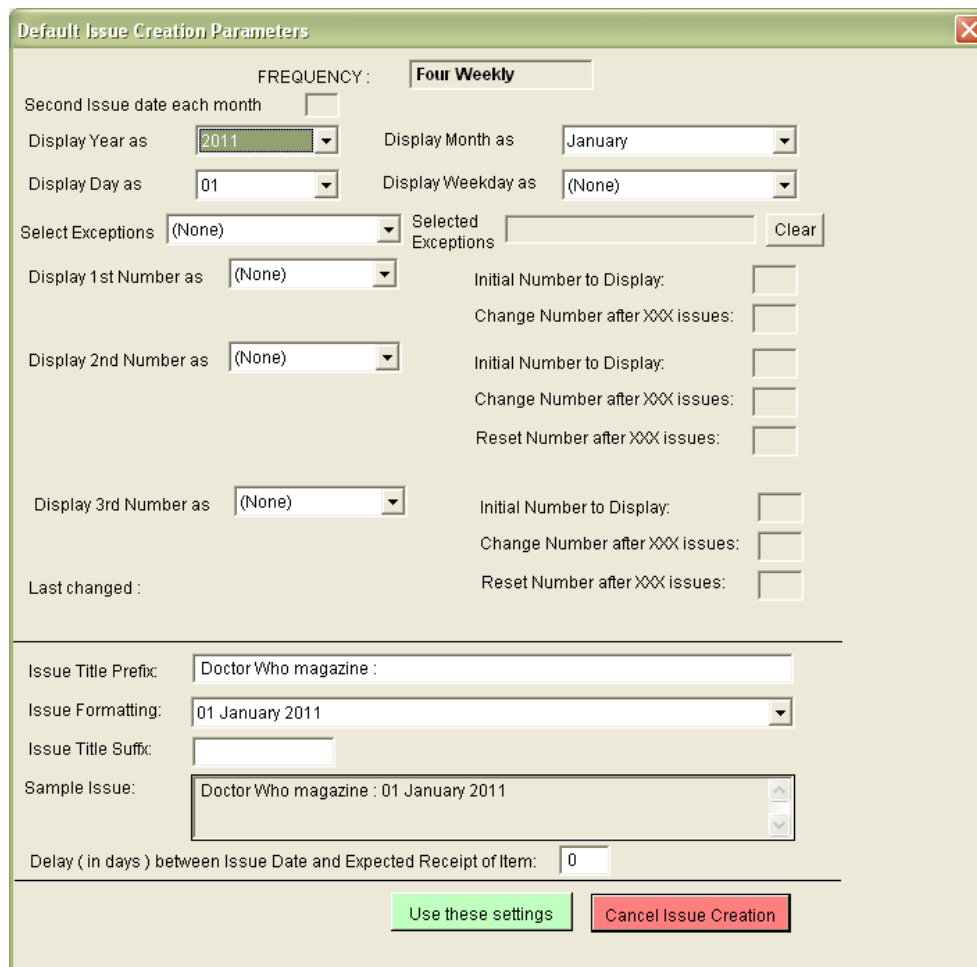
ISSUES

This next section involves creating the default parameters to be used in setting up the actual issues themselves. It is essential that this screen be set-up properly. **DO NOT** click the **F3 Update** button until you are completely satisfied.

1. Click the **New** button located under the Subscription details table



2. The Default Issue Creation Parameters screen will display:



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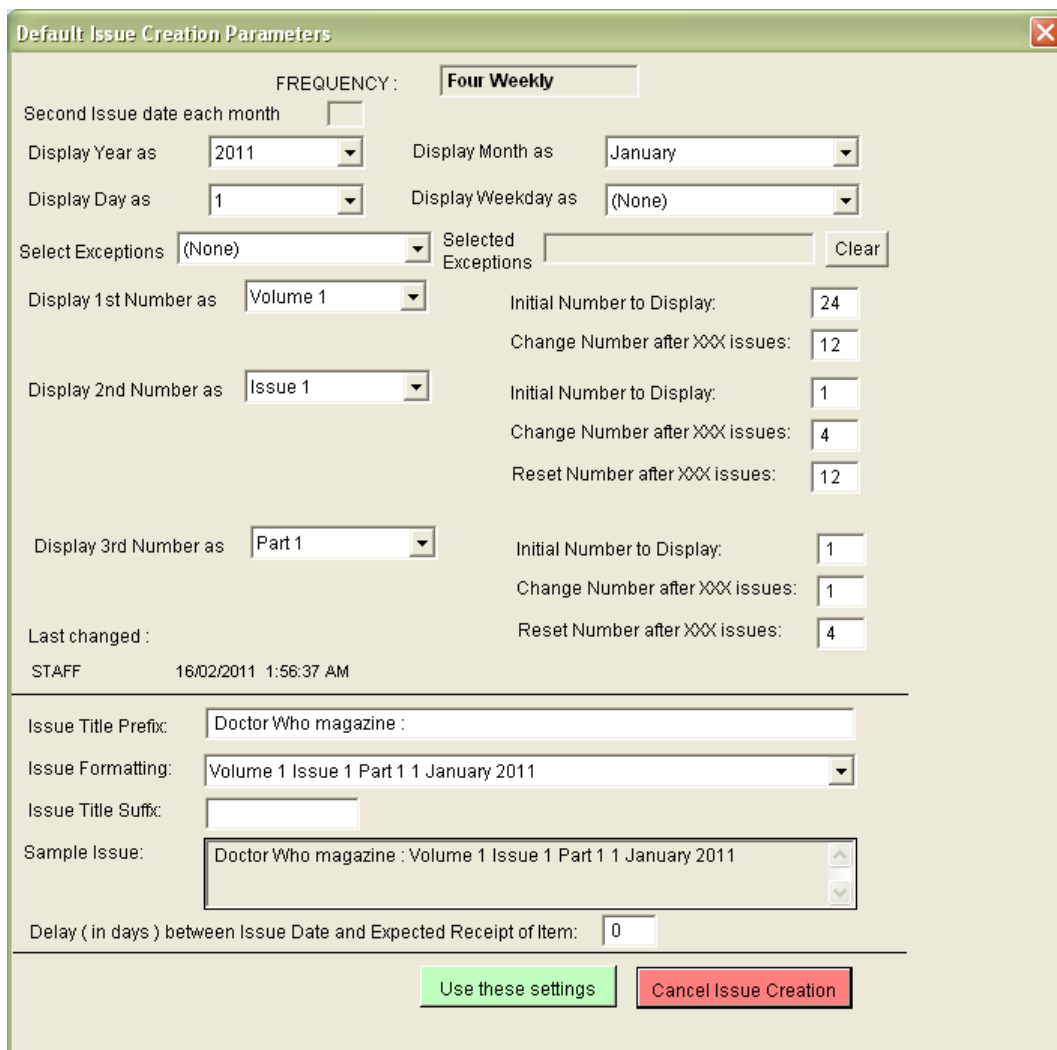
The Settings can be adapted until the Issues are displaying correctly.

FIELD	DESCRIPTION
FREQUENCY	The Frequency Displays (cannot be edited here)
Second Issue date each Month	Only becomes active if the Periodical Frequency is set to 0.5 of a Month (2 per Month). Enter the Day of the Month when the second issue for that Month is due.
Display Year as	Use dropdown menu to select appropriate display or (None) .
Display Month as	Use dropdown menu to select appropriate display or (None) . Also displays Bi-monthly and Quarterly options. If the subscription is a Quarterly, you can choose either a monthly or Seasonal description – for example: Summer
Display Day as	Use dropdown menu to select appropriate display or (None) .
Display Weekday as	Use dropdown menu to select appropriate display or (None) .
Select Exceptions	Select the exception (if appropriate) from the dropdown box or (None) . For example: a periodical may come out monthly except for December (when it is not published). Select December from the dropdown box. Please Note: Only available where the Frequency Basic Unit = MONTH .
Selected Exceptions	Exceptions selected will display in this Field. This can be emptied by selecting the Clear button
Display 1st Number as	Use dropdown menu to select appropriate display for VOLUME, ISSUE or NO. If a value other than (None) is selected then enter a Number in the field <u>Initial Number to Display</u> – for example: 24
Initial Number to Display	Defaults to 1 if a <u>Display 1st Number as</u> is entered. If the beginning Number is not to be 1 , enter the relevant Number in the field – for example: 24
Change No after XXX issues	Defaults to 1 . If the same number is required for the subscription then this may be specified in the field <u>Change Number after XXX Issues</u> – for example: If you require the term: VOL. 24 to appear for every monthly issue of a 1 year subscription then 12 should be entered into this field.
Display 2nd Number as	Same as <u>Display 1st Number as</u> and can be used for adding an additional VOLUME, ISSUE or NO.
Initial Number to Display	Defaults to 1 if a <u>Display 2nd Number as</u> is entered. If the beginning Number is not to be 1 , enter the relevant Number in the field – for example: 6

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Change No after XXX issues	Defaults to 1 which will give a running number – for example: 1,2,3,4 etc. If the same number is required for the subscription then this may be specified in the field <u>Change Number after XXX Issues</u> – for example: If you require the term: No 6 to appear for every monthly issue for a 1 year subscription then 12 should be entered into this field.
Reset No after XXX issues	Allows the Numbers to be reset after a certain number of Issues. For example, if the Numbering changes after 6 issues back to one, this will apply if a 6 is entered in this Field
Display 3rd Number as	Same as <u>Display 2nd Number as</u> and can be used for adding an additional VOLUME, ISSUE or NO.
Initial Number to Display	Defaults to 1 if a <u>Display 3rd Number as</u> is entered. If the beginning Number is not to be 1, enter the relevant Number in the field – for example: 6
Change No after XXX issues	Defaulted to 1 which will give a running number – for example: 1,2,3,4 etc. If the same number is required for the subscription then this may be specified in the field <u>Change Number after XXX Issues</u> – for example: If you require the term: No 6 to appear for every monthly issue for a 1 year subscription then 12 should be entered into this field.
Reset No after XXX issues	Allows the Numbers to be reset after a certain number of Issues. For example, if the Numbering changes after 6 issues back to one, this will apply if a 6 is entered in this Field
Issue Title Prefix	Add any symbols, letters or words to go before the Title
Issue Formatting	Use the dropdown menu to select the appropriate display from the range of options If you want the Date before the Title select from here.
Issue Title Suffix	Add any symbols, letters or words to go at the very end of the Title.
Sample Issue	Shows the final display presentation.
Delay	A number can be entered if the expected date is different to the issue date

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Default Issue Creation Parameters

FREQUENCY : **Four Weekly**

Second Issue date each month

Display Year as 2011 Display Month as January

Display Day as 1 Display Weekday as (None)

Select Exceptions (None) Selected Exceptions Clear

Display 1st Number as Volume 1 Initial Number to Display: 24
Change Number after XXX issues: 12

Display 2nd Number as Issue 1 Initial Number to Display: 1
Change Number after XXX issues: 4
Reset Number after XXX issues: 12

Display 3rd Number as Part 1 Initial Number to Display: 1
Change Number after XXX issues: 1
Reset Number after XXX issues: 4

Last changed : STAFF 16/02/2011 1:56:37 AM

Issue Title Prefix: Doctor Who magazine :

Issue Formatting: Volume 1 Issue 1 Part 1 1 January 2011

Issue Title Suffix:

Sample Issue: Doctor Who magazine : Volume 1 Issue 1 Part 1 1 January 2011

Delay (in days) between Issue Date and Expected Receipt of Item: 0

Use these settings **Cancel Issue Creation**



Issue Title Prefix: Doctor Who magazine :

Issue Formatting: Volume 1 Issue 1 Part 1 1 January 2011

Issue Title Suffix: Volume 1 Issue 1 Part 1 1 January 2011
Volume 1 Issue 1 Part 1, 1 January 2011
Volume 1 Issue 1 Part 1 1 January 2011

Sample Issue: Doctor Who magazine : Volume 1 Issue 1 Part 1 1 January 2011

3. When issue creation parameters are complete click the green **Use these Settings** button at the bottom of the screen
4. When the format options have been chosen, the issues to be received will display
5. If you are NOT satisfied with the final display, press the **New** button in the middle of the screen **again** to modify the Issue Creation Parameters
6. The final issue creation can be saved by pressing the **F3 Update** button

You will be returned to the Main Periodical Screen, where Copies can be received.

Amlib Periodicals Manual

The buttons above the issues table are for actual issue updating, deleting, copying or attaching:

BUTTON	EXPLANATION
New	Displays the Default Issue Creation parameter Window. The button will be grey if the highlighted subscription has Issues already created
Attach	Attach a catalogue entry to the Issue
Copy	Copy an entry ready to Paste and modify e.g. for a Bonus Issue
Paste	Paste an entry after copying
Delete	Delete an Issue – this will mark it for deletion, updating to save the deletion
Print	Print the Issues on the Table

Issue Description	Due Date	Likely Date	Copies Due	Copies Recd	Date Recd	Issue Comments	Claim Made	Special Issue	Amlib Cat No
→ Issue 436 27 July 2011	27/07/2011	27/07/2011	2	0			N	N	
→ Issue 435 29 June 2011	29/06/2011	29/06/2011	2	0			N	N	
→ Issue 434 1 June 2011	01/06/2011	01/06/2011	2	0			N	N	
→ Issue 433 4 May 2011	04/05/2011	04/05/2011	2	0			N	N	
→ Issue 432 6 April 2011	06/04/2011	06/04/2011	2	0			N	N	
→ Issue 431 9 March 2011	09/03/2011	09/03/2011	2	0			N	N	
→ Issue 430 9 February 2011	09/02/2011	09/02/2011	2	0			N	N	
→ Issue 429 12 January 2011	12/01/2011	12/01/2011	2	0			N	N	

Unexpected Issues

Issues can be copied and pasted if an unexpected issue is received – for example: In the case of Infrequent subscriptions. The issue description can then be altered to reflect the correct issue – for example: **Bonus Issue, Christmas Special Edition**, etc.

1. Select an issue
2. Click the **Copy** button
3. Click the **Paste** button – this will paste an exact copy of the selected issue
4. Modify the settings of the pasted copy
5. Click the **F3 Update** button at the top of the screen when complete

Issue Description	Due Date	Likely Date	Copies Due	Copies Recd	Date Recd	Issue Comments	Claim Made	Special Issue	Amlib Cat No
→ Winter Special 2011	14/09/2011	14/09/2011	2	0			N	N	
→ Summer Special 2011	14/06/2011	14/06/2011	2	0			N	N	
→ Issue 441 14 December 2011	14/12/2011	14/12/2011	2	0			N	N	
→ Issue 440 16 November 2011	16/11/2011	16/11/2011	2	0			N	N	
→ Issue 439 19 October 2011	19/10/2011	19/10/2011	2	0			N	N	

Amlib Periodicals Manual

Periodical - STAFF at Chelsea Library

Main Application Transactions XReferences

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

Title: Doctor Who magazine
 Prev Title: ISSN: 0957-9818
 Curr Supplier: DYM
 Brief Holdings Statement: Library holds 1981 -

Lib Group: LIBRARY
 Stats Code: PER Form: PE Default Call No: PER DWM
 Retain: All Cat Ref: 36317
 Frequency: 4W Ref: 80

Sort By: Issue Date Desc All Copies Received OverDue Future Copies Not Received Subs Group: LIBRARY

	Loch	Issue Details	Bar Code or R for received	Date Received	Claim	Comments Instructions	Issue Date	Likely Date	Cost	Call Numb
Copy	CHEL	Issue 431 9 March 2011			N	Copy 1	09/03/2011	09/03/2011	\$6.92	
Paste	CHEL	Issue 431 9 March 2011			N	Copy 2	09/03/2011	09/03/2011	\$6.92	
Update	CHEL	Issue 430 9 February 2011			N	Copy 1	09/02/2011	09/02/2011	\$6.92	
Delete	CHEL	Issue 430 9 February 2011			N	Copy 2	09/02/2011	09/02/2011	\$6.92	
Print	CHEL	Issue 429 12 January 2011			N	Copy 1	12/01/2011	12/01/2011	\$6.92	

CIRCULATION LIST

Circulation Lists are a checklist to accompany a periodical (usually to indicate the particular person has seen the issue of the periodical). If Circulation Lists are required for certain periodicals, then a Borrower Saved File needs to be set up in the Borrower module first.

Borrower File for Circulation Lists

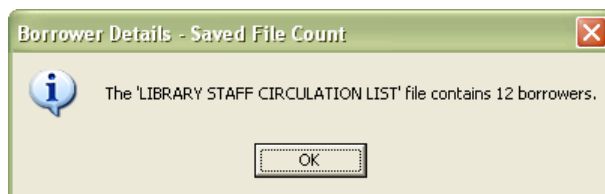
1. Launch the *Amlib* client
2. Open the *Borrower* module
3. From the menu, select **File > DisplayFile** – the Borrower Saved Query Results screen will display:

Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
Bor Update Status Based on Long C	Y	0	08/12/2010 4:45:01 PM	3011
Duplicate ID, 17 Nov 2010 12:19 PM	Y	0	17/11/2010 12:19:35 PM	3007
UPBOR	Y	0	17/11/2010 12:15:11 PM	3006
NEWBOR	Y	0	17/11/2010 12:15:10 PM	3005
Duplicate ID, 17 Nov 2010 12:14 PM	Y	0	17/11/2010 12:14:43 PM	3004
NEWBOR	Y	0	17/11/2010 12:12:40 PM	3003
Duplicate ID, 17 Nov 2010 12:12 PM	Y	0	17/11/2010 12:12:26 PM	3002
Year 11 Students	Y	37	08/11/2010 11:20:47 AM	3000
→ Library Staff Circulation List	Y	0	15/02/2011 1:50:43 PM	

4. Click the **F1 New** button – a new entry will appear in the table
5. Type in the following parameters:
 - a. Details = Name of Circulation List – for example: **Library Staff Circulation List**
 - b. Allow other operators to access this file (Y/N) = **Y**
6. Click the **F3 Save** button
7. You can then add borrowers to the file using either:
 - a. Borrower Where Search:
 - i. Go to **Main > Borrowers > BorrowerWhere**
 - ii. Enter Where Search parameters
 - iii. Click the **F7 QtoFile** button – the Borrower Saved Query Results screen will display
 - iv. Select the file to be used – for example: **Library Staff Circulation List**
 - v. Click the **F9 Select** button

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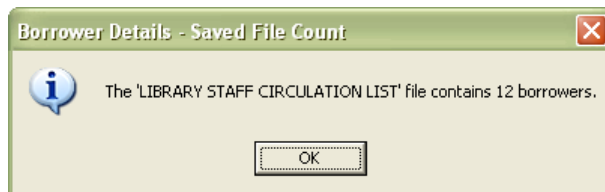
- vi. The selected borrowers will then be saved to the selected file with the following prompt displaying: **The 'XXX' file contains XX borrowers.**



- vii. Click the **OK** button
- b. One at a time from the default Borrower screen:
- i. Go to **Main > Borrowers > Borrower**
 - ii. Search for a Borrower/s record using the **F5 Query** button or via **Application > BorrowerWhere**
 - iii. If there is only one matching record, then from the main menu, select **File > AddToNewFile** – the Borrower Saved Query Results screen will display
 - iv. If there is more than one search result, a Borrower List will display: highlight the borrowers to be added to the saved file and then select **File > Save Marked** (use **Save All** to save ALL borrowers in the list)

Seq	Surname	Ne	Loan	Locn	Group	Class	Ref1	Ref2	Address1	BarCode
16	Allington	Jack	0	CHELSE	CHI	2A	ALLIN	9555 3595	3	ALLINGTONJ
17	Allison	N	0	CHELSE	SER	5A	ALLIS	9555 3622	3	ALLISON,N
18	Amos	M	0	CHELSE	RUS	1B	AMOS	9555 3612	3	AMOS,J
19	Anderson	Alan	1	CHELSE				97221550	1	B237
20	Ang	David	0	CHELSE	RUS	HB01	ANGD	9555 0386	3	ANGD1
21	Ang	Phan	0	CHELSE	TAX	HB01	ANGP	9555 0387	3	ANGP
22	Arco	Lewis								
23	Arevalo	Luis								
24	Aspley	Tegan								
25	Atherton	Cam								
26	Atkins	Cody								
27	Avery	Cameron								
28	Avery	Elliott								
29	Baker	Brittany								
30	Baker	Donna Ann								
31	Baker	George								
32	Bancroft	Rechael								
33	Carrigan	Alf	Mr	A	M	S	OK	0	CHELSE	
34	Desombre	Robert	Mr	M	M	S	OK	1	CHELSE	
35	Dykstra	Trevor	Mr	A	M	S	OK	4	BELMO	
36	Hill	Wendy	Mrs	L	F	S	OK	0	CHELSE	

- v. Select the file to be used – for example: **Library Staff Circulation List**
- vi. Click the **F9 Select** button
- vii. The selected borrowers will then be saved to the selected file with the following prompt displaying: **The 'XXX' file contains XX borrowers.**



- viii. Click the **OK** button

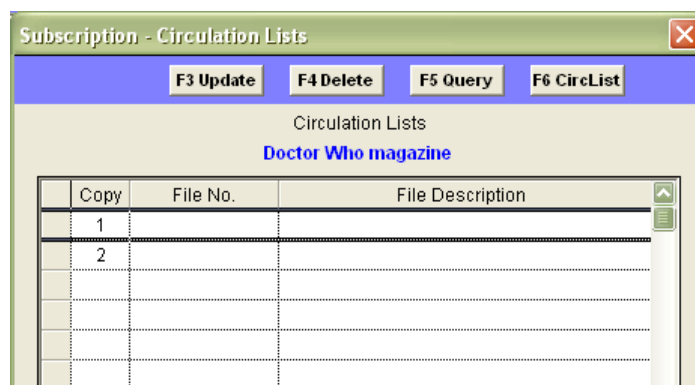
Once the file has been created, it will be available in the Periodical application for use as a Circulation list.

Creating a Circulation List

1. Launch the *Amlib* client
2. Go to **Main > Periodicals > Periodical** – the Periodical screen will display
3. Search for a periodical record via **F5 Query** button
4. From the main Periodical menu select: **XReferences > Subscriptions** – the Periodical Subscriptions and Issues screen will then open
5. The Circulation Lists can be set up in one of two ways:
 - a. In the Subscription – New screen, click the **F8 CirList** button, or



6. From the main Periodicals Subscriptions and Issues menu, select **Subscriptions > CirculationLists** – the Subscription – Circulation Lists screen will display:



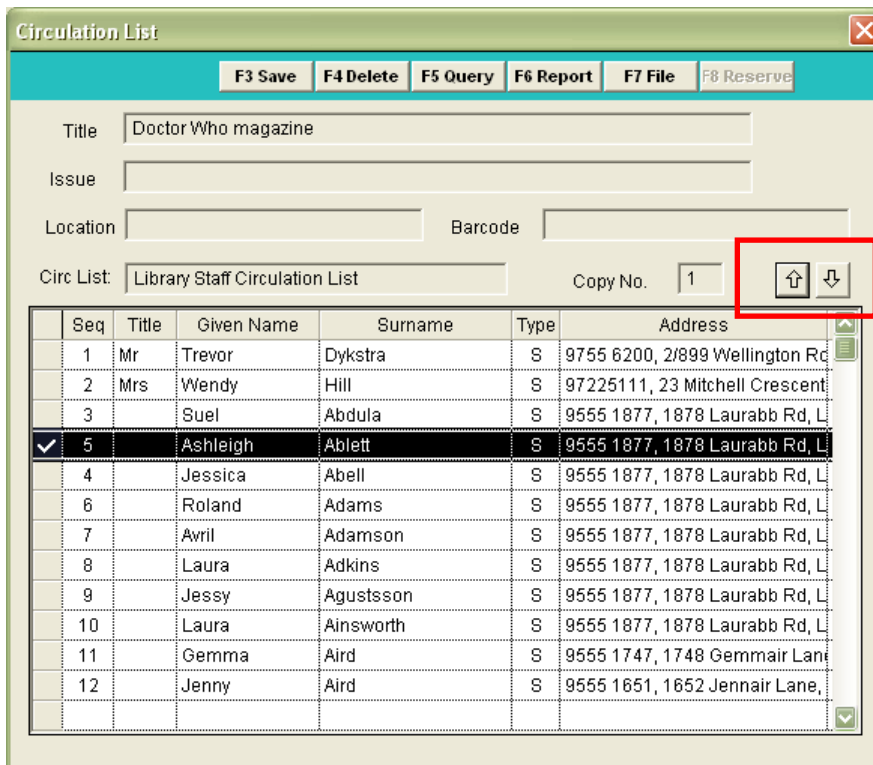
7. Highlight the Copy to which you wish to allocate a list and click the **F6 CirList** button – the Circulation List screen will display:

8. To select a Borrower Saved File, click the **F7 File** button – the Borrower Saved Query Results screen will display:

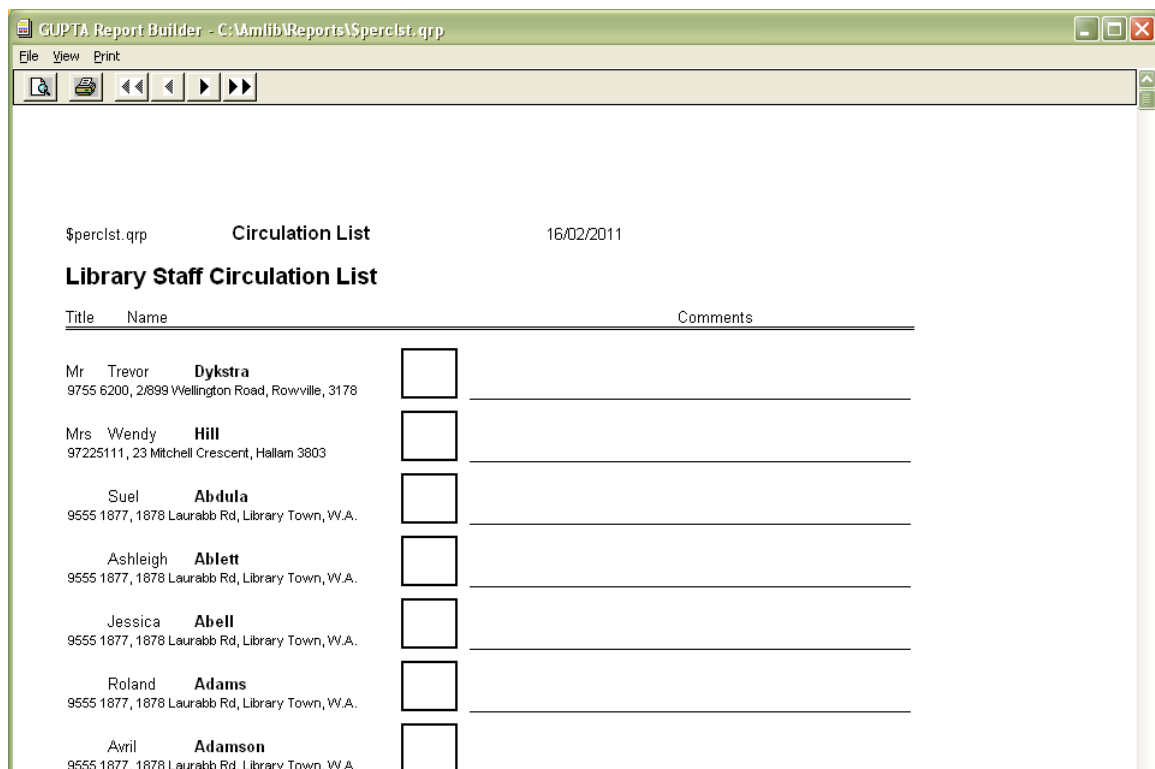
Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
Library Staff Circulation List	Y	12	16/02/2011 10:30:19 AM	3065
Bor Update Status Based on Long C	Y	0	08/12/2010 4:45:01 PM	3011
Duplicate ID, 17 Nov 2010 12:19 PM	Y	0	17/11/2010 12:19:35 PM	3007
UPBOR	Y	0	17/11/2010 12:15:11 PM	3006
NEWBOR	Y	0	17/11/2010 12:15:10 PM	3005
Duplicate ID, 17 Nov 2010 12:14 PM	Y	0	17/11/2010 12:14:43 PM	3004
NEWBOR	Y	0	17/11/2010 12:12:40 PM	3003
Duplicate ID, 17 Nov 2010 12:12 PM	Y	0	17/11/2010 12:12:26 PM	3002
Year 11 Students	Y	37	08/11/2010 11:20:47 AM	3000

9. Highlight the relevant File and click the **F9 Select** button – the borrowers from the Saved File will be added to the Circulation List screen

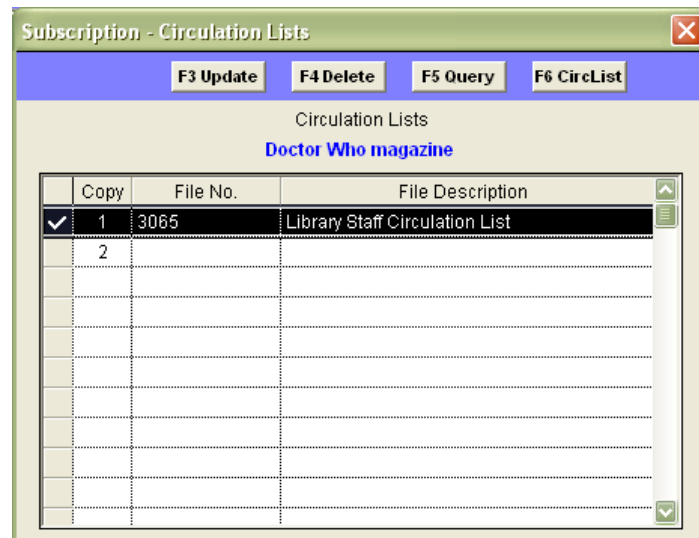
Amlib Periodicals Manual



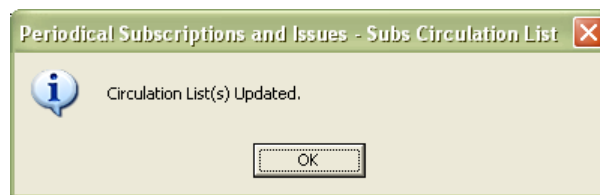
10. The names can be shuffled up and down the list by highlighting a borrower and clicking on the **up** and **down** arrow buttons situated directly above the list
11. Individual borrowers may be deleted from the list, by highlighting the borrower and clicking the **F4 Delete** button
12. Click the **F6 Report** button to bring up a Circulation List which can be printed for distribution purposes



13. Once complete, click the **F3 Save** button to save the Circulation List – you will be returned to the Subscriptions – Circulation List screen:



14. At this point you can attach a Circulation List to other copies
15. Click the **F3 Update** button when complete – the following message will display: **Circulation Lists(s) Updated.**



16. Click the **OK** button

ATTACHING A CATALOGUE RECORD TO AN INDIVIDUAL ISSUE

Attaching catalogues to issues is optional. If no catalogues are attached to the issue, the Main Entry catalogue (if it exists) will be searched or displayed when the Catalogue Details are viewed in *NetOpac*.

Many periodicals may be for recreational reading, the main priority being circulation. An individual catalogue entry would usually not be necessary in these cases. A barcode would be attached for circulation in the Barcode column, as detailed later.

Other periodicals are extremely important to certain clients, providing current information and must be able to be accessed efficiently from the search facilities. In these cases, a catalogue entry would be attached.

WARNING: Catalogue entries for individual issues should be attached prior to receiving the copy. This will ensure that the Stockitem created is properly linked the newly created Catalogue record (and not the Main Entry record).

1. Launch the *Amlib* client
2. Go to **Main > Periodicals > Periodical** – the Periodical screen will display
3. Search for a periodical record via **F5 Query** button
4. Highlight the copy for which the Issue is to have the catalogue entry
5. From the main Periodical menu select: **XReferences > Issue Details – Copy** – the Periodical Subscriptions and Issues screen will display with the corresponding issue highlighted:

Periodical Subscriptions and Issues - STAFF at Chelsea Library

Main Application Subscription Issues XReferences

F1 New F2 Modify F3 Update F4 Delete F5 Query

Title: Doctor Who magazine Cat No: 36317

ISSN: 0957-9818 Exceptions: Frequency: 4W Lib Group: LIBRARY

Recorded Date	Library Group	No. of Locns	Subs Order No	Order line	Supplier Code	Renewal Date	Start Date	End Date	Qty/ Subs	Subs Cost	Qty/ Issue	Cost/ Issue	Circ List
16/02/2011	LIBRARY	1			DYM	15/12/2011	12/01/2011	10/01/2012	15	\$90.00	2	\$6.92	Y

New Attach Copy Paste Delete Print

Issue Description	Due Date	Likely Date	Copies Due	Copies Recd	Date Recd	Issue Comm
Issue 436 27 July 2011	27/07/2011	27/07/2011	2	0		
Issue 435 29 June 2011	29/06/2011	29/06/2011	2	0		
Summer Special 2011	14/06/2011	14/06/2011	2	0		
Issue 434 1 June 2011	01/06/2011	01/06/2011	2	0		
Issue 433 4 May 2011	04/05/2011	04/05/2011	2	0		
Issue 432 6 April 2011	06/04/2011	06/04/2011	2	0		N N
Issue 431 9 March 2011	09/03/2011	09/03/2011	2	0		N N
Issue 430 9 February 2011	09/02/2011	09/02/2011	2	0		N N

Pressing the **Attach** button allows creation of catalogue records for individual issues

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Alternatively, from the main Periodical menu, select **XReferences > Subscriptions**. **Highlight** the issue required and click the **Attach** button.

1. Click the **Attach** button
2. Depending on your [Installation](#) settings, either the Issue >> Catalogue Additions or Catalogue Work Sheet screen will display ([see below](#))
3. Once saved/updated, an Amlib Cat No will display in the Periodical Subscriptions and Issues screen for that issue:

Periodical Subscriptions and Issues - STAFF at Chelsea Library

Main Application Subscription Issues XReferences

F1 New F2 Modify F3 Update F4 Delete F5 Query

Title: Doctor Who magazine Cat No: 36317

ISSN: 0957-9818 Exceptions: Frequency: 4W Lib Group: LIBRARY

Renew

Recorded Date	Library Group	No. of Locns	Subs Order No	Order line	Supplier Code	Renewal Date	Start Date	End Date	Qty/ Subs	Subs Cost	Qty/ Issue	Cost/ Issue	Circ List
16/02/2011	LIBRARY	1			DYM	15/12/2011	12/01/2011	10/01/2012	15	\$90.00	2	\$6.92	Y

New Attach Copy Paste Delete Print

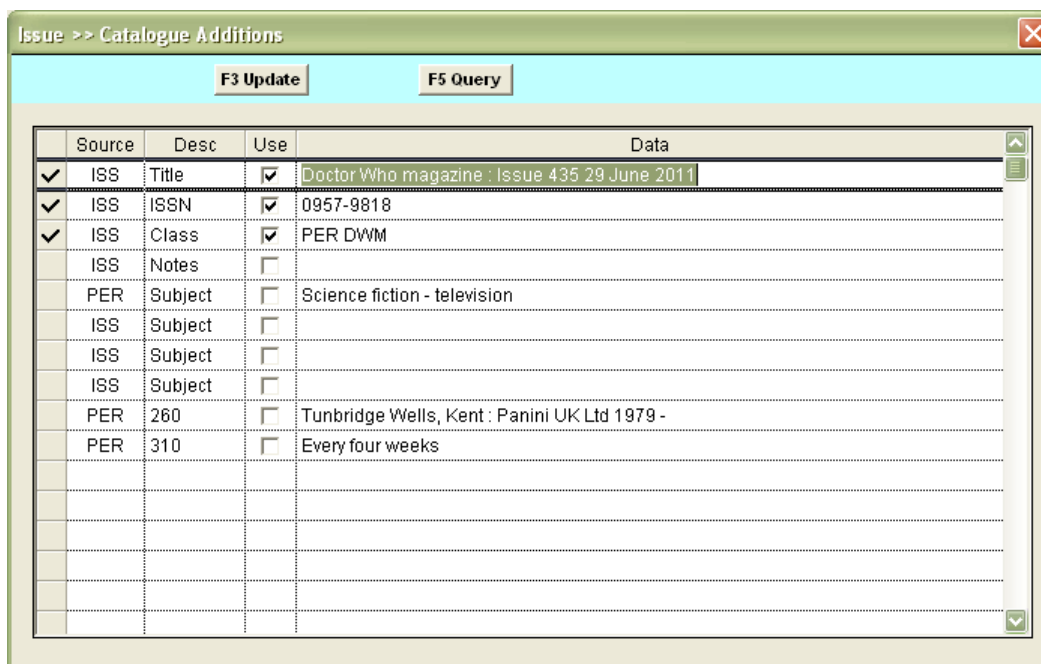
Issue Description	Due Date	Likely Date	Copies Due	Copies Recd	Date Recd	Issue Comments	Claim Made	Special Issue	Amlib Cat No
Issue 436 27 July 2011	27/07/2011	27/07/2011	2	0			N	N	
Issue 435 29 June 2011	29/06/2011	29/06/2011	2	0			N	N	36443
Summer Special 2011	14/06/2011	14/06/2011	2	0			N	N	
Issue 434 1 June 2011	01/06/2011	01/06/2011	2	0			N	N	
Issue 433 4 May 2011	04/05/2011	04/05/2011	2	0			N	N	
Issue 432 6 April 2011	06/04/2011	06/04/2011	2	0			N	N	
Issue 431 9 March 2011	09/03/2011	09/03/2011	2	0			N	N	
Issue 430 9 February 2011	09/02/2011	09/02/2011	2	0			N	N	

NUM

Issue >> Catalogue Additions Method

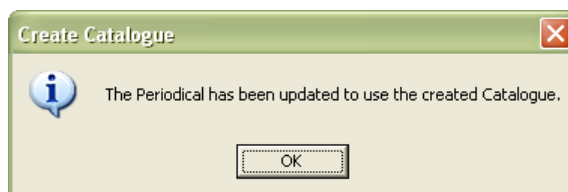
1. The Issue >> Catalogue Additions screen is displayed with the basic information from the periodical record
2. Additional tags may be entered by ticking the appropriate Use box and adding in the Data (this screen uses a combination of the Catalogue Defaults settings created earlier and the Subscription Issue Details)

DO NOT ENTER NEW SUBJECT HEADINGS HERE AS THIS SCREEN IS NOT LINKED TO THE AUTHORITY MODULE AND SUBJECT HEADINGS CANNOT BE CHECKED FROM HERE



Source	Desc	Use	Data
<input checked="" type="checkbox"/>	ISS	Title	<input checked="" type="checkbox"/> Doctor Who magazine : Issue 435 29 June 2011
<input checked="" type="checkbox"/>	ISS	ISSN	<input checked="" type="checkbox"/> 0957-9818
<input checked="" type="checkbox"/>	ISS	Class	<input checked="" type="checkbox"/> PER DWM
<input type="checkbox"/>	ISS	Notes	<input type="checkbox"/>
<input type="checkbox"/>	PER	Subject	<input type="checkbox"/> Science fiction - television
<input type="checkbox"/>	ISS	Subject	<input type="checkbox"/>
<input type="checkbox"/>	ISS	Subject	<input type="checkbox"/>
<input type="checkbox"/>	ISS	Subject	<input type="checkbox"/>
<input type="checkbox"/>	PER	260	<input type="checkbox"/> Tunbridge Wells, Kent : Panini UK Ltd 1979 -
<input type="checkbox"/>	PER	310	<input type="checkbox"/> Every four weeks

3. Click the **F3 Save** button when the record is complete – a prompt with the following message will display: **The Periodical has been updated to use the created Catalogue.**



4. Click the **OK** button

COPIES

Receiving Copies

1. Launch the *Amlib* client
2. Go to **Main > Periodicals > Periodical** – the Periodical screen will display
3. Search for a periodical record via **F5 Query** button
4. By default, the Copies table displays the Not Received view – the highlighted copy on the table is the Copy with a date closest to the current date
5. The copies can be sorted using the Sort By: and the adjacent **Desc** or **Asc** drop-down menus

Periodical - STAFF at Chelsea Library

Main Application Transactions XReferences

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

Title: Doctor Who magazine
 Prev Title: ISSN: 0957-9818
 Curr Supplier: DYM Dymocks Bookshop
 Brief Holdings Statement: Library holds 1981 -
 Lib Group: LIBRARY
 Stats Code: PER Form: PE Default Call No: PER DWM
 Retain: All Cat Ref: 36317
 Frequency: 4W Ref: 80

Sort By: Issue Date Desc
 Asc
 Desc

	Locn	Issue Date	Bar Code or R for received	Date Received	Claim	Comments Instructions	Issue Date	Likely Date	Cost	Call Num
Copy	CHEL	Issue 431 9 March 2011			N	Copy 1	09/03/2011	09/03/2011	\$6.92	
Paste	CHEL	Issue 431 9 March 2011			N	Copy 2	09/03/2011	09/03/2011	\$6.92	
Update	CHEL	Issue 430 9 February 2011			N	Copy 1	09/02/2011	09/02/2011	\$6.92	
Delete	CHEL	Issue 430 9 February 2011			N	Copy 2	09/02/2011	09/02/2011	\$6.92	
Print	CHEL	Issue 429 12 January 2011			N	Copy 1	12/01/2011	12/01/2011	\$6.92	

Please Note: If copies are to be displayed in *NetOpacs* a Stockitem record must be created.

Copies can be received in one of three ways.

1. If no Stockitem record is to be created:
 - a. Type an **R** (for **Received**) into the corresponding Bar Code or R for Received field
 - b. Press the **<TAB>** button on your keyboard – the current date will then display in the Date Received column (a tick will appear in the far-left column of the Copies table)
 - c. Click the **Update** button to the left of the Copies table will to save/update the information related to the Copy/Receipts Schedule. The updated copy will now be visible in the Received view (if you wish to check, click **Received** button)
2. If a Stockitem record is to be created (for circulation purposes):

Amlib Periodicals Manual

- a. Wand the **Barcode** into the corresponding Bar Code or R for Received field
 - b. Press the **<TAB>** button on your keyboard – the current date will then display in the Date Received column (a tick will appear in the far-left column of the Copies table)
 - c. Click the **Update** button to the left of the Copies table will to save/update the information related to the Copy/Receipts Schedule. A Stockitem will automatically be generated. The updated copy will now be visible in the Received view (if you wish to check, click **Received** button)
3. If a Stockitem record is to be created (for circulation purposes), it is possible to insert a system-generated STOCK Barcode:
 - a. Type **B** in the Bar Code or R for Received field
 - b. Press the **<TAB>** button on your keyboard – the current date will then display in the Date Received column (a tick will appear in the far-left column of the Copies table)
 - c. Click the **Update** button to the left of the Copies table will to save/update the information related to the Copy/Receipts Schedule. A Stockitem will automatically be generated if a barcode is entered. The updated copy will now be visible in the Received view (if you wish to check, click **Received** button)

Periodical - STAFF at Chelsea Library

Main Application Transactions XReferences

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

Title: Doctor Who magazine
 Prev Title: ISSN: 0957-9818
 Lib Group: LIBRARY
 Stats Code: PER Form: PE Default Call No: PER DWM
 Curr Supplier: DYM Dymocks Bookshop
 Retain: All Cat Ref: 36317
 Brief Holdings Statement: Library holds 1981 -
 Frequency: 4W Ref: 80

Sort By: Issue Date Desc All Copies Received OverDue Future Copies Not Received Subs Group: LIBRARY

	Locn	Issue Details	Bar Code or R for received	Date Received	Claim	Comments Instructions	Issue Date	Likely Date	Cost	Call Numb
Copy	CHEL	Issue 432 6 April 2011			N	Copy 1	06/04/2011	06/04/2011	\$6.92	
Paste	CHEL	Issue 432 6 April 2011			N	Copy 2	06/04/2011	06/04/2011	\$6.92	
Update	✓ CHEL	Issue 431 9 March 2011	S123456	16/02/2011	N	Copy 1	09/03/2011	09/03/2011	\$6.92	
Delete	✓ CHEL	Issue 431 9 March 2011	B	16/02/2011	N	Copy 2	09/03/2011	09/03/2011	\$6.92	
Print	✓ CHEL	Issue 430 9 February 2011	R	16/02/2011	N	Copy 2	09/02/2011	09/02/2011	\$6.92	

NUM

Stockitem Details

For copies where a Stockitem record was created:

1. Launch the *Amlib* client
2. Go to **Main > Periodicals > Periodical** – the Periodical screen will display
3. Search for a periodical record via **F5 Query** button
4. By default, the Copies table displays the Not Received view
5. Select the **Received** button

	Locn	Issue Details	Bar Code or R for received	Date Received	Claim	Comments Instructions	Issue Date	Likely Date	Cost	Call Numb
Copy	CHEL	Issue 431 9 March 2011	STOCK003707E	16/02/2011	N	Copy 1	09/03/2011	09/03/2011	\$6.92	
Paste	CHEL	Issue 431 9 March 2011	STOCK003707E	16/02/2011	N	Copy 2	09/03/2011	09/03/2011	\$6.92	
Update	CHEL	Issue 430 9 February 2011	STOCK003706E	16/02/2011	N	Copy 1	09/02/2011	09/02/2011	\$6.92	
Delete	CHEL	Issue 430 9 February 2011	R	16/02/2011	N	Copy 2	09/02/2011	09/02/2011	\$6.92	
Print	CHEL	Issue 429 12 January 2011	R	16/02/2011	N	Copy 1	12/01/2011	12/01/2011	\$6.92	

6. Highlight an item that has been received with a barcode
7. From the main Periodicals menu, select **XReferences > StockItem Details**:

Amlib Periodicals Manual

- The Stockitem record will display and will include the information as set in the Stock Default settings and will refresh from Catalogue automatically:

Stockitem - STAFF at Chelsea Library

Main Application Item References File

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

Item No: Cat Ref No: 36317

Query Via: Item Cat Keyword Any

Previous Queries:

Title: Doctor Who magazine : Issue 431 9 March 2011

Author:

Publisher: Tunbridge Wells, Kent : Panini UK Ltd 1979 -

ISBN/ISSN: 0957-9818

Subject: Science fiction - television

Call Number: PER DWM PER PE

Description:

Copy No / Convert:

Location: Perm Temp Floor: Origin/Source:

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

Received: Accessioned: Current Cost:

Group:

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

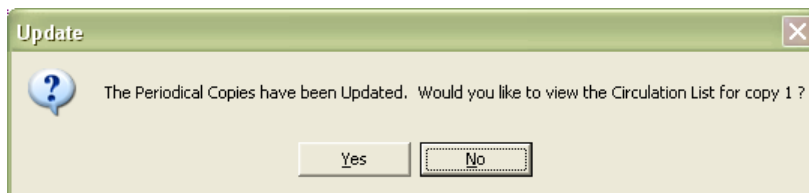
On Loan	Due	On Order	Res	Seq	Set	?Size
<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	0	1	1	200

Last Modified: 16/02/2011 2:35:40 PM by STAFF Issues: 0

Date item due back at lending library: NUM:

Receiving a Copy Attached to a Circulation List

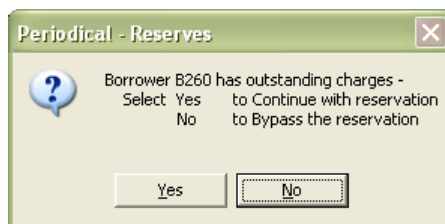
1. When the copy is received and the **Update** button clicked, a prompt with the following message will display asking if the Circulation list is to be viewed: **The Periodical Copies have been Updated. Would you like view the Circulation List for Copy 1 ?**



At this point it is possible to Reserve the periodical for those borrowers on the Circulation list (Copy with Barcode/Stockitem record only):

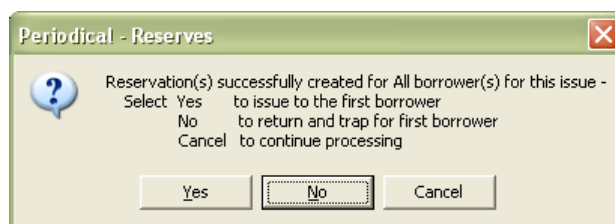
2. Click the **Yes** button – the Circulation List screen will display
3. It is possible to Reserve the items to the readers on the list, by clicking the **F8 Reserve** button

If any borrower has outstanding fines, the following Periodical – Reserves prompt will display:



4. Click the **Yes** button to continue with reservation

Once complete the following Periodical – Reserves prompt will appear: **Reservation(s) successfully created for All borrower(s) for this issue -**



5. Select the **Yes** button to issue to the first borrower, the **No** button to return and trap the first borrower, or the **Cancel** button to continue processing (this will return you to the Periodicals screen)

ADDING INFREQUENT ISSUES/BONUS ISSUES

A Copy and Paste facility is available in both the Copies section on the Main Periodical Screen and in the Issues section of the Subscriptions Screen. This allows an infrequent subscription to be added into the issues table when an unexpected issue arrives. This may be for an extra donated copy or unexpected Bonus issues.

Issues

1. Launch the *Amlib* client
2. Go to **Main > Periodicals > Periodical** – the Periodical screen will display
3. Search for a periodical record via **F5 Query** button
4. From the main Periodical menu select: **XReferences > Subscriptions** – the Periodical Subscriptions and Issues screen will display:

5. Highlight the issue to copy
6. Click the **Copy** button just above the Issues table
7. Click the **Paste** button to add into the Issues table
8. The Issue Description can then be altered to reflect the periodical that has been newly entered f- for example: **Winter Special**

Amlib Periodicals Manual

9. When complete, click the **F3 Update** button at the top of the screen:

Periodical Subscriptions and Issues - STAFF at Chelsea Library

Main Application Subscription Issues XReferences

F1 New F2 Modify **F3 Update** F4 Delete F5 Query

Title: Doctor Who magazine Cat No: 36317

ISSN: 0957-9818 Exceptions: Frequency: 4W Lib Group: LIBRARY

Renew

Recorded Date	Library Group	No. of Locns	Subs Order No	Order line	Supplier Code	Renewal Date	Start Date	End Date	Qty / Subs	Subs Cost	Qty / Issue	Cost / Issue	Circ List
16/02/2011	LIBRARY	1			DYM	15/12/2011	12/01/2011	10/01/2012	15	\$90.00	2	\$6.92	Y

New Attach Copy Paste Delete Print

Issue Description	Due Date	Likely Date	Copies Due	Copies Recd	Date Recd	Issue Comments	Claim Made	Special Issue	Amlib Cat No
→ Autumn Special	14/12/2011	14/12/2011	2	0			N	N	
Issue 441 14 December 2011	14/12/2011	14/12/2011	2	0			N	N	
Issue 440 16 November 2011	16/11/2011	16/11/2011	2	0			N	N	
Issue 439 19 October 2011	19/10/2011	19/10/2011	2	0			N	N	
Issue 438 21 September 2011	21/09/2011	21/09/2011	2	0			N	N	
Winter Special 2011	14/09/2011	14/09/2011	2	0			N	N	
Issue 437 24 August 2011	24/08/2011	24/08/2011	2	0			N	N	
Issue 436 27 July 2011	27/07/2011	27/07/2011	2	0			N	N	

NUM

10. From the main Periodical Subscriptions and Issues menu, select **XReferences > Periodical** to return to the main Periodical screen (this will then make the copy available for receipt):

Periodical - STAFF at Chelsea Library

Main Application Transactions XReferences

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

Title: Doctor Who magazine Lib Group: LIBRARY

Prev Title: ISSN: 0957-9818 Stats Code: PER Form: PE Default Call No: PER DWM

Curr Supplier: DYM Dymocks Bookshop Retain: All Cat Ref: 36317

Brief Holdings Statement: Library holds 1981 - Frequency: 4W Ref: 80

Sort By: Issue Date Desc All Copies Received OverDue Future Copies Not Received Subs Group: LIBRARY

Copies	Locn	Issue Details	Bar Code or R for received	Date Received	Claim	Comments Instructions	Issue Date	Likely Date	Cost	Call Num
Copy	CHEL	Issue 441 14 December 2011			N	Copy 1	14/12/2011	14/12/2011	\$6.92	
Paste	CHEL	Issue 441 14 December 2011			N	Copy 2	14/12/2011	14/12/2011	\$6.92	
Update	CHEL	Autumn Special			N	Copy 1	14/12/2011	14/12/2011	\$6.92	
Delete	CHEL	Autumn Special			N	Copy 2	14/12/2011	14/12/2011	\$6.92	

DELETING PERIODICALS

Periodicals and Stockitems are separate entities. The Periodical window is a register indicating those periodicals expected and those received. Once a Copy is **RECEIVED** with a BARCODE, a Stockitem is created which can be stored and circulated in the Library. If a Periodical Stockitem is deleted, the entry still appears on the Periodical screen but the Barcode no longer shows. This may suit some sites so that they can see that they have received the item from the Date Received column.

Periodical - STAFF at Chelsea Library

Main Application Transactions XReferences

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

Title: Doctor Who magazine
 Prev Title: ISSN: 0957-9818
 Lib Group: LIBRARY
 Stats Code: PER Form: PE Default Call No: PER DWM
 Curr Supplier: DYM Dymocks Bookshop
 Retain: All Cat Ref: 36317
 Frequency: 4W Ref: 80

Brief Holdings Statement: Library holds 1981 -

Sort By: Issue Date Desc All Copies Received OverDue Future Copies Not Received Subs Group: LIBRARY

Copies	Locn	Issue Details	Bar Code or R for received	Date Received	Claim	Comments Instructions	Issue Date	Likely Date	Cost	Call Numb
Copy	CHEL	Issue 434 1 June 2011			N	Copy 1	01/06/2011	01/06/2011	\$6.92	
Paste	CHEL	Issue 434 1 June 2011			N	Copy 2	01/06/2011	01/06/2011	\$6.92	
Update	CHEL	Issue 433 4 May 2011			N	Copy 1	04/05/2011	04/05/2011	\$6.92	
Delete	CHEL	Issue 433 4 May 2011			N	Copy 2	04/05/2011	04/05/2011	\$6.92	
Print	CHEL	Issue 432 6 April 2011			N	Copy 2	06/04/2011	06/04/2011	\$6.92	

Brief Holdings Statement NUM

Deleting Subscriptions/Issues

If the details/records of certain issues/copies are to be deleted in both the Periodical and Stockitem modules (for example: all the *Doctor Who Magazines* from 2010) it is recommended that the Periodicals be deleted within the Periodical Subscriptions and Issues screen.

1. Launch the *Amlib* client
2. Go to **Main > Periodicals > Periodical** – the Periodical screen will display
3. Search for a periodical record via **F5 Query** button
4. From the main Periodical menu select: **XReferences > Subscriptions** – the Periodical Subscriptions and Issues screen will then open
5. Highlight the Subscription line to be deleted

Amlib Periodicals Manual

- Click the **F4 Delete** button – the issues will also be marked for deletion:

Periodical Subscriptions and Issues - STAFF at Chelsea Library

Main Application Subscription Issues References

F1 New F2 Modify F3 Update F4 Delete F5 Query

Title: Doctor Who magazine Cat No: 36317

ISSN: 0957-9818 Exceptions: Frequency: 4W Lib Group: LIBRARY

Renew

Recorded Date	Library Group	No. of Locns	Subs Order No	Order line	Supplier Code	Renewal Date	Start Date	End Date	Qty/ Subs	Subs Cost	Qty/ Issue	Cost/ Issue	Circ List
16/02/2011	LIBRARY	1			DYM	15/12/2011	12/01/2011	10/01/2012	16	\$90.00	2	\$6.92	Y
X 16/02/2011	LIBRARY	1			DYM	13/12/2010	01/01/2010	30/12/2010	15	\$90.00	1	\$6.92	N

New Attach Copy Paste Delete Print

Issue Description	Due Date	Likely Date	Copies Due	Copies Recd	Date Recd	Issue Comments	Claim Made	Special Issue	Amlib Cat No
X Autumn Special	03/12/2010	03/12/2010	1	0			N	N	36444
X Issue 428 3 December 2010	03/12/2010	03/12/2010	1	1	16/02/2011		N	N	
X Summer Special	03/12/2010	03/12/2010	1	0			N	N	36445
X Issue 427 5 November 2010	05/11/2010	05/11/2010	1	1	16/02/2011		N	N	
X Issue 426 8 October 2010	08/10/2010	08/10/2010	1	1	16/02/2011		N	N	

- Check carefully and if correct, click the **F3 Update** button at the top of the screen – an Update Issues prompt with the following message will display (elements will vary depending on whether there are both Stockitem and Individual Issue catalogue records attached) :

There are XX Issue(s) marked for deletion. Continue with Update?

Note: Any stockitem records attached to a Copy will be saved in a file called PER COPY DELETIONS. Any catalogue records attached to an Issue will be saved in a file called PER ISSUE DELETIONS.

Update Issues

There are 15 Issue(s) marked for deletion. Continue with Update?

Note: Any stockitem records attached to a Copy will be saved in a file called PER COPY DELETIONS. Any catalogue records attached to an Issue will be saved in a file called PER ISSUE DELETIONS.

Yes No

- Click the **Yes** button – the Issues will be deleted and a prompt with the following message will display: **There are X Subscription(s) marked for deletion. Continue with Update?**

Update Subscription

There are 1 Subscription(s) marked for deletion. Continue with Update?

Yes No

- If you wish to retain the Subscription information, click the **No** button, otherwise click the **Yes** button

Deleting Stockitem and Single Issue Catalogue Records

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

Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
PER Copies Deletions	Y	14	16/02/2011 3:38:21 PM	3066
Full Holdings Chelsea	Y	4839	02/02/2011 2:55:31 PM	3063
EXCH JP 20/01	Y	10	21/01/2011 4:35:26 PM	3038

3. Select the **PER Copies Deletions** file and click the **F9 Select** button – a Stockitem List will display:

Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Edit
1	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
2	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
3	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
4	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
5	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
6	Doctor Who magazine : Issue					N		0	CHEL		N			
7	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
8	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
9	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
10	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
11	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
12	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		

4. Highlight the items to be deleted:

Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Edit
1	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
2	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
3	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
4	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
5	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
6	Doctor Who magazine : Issue					N		0	CHEL		N			
7	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
8	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
9	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
10	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		
11	Doctor Who magazine : Issue		PER DWM	PE	PER	N		0	CHEL		N	0957-9818		

- From the Stockitem List main menu, select **Table > Mass Item Deletion** – the Mass Delete Items screen will display:

Mass Delete Items

Items

Confirm Delete Item Message Required ?

Last Item Message for Cat Required ?

Catalogue

Delete Catalogue if Last ? **

Confirm Delete Cat. Message Required?

CatalogueFile

If a Catalogue record has no more items after an item is deleted then save in the file below (Do not choose Delete ** above !)

GetFile File: [] []

Note : Items on loan, reserved or with memos will not be deleted

OK Cancel

- Add a **tick** in the Catalogue: Delete Catalogue if Last ? box
- Click the **OK** button – a prompt with the following message will display: **You are about to delete items...**

Stockitem List - Item Deletions

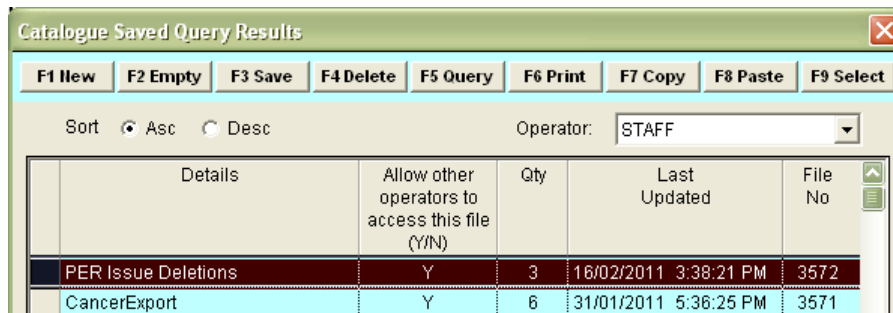
You are about to delete items
With the parameters as supplied you can expect that you will
.....
Not get a message for every item deletion
Not get a message if the item is the last for the catalogue record
Catalogue records with no more items will be deleted
You will NOT get a message before Catalogue records are deleted
Do you wish to Continue ?

Yes No

- Click the **Yes** button
- The items (and any associated Issue Catalogue records) will be deleted

Any Catalogues are transferred to a Saved File within the Catalogue module called **PER ISSUE DELETIONS** (Often the Catalogues are deleted as part of the Stockitem Copy deletions)

10. Go to **Main > Catalogue > Catalogue** – the Catalogue screen will display
11. From the Catalogue menu, select **File > DisplayFile** – the Catalogue Saved Query Results screen will display:

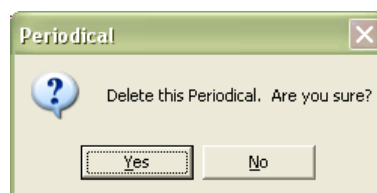


12. Repeat steps 3-9 above to delete Single Issue catalogue records

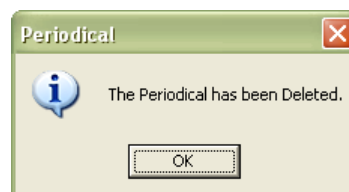
Deleting Main Entry Periodicals

Main Entry Periodicals can only be deleted if there are no Subscriptions attached. The Subscriptions cannot be deleted unless the Issues are also first deleted. Once all Subscriptions and Issues are deleted ([see above](#)), the Main Periodical entry can be deleted.

1. Launch the *Amlib* client
2. Go to **Main > Periodicals > Periodical** – the Periodical screen will display
3. Search for a periodical record via **F5 Query** button
4. Click the **F4 Delete** button – a Periodical prompt with the following message will display:
Delete this Periodical. Are you sure?



5. Click the **Yes** button – a Periodical prompt with the following message will display: **The Periodical has been Deleted.**

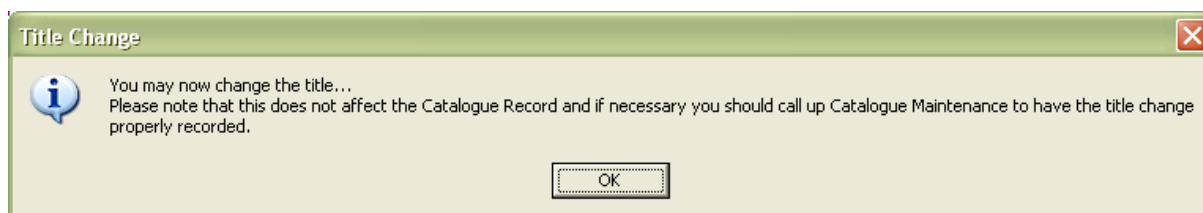


6. Click the **OK** button

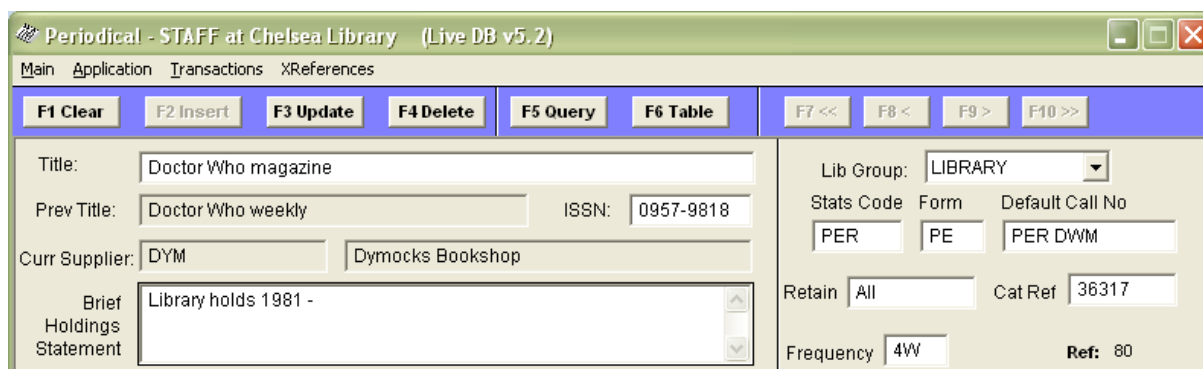
AMENDING PERIODICAL DETAILS

Changing a Title

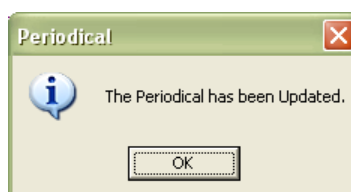
1. Launch the *Amlib* client
2. Go to **Main > Periodicals > Periodical** – the Periodical screen will display
3. Search for a periodical record via **F5 Query** button
4. Once displayed, from the Periodical menu, select **Transactions > AllowTitleChange** – a Title Change prompt with the following message will display: **You may now change the title... Please note that this does not affect the Catalogue Record and if necessary you should call up Catalogue Maintenance to have the title change properly recorded.**



5. Click the **OK** button – the “old” title will now appear in the Prev Title: field – for example: **Doctor Who weekly**
6. You are then able to type in the new Title:




7. Click the **F3 Update** button when complete – a prompt with the following message will display:



8. Click the **OK** button
9. You will then need to **XReference** to the **Catalogue** entry and update the Title if required

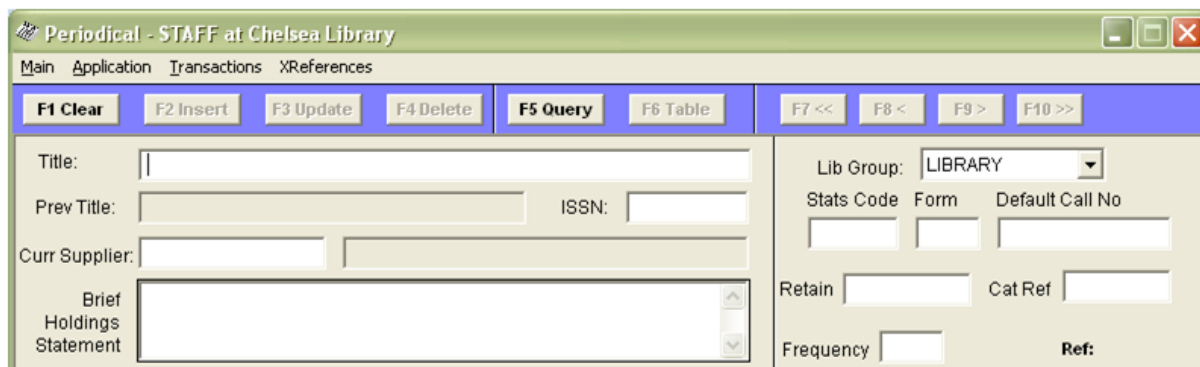
SEARCH

Within the Periodical Module

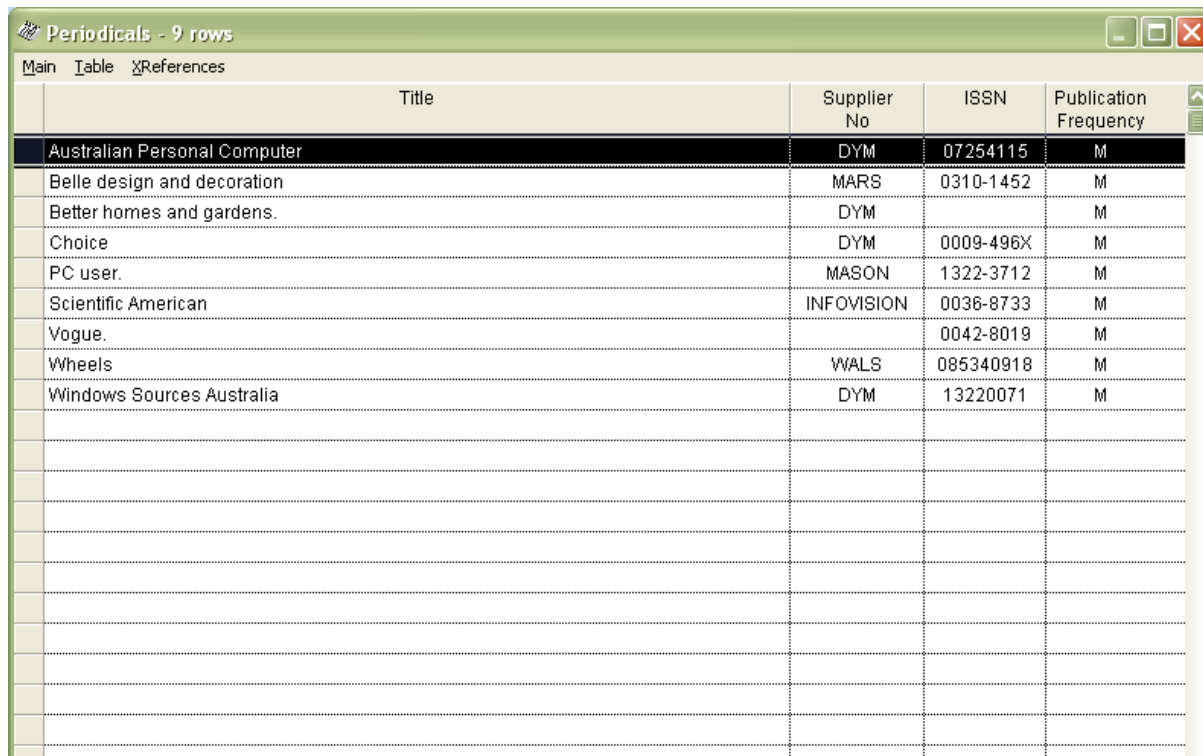
1. Launch the *Amlib* client
2. Go to **Main > Periodicals > Periodical** (or the  icon) – the Periodical screen will display
3. Search for a periodical record via **F5 Query** button

Any of the fields on the initial periodical screen can be used for a query. For example: the Frequency field can be searched to find all the periodicals received Monthly. The Title can be searched to find a specific periodical.

Please Note: To search ALL periodicals, click the **F5 Query** button without entering any data on the screen.



4. If more than one incidence of the search term is found, a Periodicals list will display:



Title	Supplier No	ISSN	Publication Frequency
Australian Personal Computer	DYM	07254115	M
Belle design and decoration	MARS	0310-1452	M
Better homes and gardens.	DYM		M
Choice	DYM	0009-496X	M
PC user.	MASON	1322-3712	M
Scientific American	INFOVISION	0036-8733	M
Vogue.		0042-8019	M
Wheels	WALS	085340918	M
Windows Sources Australia	DYM	13220071	M

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5. Double-click on the periodical to view details about the Main Entry:

Periodical - STAFF at Chelsea Library

Main Application Transactions XReferences

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

Title: Choice Lib Group: LIBRARY
 Prev Title: ISSN: 0009-496X Stats Code: PER Form: PE Default Call No:
 Curr Supplier: DYM Dymnocks Bookshop Retain: 25 Cat Ref: 34486
 Brief Holdings Statement: Frequency: M Ref: 68

Sort By: Issue Date Desc All Copies Received OverDue Future Copies Not Received Subs Group: LIBRARY

Copies	Locn	Issue Details	Bar Code or R for received	Date Received	Claim	Comments Instructions	Issue Date	Likely Date	Cost	Call Numb
Copy	CHEL	Choice April 1999			N	Copy 1	27/04/1999	27/04/1999	\$4.57	PER
Paste	CHEL	Choice March 1999			N	Copy 1	27/03/1999	27/03/1999	\$4.57	PER
Update	CHEL	Choice February 1999			N	Copy 1	27/02/1999	27/02/1999	\$4.57	PER
Delete	CHEL	Choice January 1999			N	Copy 1	27/01/1999	27/01/1999	\$4.57	PER
Print	CHEL	Choice December 1998			N	Copy 1	27/12/1998	27/12/1998	\$4.57	PER


Brief Holdings Statement NUM

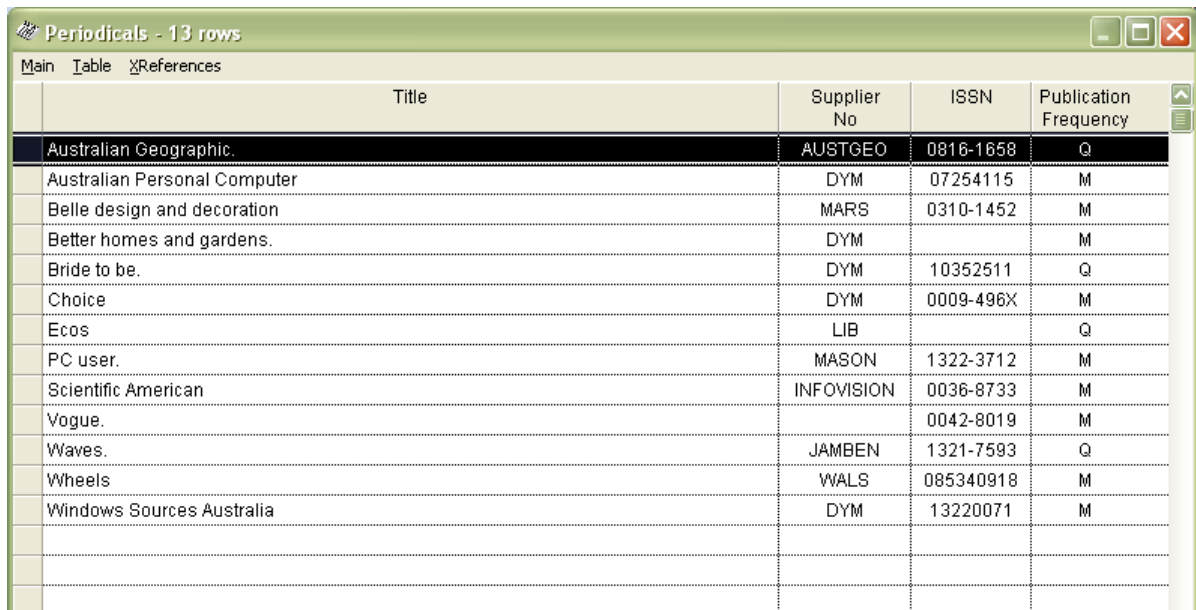
From this screen you are able to view All copies, Received copies, Overdue copies, Future Copies and copies Not Received.

REPORTS

Periodical List

A listing of the Periodical titles is available from the Main Periodicals screen:

1. Launch the *Amlib* client
2. Go to **Main > Periodicals > Periodical** (or the  icon) – the Periodical screen will display
3. Click the **F5 Query** button – a Periodicals list will display:



Title	Supplier No	ISSN	Publication Frequency
Australian Geographic.	AUSTGEO	0816-1658	Q
Australian Personal Computer	DYM	07254115	M
Belle design and decoration	MARS	0310-1452	M
Better homes and gardens.	DYM		M
Bride to be.	DYM	10352511	Q
Choice	DYM	0009-496X	M
Ecos	LIB		Q
PC user.	MASON	1322-3712	M
Scientific American	INFOVISION	0036-8733	M
Vogue.		0042-8019	M
Waves.	JAMBEN	1321-7593	Q
Wheels	WALS	085340918	M
Windows Sources Australia	DYM	13220071	M

4. From the main Periodicals menu, select **Table > Report** – the list will display in print view:

Periodical List			
\$perlist.qrp ISSN	Title	Supplier	16/02/2011 Frequency
0816-1658	Australian Geographic.	AUSTGEO	Q
07254115	Australian Personal Computer	DYM	M
0310-1452	Belle design and decoration	MARS	M
	Better homes and gardens.	DYM	M
10352511	Bride to be.	DYM	Q
0009-496X	Choice	DYM	M
	Ecos	LIB	Q
1322-3712	PC user.	MASON	M
0036-8733	Scientific American	INFOVISION	M
0042-8019	Vogue.		M
1321-7593	Waves.	JAMBEN	Q
085340918	Wheels	WALS	M
13220071	Windows Sources Australia	DYM	M

5. Click the **print** button to print the list

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It is also possible to copy the table and enter it into *MS Excel* or *Word* if required:

1. **Highlight** the items in the list that you would like to copy
2. Select **Main > Base > Copy** (or **Ctrl-C**)
3. After copying the Table, go to the application – for example: *MS Excel*
4. Paste the table (**Ctrl-V**)

	A	B	C	D	E	F	G	H	I
1	Australian Geographic.	AUSTGEO	0816-1658	Q					
2	Australian Personal Computer	DYM	7254115	M					
3	Belle design and decoration	MARS	0310-1452	M					
4	Better homes and gardens.	DYM		M					
5	Bride to be.	DYM	10352511	Q					
6	Choice	DYM	0009-496X	M					
7	Ecos	LIB		Q					
8	PC user.	MASON	1322-3712	M					
9	Scientific American	INFOVISION	0036-8733	M					
10	Vogue.		0042-8019	M					
11	Waves.	JAMBEN	1321-7593	Q					
12	Wheels	WALS	85340918	M					
13	Windows Sources Australia	DYM	13220071	M					
14									
15									
16									
17									
18									
19									
20									
21									
22									

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Reports Module

1. Launch the *Amlib* client
2. Go to **Main > Reports > RepPeriodical** – the Periodicals Reports screen will display:

Report Stats Code	Set Claim (Y/N)	Report Description	Report Type	Template
	Y	Claims Notice via Email	Periodical, Issue, Copy Email	&PICLE.QRP
	N	Full Subscription Details	FULL Details in Supplier, Periodical sequence	&PE1000.qrp
	Y	Monthly Claims Notice	Claim for Undelivered Issues	&perclm.qrp
	N	Overdue Periodicals	Short Listing Issues	&PI0010.qrp
	N	Periodicals List	Short Listing - Periodicals	&PE0010.qrp
	N	Subscription Details for Chelsea	Short Listing Issues	&PI0010.qrp
	N	Test Per OD	Periodical, Issues and Copies	&PIC010.qrp
	N	Title List	Periodical Title List	&PERLIST.QRP

Below is table containing a list of the available reports that can be set up in RepPeriodicals:

TEMPLATE	DESCRIPTION	REPORT TYPE
&PE0001.QRP	Periodical Title Listing	Periodical
&PE0010.QRP	Periodicals listing (short details)	Periodical
&PE0100.QRP	Periodicals listing (medium details)	Periodical
&PE1000.QRP	Periodical listing (full details) – details in Supplier, Periodical sequence	Periodical
&PERCLM.QRP	Claim for undelivered issues	Periodical & Issue
&PERLIST.QRP	List of titles, Location and Frequency	Periodical, Issue, Copy & Item (Default)
&PI0001.QRP	Title listing with issues	Periodical & Issue
&PI0010.QRP	Title listing with issues (brief details)	Periodical & Issue
&PI0100.QRP	Title listing with issues (medium details)	Periodical & Issue
&PICLAIM.QRP	Claim Letter	Periodical, Issue & Copy
&PICLE.QRP	Periodical, Issue, Copy Email	Periodical, Issue, Copy Email
&PIC010.QRP	Periodical, Issues & Copies (Brief details)	Periodical, Issue & Copy
&PICS001.QRP	Periodical Stockitem	Periodical, Issue, Copy & Item (Default)
&PICS010.QRP	Periodical, Issues and Stockitem	Periodical, Issue, Copy & Item (Default)
&SU1000.QRP	Suppliers Only List	Supplier

The report Template names indicate the type of report – the higher the number, the more details that are displayed:

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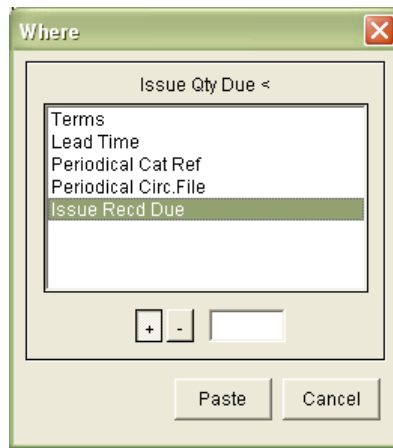
- **PE** Periodical and Suppliers
- **PI** Periodicals and Issues
- **PIC** Periodicals, Issues and Copies
- **PICS** Periodicals, Issues, Copies and Stockitems
- **SU** Suppliers only

Periodical Subscriptions not Received

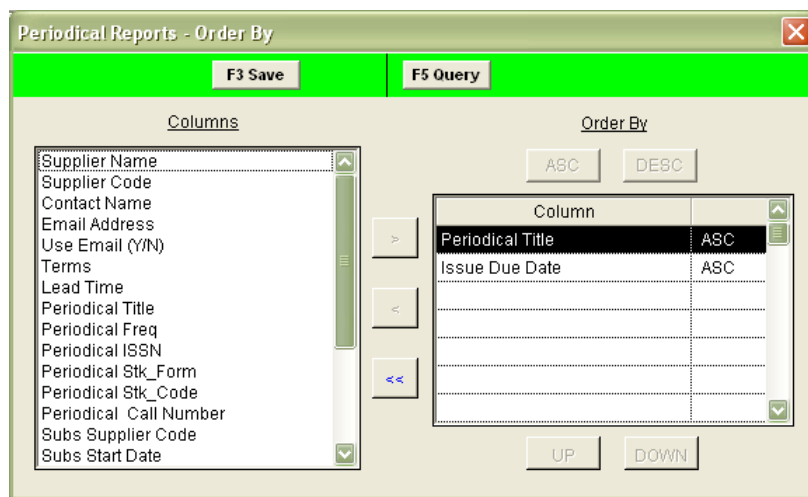
1. Click on the **F1 New** button and highlight a Template that includes Issue details – for example: Short Listing Issues (**&PI0010.QRP** or **&PI0100.QRP**) or Claim Letter (**&PICLAIM.QRP**)
2. Click the **Select** button – the new Report will appear in the table
3. Type in a Report Description and click the **F3 Save** button
4. Highlight this report and click on the **F7 Where** button – the Periodical Reports - Where screen will display
5. Enter the following Where statement:
 - a. **Issue Recd Due < Issue Qty Due** (select **Issue Qty Due** can using the **Special** button)
 - b. **Issue Due Date < Current Date – 1 Month** (select **Current Date – 1 Month** using the **Special** button)

(	Column	Oper	Where)
	Issue Qty Due	<	Issue Recd Due	AND
	Issue Due Date	<	Current Date - 1 Month	

In this example, we are checking for all titles that were expected at least 1 month ago but have not yet arrived. However, you may use as many days or months as appropriate for you.



6. Click the **F3 Save** button when complete
7. Click on the **F9 Order** button – the Periodical Reports – Order By screen will display:



8. From the Columns table, use the > arrow key to move the following across into the Order By table:
 - a. **Periodical Title**
 - b. **Issue Date Due**
9. Click the **F3 Save** button when complete
10. Click the **F8 View** button to see a list on the screen (which can then be printed using the **print** icon) or **F6 Print** to print/email the report via the *Scheduler*

8PI0010.qrp	Short Listing Issues - Issues outstanding	2/09/2002
Brief Periodical with Issues Li		
Landscape		
Issn. 1224.1334	Retn. 999	Circ: Freq: Q Form: PER Stats: ANF
Supplier Dept of Conservation & Land Management		
Issues		
Landscape Summer, 2001		
Claimed: N	Due: 1/01/2001	Recd: Special: N
	Due: 1	Qty: 0
Landscape Autumn, 2001		
Claimed: N	Due: 1/04/2001	Recd: Special: N
	Due: 1	Qty: 0

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A letter could be set up to Print out Claims to the supplier, or a list so that the Supplier could be phoned.

Claim for Periodical Undelivered

2/09/2002

Subscription Dept
Dept of Conservation & Land Management
17 DickPerry Avenue
Kensington WA

9334 0333

The following periodicals did not arrive as ordered. Please supply these items or refund the Library the amount owing.

Landscape
Issn. 1224-1334 Freq. Q 01-Jan-2001 Subscription Paid: \$48.00

Produce a Renewals List

For example: a listing of Periodicals with **subscriptions that will need renewing** in the next 2 months.

Periodical Reports - Where

F3 Save F5 Query

1 Choose Search Column

- Supplier Name
- Supplier Code
- Contact Name
- Email Address
- Use Email (Y/N)
- Terms

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)
	Subs Renew Date	>=	Current Date	AND
	Subs Renew Date	<=	Current Date + 2 Months	

AND

OR

Delete

Where

Subs Renew Date <= Sunday, 17 Apr 2011

Current Date

- Start of Week
- Start of Month
- Subs Start Date
- Subs End Date
- Issue Due Date

+ - [] Days

+ - [2] Months

Paste Cancel

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Periodicals with a Particular Supplier

Periodical 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)
	Subs Supplier Code	=	DYM	

AND

All Periodicals

Periodical 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)
	Periodical Title	IS NOT	NULL	

AND

Supplier Listing (&SU1000.QRP)

EBS	Subscriptions Dept		
	Ebsco		
	253 Bourke St		7 30
	Melbourne		Tel. 03 1234 1234
	VIC		Fax 03 4321 4321
	3000		Email ebsco@ozemail.cc

Supplier: Full listing of Subscriptions with Costs (&PE1000.QRP)

Choice					
Issn. 1227-2567	Retn. 12	Circ:	Freq: M	Form: MAG	Stats: A
Subscriptions					
Renew	OrderNo:	Cost: \$50.00	Quantity: 2	Location: E	
Nov-1998	Comments:				

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Title Listing (&PE0001.QRP – also includes Frequency)

Motor Mechanic	
Time magazine	
Choice	1227-2567
National Geographic	0027-9358
Australian Personal Computer	
Southern Sky	1320-3347
Astronomy Now	1234-1256
Australian Geographic	

Brief Details (&PE0010.QRP)

Designer Monthly					
Issn.	Retn. 48	Circ: 222	Freq: M	Form: P	Stats: P
Supplier Angus & Robertson			Quantity: 1		
<hr/>					
Sunny Times					
Issn.	Retn. 999	Circ:	Freq: I	Form: P	Stats: P
Supplier Belmont Newsagency			Quantity: 1		

Issues Listing (&PI0001.QRP)

Where **Issue Qty Due > Issue Recd Due** to get Outstanding items only (in a very brief report)

<small>&PI0001.qrp</small>	Issues - very brief - Holdings for Landscape	<small>5/10/2004</small>
Brief Issues Listing		
The bulletin		Freq: W
08 September 2004		
15 September 2004		
22 September 2004		
Fremantle Town Crier		Freq: W
16 September 2004		
23 September 2004		
Vincent Voice		Freq: F
Vol. 13 No. 44 16 Sep 2004		

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Issues and Copies (&PIC010.QRP)

Periodical 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)
	Line1	LIKE	Lands	AND
	DateReceived	>=	Friday, 1 Jan 2010	AND
	DateReceived	<=	Friday, 31 Dec 2010	

Buttons: AND, OR, Delete, Paste, Special

&PIC010.qrp Periodical,Issues and Copies - Holdings for Landscape 5/10/2004
Brief Periodical with Issues & Copies Listing

Landscape
Issn. 0123-0443 Retn. 999 Circ: 555 Freq: Q Form: PER Stats: ANF
L

Supplier Osborne Park Newsagency

Issues

Spring, No. 4 2004 Special: N
Claimed: N Due: 1/10/2004 Recd: 19/08/2004
Due: 1 Qty: 1

Stock Listing (&PICS001.QRP)

Indicates if the copy is on loan with the Return date displayed as Back On:

&PICS001.qrp Holdings for Periodical - Holdings for Landscape 5/10/2004
Issues & Stock Listing

AL	Title	Call	Locn	Back On
AL0345123444	Title: Landscape Summer, 2001	Call: ANFL	Locn:EAS	Back On: Form: PER
AL0345123445	Title: Landscape Autumn, 2001	Call: ANFL	Locn:EAS	Back On: Form: PER
AL0567123442	Title: Landscape Winter, 2001	Call: LAN PER	Locn:EAS	Back On: Form: PER
AL0567123452	Title: Landscape, Summer 2001	Call: LAN PER	Locn:EAS	Back On: Form: PER
324567898972	Title: Landscape : Autumn No. 2 2003	Call: LAN PER	Locn:EAS	Back On: 26/10/2004 Form: PER
32443233453	Title: Landscape : Winter No. 3 2003	Call: LAN PER	Locn:EAS	Back On: Form: PER

APPENDICES

Appendix 1: Stockwand Change

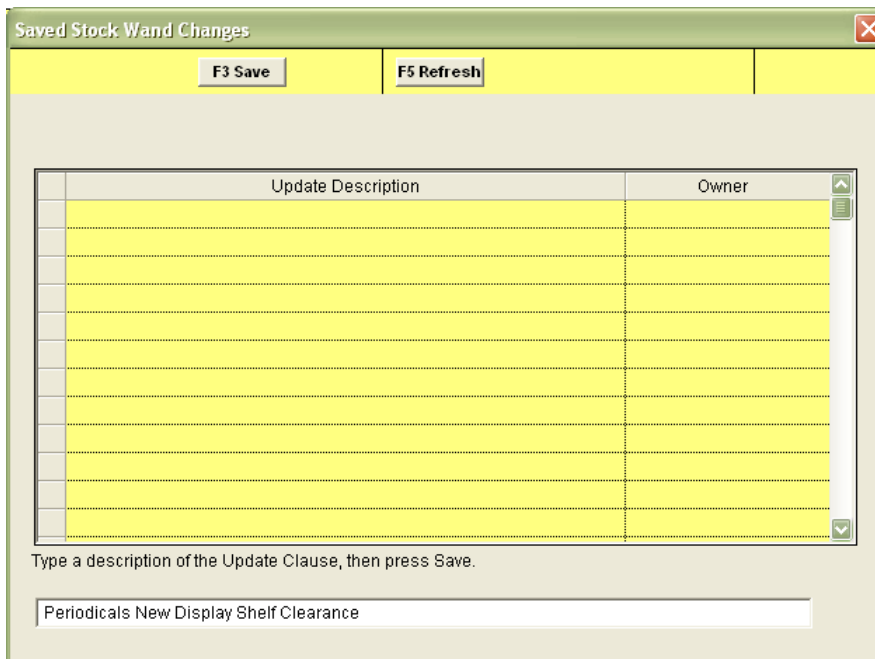
Stockwand change may be useful if the library has a stack of Periodicals that were on display and are now ready for the shelves and to be loaned. The Process can be saved for further use.

1. Launch the *Amlib* client
2. Go to **Main > StockItems > StockitemWandChange** – the Stockitem Wand Change screen will display
3. Choose a Column to change (1) – for example: **Floor Location**
4. Type in the New Value (2) – for example: **NULL** (paste without value)
5. Click the **Paste** button – the parameter will display in the Update Description table at the bottom of the screen:

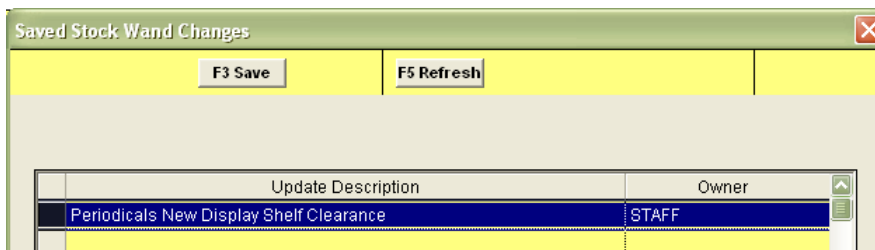
Please Note: If some/all of the buttons are not visible (for example: **FrWhere**) these can be added in **Main > Supervisor > UserNames > select User > F8 Choose > ViewingMenu > StockItems > StockWandChange**

Save the Process

1. The Process can be saved by clicking the **F2 Insert** button – the Saved Stock Wand Changes table will display:



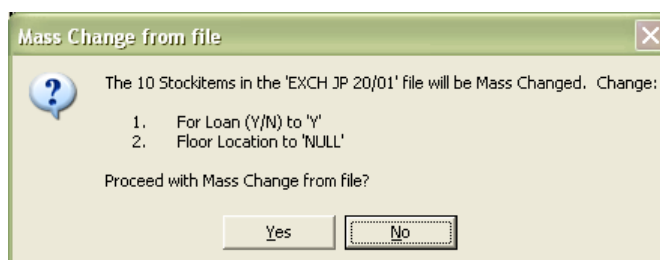
2. Type in a description – for example: **Periodicals New Display Shelf Clearance**
3. Click the **F3 Save** button



- Previously Saved Processes can be selected by clicking on the **F4 Select** button

Execute the Changes

1. Changes can be made by wanding the items in one-by-one, from a Stockitem Saved File (click the **F7 FrFile** button) or a Saved Where search (click the **F8 FrWhere** button)
2. A prompt will display, detailing how many items will be changed and the data changes that will be implemented:



3. Click the **Yes** button – the following Mass Change prompt will appear: **The XX Stockitems have been Updated.**



4. Click the **OK** button

Appendix 2: NetOpacs

There can be a specific [Periodicals Search](#) if required. The design and function depends on the way the *NetOpacs* were installed and configured. The screenshots below show examples of a specific Periodical Search. Some sites do not have this configured and Periodicals searched via a normal [Title](#) or [Subject](#) search.

The screenshot shows a web page titled "Web Catalogue Access" with a yellow background. Below the title, there is a welcome message: "Welcome to the General online library catalogue. Select a Search option from the choices below." The page is divided into two main sections: "Keyword Searches" and "Other".

Keyword Searches	
All Fields	Search any word from Title, Author, Subject, Series or Notes
Author	Search an Author's name
Title & Series	Search using any word in a Title or Series
Exact Title	Search using the Exact title of an item
Subject	Search using any word in a Subject Heading
Periodicals	Search a Periodical or Magazine Title
New Items	Search for New Items

Other	
My Details	Enter your barcode to view loan information
Email	Email the library with any queries you have

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- Click on the **Periodicals** search link

The screenshot shows a web page titled "Periodical and Magazine Search" with a yellow background. Below the title, there is a text box with the following text: "To find a Periodical or Magazine you can search on any word in the Title. After typing your keywords in the box below, press Enter or the Search Button." Below this, there is an example: "e.g. To find the Periodical 'Australian Personal Computer' you can type the following:"

Personal Computer or
Australian Computer

Choice

Refine by:
Item Type (optional) by Classification (optional)

All All

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Periodical List

Back [] [] [] [] []

4 periodicals found for **CHOICE**

1	Choice 2003	Full Details
2	Choice 2004	Full Details
3	Choice 2005	Full Details
4	Choice 2006	Full Details

Back [] [] [] [] []

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- Click on the hyperlink for Main Entry to show the holdings held in the Library. Full Details will display the Catalogue entry of the Master
- Click the Issue hyperlink to see the Catalogue details of the Issues

Issues List

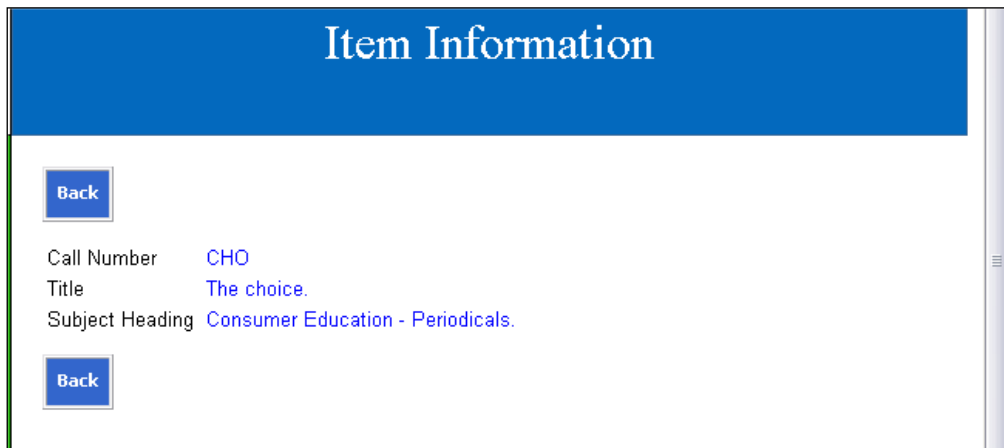
Back [] [] [] [] **First Entry** **Prev Entry** [] [] [] []

6 issues found for **Choice 2006**

1	January/February 2006	Issue Details: Issue Date:	Copies: 1 1 Jan 2006
2	March 2006	Issue Details: Issue Date:	Copies: 1 1 Mar 2006
3	April 2006	Issue Details: Issue Date:	Copies: 1 1 Apr 2006
4	May 2006	Issue Details: Issue Date:	Copies: 1 1 May 2006
5	June 2006	Issue Details: Issue Date:	Copies: 1 1 Jun 2006
6	July 2006	Issue Details: Issue Date:	Copies: 1 1 Jul 2006

Back [] [] [] [] **First Entry** **Prev Entry** [] [] [] []

- Clicking on the Issues hyperlink will display the library's Catalogue for the Issue



Item Information

[Back](#)

Call Number [CHO](#)
Title [The choice.](#)
Subject Heading [Consumer Education - Periodicals.](#)

[Back](#)

- Clicking on the hyperlink "Copies" will display the Item listing of the copies, showing Loan Status of the items etc



Item List

[View All](#)

1 items found for **March 2006** **Sort By:** **GO**

1. [Choice 2006 : March 2006](#) /
Shelf Location: **PL**
Number of Reserves: **0**

Item Type: **P PL**
Status: **Not For Loan**
Lib. Location: **Library**
Floor Location:

[View All](#)

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- Click on the Title to see the Catalogue entry for the Item

To search for magazines on a particular subject – go to the Subject search page and perform a subject search, then limit the results using the Item Type drop-down (where available) and limit to Magazines

Subject Keyword Search

Type all or part of one or more words in the subject you are interested in

Examples Garden Ornaments and Furniture
 Ornaments and Furniture
 Garden Furniture

Limit search by:
Item Type: eg book, cd-rom and/or Branch:

Press the arrow in either of the above boxes for further choices
To start the search press

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- The Main Periodical Catalogue could have the Subdivision on the Subject heading to define it more accurately and prevent resulting item lists from being “clogged” with Periodical Titles when doing general Subject Searching.

Subject List

8 subjects found for CONSUMER EDUCATION

- Consumer Education. (30 entries)
- Consumer Education - Australia. (5 entries)
- Consumer Education - Australia - Video.
- Consumer Education - Computer Network Resources.
- Consumer Education - Great Britain.
- Consumer Education - Periodicals. (8 entries)
- Consumer Education - United States. (2 entries)
- Consumer Education - United States - Video.

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Appendix 3: Periodicals Linking to the Orders Module

When creating a new Subscription line in the Periodicals module, it is possible to link that Subscription to an Order.

1. Create an Order Header and Order Line – entering the Subscription cost details (if you have an Order Type for Subscriptions set up, then you may like to enter this in the Order Header Type field)

Order Header - STAFF at Eastville

Main Application Orders Transactions References

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

Order No: 677 (AMREF1) Order Group: Lib Group: LIB

Summary: Time Australia Magazine Subscription Received: 0

Supplier: NEW Osborne Park Newsagency (AMREF2) Invoiced: 0

Supplier's Reference (EXTREF1) Ordered: 0

Forex Code: AUS Forex Rate: 1.000 Forex Date: 01/01/1996 Forex Amount: AU\$177.00

Date Placed: 27/08/2009 Date Expected: 03/09/2009 Date Printed: Local Amount: AU\$177.00

Type: SUBS Condition: APPRO Date to Claim: Status: ORDERED

Notes:

STAFF
27/08/2009 9:11 AM

Item	Ln	Line 1 Details	Line 2 Details	Line 6 Details	Qty Ord	Qty Recd	Qty Invd	Order Line Process	Cost (Inc Tax)	Item Form	Item Stats	Account	Alloc.
N	1	Time Magazine Subscri			1	0	0		AU\$177.00			MAG	SS

You can then add the Order details to a Subscription line.

New Subscriptions

1. In the Periodical Subscriptions - New screen, type in the following:
 - a. Order No: – for example: **677**
 - b. Line No: – for example: **1**

Subscriptions - New

F1 Clear F3 Update F5 Query F6 StkDef F7 Order F8 CircList

All Subscriptions for Time Australia Magazine

Library Group	Supplier Code	Renewal Date	Start Date	End Date	Issues per Subs	Copies per Issue	Subs Cost	Cost per Issue
LIBRARY	DYM	27/04/1999	27/04/1998	28/04/1999	13	1	\$59.40	
LIBRARY	DYM	17/12/1998	16/12/1997	17/12/1998	13	1	\$59.40	

Order No: 677 Line No: 1 Lib Group: LIBRARY

2. You can also look up the existing Order information:
 - a. Click on the **F7 Order** button – the Select screen will open

Order Number	Order Line	Title	Qty Ordered	Cost
677	1	Time Magazine Subscription	1	\$160.91

- b. In the Title field enter the Description/Line 1 Details for any existing Line No and click the **F5 Query** button
 - c. A list of matches will then appear in the table at the bottom of the screen
 - d. Highlight the desired Order Number/Order Line and click the **F9 Select** button
 - e. The Order No and Line No details will automatically be inserted on the Subscriptions – New screen
3. Click the **F3 Update button** when complete

Existing Subscriptions

1. In the Periodical Issues and Subscriptions screen, highlight an existing Subscription line and click the **F2 Modify** button – the Subscriptions - Modify screen will display
2. Type in the following:
 - a. Order No: – for example: **677**
 - b. Line No: – for example: **1**
3. You can also look up the existing Order information:
 - a. Click on the **F7 Order** button – the Select screen will open
 - b. In the Title field enter the Description/Line 1 Details for any existing Line No and click the **F5 Query** button
 - c. A list of matches will then appear in the table at the bottom of the screen
 - d. Highlight the desired Order Number/Order Line and click the **F9 Select** button
 - e. The Order No and Line No details will automatically be inserted on the Subscriptions – Modify screen
4. Click the **F3 Update button** when complete