



Amlib

Library Management System

Amlib Stocktake Manual

Last Updated: 9th September, 2015

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Support:

Australia: 1300 260 795 (Local call cost in Australia)

Email: support-anz@oclc.org

Amlib Help Desk (TOPDesk):

<https://oclc.topdesk.net/tas/public/login/form> OCLC Amlib

Support Documentation:

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

Sales:

Australia: 1300 260 795 (Local call cost in Australia)

Fax: +61 (0) 3 9929 0801

Email: sales-anz@oclc.org

www.oclc.org/en-AU/

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OVERVIEW

Purpose of a Stocktake

Are run for Library management purposes to determine whether the data on the database of the computer reflects the items on the shelves and vice versa.

Stocktakes are conducted from the *Stockitem* module and *simply populates* the Stocktake Field in the History window as each item is counted.

Stocktake Range

A Stocktake is initiated by creating an entry in the Stock Takes table. The counting is based on a range of user-defined parameters. This is usually Call Numbers (Line 6).

It is possible to set a new Stocktake range for the whole collection but only report on a small section of the library. For example, the report parameters can be set to view only the missing items in a particular location –i.e: Fiction only, Junior Fiction only, Non-Fiction Call No's up to the 400s, Junior Campus, Chelsea Branch only, etc.

Loaning and Returning

Items issued or returned during the Stocktake will have their flags set to count. Therefore, it is not essential to recall all items for stocktaking purposes. Creating a separate report can identify items on loan that have not been counted, if necessary.

Stocktake Date in History of Item

Before commencing the Stocktake, this field can be cleared if desired, by Setting Flags. **It is important that this option is not chosen during the Stocktake as this will clear the Stocktake Date field for all counted items!**

STOCKTAKE - STEPS IN THE PROCESS

PREPARATION FOR STOCKTAKE

- Are there any items without Call Nos?
- Optional Mass change to give a Call No



SET STOCKTAKE RANGE AND CLEAR FLAGS

- Set Call No Ranges for Stocktake
- Optional Clear Flags – deletes Stocktake dates in Stockitem



COUNTING

- Online using **Upload** button
- Offline from a File (e.g. Text file) and then using **Upload**



REPORTING MISSING ITEMS

Where Searches – save these. Could include:

- Missing items
- Missing items already Missing e.g. from last year
- Items Counted
- Print Reports from the Table Menu



CHECKING MISSING ITEMS

- From Printed lists



MASS CHANGE OF MISSING ITEMS

- Create a New Process e.g. Missing Stk 2015
- Use Stockwand Change, accessing Saved Where Searches



MASS DELETE OF ITEMS ALREADY MISSING

- Optional Delete from Saved Where search of items already Missing

PREPARING FOR A STOCKTAKE

Stocktaking Decisions

- **How will the counting be done?**

Wireless Scanner, RFID readers, Portable barcode readers, laptops, PCs, etc.

- **Which parts of the stock is to be counted?**

All items, fiction only, all items excluding periodicals, a certain Location, DVDs, CD-ROMs and Digital Collections etc.? This will be important when the reports are created.

- **What about items on loan?**

These will be counted if they are returned during the Stocktake period. You will not want the outstanding items to be made Missing but you may want to get a listing of them, particularly long term loans.

- **When is the best time to do the Stocktake?**

Least disruption to services. Staff involved etc.

Portable scanners have less impact on the client base as there are no cords to trip over or bulky items to move around.

As the items that are issued are also counted, there is no need to actually halt lending practices.

- **How long will the Stocktake take?**

This is always difficult to answer, as the counting may only take a few days but sorting out the mysteries is the lengthiest process in a Stocktake.

If the time between the actual counting and reporting of missing items is lengthy, it is possible to set a date received in the reports, so that new items within this period will not have to be counted and will not display as missing.

- **Which locations are to be included in the Stocktake? Are there other locations that can be impacted by the Stocktake preparation?**

If the flags are set, it clears the Stocktake date from ALL Stockitems. Therefore if the Library site is a multi-campus site, it may be safer not to clear the flags (dates), but have the Stocktake reports show the dates prior to when the Stocktake was commenced.

ITEMS WITHOUT CALL NUMBERS

Stocktake counting is usually based on Call Numbers of Stockitems. There may be some items which – for whatever reason – may not have a call number.

Items without Call Numbers will not be included in the Count in Theory and will not be included in the Stocktake because they are “**Out of Call Number range**”.

Ref. No	Closed	Data Line	KEY Data From	KEY Data To	Count in Theory	Actual Count	Started	Latest Date	Last Line Details
1	N	6	200	300	11	0	18/07/2003	21/07/2003	VIDEO 799.1 HO
2	N	6	0	200	48	8	18/07/2003		

Therefore, it will be necessary to assign these items a call number for stocktaking purposes (if only temporarily).

Locate Items without Call Numbers

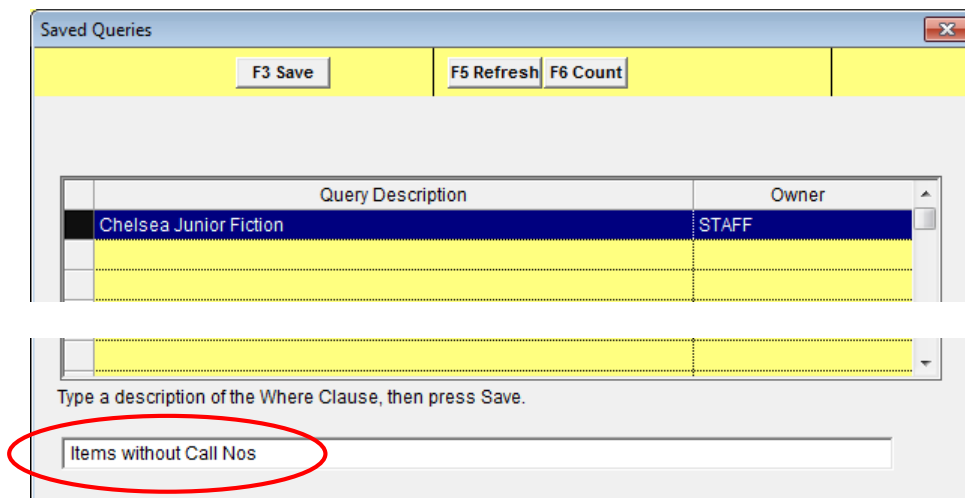
1. Launch the *Amlib* client
2. Go to **Main > StockItems> StockitemWhere** – the Where Search screen will display:

3. Enter the following Where statement: **Call Number IS NULL**
 - a. In box 1, select **Call Number**
 - b. In box 2, select =
4. Click the **Paste** button (without entering a value in box 3)

Save the Where Search

It is possible to save the above Where Search for future use:

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

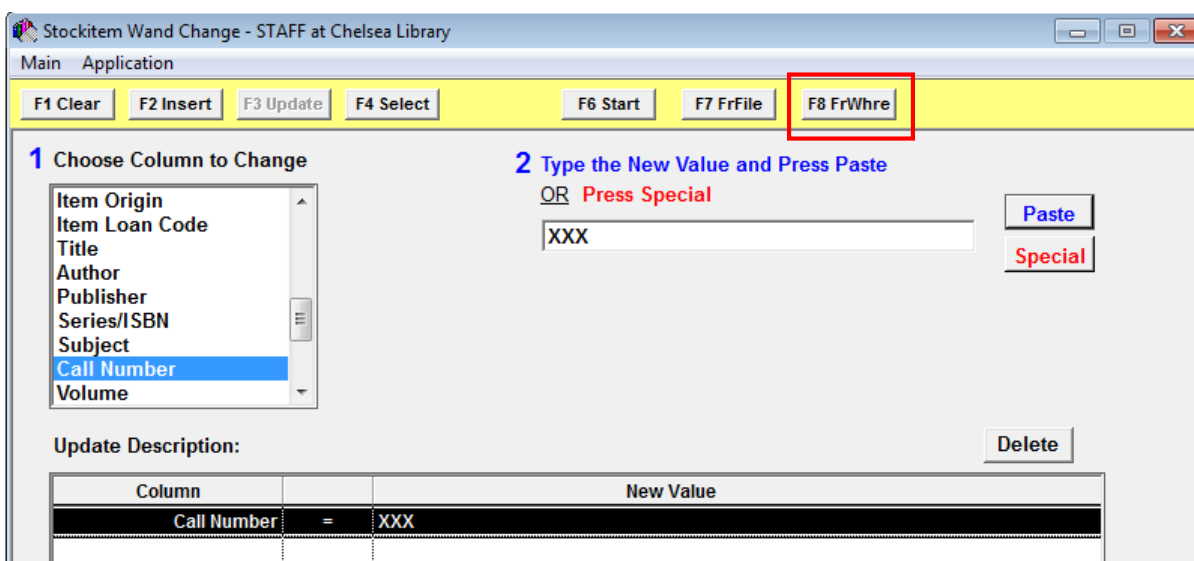


2. Type a Description in the box at the bottom of the screen – for example: **Items without Call Nos**
3. Click the **F3 Save** button – a prompt with the following message will display:
The Query File has been created.
4. Click the **OK** button

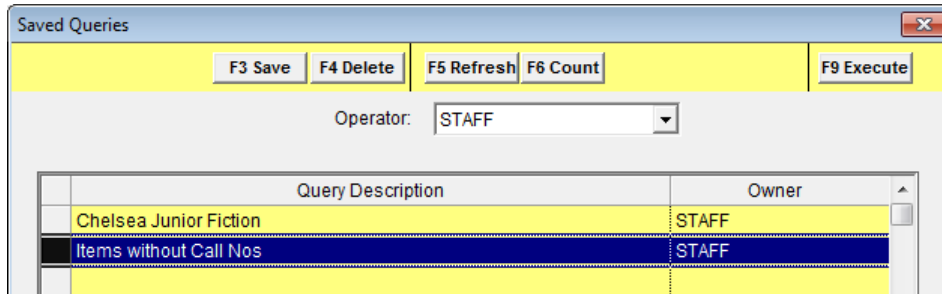
Stockitem Wand Change

A Mass Update can then be performed which will insert a “dummy” call number (for example: **XXX**) into each stockitem. These call numbers can then be deleted/changed at a later date.

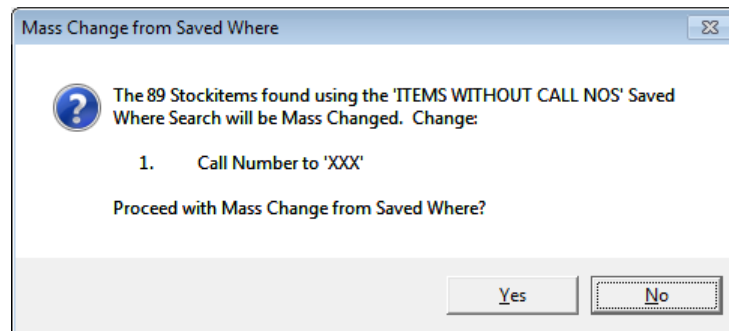
1. Launch the *Amlib* client
2. Go to **Main > StockItems > StockitemWandChange** - the Stockitem Wand Change screen will display:



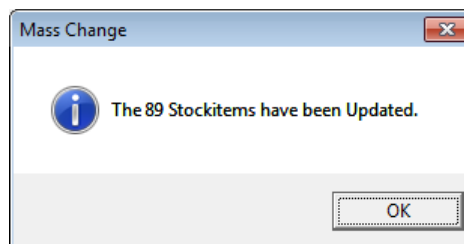
3. Enter the following Where statement:
 - a. In box 1, select **Call Number**
 - b. In box 2, type **XXX** (or whatever the dummy call number is to be)
4. Click the **Paste** button
5. Click the **F8 FrWhere** button – the Saved Queries screen will display:



5. Select the Where Search saved previously – for example: **Items without Call Nos**
6. Click the **F9 Execute** button – a prompt with the following message will display:
The XXX Stockitems found using the 'ITEMS WITHOUT CALL NOS' Saved Where Search will be Massed Changed. Change:
 1. **Call Number to 'XXX'****Proceed with Mass Change from Saved Where?**



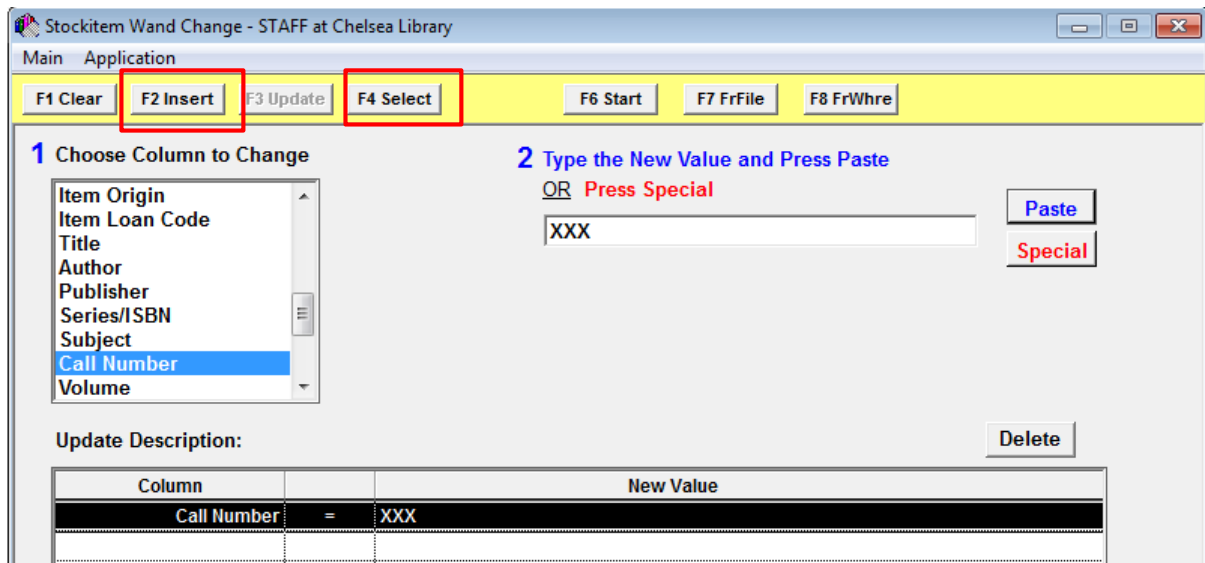
7. Click the **Yes** button
8. The items will be processed – a prompt with the following message will display when complete:
The XX Stockitems have been Updated.



9. Click the **OK** button

Stocktake Manual

Please Note: Processes are able to be saved by clicking the **F2 Insert** button. These can then be chosen again using the **F4 Select** button and the list of saved queries will display.



Please Note: If all the buttons are not available across the top of the Stock Wand Change screen, these can be made available to the user via the *Supervisor* module.

- See [Appendix A: Stockitem Wand Change Buttons](#) for more information

BEGINNING A NEW STOCKTAKE

New Stocktake in Progress

1. Launch the *Amlib* client
2. Go to **Main > StockItems > StockTake** – the Stocktakes In Progress screen will display:

Ref. No	Closed	Data Line	KEY Data From	KEY Data To	Count in Theory	Actual Count	Started	Latest Date	Last Line Details
	N	6	0	ZZZ		0	09/09/2015		

NOTE : USE KEY FORMATS for FROM & TO

3. Click the **F1 New** button – a new line will be added to the table with the following settings:
 - a. Ref. No. (Reference Number): this will be automatically generated
 - b. The Closed column will be set to **N** (this means the Stocktake is *active*)
 - c. The Data Line will default to **6** (this refers **Line 6** of the stockitem record – which is usually the field containing the Call Number – and is the field we recommend you use for testing your KEY Data against)

Stocktake Range

4. Enter the KEY Data From and To range of parameters for the Stocktake – for example:
 - From: 0 To: ZZZ (for ALL items) [recommended]
 - From: 000 To: 999 ZZZ (for all non-fiction items)
 - From: AAA To: ZZZ ZZZ (for all fiction items)

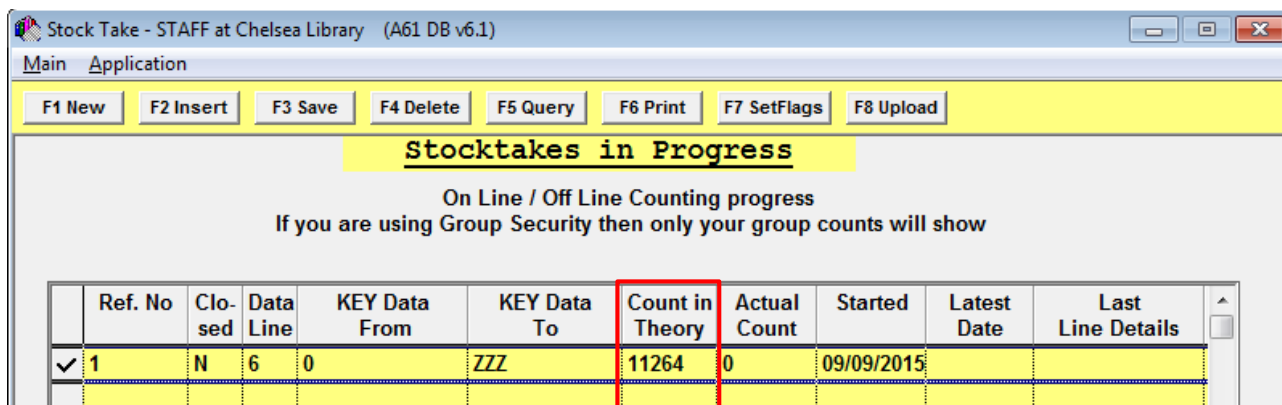
5. Click the **F3 Save** button when complete

Please Note: Some non-fiction items sometimes have a letter in front of their call number (for example: **A820** for Australian Literature). These items would not be included in the following example number range: From: **000** To: **899 ZZZ**. We recommend setting up a separate Stocktake line to account for these items (see [Grouping Stocktakes](#) below).

Stocktake Manual

Count in Theory

- Once the range has been saved, the Count in Theory number displays:



Stock Take - STAFF at Chelsea Library (A61 DB v6.1)

Main Application

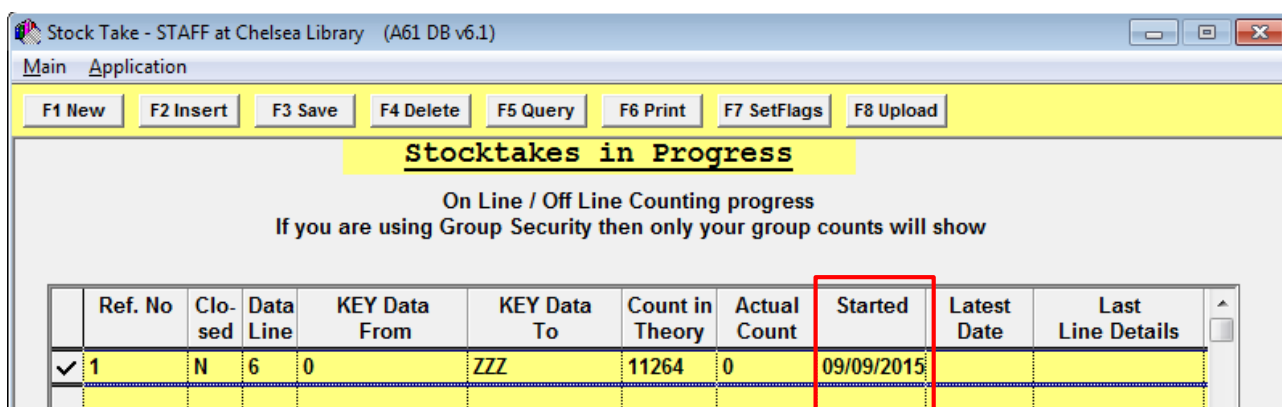
F1 New F2 Insert F3 Save F4 Delete F5 Query F6 Print F7 SetFlags F8 Upload

Stocktakes in Progress

On Line / Off Line Counting progress
If you are using Group Security then only your group counts will show

	Ref. No	Clo- sed	Data Line	KEY Data From	KEY Data To	Count in Theory	Actual Count	Started	Latest Date	Last Line Details
✓	1	N	6	0	ZZZ	11264	0	09/09/2015		

- This is the system count of items within that range that should exist in the database
- As items are counted, the number in the Actual Count increases to reflect those counted
- It also sets a Stocktake Started date:



Stock Take - STAFF at Chelsea Library (A61 DB v6.1)

Main Application

F1 New F2 Insert F3 Save F4 Delete F5 Query F6 Print F7 SetFlags F8 Upload

Stocktakes in Progress

On Line / Off Line Counting progress
If you are using Group Security then only your group counts will show

	Ref. No	Clo- sed	Data Line	KEY Data From	KEY Data To	Count in Theory	Actual Count	Started	Latest Date	Last Line Details
✓	1	N	6	0	ZZZ	11264	0	09/09/2015		

Grouping Stocktakes

It is possible to run multiple simultaneous Stocktakes, each capturing Stocktake information on a particular part of the collection.

Stocktake can be set by Call Numbers categories – as the following example shows:

Stocktake Manual

Stock Take - STAFF at Chelsea Library

Main Application

F1 New F2 Insert F3 Save F4 Delete F5 Query F6 Print F7 SetFlags F8 Upload

Stocktakes in Progress

On Line / Off Line Counting progress
If you are using Group Security then only your group counts will show

	Ref. No	Clo- sed	Data Line	KEY Data From	KEY Data To	Count in Theory	Actual Count	Started	Latest Date	Last Line Details
✓	1	N	6	200	300	421	122	18/07/2003	21/07/2003	VIDEO 799.1 HO
✓	2	N	6	300	500	1252	173	18/07/2003		
✓	3	N	6	500	700	4035	272	18/07/2003		
✓	4	N	6	700	999	544	340	18/07/2003		

Fiction/Non-Fiction

Stock Take - STAFF at Chelsea Library

Main Application

F1 New F2 Insert F3 Save F4 Delete F5 Query F6 Print F7 SetFlags F8 Upload

Stocktakes in Progress

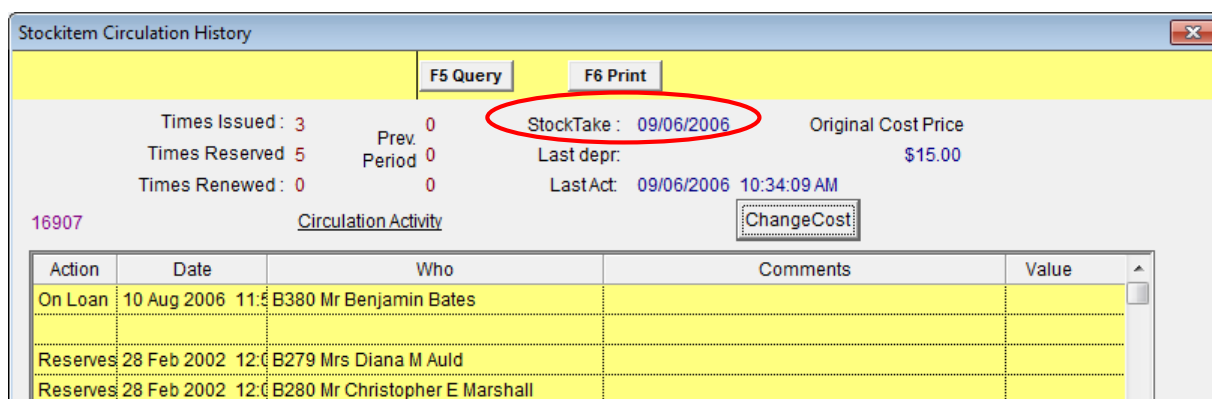
On Line / Off Line Counting progress
If you are using Group Security then only your group counts will show

	Ref. No	Clo- sed	Data Line	KEY Data From	KEY Data To	Count in Theory	Actual Count	Started	Latest Date	Last Line Details
✓	1	N	6	0	999 ZZZ	1121	0	14/10/2011	20/10/2011	
✓	2	N	6	A	ZZZ	4035	0	14/10/2011		

SET FLAGS (CLEAR PREVIOUS STOCKTAKE DATE FROM ITEM HISTORY)

General Information

- Each stockitem counted during a Stocktake is flagged with a StockTake date (the date that it was counted). This can be seen in the Stockitem Circulation History screen of each item:
 1. Launch the *Amlib* client
 2. Go to **Main > StockItems > Stockitem** – the Stockitem screen will display
 3. Enter a search for an item
 4. Once the item is displayed, from the menu, select: **Item > History** – the Stockitem Circulation History screen will display:

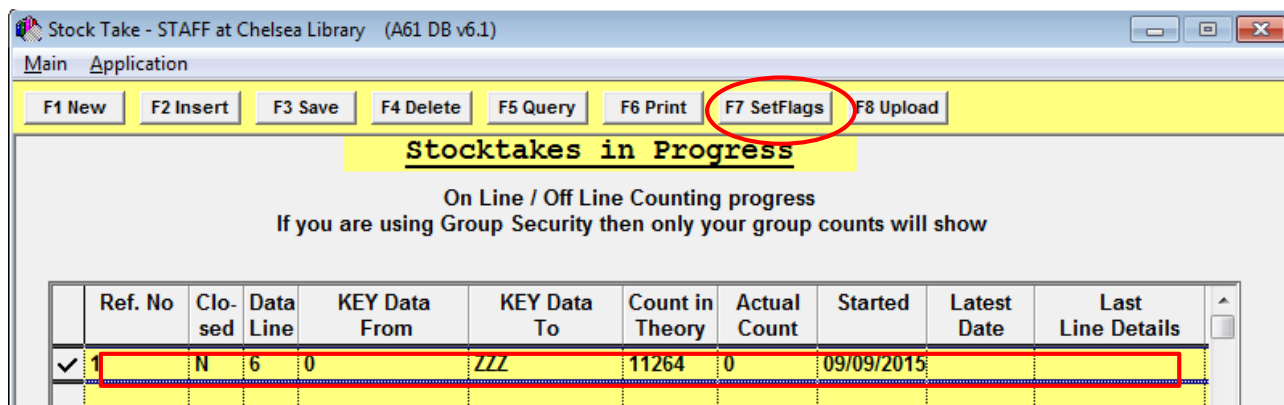


- The date that the item was last counted in a Stocktake displays in the StockTake field (displayed above)
- The Set Flags process removes any pre-existing StockTake dates from the items in the system (by replacing it with a null value), ready for a new Stocktake
- This makes it easier to detect the items not counted in the Stocktake, which helps make the reporting process easier (as the user is only checking for a NULL StockTake date value, rather than a specific range of dates)
- If the flags are NOT set, the report must use the **LastStockTake** date parameter to measure a specific date range in order to locate items missing prior to the start of the current Stocktake
- The Set Flags process can be done at the beginning of each new Stocktake (if desired). The time this takes depends on the number of the items in the range selected
- The Set Flags process only clears the StockTake dates for the **chosen range** of Call Numbers
- It is not possible to Set Flags for only one location, so before setting flags check that no other location is performing a Stocktake (for multi-campus sites it may be preferable NOT to set flags)

To Set the Flags

Please Note: DO NOT set the flags at any other time than the *beginning* of the Stocktake as this “wipes” the slate clean for those items already counted.

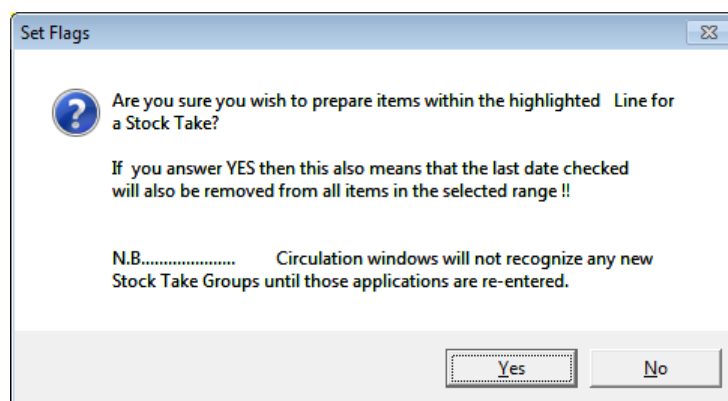
1. Launch the *Amlib* client
2. Go to **Main > StockItems > StockTake** – the Stocktakes in Progress screen will display
3. Highlight the Stocktake range in the table
4. Select the **F7 SetFlags** button – a prompt with the following message will display:



Are you sure you wish to prepare items within the highlighted Line for Stocktake?

If you answer YES then this also means that the last date checked will also be removed from all items in the selected range!!

NB Circulation windows will not recognize any new Stock Take Groups until those applications are re-entered.



6. Click the **Yes** button if you wish to continue

Please Note: All circulation users will need to Log Out and back into any *Circulation* module screen (Issues, Returns, etc) so that the system can be made “aware” that a range has been set for circulation counting.

COUNTING ITEMS

Counting of items is performed using day-to-day circulation, as well as deliberate counting within the *Stocktake* module.

Circulation Module (Issue>Returns)

Once the Stocktake entry has been set, **any return or issue of the item will result in the item being counted** on that date (renewals do not count items).

Stocktake Module

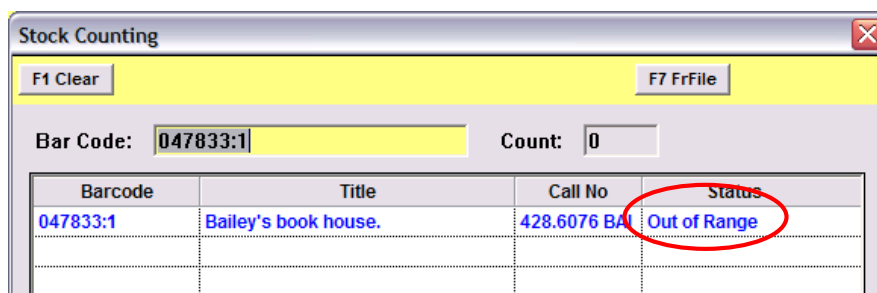
There are **two** options for counting:

1. Offline circulation: this is the ability to download data from a portable barcode reader or from a File
2. Online circulation: this is the ability to wand items directly into the application and count "live"

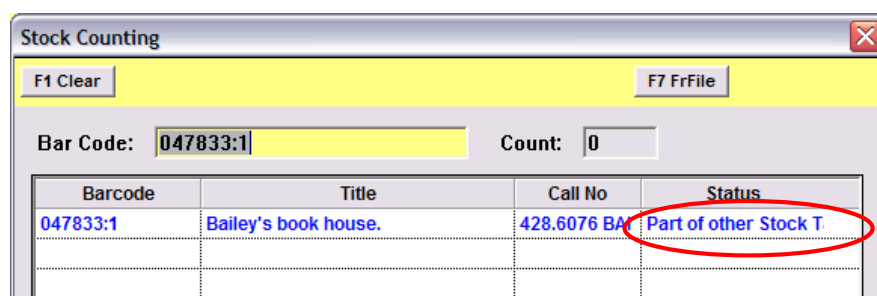
Both can be conducted at the same time. For example: both *Offline* files of barcodes and *Online* barcodes can be wanded through the **F8 Upload** option.

Both options will alert the user to items that are **outside of the specified range**:

- If the Stocktake Range for the Call No has been set, but is not the current Range, an **Out of Range** message will display:



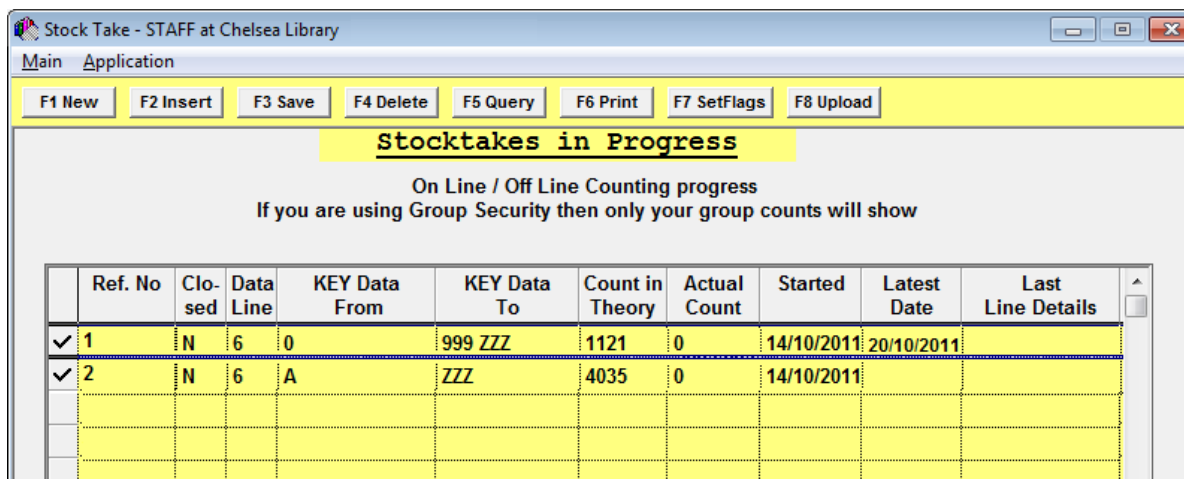
- If the Stocktake Range has not been set, a **Part of other Stock Take** message will display:



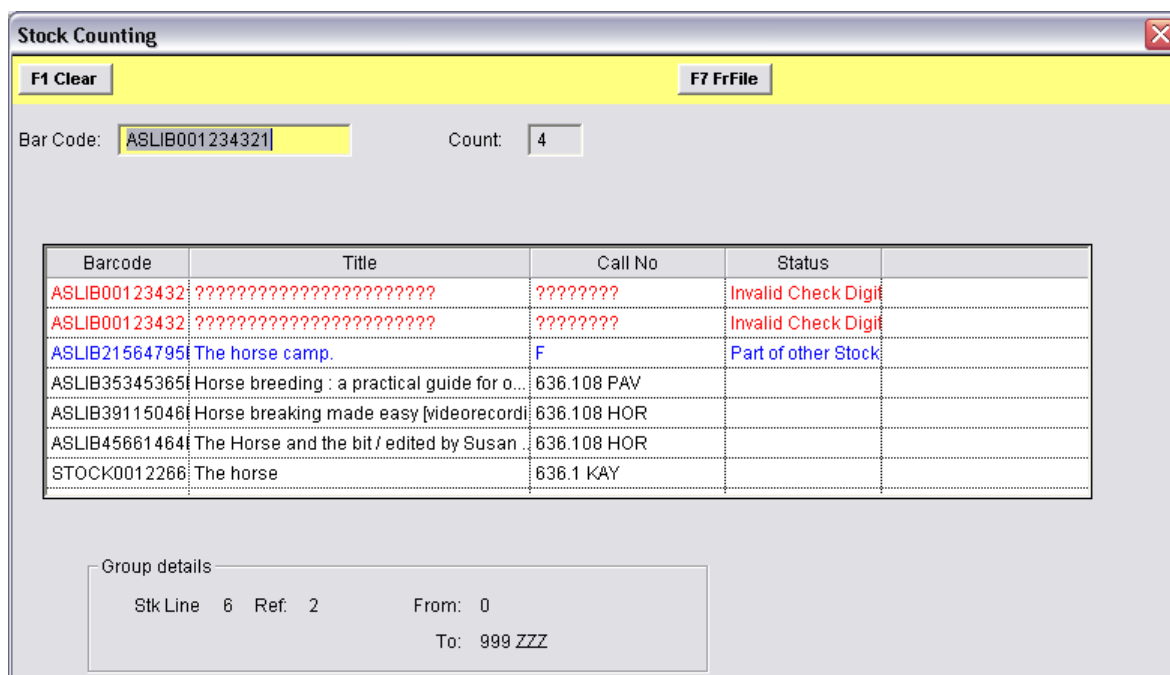
ONLINE STOCKTAKE

On Line Counting

1. Launch the *Amlib* client
2. Go to **Main > StockItems > StockTake** – the Stocktakes in Progress screen will display:



3. Highlight the data line and select the **F8 Upload** button – the Stock Counting screen will display :

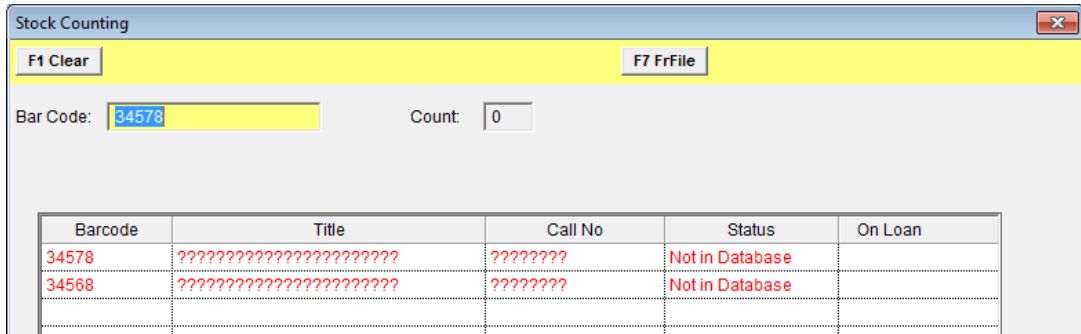


4. Wand each barcode into the Bar Code field
5. Watch the screen for any change of colour on the listing:
 - **Black:** No errors, and in the Stocktake Range
 - **Red:** Error
 - **Blue:** Not in Range

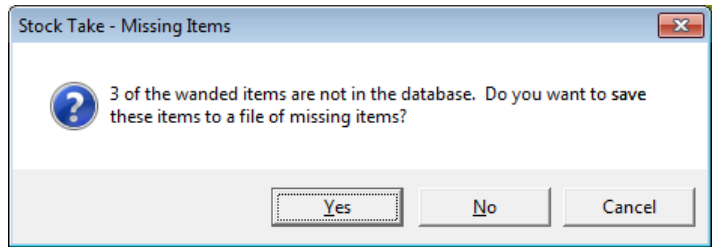
Stocktake Manual

Barcode Errors

1. Any Barcode errors encountered will display as follows – for example: **Not in Database**



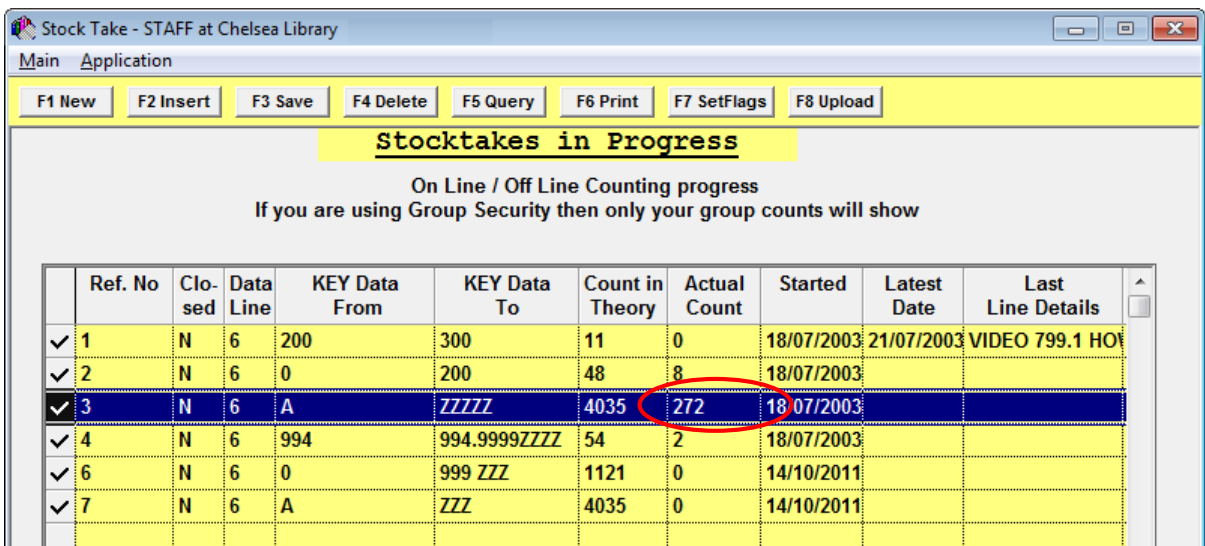
2. A prompt will display: **XX of the wanded items are not in the database. Do you want to save these items to a file of missing items?**



3. Usually the **Yes** button is chosen in case a list is required later

Actual Count

As the items are counted, the Stocktakes in Progress table is updated to show the Actual Count:



OFFLINE COUNTING

Performed by wandling items by:

- Using a portable barcode reader or scanner device
- The *Offline* module
- Saved into a text file

Portable Barcode Reader or Scanning Device

A Portable barcode wand/scanner enables the operator to scan the barcodes of the items at the shelf.

1. Clear the barcode reader so that there are no scans in the memory (follow the manufacturer's instructions for this)
2. Scan the barcodes of the items: each device has a set amount of memory but the download can be done at any time convenient for example, after a bay of books is complete
3. Download into *Amlib*:
 - a. Launch *Amlib* client
 - b. Go to **Main > StockItems > StockTake** – the Stocktakes in Progress screen will display
 - c. Click the **F8 Upload** button – the Stock Counting screen will display:

Barcode	Title	Call No	Status	On Loan

Group details
Stk Line 6 Ref: 4 From: 994

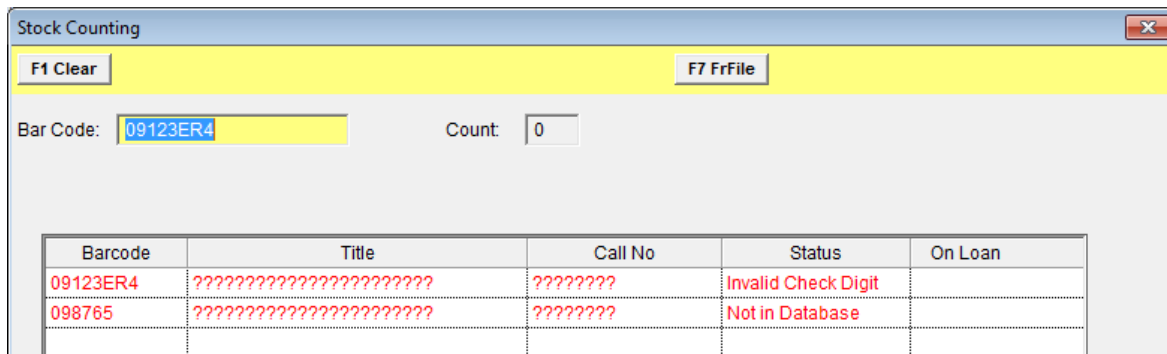
- d. Put the cursor in the Bar Code field and begin the download process (you will need to follow the manufacturer's instruction for this)

Please Note: It is possible to download the items wanded from the device and save as a text file which can then be uploaded into the Stocktake – see: [Load Barcodes \(Items Numbers\) from a Text File.](#)

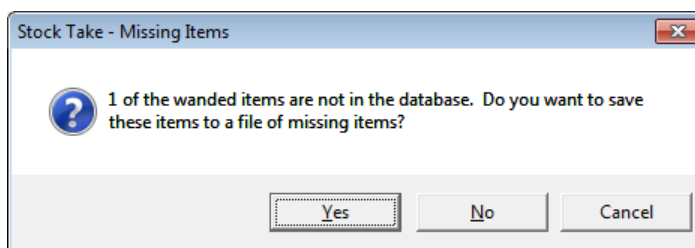
BARCODE ERROR STATUSES ENCOUNTERED

The barcode entered is Not in Database OR has Invalid Check Digit so *Amlib* cannot give the Title, Call number, etc.

1. It is possible to find the item by checking the item previously wanted, and checking the Call No.



2. It is likely to be the next item on the shelf. Take note of the barcode for checking.
3. Select the [X] to close the window – a prompt with the following message will display:
XX of the wanted items are not in the database. Do you want to save these items to a file of missing items?



4. Click the **Yes** button to save these items to a missing items folder to be checked later

Not in the Database Items

A list of barcodes not in the database can be seen in *Query Analyser* for *SQL Server* sites. A query string will bring up a list of unidentified item barcodes:

Query Analyser (for SQL Server sites only)

1. On the server locate *Query Analyser*
2. Logon as **SYSADM**
3. Select **AMLIB** from the database drop-down
4. Enter the script (note the different date format)
5. Select *** from stk_check_miss where stk_date > '14 Sep 2015'**
6. Click on the green arrow or press <F5> to execute the script

7. A list of barcodes that did not match an item on the database will display:

STK_ITEM_NO	STK_DATE
321453447746	21-MAY-2004
321453447735	21-MAY-2004

2 ROWS SELECTED

Invalid Check Digit

The barcode entered does not match the barcode validations set up in **Main > Supervisor > CheckDigits**.

The screenshot shows the 'Stock Counting' window with 'Bar Code: 09123ER4' and 'Count: 0'. Below is a table with the following data:

Barcode	Title	Call No	Status	On Loan
09123ER4	????????????????????	????????	Invalid Check Digit	

If the barcode is a legitimate barcode and is to be used, ensure that a validation is set up correctly in the Check Digits table.

Out of Range

The barcode scanned is not in the range set for the current Stocktake. If the range does not exist, then the item is not counted.

The screenshot shows the 'Stock Counting' window with 'Bar Code: 047833:1' and 'Count: 0'. Below is a table with the following data:

Barcode	Title	Call No	Status
047833:1	Bailey's book house.	428.6076 BAI	Out of Range

Part of Other Stocktake

The barcode scanned is not in the range selected for the current Stocktake line but is within another range that has been set. If the range exists, it will still be counted and the date registered in the History of the item:

The screenshot shows the 'Stock Counting' window with an empty 'Bar Code' field and 'Count: 0'. Below is a table with the following data:

Barcode	Title	Call No	Status	On Loan
980388710	Little Sally Shrimp / Retold by Vera Gis...	J MANG	Part of other Stock Take	N
980388382	The Blood-and-Thunder Adventure on Hu J MAHY		Part of other Stock Take	N

REPORTING ON MISSING ITEMS

Check Individual Items

Individual items can be checked from the **Main > Stockitems > Stockitem - Item > History**. This screen displays the last StockTake date. If the flags have been set, this will be empty (until counted). This is the field that is updated if the item has been wanded using *Offline*, *Online*, on *Issue* or on *Return*.

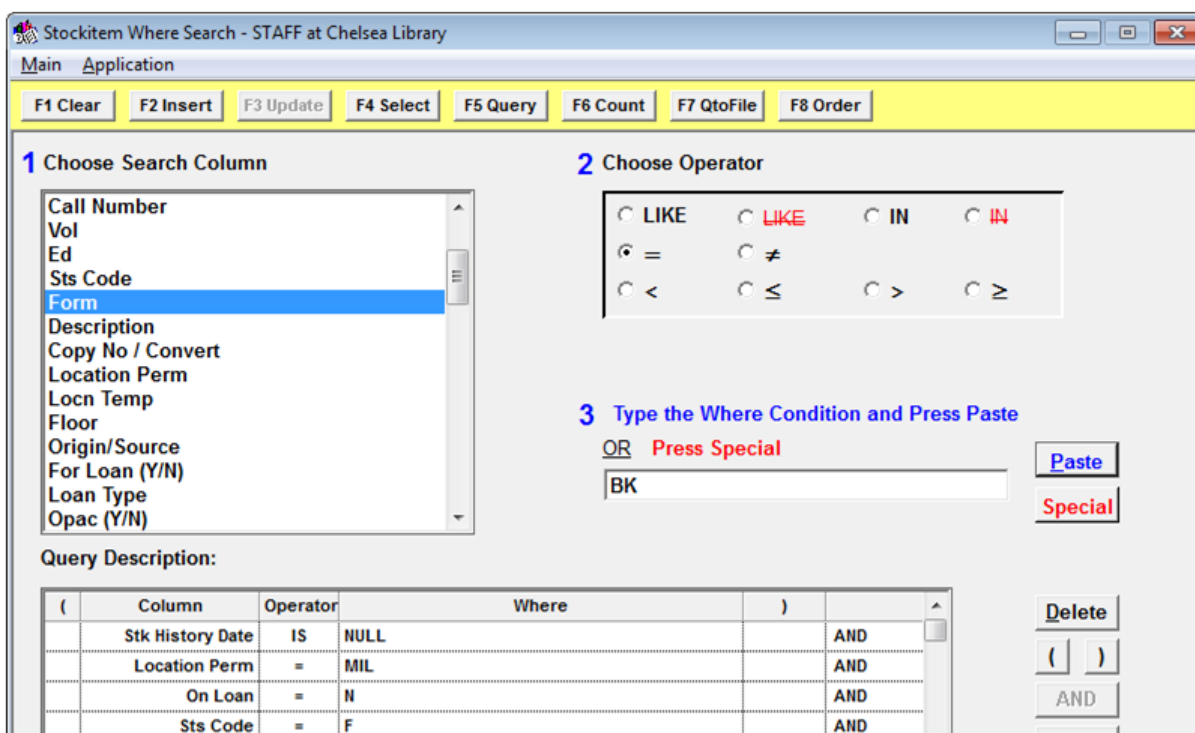


Reports

Reports can be done either via a Where Search or set up as a *Stockitem Report*.

Recommended Where Searches for Stocktake missing items:

- They can be saved and adapted to report various sections of the database, for example, **Missing NF** can be set up for Call Numbers > **0** and < **299 ZZZ**, saved and adapted for Call Numbers > **300** and < **499 ZZZ**
- The same report can be viewed as a Count, a Query table or QueryInto File
- When the items are to be changed (for example: to **Missing 2011**) as a Process, then a Stockitem Wand Change can used to save the Where Search or File created:



Where Statement

The Where Clauses used will depend on the site and the report required. The most important **WhereSearch** clauses will be Stocktake Date is NULL. Other conditions to include could be:

- Location – for example: Branch, Campus, Dept, LIB only, etc
- Stats Code – for example: **JF** (Junior Fiction) only
- Form Code – for example: **BK** (Books) only
- Loan Status – for example: **On Loan = N**
- Call Number range – for example: **F AAA** to **F CZZ**
- Item received by date – for example: Items received before Stocktake started
- Process – for example: exclude Damaged or Missing
- On Order – for example: exclude On Order items
- InterLibrary Loan – for example: exclude all ILLs

This table contains a list of column names from which to choose (use the scroll bar to move up and down this list):

OPERATOR	DESCRIPTION	EXAMPLE
LIKE	Where the required data in this field begins with the text entered	LIKE ELD (for Eldorado)
LIKE	Where the required data in this field does not begin with the text entered	LIKE ELD (for all except Eldorado)
IN	Useful for multi-selections of codes	IN F,JF (for all Fiction, Junior Fiction)
IN	Useful for multi-selections of data not to be included.	IN F,JF (to exclude these codes)
=	Where the text entered is exactly equal to the data required	= BK (for only this Form)
≠	Where the text entered is not equal to the data required. Useful for “not equal to null” – choose this operator but do not enter any data and press paste	≠ BK (to exclude the Form of BK)
<	Where the text entered is less than the data required	< 01/10/15 (less than 1 October 2015)
≤	Where the text entered is equal or less than the data required	≤ 01/10/15 (less than or equal to 1 October 2015)
>	Greater than	>01/10/15 (greater than 1 October 2015)
≥	Equal or greater than the text entered	≥ 01/10/15 (greater than or equal to 1 October 2015)

Stocktake Manual

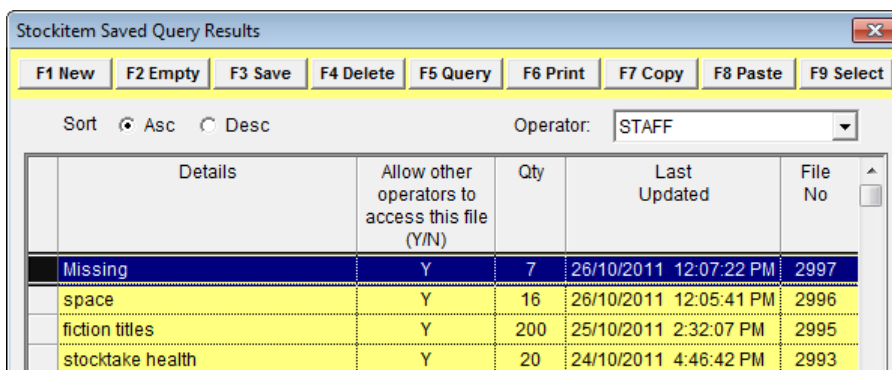
1. Type the Where Condition (box 1)
2. Choose an Operator (box 2)
3. Type your search term for the chosen field (box 3) OR use the **Special** button, which enables you to choose useful fields (for example: **Current Date**) that can be used for any mathematical operand (for example: =, ≠, <, ≤, >, ≥)
4. Click the **Paste** button to add in each statement

Description of buttons:

BUTTON	DESCRIPTION
Paste	Adds the Where Condition to the Query box
Delete	Deletes the Highlighted Where Condition from the Query box
And	Includes the “and” separator to the multiple Where Conditions in the Query box. This is the default
Or	Includes the “or” separator to the multiple Where Conditions in the Query box
(	Adds a beginning bracket to the Where Condition in the Query box
)	Adds a closing bracket to the Where Condition in the Query box

Get Your Results

- Click the **F5 Query** button to view the records contained in the Query
- Click the **F6 Count** button to Display the number of matching records
- Click the **F7 QtoFile** button to save the results of the query in a file. Either select a file or create a new file and then click the **F9 Select** button. The number of records inserted into the file will be displayed. If the file already contains data the new records will be added to the file and existing data remains. It is possible to empty the contents of the file by selecting the **F2 Empty** button before selecting the file:



Saving Where Searches

1. Where searches can be saved by selecting the **F2 Insert** button
2. Type a Description so that they can be recalled for execution at another time from Stockitem (Item menu)

Alternatively the search can be saved from the Where Search screen by choosing the **F4 Select** button. This is useful for calling up queries used on a regular basis and can be used when updating Process to **MISSING** in Stockitem Wand Change.

It is also very useful for *Stocktake Reports* as the parameters can be set and then altered slightly for a different area of Stocktake – for example: the Missing Fiction Where search can be edited when the non-fiction area is counted – just change the Stats code to be **NF** rather than **F**.

Accessing the Saved Searches

Saved Where Searches can be accessed either through:

- The Where Search Window by clicking the **F4 Select** button OR
- From the Stockitem screen menu, select **Item > SavedWhereSearch** (the searches can be executed or counted from this option)
- Reports cannot be edited here; editing is only done within the Where Application

Printing a List

A printed listing of missing items is usually required so they can be checked on the shelf.

1. From the table of items generated from the Where Search (by using **F5 Query**) highlight the items to be included in the report
2. Click the **F6** (to print) or **F7** (to report) key on your keyboard OR from the *Amlib* client menu, select **Table > Print** or **Table > Report**

F6 Print

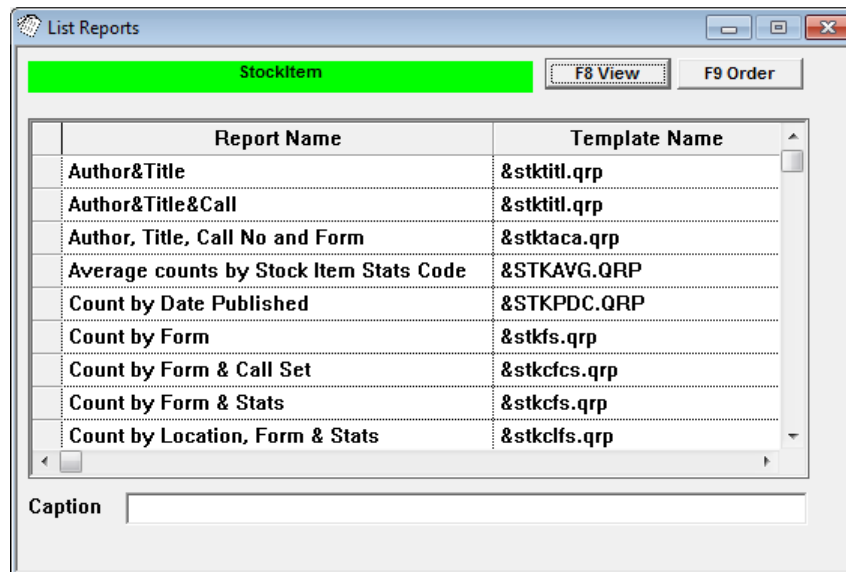
This is a preset Format, giving details of each item.

SITELIST.qrp		Selected Stockitem List			30/05/2003		
StockItem	Author	Call No	For	On Loan	Order	Rsv	
Per Temp	Title		StatsCode	Back	Ext.Cat	Ref	
Floor Location	Process			Description			
STOCK00446734B HAL HAL	Beatles (Band) 20 greatest hits [music] / The Beatles.	787.87166	BK ANF	N	N	0	
STOCK00450812B HAL HAL	Berlin, Irving, 1888- Annie get your gun [music] / [the] lyrics and music by Irving Berlin ; [the] book by Herbert and Dorothy Fields.		BK ANF	N	N	0	
STOCK00407097B HAL HAL	Berglund, Noel The Australian Colour Library Plants / text by Noila Berglund	FJ581.994 BERG	BK ANF	N	N	0	

F7 Report

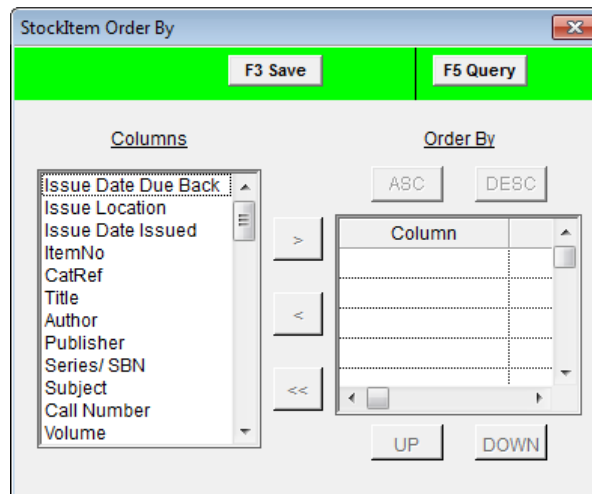
All the available templates for Reports will display, where a specific style can be chosen.

1. In many templates, the heading can be typed in the Report Description:



To select the sequence in which the items display (for example: **Call No**):

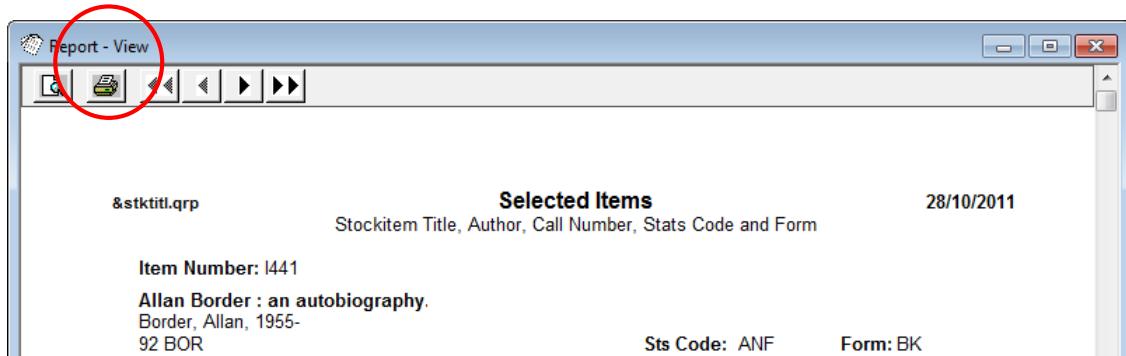
2. Select the **F9 Order** button – the Order By screen will display



3. Highlight the item to order by in the Columns list, click the arrow to add to the Order By list
4. Click the **F3 Save** button

To View/Print:

5. Click the **F8 View** button



Check the Shelves:

6. The Report can then be printed by using the **Print** icon
7. The shelves can then be checked for missing items, using the Report as a guide as to those items to be searched
8. If an item is found it can be wanded into the **F8 Upload** button of Stocktake or Returned through circulation

MASS CHANGING MISSING ITEMS

Identify Missing Items

Once the shelves have been checked and the items showing on the where search are definitely missing, the database can be updated to show them as missing.

A decision as to how to identify these missing items on the system needs to be made. It is suggested that a Stockitem process be made to show that they were made missing during Stocktake – for example: **MISSING STOCKTAKE 2015** or similar. Some sites may choose to identify them by giving them a different location, etc.

Please Note: If it is a new Process (for example: **MISSING STK**) you will need to add this as a new Process (**Main > StockItems > Stockitem - Application > StockProcess**). If you want a new Floor Location add this in (**Main > StockItems > Stockitem - Application > StockLocFloor**):

Methods of Mass Changing Items

There are 3 main methods for Mass Changing the items:

1. Stock Wand Change
2. Where Search (Save to File)
3. Mass Delete of items Missing from Last Stocktake

Each will be documented separately and you can choose which you will use.

Stockwand Change

Advantages

Stockwand change has several advantages for mass changing items:

- The Process can be saved for further use
- The codes (for example: Process code) can be searched (for example: ? and press <Tab> in box 2)
- The change can be implemented using a saved Where search **F8 FrWhre** or a saved File **F7 FrFile**
- The **Special** button is available for selecting Current Date
- A clear confirmation is displayed prior to any changes, outlining the number of items and the changes that will apply

Please Note: If the buttons are not visible (for example: **F8FrWhere**, these can be added in **Main > Supervisor > Usernames > Viewing Menu** for the Login User (See [Appendix A](#) for more information).

There are three (3) options for initiating the Stockitem Wand Change process:

Option 1: Create a Stockitem Wand Change Selection Process

1. Navigate to **Main > StockItems > StockitemWandChange** – the Stockitem Wand Change screen will display:

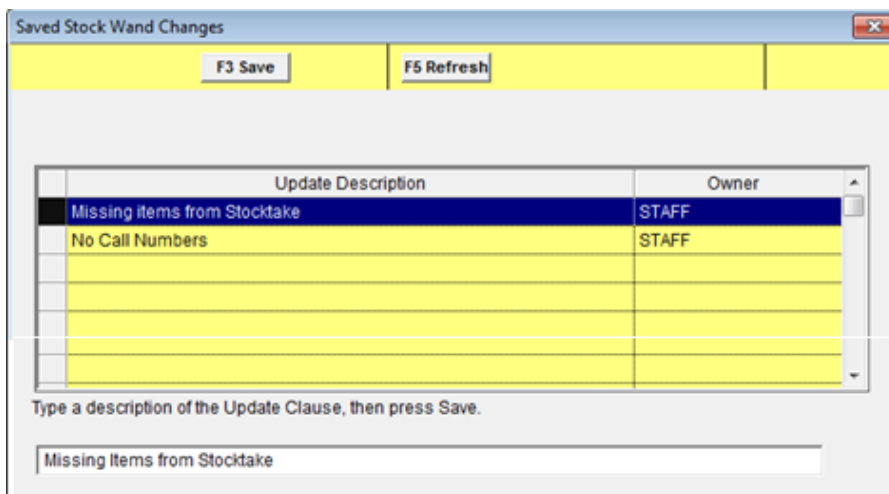
2. Enter your selection criteria

Please Note: The **Current Date** is selected via the **Special** button – for example: **Process Date = Current Date**.

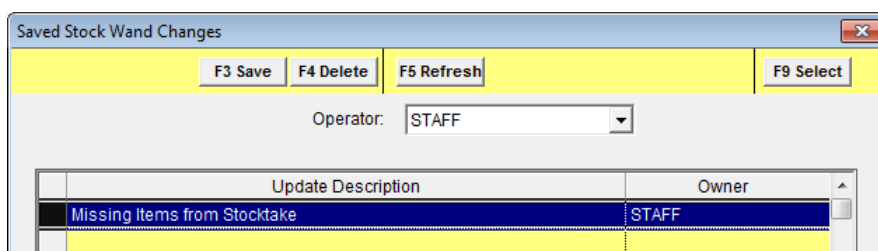
3. Click the **F6 Start** button to execute the process

Save the Selection Process

1. Click the **F2 Insert** button – the Saved Stock Wand Changes screen will display:

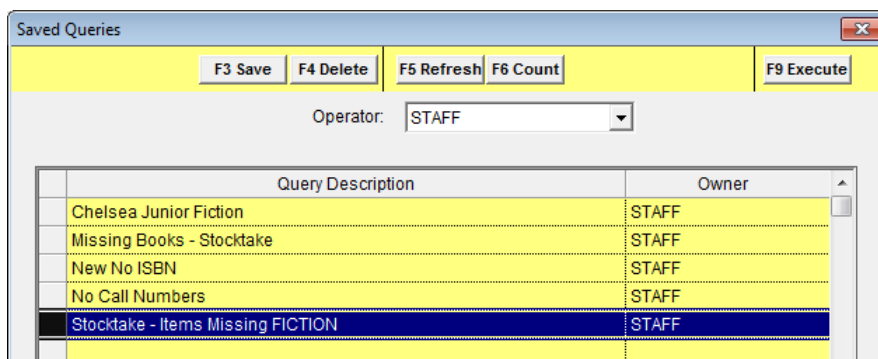


2. Type a description in the field at the bottom of the screen
3. Click the **F3 Save** button
4. These can then be recalled using the **F4 Select** button



Option 2: Select a Saved Where Search

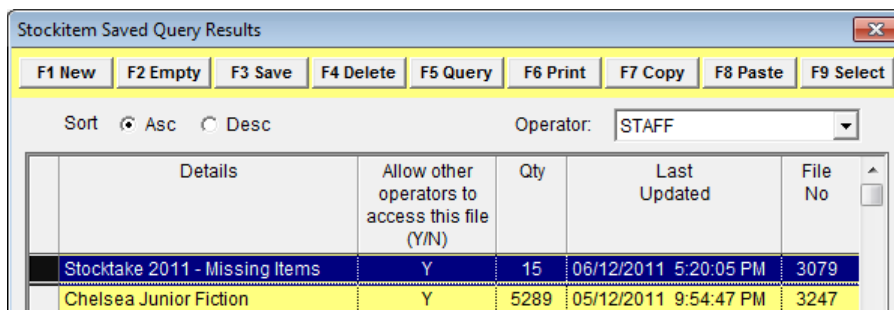
1. Go to **Main > StockItems > StockitemWandChange** – the Stockitem Wand Change screen will display
2. Click the **F8 FrWhre** button – the Saved Queries screen will display:



3. Select the **Where search** saved previously – for example: **Stocktake - Items Missing FICTION**
4. Click the **F9 Execute** button

Option 3: Select a Saved File

1. Go to **Main > StockItems > StockitemWandChange** – the Stockitem Wand Change screen will display
2. Click the **F7 FrFile** button – the Stockitem Saved Query Results screen will display:



Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
Stocktake 2011 - Missing Items	Y	15	06/12/2011 5:20:05 PM	3079
Chelsea Junior Fiction	Y	5289	05/12/2011 9:54:47 PM	3247

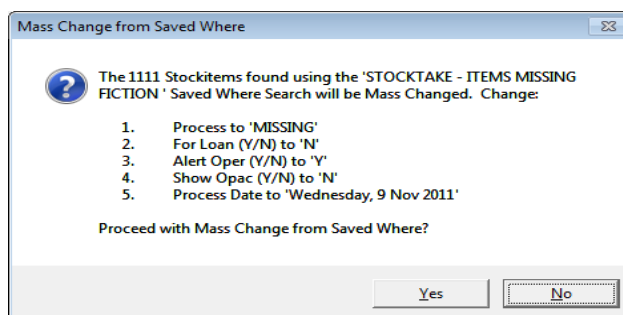
3. Select the file – for example: **Stocktake 2011 – Missing Items**
4. Click the **F9 Select** button

Execute the Changes

Once a process has been initiated (via **F6 Start**, **F9 Execute** or **F9 Select**):

1. A prompt with the following message will display:
The XXXXX Stockitems found Using the 'STOCKTAKE –ITEMS MISSING FICTION' Saved Where Search will be Mass Changed. Change:
 1. Process to 'MISSING STK 2015'
 2. For Loan (Y/N) to 'N'
 3. Alert Oper (Y/N) to 'Y'
 4. Show Opac (Y/N) to 'N'
 5. Process Date to XXXXX 2011

Proceed with Mass Change from Saved Where?

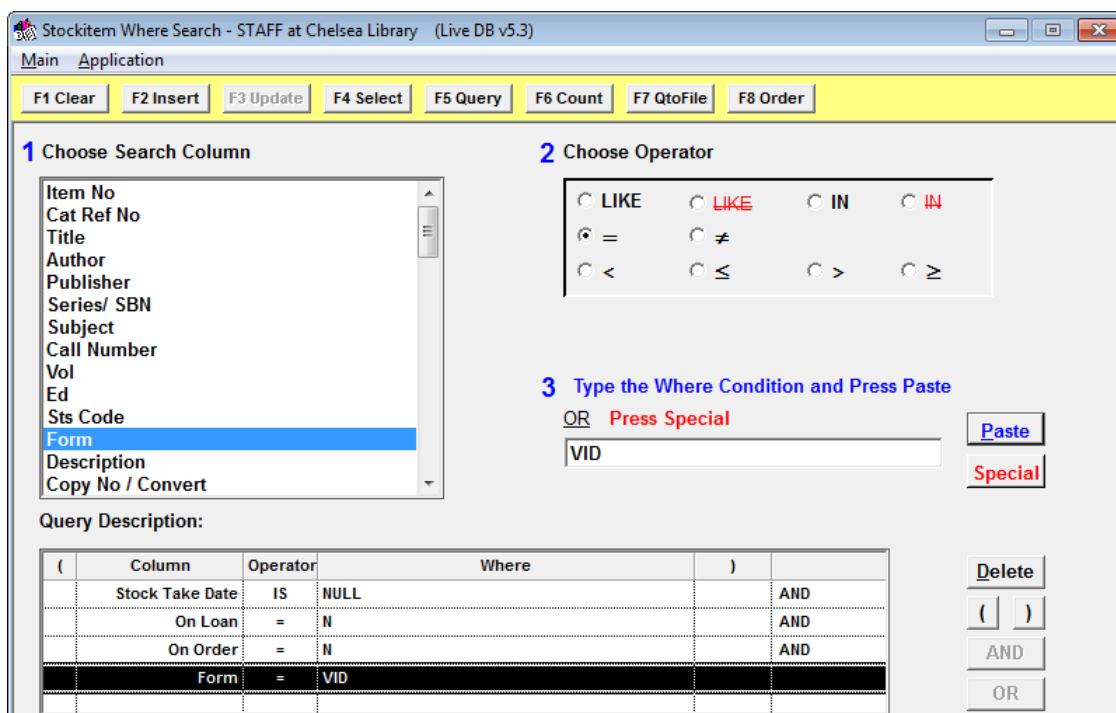


2. Click the **Yes** button to continue with the Update
3. When complete a prompt with the following message will display:
The XXX Stockitems have been Updated.
4. Click the **OK** button

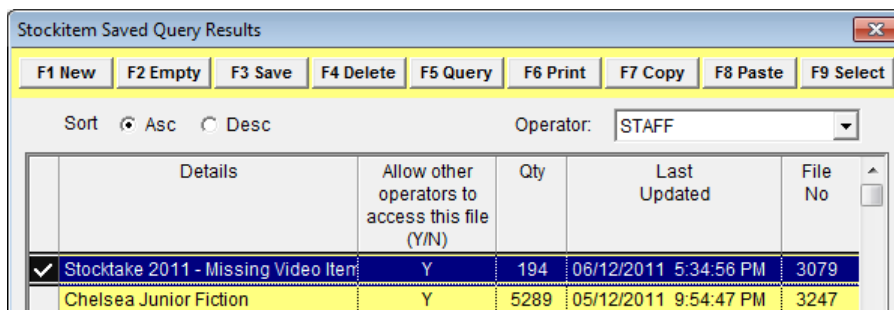
Where Search (Save to File)

An alternative to using a Saved Where search is to use a File for Mass changing missing items.

1. Launch the *Amlib* client
2. Go to **Main > StockItems > StockitemWhere** – the Stockitem Where Search screen will display
3. Set the parameters as required within the Where search – for example: Items not counted that are Videos
4. Click the **F7 QtoFile** button



5. The Stockitem Saved Query Results screen will display
6. Click the **F1 New** button
7. Add a Description – for example: **Stocktake – Items Missing Video Items**
8. Click the **F3 Save** button when complete



9. Once the file is saved, highlight the file and click the **F9 Select** button
10. Exit the table by selecting the red [X] in the top right hand corner
11. Navigate to **Main > StockItems > Stockitem** – the Stockitems screen will display
12. From the menu, select **File > DisplayFile** – the Stockitem Saved Query Results screen will display

13. Select the saved file previously created – for example: **Stocktake 2011 – Missing Video Items** – a Stockitem List of results will display:

Seq	Title	Author	Call No	Form	Stats	On Loa	Due Back	Rsv	Perm Loc	Process	On Ord	Series	Process Date	Ec
1	4 wheel driving : recovery		VIDEO 629.28	VI	VID	N		0	CHEL		N			19
2	4 wheel driving : The right wa		VIDEO 629.28	VI	VID	N		0	CHEL		N			19
3	50 first dates /		DVD	VI	DVD	N		0	BELM		N			
4	Accounting for the GST in Sm		CVR290	VI	CL	N		0	CHEL		N	This program		20
5	Advanced Excel 5 for Window		VIDEO 005.36	VI	VID	N		0	CHEL		N			19
6	Advanced microsoft word		VIDEO 005.36	VI	VID	N		0	CHEL		N			19
7	Advanced panel beating & pa		VIDEO 629.26	VI	VID	N		0	CHEL		N			19
8	Adventure crazy [videorecor	Keoghan, Phil.	919.3	VI	VID	N		0	CHEL		N			20

14. From the menu, select **Table > MassItemChange** – Mass Change of Stock Within a File screen will display:

1 Choose Column to Change

- Floor
- Origin/Source
- ForLoan(Y/N)
- LoanType
- Opac?
- Alert?**
- Process
- ProcessDate
- Received
- Accessioned
- CurrentCost

2 Type the New Column Value

Y

3 Click.....

Column		New Value
Process	=	MISSING
ForLoan(Y/N)	=	N
Opac?	=	N
Alert?	=	Y

15. Enter the processes, floor locations, etc to update – for example:

- Process = MISSING
- For Loan(Y/N) = N
- Alert? = Y
- Opac? = N

16. Click the **F3 Update** button to perform the mass update

17. A prompt with the following message will display: **Update the XXX items in the 'XXXXX' file?**

18. Click the **Yes** button

Finding an Item after the Change to Missing Process (Clear Missing Process)

1. If an item is found after the Process is made to be Missing, go to the Stockitem screen for that particular item:

Stocktake Manual

Stockitem - STAFF at Chelsea Library

Main Application Item XReferences File

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

Item No 980258879 Cat Ref No 27187

Query Via
 Item Cat Keyword Any

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

Title 4 wheel driving : recovery

Author

Publisher Wodonga, VIC : Cape Enterprises, 1992

Series Vol Ed 1992

Subject Motor vehicles - Recreational use.

Call number VIDEO 629.283 FOUR WHEEL Sts Code VID Form VI Call Set

Description

Copy No / Convert

Location Perm CHELSEA Temp CHELSEA Floor Origin/Source

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

Received 02/09/1996 < = > Accessioned 02/09/1996 Current Cost 30.00

Group LIBRARY

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

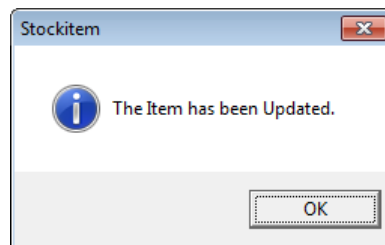
On Loan	Due	On Order	Res	Seq	Set	?Size
1		1	0	1	194	200

Last Modified 06/12/2011 5:44:13 PM by STAFF Issues 2

Current Cost of Item (refer item history for original cost)

NUM

2. Delete the Process of **MISSING**
3. Click the **F3 Update** button – a prompt with the following message will display:
The Item has been Updated.



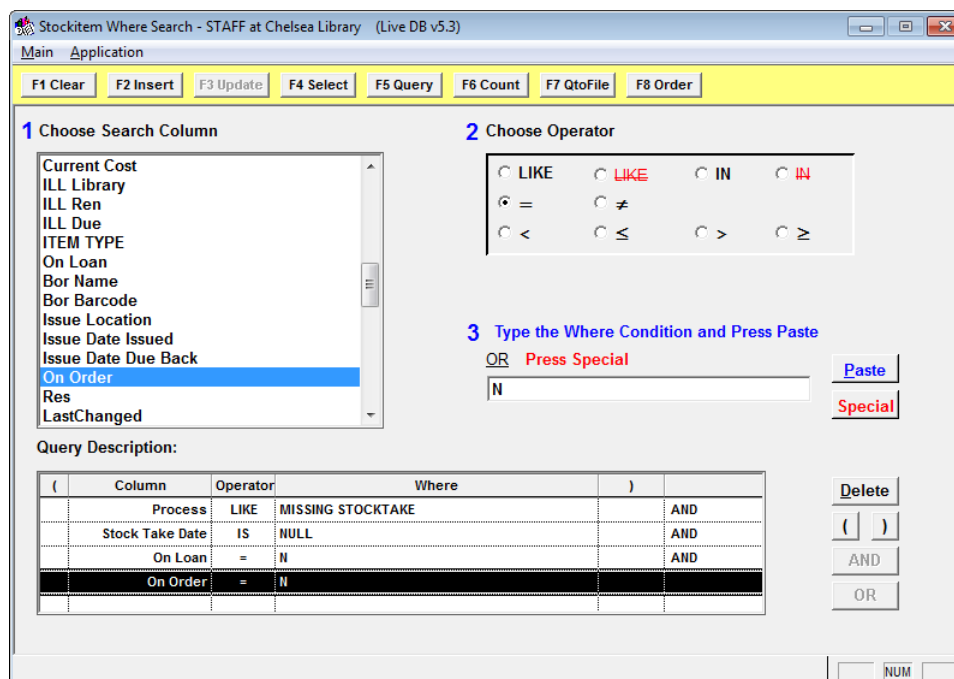
4. Click the **OK** button
5. The correct Alert and Opac? will be restored, and the Process date will clear

MASS DELETE MISSING ITEMS

Identify Items to Delete

A Where search could be created for those items that had a status of **Missing** from the previous Stocktake (for example: **MISSING 2011**) and are still missing at the current Stocktake.

Once identified, these items could be Mass Deleted or have their Process mass changed to **WEDED**.



Mass Delete from Stockitem List

Stockitems can be deleted “en masse” by creating a table of Stockitems.

1. Launch the *Amlib* client
2. Go to **Main > StockItems > Stockitem** – the Stockitems screen will display
3. Perform a **F5 Query** search
4. From a resulting Stockitem List table, select the stockitems to be deleted by highlighting the rows (to highlight more than one Stockitem, press the **Ctrl** key and click with the left mouse button)
5. From the menu, select **Table > MassItemDeletion** – the Mass Delete Items prompt will display with the following options:
 - a. Items:
 - i. Confirm Delete Item Message Required? Do you want a confirmation prompt for each item to be deleted? (not recommended for numerous deletions)
 - ii. Last item Message for Cat Required? Do you want to receive a message if this is the last item of a catalogue record?

- b. Catalogue:
 - i. Delete Catalogue if Last? ** If this is the last catalogue record do you want it deleted?
 - ii. Confirm Delete Cat. Message Required? When a catalogue record is deleted do you want a confirmation prompt telling you?
- c. CatalogueFile:
 - i. If a catalogue record has no more items after an item is deleted then save in the file below (Do not choose Delete ** above !)
 - ii. **Get File** (browse to where you want this information saved to)

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 !)

File:

GetFile []

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

OK Cancel

6. Once you have made your selections, click the **OK** button to proceed with deletion

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

CLOSING OFF THE STOCKTAKE

Close Stocktake in Progress

Once the Stocktake mass changes have been processed, and the counting of the items issued and returned are no longer required, the Stocktake can be closed or deleted.

1. Launch the *Amlib* client
2. Go to **Main > StockItems > StockTake** – the Stocktakes in Progress screen will display
3. Highlight the Stocktake row to be closed
4. Change the Closed column to be **Y** (or delete the Stocktake row completely using the **F4 Delete** button)
5. Click the **F3 Save** button when complete

Ref. No	Closed	Data Line	KEY Data From	KEY Data To	Count in Theory	Actual Count	Started	Latest Date	Last Line Details
✓ 1	Y	6	0	ZZZ	11264	0	09/09/2015		

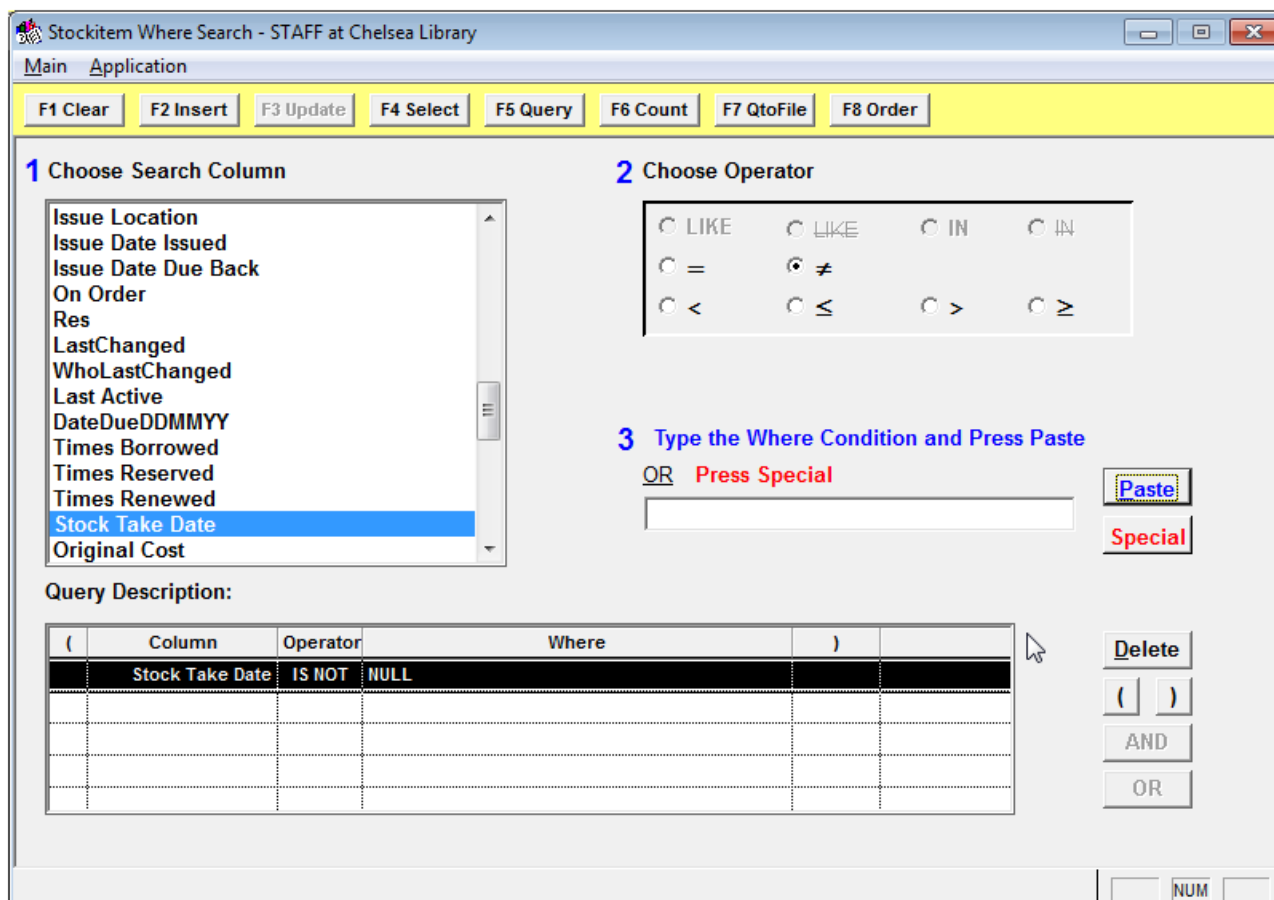
Set the Closed column to **Y** or delete the Stocktake row

OTHER WHERE SEARCHES

Items Counted

The parameters that must be set include:

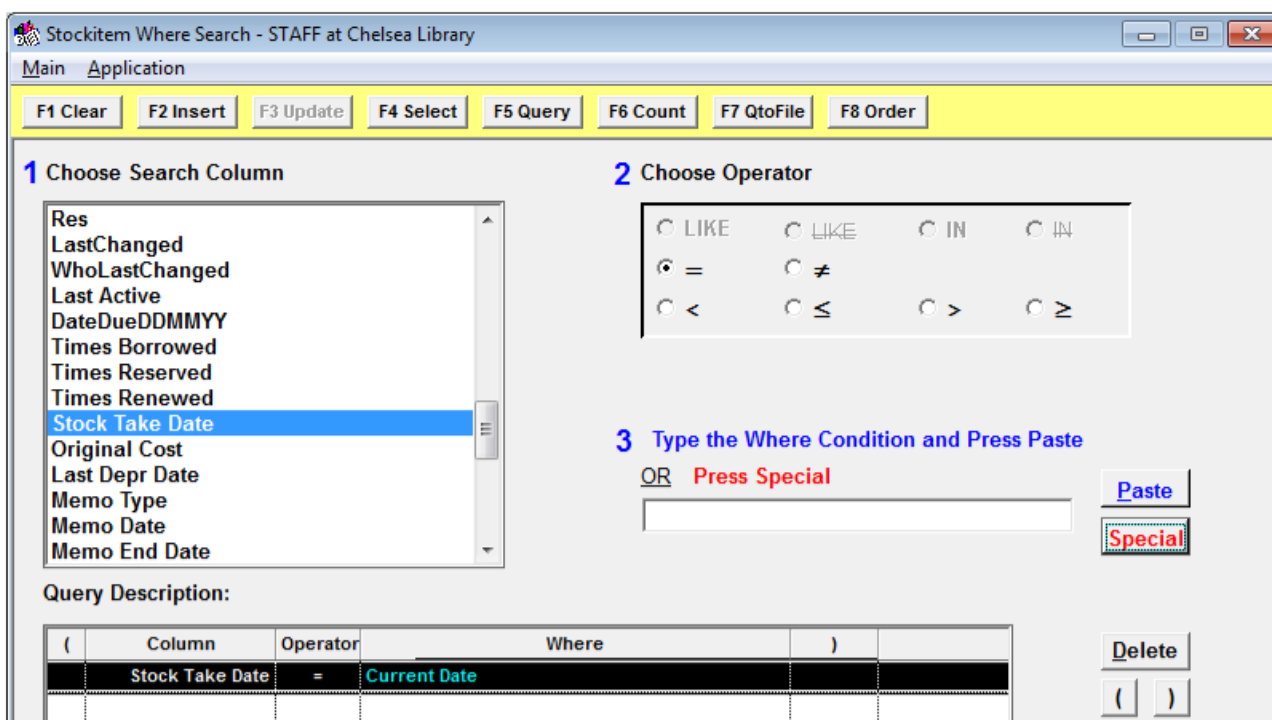
1. Enter the following parameter: **Stock Take Date IS NOT NULL**
 - a. In box 1: **Stock Take Date**
 - b. In box 2: **!=** (not equal to)
 - c. Click the **Paste** button
2. Enter additional parameters as required – for example: Location, Form code, Stats code



Items Counted Today

The parameters that must be set include:

1. Enter the following parameter: **Stock Take Date = Current Date**
 - a. In box 1: **Stock Take Date**
 - b. In box 2: = (equals)
 - c. Click the **Special** button
 - d. Select **Current Date**
 - e. Click the **Paste** button
2. Enter additional parameters as required – for example: Location, Form code, Stats code



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Items Not Counted But On Loan

The parameters that must be set include:

1. Enter the following parameter: **Stock Take date IS NULL AND On Loan =Y**
 - a. In box 1: **Stocktake Date**
 - b. In box 2: = (equals)
 - c. Click the **Paste** button
 - d. In box 1: **On Loan**
 - e. In box 2: = (equals)
 - f. In box 3: type **Y**
2. Enter additional parameters as required – for example: Location, Form code, Stats code

The screenshot shows the 'Stockitem Where Search - STAFF at Chelsea Library' application window. The interface includes a menu bar with 'Main' and 'Application', and a toolbar with function keys F1 through F8. The main area is divided into three sections: '1 Choose Search Column', '2 Choose Operator', and '3 Type the Where Condition and Press Paste'. In section 1, 'On Loan' is selected in a list. In section 2, the '=' operator is selected. In section 3, 'Y' is entered in the text box. Below these sections is a 'Query Description' table.

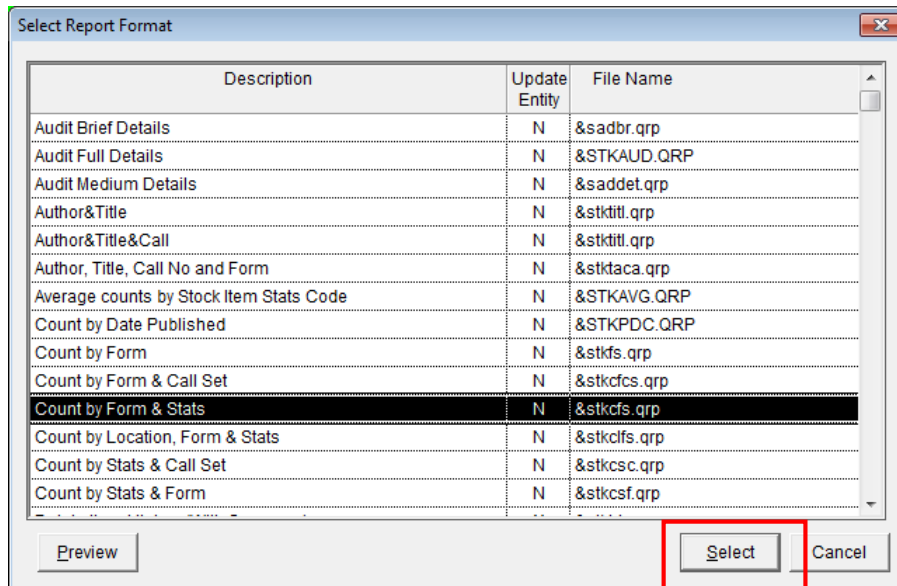
(	Column	Operator	Where)	
	Stock Take Date	IS	NULL		AND
	On Loan	=	Y		

Amlib Stocktake Training Guide

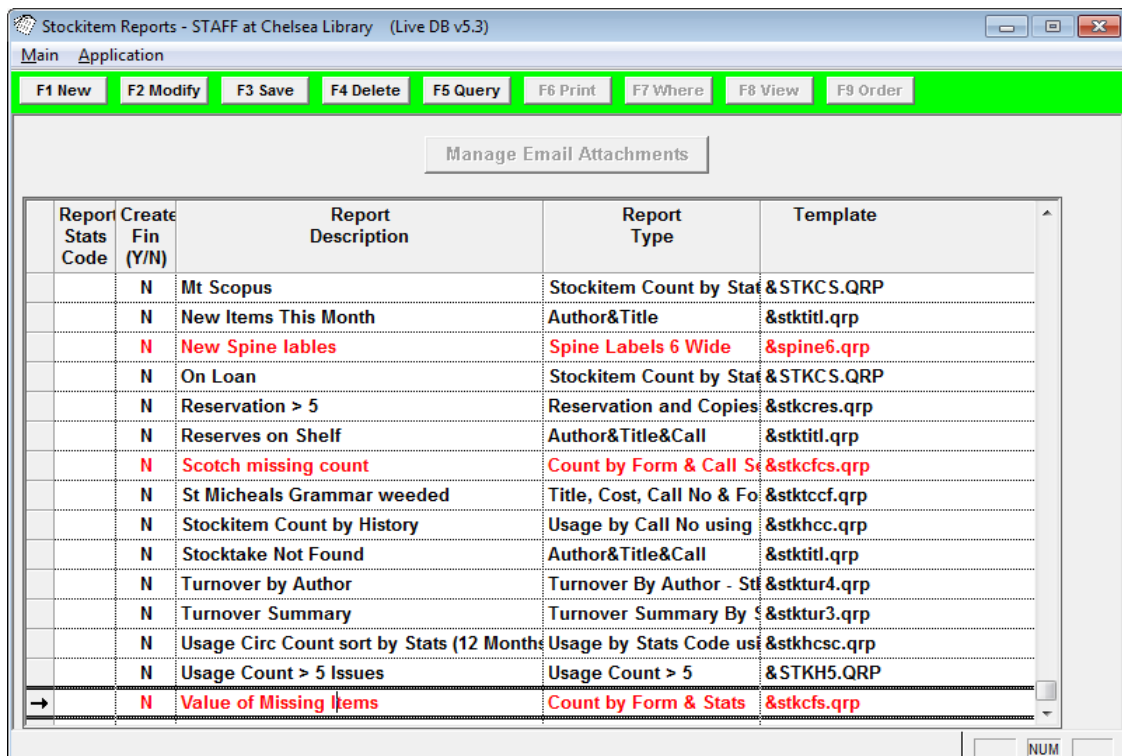
Value of Missing Items

A useful report at the end of Stocktake, is a report on the value of Missing items.

1. Launch the *Amlib* client
2. Go to **Main > Reports > RepStockitem** – the Stockitem Reports screen will display
3. Click the **F1 New** button – the Select Report Format screen will display:

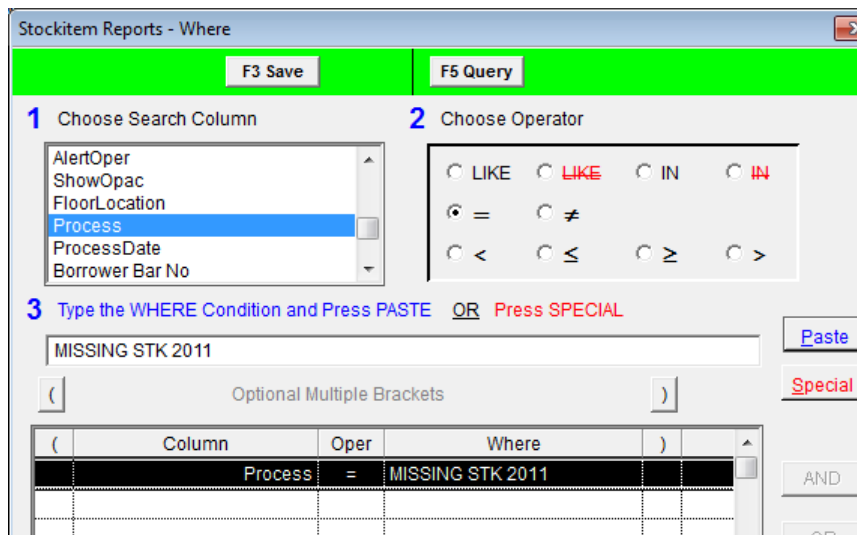


4. Select this report template: **&STKCSF.QRP – Count by Form & Stats** and click the **Select** button
5. Type in a Report Description – for example: **Value of Missing Items (Stocktake 2011)**



6. Click the **F3Save** button
7. Highlight the report and click the **F7 Where** button – the Where screen will display:

Amlib Stocktake Training Guide



8. Create your **Where Statements** for your collection you want to run this report on
9. Enter the following statement: **Process = MISSING STK 2015**
 - a. In box 1: **Process**
 - b. In box 2: = (equals)
 - c. In box 3: type **MISSING STK 2011** (or the appropriate Process Description)
10. Enter additional parameters as required – for example: Location, Form code, Stats code
11. Click the **F3 Save** button when complete
12. If not *greyed* out, click the **F9 Order** button – the Order By screen will display
13. The order must be **Form** and then **Stats Code**
14. Click the **F3 Save** button when complete
15. Click the **F8 View** button to display the Report

Please Note: This report will take some time to display, depending on the Where parameters selected

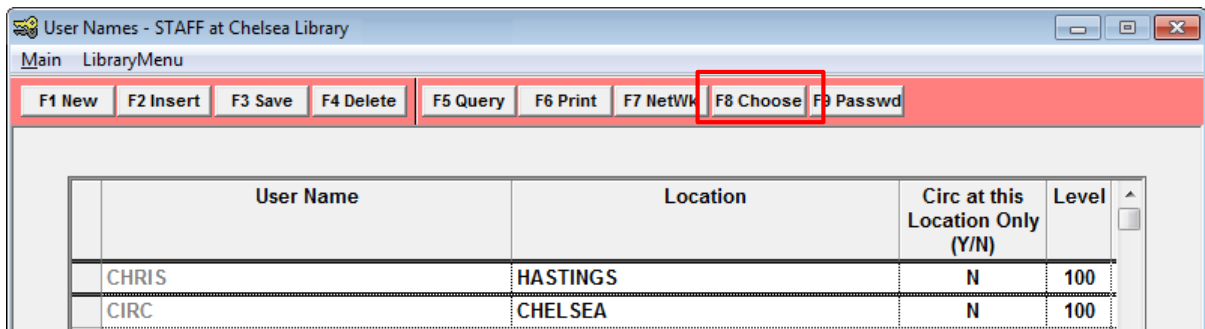
Value of Missing Items						
Stockitem count by form and stats code.						
2/12/2011						
&stkcls.qrp						
Form AC						
	COUNT	UNIQU CAT	ISSUES	RESERVES	RENEWALS	VALUE
CAS	2	2	1	0	0	\$40.00
JSW	1	1	2	0	0	\$20.00
Form AC	3	3	3	0	0	\$60.00
Form BK						
	COUNT	UNIQU CAT	ISSUES	RESERVES	RENEWALS	VALUE
JNF	2	2	5	0	0	\$61.90
PB	2	2	2	0	0	\$40.00
Form BK	4	4	7	0	0	\$101.90
GRAND TOTAL	7	7	10	0	0	\$161.90

Amlib Stocktake Training Guide

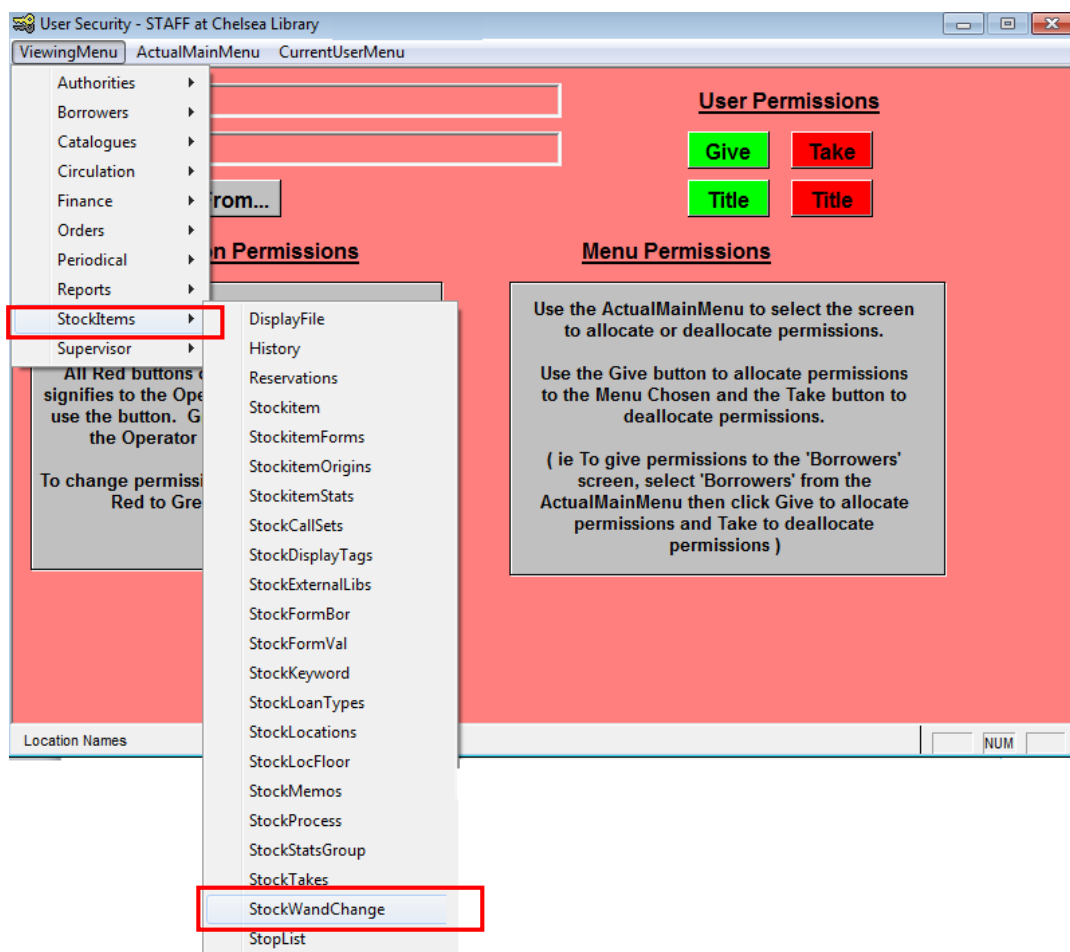
APPENDIX A: STOCKITEM WAND CHANGE BUTTONS

If the Stockitem Wand Change buttons are not all available, it is possible to change the user permissions to get access these extra buttons.

1. Launch the *Amlib* client
2. Go to **Main > Supervisor > UserNames** – the User Names screen will display:



3. Select the User Name (this process must be performed for each user)
4. Click the **F8 Choose** button – the User Security screen will display:



5. From the menu, select **ViewingMenu > StockItems > StockWandChange**
6. The StockWandChange buttons will display:

Amlib Stocktake Training Guide

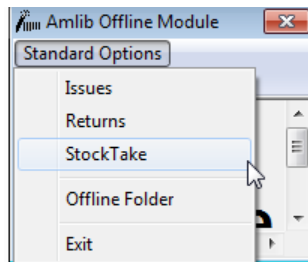


7. Click any **red** button to make them **green**
8. Close out of the StockWandChange and User Security screens by clicking on the red [**X**]
9. Exit and restart the *Amlib* client for the changes to take effect

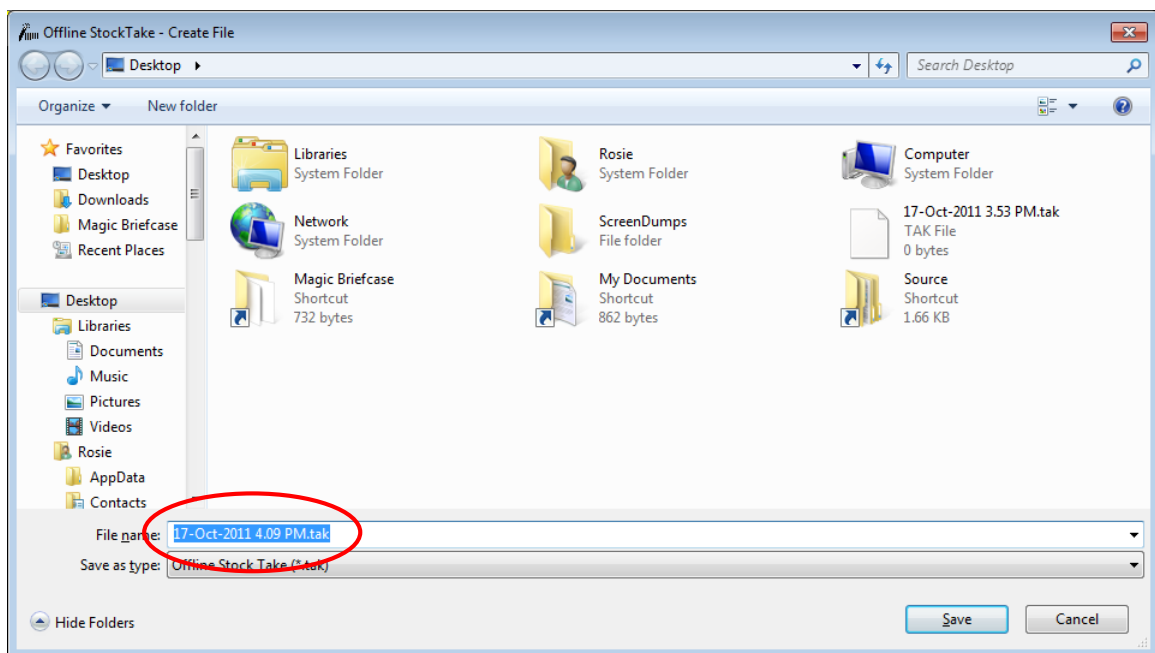
APPENDIX 2: OFFLINE MODULE FACILITY

The *Offline* module can be used to create a file on a portable laptop, which can then be transferred to the server or networked PC for upload.

1. Go to your **Amlib** folder on your C: drive or server (for example: **C:\Amlib**) and locate the **Offline.exe** application file
2. Right-click with mouse and drag onto your desktop to create a short-cut
3. Double-click the icon – the *Amlib Offline Module* will launch
4. From the menu, select **Standard Options > StockTake**



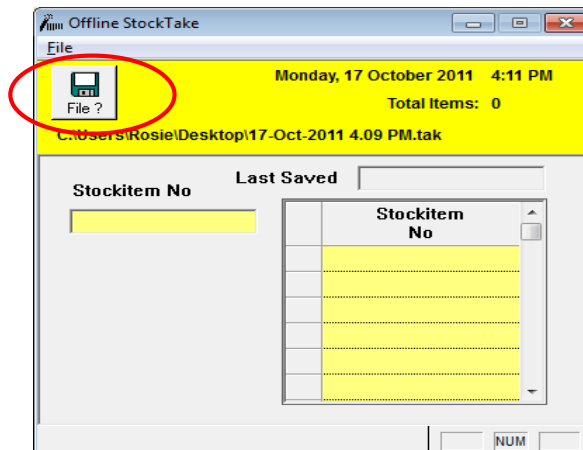
4. A *Windows* dialogue box will display: the date and time displays as part of a default File name (it is possible to rename the file, but this format is usually adequate for most offline stocktake collection purposes)



5. Navigate to the location where you would like to save the file (we recommend creating a separate folder for the *Offline* Stocktake files)
6. Click the **Save** button

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- The Offline StockTake screen then displays (ready for you to scan in your barcodes):

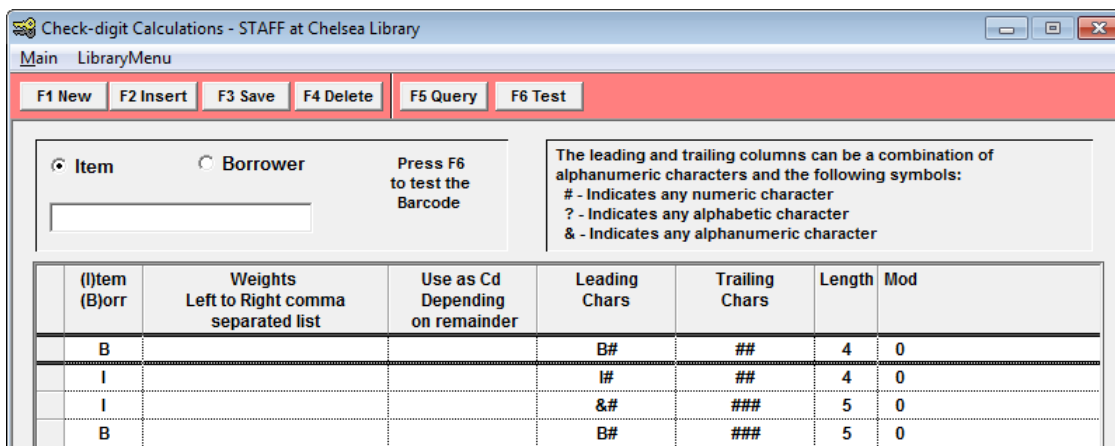


Please Note: If you are capturing numerous offline barcodes across a long period of time it may be a good idea to periodically to start a new file. To change to a new file, just click the **File ?** icon and the *Windows* dialogue box will display allowing you to save to a different file.

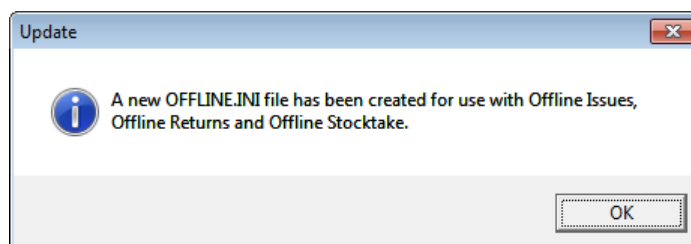
Check Digits

In order for the program to correctly validate CheckDigits there must be a file of the name **Offline.ini** in the working directory of the PC.

- Launch the *Amlib* client
- Go to **Main > Supervisor > CheckDigits** – the Check-digit Calculations screen will display:



- Make changes OR just click the **F3 Save** button (if nothing needs to be changed) – a prompt with the following message will display: **A new OFFLINE.INI file has been created for use with Offline Issues, Offline Returns and Offline Stocktake.**



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Please Note: Once created, it will be in your *Amlib* client folder (for example: **C:\Amlib\Offline.ini**) for you to copy if you are using this *Offline* module on a different non-networked PC

4. Go to your *Amlib* client folder on your C: drive or server (for example: **C:\Amlib**) and locate the file named **Offline.ini**
5. Copy and paste this file (into the corresponding location) on the PC where you are using the *Offline* module

Please Note: This file is updated whenever you change the Check Digits screen in the *Supervisor* module.

Load Barcodes (Item Numbers) from a Text File

Manually Enter Item Numbers into a Saved File

It is possible for the barcodes to be entered directly into a text file (using *WordPad* or *Notepad*, etc). It is therefore possible for a staff member at a different campus or department to create a file and send it to another user for uploading.

Please Note: The Stocktake file created should contain only one stockitem item number per line, as below:

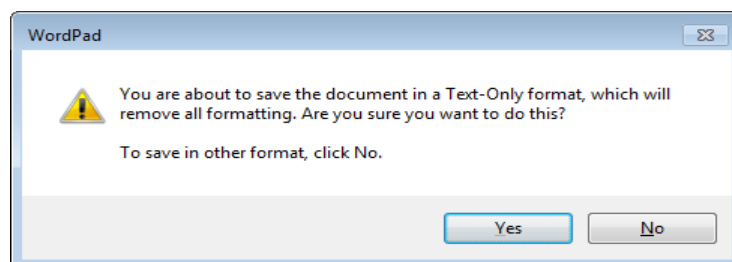


Save the File as a Text Document

It is important to know where the file is saved as you will need to access it later. You may wish to create a new folder named **Stocktakes**. You need to save the file as a text only file (**.txt** format).

If saving the file in *WordPad*:

1. Save as Type: **Text Document (*.txt)**
2. A prompt with the following message will display:
You are about to save the documents in a Text-only format, which will remove all formatting. Are you sure you want to do this?
To save in other format, click No.

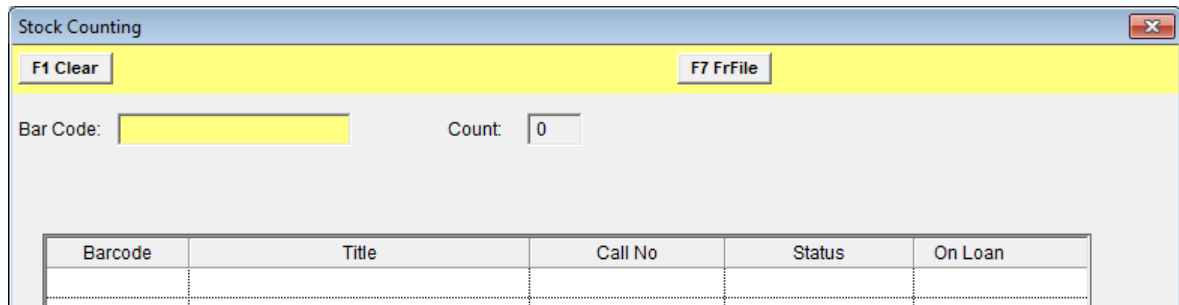


3. Click the **Yes** button, as the file is to be downloaded into *Amlib* without the formatting

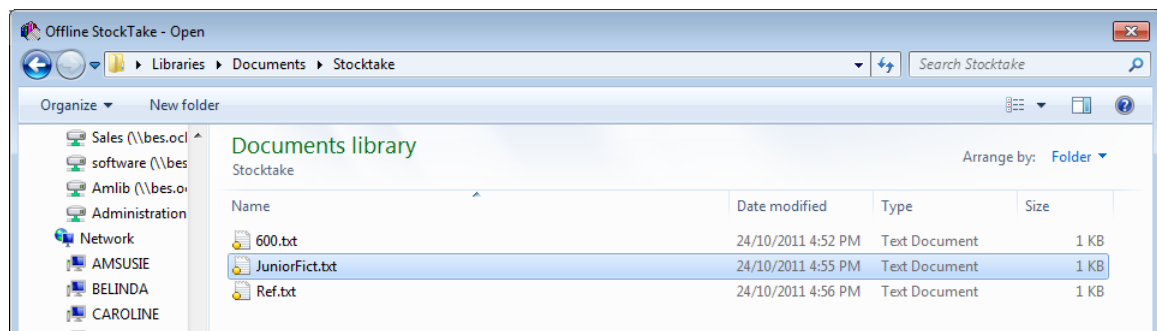
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Load (Count) Items from a Saved File

1. Launch *Amlib* client
2. Go to **Main > StockItems > StockTake** – the Stocktakes in Progress screen will display
3. Locate the file you want to use and highlight it
4. Click the **F8 Upload** button – the Stock Counting screen will display:



5. Click the **F7 FrFile** button – a *Windows* dialogue box will display:



6. Navigate to the file, select the file and click the **Open** button

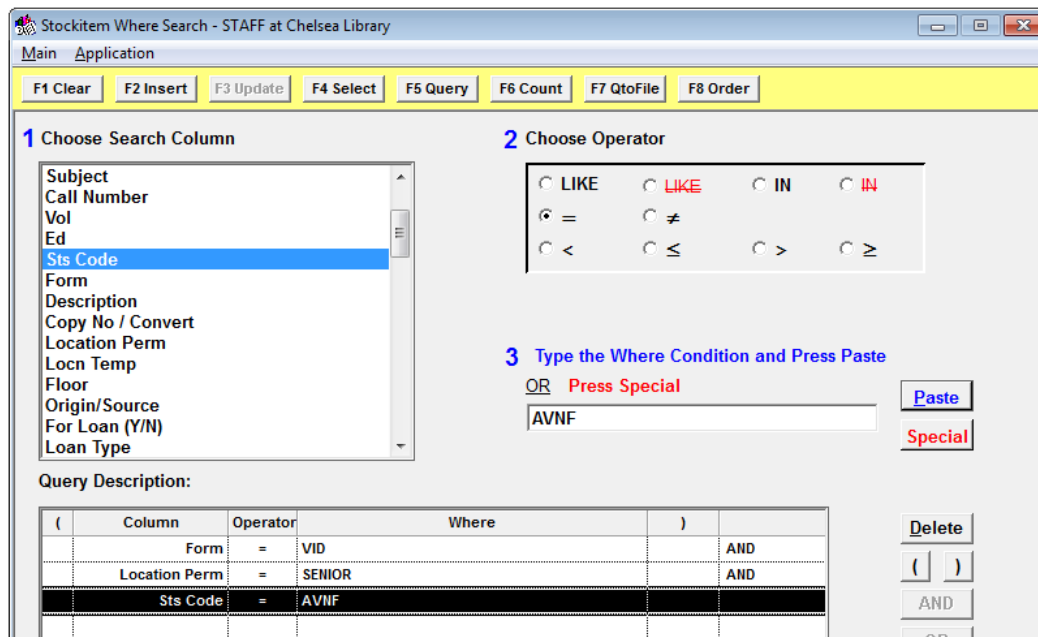
The system will read the file and process the barcodes into the Stocktake.

APPENDIX 3: OTHER USEFUL REPORTS

Counts of Collections (Where Search)

The Parameters can be set according to what is to be counted – for example: Location, Form code, Stats Code, Process code, etc.

1. Launch the *Amlib* client
2. Go to **Main > StockItems > StockitemWhere** – the Stockitem Where Search screen will display
3. Set the parameters as required within the Where search



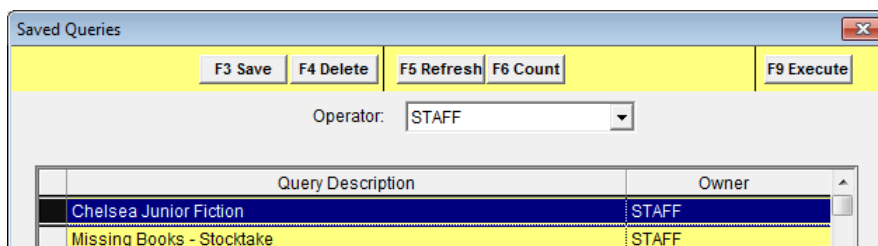
4. Select the **F6 Count** button to get a total number, or
5. Click the **F9 Execute** button to get a listing

Save Where Search

1. Save by clicking the **F2 Insert** button – the Saved Queries screen will display
2. Type a description in the field at the bottom of the screen
3. Click the **F3 Save** button

Accessing Saved Searches

1. Saved Searches can be accessed from the Stockitem screen: **Item > SavedWhereSearches**



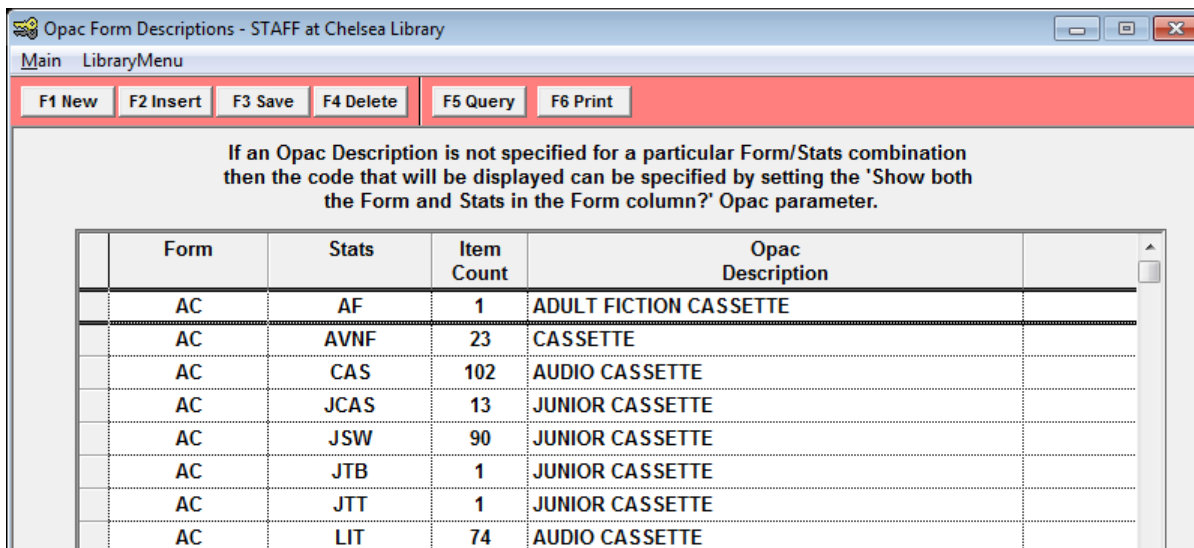
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2. Highlight the desired search and click the **F9 Execute** button

Opac Form Description (Form/Stats Combination Counts)

Counts of stockitems can also be seen in the Opac Form Descriptions screen.

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



Form	Stats	Item Count	Opac Description
AC	AF	1	ADULT FICTION CASSETTE
AC	AVNF	23	CASSETTE
AC	CAS	102	AUDIO CASSETTE
AC	JCAS	13	JUNIOR CASSETTE
AC	JSW	90	JUNIOR CASSETTE
AC	JTB	1	JUNIOR CASSETTE
AC	JTT	1	JUNIOR CASSETTE
AC	LIT	74	AUDIO CASSETTE

3. A **F6 Print** button is available

Please Note: The Opac Description is a user-friendly description designed for use in the *Opac* or *NetOpacs* (not *OpenOPAC* because the *Filters* are useful for separating the *Items* by *Forms* and *Stats* codes).

If the **F6 Print** button is not viewable:

1. Go to: **Main > Supervisor > UserNames**
2. Select the user and click the **F8 Choose** button
3. Select **ViewingMenu > Supervisor > OpacFormDesc**
4. If any buttons are **red** click on them ,they will then turn green and be viewable in *Amlib*
5. Exit and restart the *Amlib* client for changes to take effect

Call Set Count Report

If Call Sets are defined, it is possible to get a Collection “map” of your library based on call numbers.

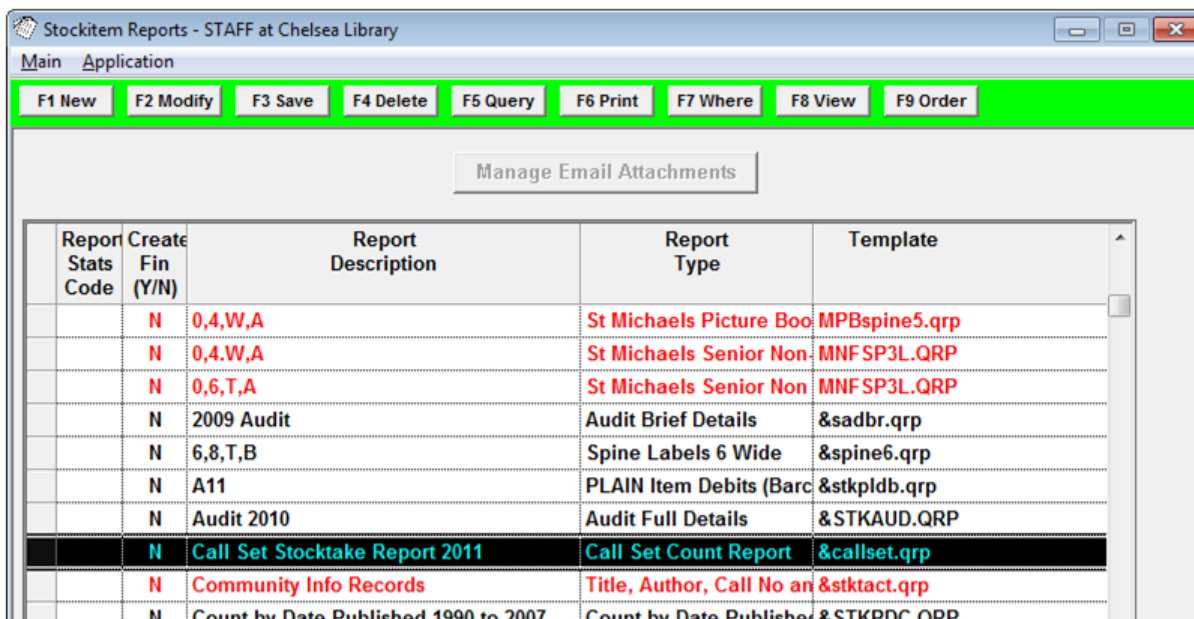
1. Launch the *Amlib* client
2. Go to **Main > Reports > RepStockitem** – the Stockitem Reports screen will display
3. Click the **F1 New** button, highlight the **&CALLSET.QRP** template and click the **Select** button
4. If the template is not listed:
 - a. Go to **Main > Reports > RepAddNew** – the Report Files screen will display
 - b. Ensure that Report Entity: Stockitem
 - c. Click the **F1 New** button – the New Report File screen will display:

- d. Enter the following:
 - i. Description – for example: **Call Set Count Report**
 - ii. Template: **&CALLSET.QRP**
 - iii. Choose Type: **Stockitem (Default)**
 - iv. Update Entity (Y/N): **N**
- e. Click the **F3 Update** button when complete

Default Stats Code	Update Entity	Description	Report Type	File Name	Message (may be split in 2 x 60 or 3 x 40)
	N	Author, Title, Call No and Form	StockItems (Def: &stktaca.qrp		
	N	Average counts by Stock Item Stat	StockItems (Def: &STKAVG.QRP		
	N	Call Set Count Report	StockItems (Def: &CALLSET.QR		
	N	Count by Date Published	StockItems (Def: &STKPDC.QR		

5. Type in a Report Description – for example: **Call Set Stocktake Report 2011**

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6. Click the **F3 Save** button
7. Highlight the report and click the **F7 Where** button – the Stockitem Reports - Where screen will display
8. Enter the Where parameters and click the **F3 Save** button when complete
9. Highlight the report and select the **F8 View** button

Stockitem Counts by Call Set		CALL SETS				10/05/01
		Count	On Loan	Loans	Renewals	Reserves
Form	BK					
	Call Set					
	AGR	3875	12	14	0	5
	ANIM	464	1	5	2	2
	ARCH	142	0	2	0	0
	ART	21	0	0	0	0
	ASTRO	605	1	2	1	3
	BIOG	15	0	0	0	0
	BIOL	59	0	0	0	0
	BOT	32	0	0	0	0
	COMM	61	0	0	0	0
	COMP	7	0	0	0	0
		56	0	0	0	0

- Call Sets are defined in **Main > StockItems > StockCallSets**

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Statistics (Summary)

Stats Parameters

The statistics that *Amlib* collects are selected from the Statistics Codes table:

- **Main > Supervisor > StatsParams**

Stat Type	Stats Description	Count (Y/N)	Money (Y/N)	Form (Y/N)	Item Type (Y/N)	Borr (Y/N)	Borr Group (Y/N)	Borr Class (Y/N)	Locn (Y/N)	Suburb (Y/N)	Ward (Y/N)	Area (Y/N)	Year (Y/N)	Month (Y/N)	Day (Y/N)	Hc (Y/N)
4	Foreign Issues	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
5	Issues (Loans)	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
6	Renewals	Y	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
7	Borrower Visits	Y	N	N	N	Y	Y	Y	Y	Y	Y	Y	Y	Y	Y	
10	Returns	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y	Y	
11	Foreign Return	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y	Y	
13	Returns (Not on	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y	Y	
15	Reservations	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y	Y	
16	Satisfied Reser	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y	Y	
17	Expired Reserv	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y	Y	
18	Cancelled Rese	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y	Y	
19	Foreign Reserv	Y	N	Y	Y	Y	Y	Y	Y	N	N	N	Y	Y	Y	
20	Locn Transfers	Y	N	Y	Y	N	N	N	Y	N	N	N	Y	Y	Y	
25	InHouse Circ	Y	N	Y	Y	N	N	N	Y	N	N	N	Y	Y	Y	
26	Bookings	Y	N	Y	Y	N	N	N	Y	N	N	N	Y	Y	Y	

Statistics are kept on the database until deleted, so there is no urgency in getting certain reports by a certain time (not from the system aspect anyway!).

For example: statistics can be gathered for January in June. (As long as you have been using *Amlib* that long, and that the Statistics Codes table was set to collect the statistics).

Where Parameters

The parameters applied to the reports can determine the data presented – for example: new Stockitems for this hour, this day, yesterday, week only, for a month, a term, a semester, a calendar year, a financial year etc. etc.

Because *Amlib* reports are very flexible in the data to be selected it is important to understand how to set up the parameters for the report.

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1 Choose Search Column

Location
 Trans Type (Issue,Ret)
Trans Date
 Trans Year
 Trans Month
 Trans Day

2 Choose Operator

LIKE LIKE IN IN
 = ≠
 < ≤ ≥ >

3 Type the WHERE Condition and Press PASTE OR Press SPECIAL

30/06/2011

(Optional Multiple Brackets)

(	Column	Oper	Where)	
	Trans Type (Issue,Ret)	IN	05,06,80,81,90,91,111		AND
	Trans Date	>=	Thursday, 1 Jul 2010		AND
	Trans Date	<=	Thursday, 30 Jun 2011		

Paste
 Special
 AND
 OR
 Delete

Order Parameters

Many reports now have the Order pre-determined. The **F9 Order** button will be *greyed out* in these cases. If the **F9 Order** button is not grey, the Report type gives an indication of the Report Order sequence.

If the incorrect sequencing is chosen, the report will not present correctly and can take forests of trees if printed!!

05 - Issues

	2005	2006	Total
January		1	1
April		16	16
May		139	139
June		2	2
August	2		2
September	1		1
December	1		1
Total	4	158	162

06 - Renewals

	2005	2006	Total
May		5	5
August	1		1
Total	1	5	6

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Statistics Detailed Report

Gives more details depending on the template chosen and the Where parameters selected.

For example: to see the **Form** and **Stats** codes of the New and Deleted items created this year, the Stats Report **&STAT526.QRP – Details by Form & Stats**:

HALLAM - Hallam Branch			
90 - New Items			
BK - Books	AF	Adult Fiction	4
	ANF	Adult Nonfiction	2
		Total:	6
URL - URL	WEB	Website	1
		Total:	7
		New Items Total:	7
91 - Del. Items			
BK - Books	AF	Adult Fiction	1
	ANF	Adult Nonfiction	246
	PB	Adult Paperback	1
		Total:	255
		Del. Items Total:	248

Report Formats for Stockitem Counts

&XSTKCS.QRP	Count by Stats Code	<table border="1" style="width: 100%; border-collapse: collapse; font-size: 8px;"> <thead> <tr> <th>A</th><th>B</th><th>C</th><th>D</th><th>E</th><th>F</th><th>G</th></tr> </thead> <tbody> <tr><td>3</td><td>&XSTKCS.qrp</td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>4</td><td>Stats code count</td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>5</td><td>Stockitem counts by stats code</td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>6</td><td>10/11/2003</td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>7</td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>8</td><td>STATS CODE</td><td>COUNT</td><td>ISSUE</td><td>RESERVE</td><td>RENEWALS</td><td>VALUE</td></tr> <tr><td>9</td><td></td><td></td><td></td><td></td><td></td><td></td></tr> <tr><td>10</td><td>ANF0</td><td>408</td><td>62</td><td>6</td><td>14</td><td>\$12,734.75</td></tr> <tr><td>11</td><td>ANF1</td><td>661</td><td>93</td><td>19</td><td>42</td><td>\$12,416.99</td></tr> <tr><td>12</td><td>ANF2</td><td>425</td><td>35</td><td>8</td><td>10</td><td>\$7,981.01</td></tr> <tr><td>13</td><td>ANF3</td><td>2949</td><td>250</td><td>33</td><td>92</td><td>\$98,067.30</td></tr> <tr><td>14</td><td>ANF4</td><td>115</td><td>10</td><td>1</td><td>0</td><td>\$1,920.92</td></tr> <tr><td>15</td><td>ANF5</td><td>1350</td><td>153</td><td>27</td><td>72</td><td>\$32,509.81</td></tr> <tr><td>16</td><td>ANF6</td><td>3062</td><td>490</td><td>46</td><td>172</td><td>\$66,478.92</td></tr> <tr><td>17</td><td>ANF6G</td><td>727</td><td>134</td><td>9</td><td>46</td><td>\$15,756.10</td></tr> <tr><td>18</td><td>ANF6M</td><td>1216</td><td>186</td><td>29</td><td>66</td><td>\$24,757.41</td></tr> <tr><td>19</td><td>ANF7</td><td>3365</td><td>430</td><td>40</td><td>138</td><td>\$77,462.38</td></tr> <tr><td>20</td><td>ANF8</td><td>883</td><td>60</td><td>10</td><td>21</td><td>\$11,390.08</td></tr> <tr><td>21</td><td>ANF9</td><td>2502</td><td>314</td><td>52</td><td>114</td><td>\$53,721.80</td></tr> <tr><td>22</td><td>ANF9T</td><td>1284</td><td>174</td><td>20</td><td>54</td><td>\$29,249.18</td></tr> <tr><td>23</td><td>BKPOP</td><td>22</td><td>20</td><td>90</td><td>6</td><td>\$994.18</td></tr> <tr><td>24</td><td>CDRA</td><td>165</td><td>23</td><td>5</td><td>7</td><td>\$8,356.02</td></tr> </tbody> </table>	A	B	C	D	E	F	G	3	&XSTKCS.qrp						4	Stats code count						5	Stockitem counts by stats code						6	10/11/2003						7							8	STATS CODE	COUNT	ISSUE	RESERVE	RENEWALS	VALUE	9							10	ANF0	408	62	6	14	\$12,734.75	11	ANF1	661	93	19	42	\$12,416.99	12	ANF2	425	35	8	10	\$7,981.01	13	ANF3	2949	250	33	92	\$98,067.30	14	ANF4	115	10	1	0	\$1,920.92	15	ANF5	1350	153	27	72	\$32,509.81	16	ANF6	3062	490	46	172	\$66,478.92	17	ANF6G	727	134	9	46	\$15,756.10	18	ANF6M	1216	186	29	66	\$24,757.41	19	ANF7	3365	430	40	138	\$77,462.38	20	ANF8	883	60	10	21	\$11,390.08	21	ANF9	2502	314	52	114	\$53,721.80	22	ANF9T	1284	174	20	54	\$29,249.18	23	BKPOP	22	20	90	6	\$994.18	24	CDRA	165	23	5	7	\$8,356.02																																																							
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20	ANF8	883	60	10	21	\$11,390.08																																																																																																																																																																																																																				
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<p>&XSTKCSV.QRP</p>	<p>Stockitem List - Title, Author, Call No, Form, Stats, Location, Floor, Cost in CSV Format: Delimited by ' ' .</p>	
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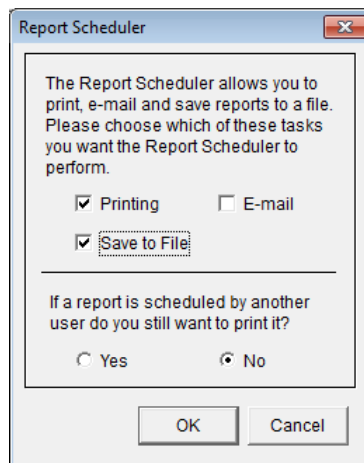
Procedure to Save reports as .Txt File and Import into Excel

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

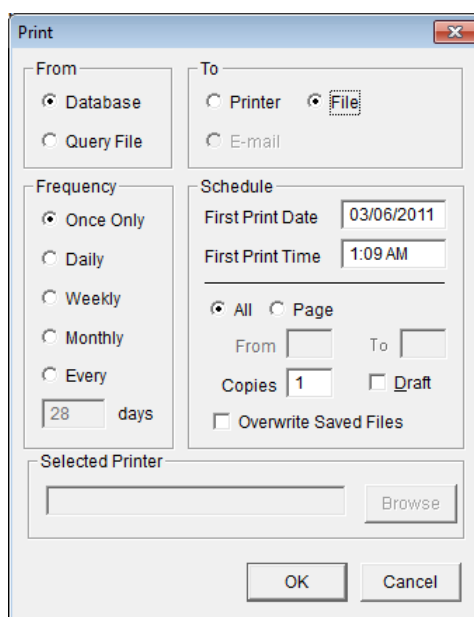
In this example, we are going to use the **&XSTKCSV.QRP** template in the **Reports > RepStockitem** module:

1. Go to **Main > Reports > RepStockitem** – the Stockitem Reports screen will display
2. Click the **F1 New** button – the Select Report Format screen will display
3. Highlight the **&XSTKCSV.QRP** template and click the **Select** button
4. Type in an appropriate Description and click the **F3 Save** button
5. Enter an appropriate **F7 Where** search – for example: **Title LIKE Harry Potter**

6. Order the Report – for example: **Title | ASC**
7. Select **Application > RepStartSchedule** – the Report Scheduler screen will display
8. Ensure that **Save to File** is ticked and click the **OK** button

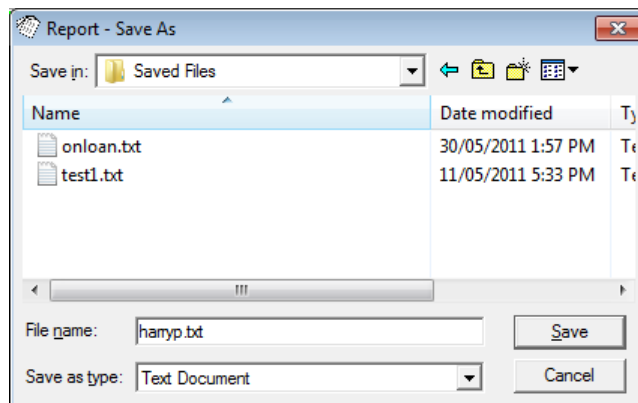


9. Click the **F6 Print** button – change the To: option to **File** and click the **OK** button



10. A Report – Save As dialogue box will display:

- To save it for a Word document, leave the Save as type: as **Rich Text Format (RTF)**
- To be able to open it in Excel, change the Save as type: to **Text Document**

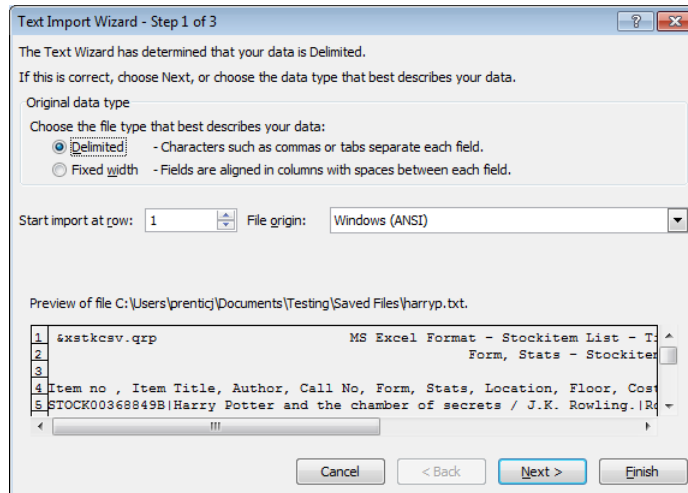


11. You can check the progress of your report in *Reports > RepPrintProgress*

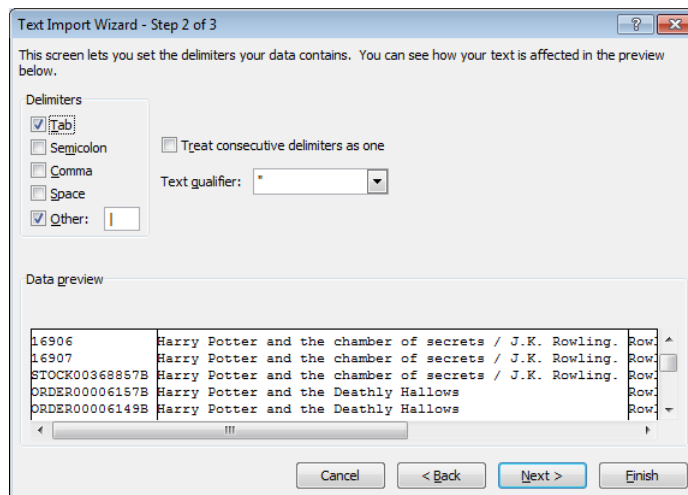
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12. If you've saved the report to open in *Excel* (Text Document) then you will need to follow these steps so it is displayed correctly:

- a. Open *Microsoft Excel*
- b. Use **File > Open** to open the text file you've saved – ensure that the Files of type: = **All Files (*.*)**
- c. The Text Import Wizard will display:



- d. Excel will recognise your file as **Delimited**, so click the **Next** button
- e. Delimiters: select **Semicolon** and add a pipe | in the **Other** box
- f. Click the **Next** button and then the **Finish** button



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

	A	B	C	D	E	F	G	H	I	J
1	&xstkcsv.qrp	Stock Details (CSV) - Harry Potter Books								9/12/2010
2	Item no ,	Item Title, Author, Call No, Form, Stats, Location, Floor, Cost								
3										
4	STOCK003	Harry Pott	illustratic	Rowling, J.F	ROW	BK	J	CHELSEA		35
5	STOCK003	Harry Pott	illustratic	Rowling, J.K.		BK	J	CHELSEA		35
6	STOCK003	Harry Pott	illustratic	Rowling, J.K.		BK	J	CHELSEA		35
7	STOCK003	Harry Pott	illustratic	Rowling, J.K.		BK	J	CHELSEA		35

Never Borrowed (via Stockitem Where)

1. Launch the *Amlib* client
2. Go to **Main > StockItems > StockitemWhere** – the Stockitem Where Search screen will display
3. Enter the following Query Description:
 - a. **Times Borrowed = 0**
 - b. **On Loan = N**
 - c. (optional) **Location Perm =**
 - d. (optional) **Form** – for example: **Form = DVD**
 - e. (optional) **Sts Code** – for example: **Sts Code = FIC**
4. Click the **F5 Query** button to see a list of items
5. Click the **F6 Count** button to see a count of items
6. Click the **F7 QtoFile** button to save the list to a Saved File

Last Borrowed 12 Months Ago (via Stockitem Where)

1. Go to **Main > StockItems > StockitemWhere** – the Stockitem Where Search screen will display
2. Enter the following Query Description:
 - a. **Last Active <= Current Date – 12 months** (via the **Special** button)*
 - b. (optional) **Location Perm =**
 - c. (optional) **Form** – for example: **Form = DVD**
 - d. (optional) **Sts Code** – for example: **Sts Code = FIC**
3. Click the **F5 Query** button to see a list of items
4. Click the **F6 Count** button to see a count of items
5. Click the **F7 QtoFile** button to save the list to a Saved File

Usage Reports

There are several report templates to count Stockitem usage. The report templates are designed to show usage statistics displayed in a number of ways:

- **&STKHCC.QRP** – usage count in **Call Number** order giving details of each Stockitem
- **&STKHCCSC.QRP** – usage count in **Stats Code** order giving details of each Stockitem
- **&STKHCCS.QRP** – usage count in **Call Number** order giving summary only (by Call No)
- **&STKHCCSS.QRP** - usage count in **Stats Code** order giving summary only (by Stats Code)

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

Create Report

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7. Launch the *Amlib* client
8. Go to **Main > Reports > RepStockitem** – the Stockitem Reports screen will open
9. Select the **F1 New** button – the Select Report Format screen will appear
10. Highlight the Stockitem History report template you would like to use – **&STKHCC.QRP** (Usage by Call No using History), **&STKHCCSC.QRP** (Usage by Stats Code using History), **&STKHCCS.QRP** (Usage by Call No – Summary – Using History) or **&STKHCCSS.QRP** (Usage by Stats Code – Summary – Using History).
11. Click the **OK** button
12. Type in a Description – for example: **Usage Count (DVDs)**
13. Ensure the Create Fin (Y/N) column is set to **N**

Report Stats Code	Create Fin (Y/N)	Report Description	Report Type	Template
	N	Stock - Brief Details	Med. Dtls	&stkbfr.qrp
	N	Stock Barcodes	Stock Barcodes	STKBCODE.ORP
	N	Stock Book Hire Test	Stock Book Hire	STKBKHIRE.ORF
	N	Stockitem Details (CSV)	Stock Details (CSV)	&XSTKCSV.ORP
	N	Stockitem Turnover Test	Stockitem Turnover	TestSTKHTUR.C
	N	Stockitem Usage Count	Stockitem Usage Count	...\Documents & Settings\user\My Recent Documents\Usage Count (DVDs).qrp
	N	Stocktake Not Found	Author&Title&Call	&stktitl.qrp
	N	Test	Test	...\Documents & Settings\user\My Recent Documents\Usage Count (DVDs).qrp
	N	Test InfoTrieve	Most Recent Return Email	&STKMRRE.ORP
	N	Test Stock Opac Count	Author&Title&Call	&stktitl.qrp
	N	Turnover by Cat Ref	Turnover By Cat Ref	&stktur2.qrp
	N	Usage by Stats Code (Summary)	Usage by Stats Code (Sum)	&stkhccss.qrp
	N	Usage Circ Count sort by Stats (12 Months)	Usage by Stats Code using	&stkhccsc.qrp
	N	Usage Count (DVDs)	Usage by Call No using His	&stkhcc.qrp
	N	Usage Count > 5 Issues	Usage Count > 5	&STKH5.ORP

14. Click the **F3 Save** button

Where Search and Order By Parameters

1. Highlight the report and select the **F7 Where** button – this will bring up the Stockitem Reports – Where screen
2. Enter the following Where search:
 - a. **History Type = ISSUE**
You can use **ISSUE, RENEW OR RETURN**
(Use the **Paste** button to insert the parameter into the list at the bottom of the screen)
 - b. If using **History Type = Issue**, you may want to exclude any alterations made to the due date after renewals: **History Contents NOT LIKE Due Date Altered**
 - c. Enter a start date: **History Date >=** enter a date in DD/MM/YYYY format – for example: **01/01/2015**
 - d. Enter a finish date: **History Date <=** enter a date in DD/MM/YYYY format – for example: **11/11/2015** (a finish date is optional – if not inserted, the report will go up to the current date).

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- e. You can further restrict your list to a particular **Form** or **Stats Code** - for example: **Form = DVD** or **StatsCode = FIC**
- f. Click the **F3 Save** button when complete – this will close the Stockitem Reports – Where screen and return you to the Stockitem Reports screen

Stockitem Reports - Where

F3 Save F5 Query

1 Choose Search Column

2 Choose Operator

3 Type the WHERE Condition and Press PASTE OR Press SPECIAL

DVD

Paste Special

(	Column	Oper	Where)
	History Type	=	ISSUE	AND
	History Date	>=	Current Date - 1 Year	AND
	Form	=	DVD	

AND OR Delete

View Report

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

Select File for View

This type of report may use a Saved File as the Source. Do you want to select the file now?

Yes No Cancel

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

Summary

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&STKHCS.S.QRP	test	2015/09/10
ANF	Date Range: 2015/06/18 to 2015/06/18	Usage
		Total: <u>1</u>
CI	Date Range: 2015/06/05 to 2015/06/05	Usage
		Total: <u>2</u>
		Grand Total: <u><u>3</u></u>

Detail

&STKHCS.S.QRP	test	2015/09/10
ANF	Date Range: 2015/06/18 to 2015/06/18	Usage
STOCK00470023B	The horse dancer [electronic resource] / Jojo Moyes.	<u>1</u>
		Total: <u>1</u>
CI	Date Range: 2015/06/05 to 2015/06/05	Usage
STOCK00373281B	An accidental American [electronic resource] / Alex Carr ; read by Caroline Lee.	1
STOCK00381101B	The accidental billionaires [electronic resource] / Ben Mezrich ; read by Mike Chamberlain.	1
		Total: <u>2</u>
		Grand Total: <u><u>3</u></u>

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

Sending List of Barcodes to SLWA (W.A. Public Libraries)

Where Search

The Parameters that must be set include:

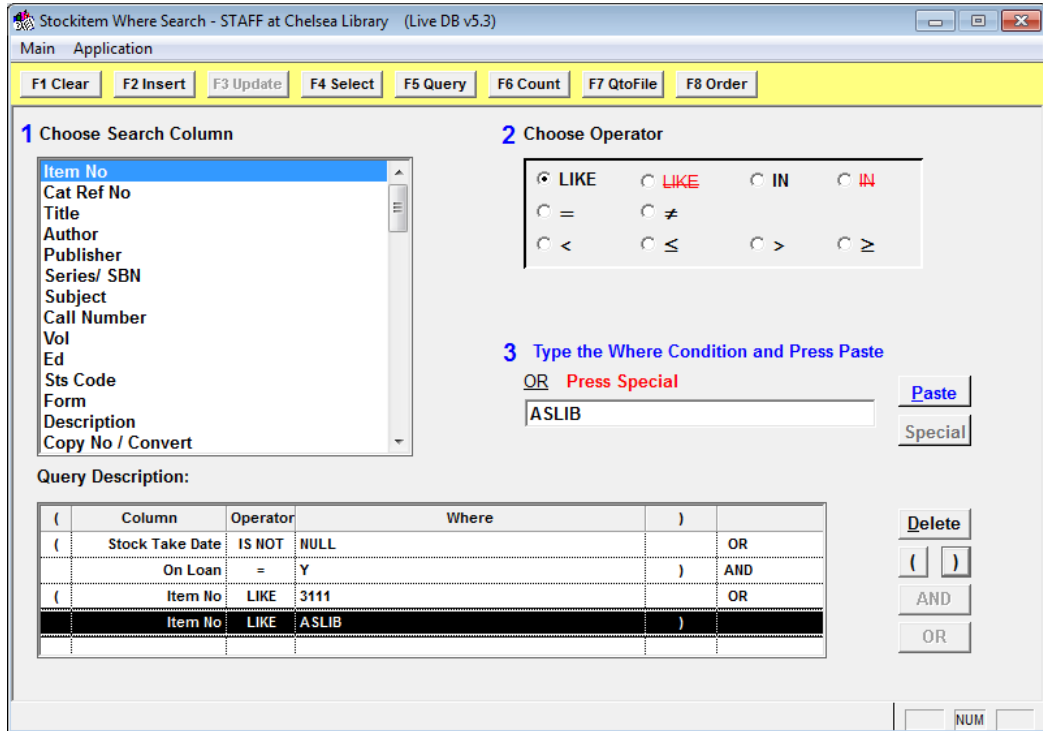
1. **Stock Take Date** ≠ and select the **Paste** button to get **Stocktake Date IS NOT NULL**
2. Select **On Loan = Y**
3. Ensure the Operand is set to **OR** (Also includes items on loan that may not have been counted)
4. Highlight the **top line** and click on the Opening Bracket (
5. Click on the second line and then click the closing bracket)

Please Note: When only State Government Stock is needed to be included in your report, include the following statements:

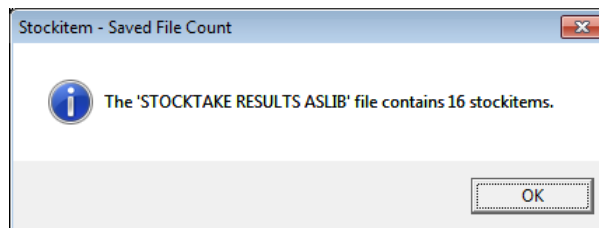
- (a) Select **Item No** in box 1
- (b) Select **LIKE** in box 2
- (c) Type **3111** in box 3
- (d) Click the **Paste** button
- (a) Select **Item No** in box 1
- (b) Select **LIKE** in box 2
- (c) Type **ASLIB** in box 3
- (d) Click the **Paste** button
- (e) Click on the first of the Item Barcode Statements
- (f) Select the Operand of **OR**
- (g) Click on the opening bracket (
- (h) Click on the second of the Item Barcode Statements
- (i) Click on the closing bracket)

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The following screen for your Where Statement should look as below:



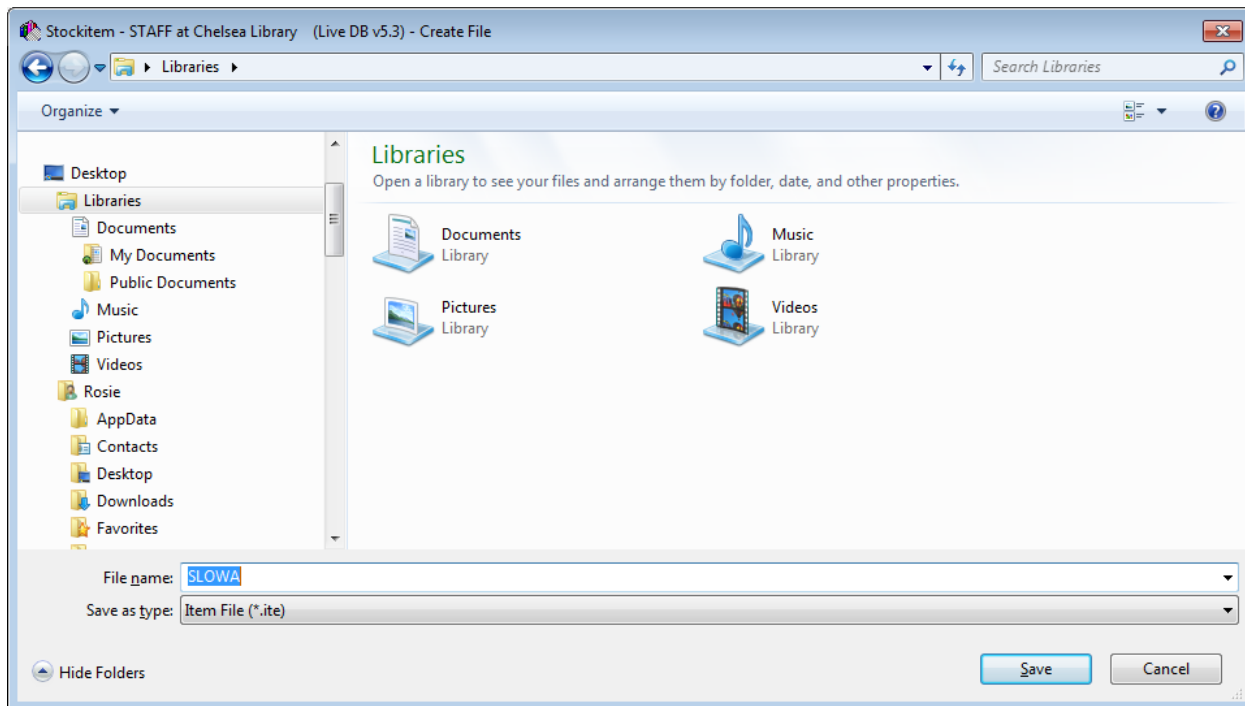
6. Click the **F7 QtoFile** button – the Stockitem Saved Query Results screen will display
7. Click the **F1 New** button
8. Type in a Description – for example: **SLOWA barcodes**
9. Click the **F3 Save** button
10. Ensure the file is highlighted and click the **F9 Select** button – a prompt with the following message will display: **The 'STOCKTAKE RESULTS ASLIB' file contains XX stockitems.**



11. Click the **OK** button
12. Once the File has been saved, from the menu select **Application > Stockitem** – the Stockitems screen will display
13. From the menu, select **File > WriteSaveFileIntoDosFile**
14. Highlight the correct File and click the **F9 Select** button

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15. A *Windows* dialogue box will display:



16. Navigate to the location where you would like to save the file and enter a File name – for example: **SLWA**

17. Click the **Save** button

18. This can then be emailed to *State Library* or opened in *WordPad*, *MS Word* or *Notepad*, etc. [It will result in a page of barcodes, each on a separate line]

