

OpenOPAC Training & User Guide

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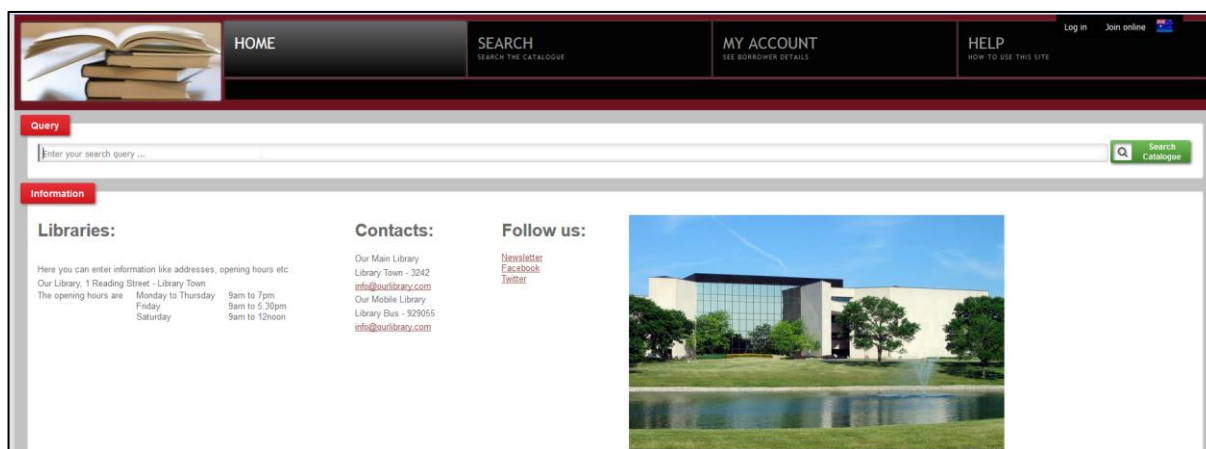
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OVERVIEW

This manual provides a basic overview of the **OpenOPAC**, the settings available from within the **Amlib Client** and some of the basic customisations available for your *OpenOPAC* screens.



What is OpenOPAC?

The Amlib **OpenOPAC** is a web-based OPAC used to search your Amlib catalogue records. Amlib OpenOPAC can be used as an alternative to your Amlib NetOpac.

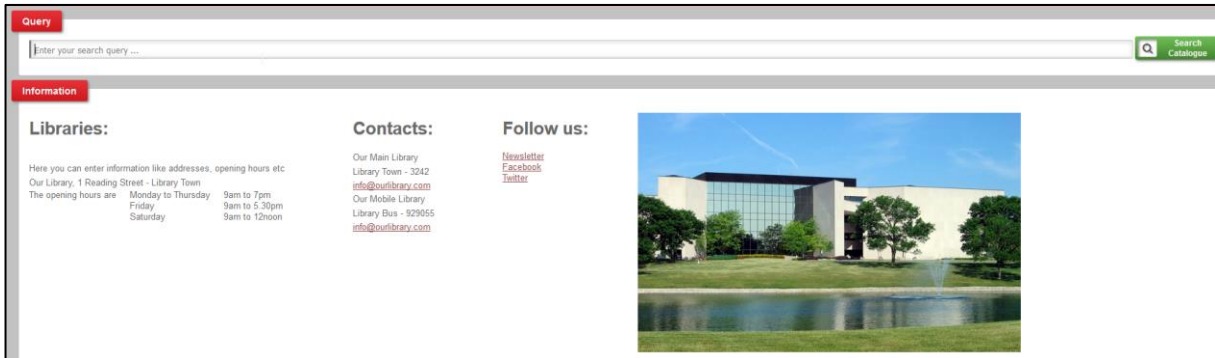
OpenOPAC is a local server solution which is installed on your local server with its own search engine and a separate database populated from an initial load from Amlib. Once implemented, the database is self-managing with direct updates from Amlib so that availability and status information displayed is current and reliable at all times.

Some of the main features of OpenOPAC:

1. Use *filters* to drill down and refine search results. The new results are instantly returned as soon as an option is selected or deselected
2. You can *Save* items from search results, in several ways:
 - a. Create saved lists of items
 - b. Save search queries –useful if patrons have used set filters and want to run the search again in the future
 - c. User can email results to themselves
 - d. The current screens can also be printed
3. Data maintained with direct updates from Amlib
4. *Mobile* Version available – there is an option to view the site as a **Desktop** or **Mobile** version, and what is chosen is remembered on that device
5. Easy to customise interface using Configuration Manager
6. Tailor fields that are displayed for bibliographic records and search result screens
7. Search facilities and how to search on **OpenOPAC** can be found via the **Help Men**

OPENOPACS DESIGN

Home



Query

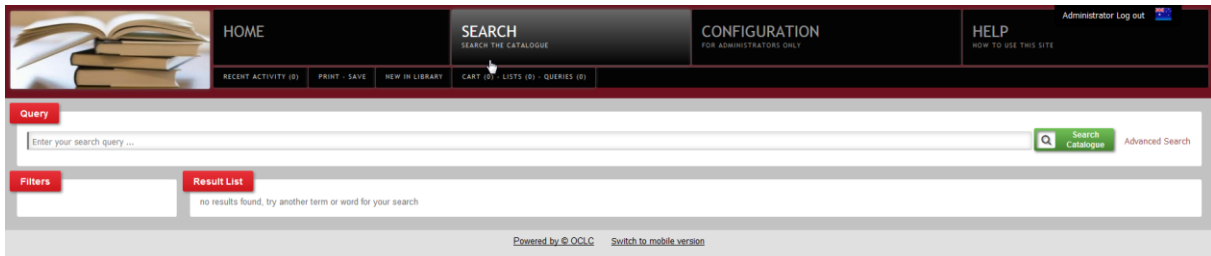
Allows for a Basic Search

Enter the Search term and click Search Catalogue button

Information

Optional – can be left blank or edited to be customised in the Administrator/Configuration area / Custom Text with site specific details, images and links as required

Search



Search extras

Includes:

- Recent Activity
- Print – Save
- New in Library
- Cart
- Lists

Query

Basic and Advanced Search

Filters

Where the facets of the Results show so that the search can be filtered

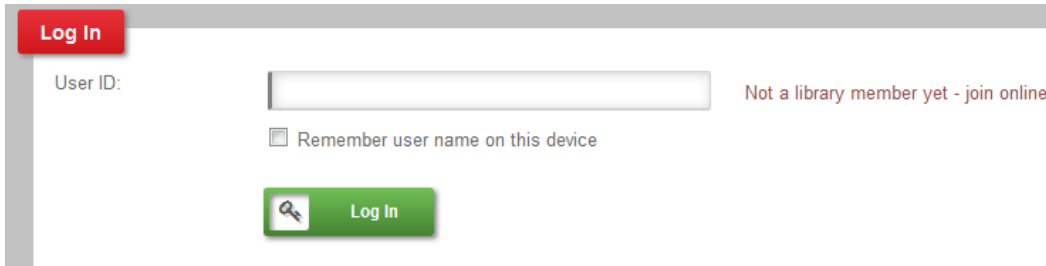
Result List

Displays the results of the Search

My Account / Configuration

Log in with a Borrower Barcode to display details of the Account


Log in with Administrator to set Configuration



Log In

User ID: [Not a library member yet - join online](#)

Remember user name on this device

 Log In

Help

The Help Menu contains useful topics for Searching and checking an Account

There are 2 Help Views:

1. If not logged in, or logged in as a Patron the Help is general. Displays:
 - Index
 - Content
 - Cookies
 - Version

The screenshot displays the OpenOPAC user interface. On the left, there is a vertical navigation menu under the heading "Index". This menu is divided into three sections: "Overview" with one item, "Home (Search)" with seven items, and "My Account" with ten items. Each item is preceded by a question mark icon. The main content area on the right is titled "Content" and features an "Overview" section with introductory text. Below the main content, there are three additional sections: "Cookies" with a sub-heading "How cookies may affect you", "Version" with the text "You are currently running version 6.3.778.0 from 27/04/2017 3:03:09 PM", and a footer area.

Index

Overview

- Overview

Home (Search)

- Search Guidelines
- Quick Search
- Advanced Search
- Search Result List
- Search Details View
- Search Filters
- Search Menu Options

My Account

- What is My Account
- Items on Loan
- Reservations
- History
- Financial Transactions
- Saved Lists
- Saved Queries
- Requests
- Borrower Details

Content

Overview

Here you can find everything y
branches. You can reserve or l

Patrons can save their search

When you go to the Home pag
your library account.

Cookies

How cookies may affect you

Version

You are currently running version 6.3.778.0 from 27/04/2017 3:03:09 PM

2. The Help Menu changes once logged in as Administrator to give assistance in setting the Configuration.

This screenshot shows a portion of the OpenOPAC user interface, specifically the "Index" section. The "Index" heading is highlighted in a dark blue box. Below it, the "Configuration" section is highlighted in a light blue box. Under "Configuration", there is a list of ten items, each preceded by a question mark icon: Colours, Visibility, Parameters, Enrichment, Marc Fields, Format Groups, Search, Text, Upload, and Security.

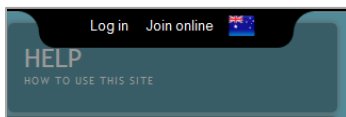
Index

Configuration

- Colours
- Visibility
- Parameters
- Enrichment
- Marc Fields
- Format Groups
- Search
- Text
- Upload
- Security

Login / Logout

At the top right hand corner, a Login Link is visible, so a patron can log into their Account. They have to be logged in to Reserve items (if permitted). They can also Login using My Account TAB



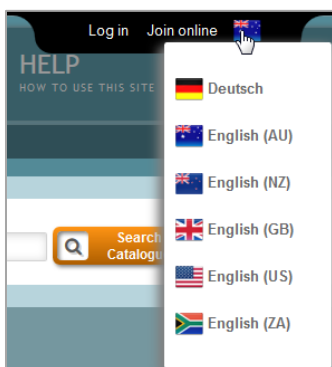
Join online

If set as a parameter, click to Join online as a Temporary member. The process is described latter in the document

Language Flag

When *OpenOPAC* is logged in, a Language Flag will display in the top right hand corner

1. Select the **Flag**
2. A list of options displays



3. Click the most relevant flag for the correct display of language and symbols for currency
4. This flag will display in the top right hand section
5. The language is dictated by the browser language settings, so if you find it has reverted back to the US Flag, this means you will need to change the language on the Browser, to keep the Australian regional settings.
6. If you are in an institution and need to control this language setting globally across numerous browsers/PCs then this can be controlled by your IIS settings [see Appendix 3 - Language control of browsers via IIS settings]

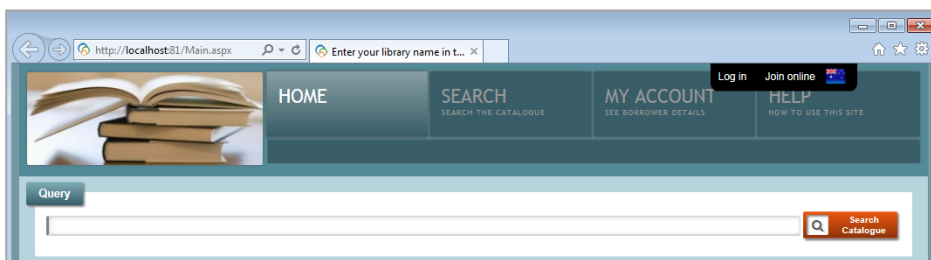
CONFIGURATION

Once OPENOpac has been installed there are several settings that need configuration in the Amlib Client and OpenOPAC to ensure that OpenOPAC updates when records are altered or new records are added:

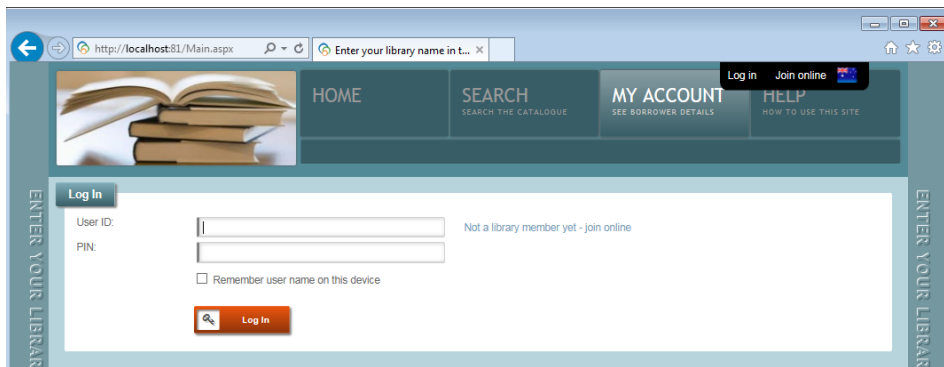
1. Default Amlib/Supervisor settings to set for OpenOPAC
2. Internet Settings
3. OpenOPAC Settings within Configuration

Initial Configuration and uploading of records from the Database

1. This is part of the OpenOPAC installation Notes.
2. After the initial installation of OpenOPAC has been done it is necessary to set the Marc Tags required and upload the Catalogues so that Searching can be done.
3. Open the browser window that has been installed .



4. To Log in as the Administrator



Select > **Log In**

Username: Administrator

Password: 1234 [this is the default PIN, but we recommend that this be changed after installation is complete]

Marc Fields

1. Go to the **Configuration tab** > select **Marc Fields** > then set them and select > **SAVE**

The screenshot shows the 'Configuration' page in OpenOPAC, specifically the 'Marc fields' tab. The page has a vertical sidebar on the left that says 'ENTER YOUR LIBRARY NAME IN THE ADMIN SETTINGS'. At the top, there are two red warning messages: 'You have to change your Administrator password because it still has the insecure initial value!' and 'You have to supply a security question and answer to be able to reset you administrator password!'. Below these are navigation tabs: 'Colours', 'Visibility', 'Visibility (mobile)', 'Parameters', 'Enrichment', 'Marc fields' (selected), 'Search', 'T & C's', 'Upload', and 'Security'. The main content area is titled 'Marc field mapping' and contains a list of fields with input boxes and default values. The fields are: Title: * (245, Default: 245a,245b), Other Title: * (246, Default: 246), Author: * (100a, Default: 100a), ISBN: * (020a, Default: 020a), ISSN: (022a, Default: 022a), Publisher: ** (260, Default: 260), Publication year: ** (260c, Default: 260c), Languages: (041, 546, Default: 041, 546), Physical description: (300, Default: 300), Notes: (500, 504, Default: 500, 504), Summary: (520, Default: 520), Subjects: * (600, 610, 611, 630, 650, 651, Default: 600, 610, 611, 630, 650, 651), Contributors: * (700, Default: 700), Other links: (856u, 856z, Default: 856), and Series: * (440, 490, Default: 440, 490). At the bottom, there are two buttons: 'Save' and 'Cancel'. A legend at the bottom left indicates: '* These fields are used for searching' and '** These fields are used for filtering'.

Field	Value	Default
Title: *	245	245a,245b
Other Title: *	246	246
Author: *	100a	100a
ISBN: *	020a	020a
ISSN:	022a	022a
Publisher: **	260	260
Publication year: **	260c	260c
Languages:	041, 546	041, 546
Physical description:	300	300
Notes:	500, 504	500, 504
Summary:	520	520
Subjects: *	600, 610, 611, 630, 650, 651	600, 610, 611, 630, 650, 651
Contributors: *	700	700
Other links:	856u, 856z	856
Series: *	440, 490	440, 490

Choosing the Marc fields will have ramifications as how the Search results are displayed – for example. Having 245a,245b (to get just the Main Title and Subfield if it exists) or 245 (to get all the Subfields included) ...

Tag 245:

[The ivory swing \[electronic resource\] / Janette Turner Hospital ; read by Lise Rodgers.](#)

Tag 245a,b

[The ivory swing](#)

Upload

1. From Configuration Tabs, select Upload
2. Start the **Upload** Data process. Try one Catalogue item upload first. Please specify a valid catalogue ID before you start the upload process.
Please note that the stock item must be set to Opac? = Y and the catalogue must be set to Opac View Restriction = N.
3. Select on the **Upload** tab and enter a valid catalogue reference number from Amlib and try uploading one catalogue [must do this TEST first to ensure all is correct]

Upload one Catalogue:

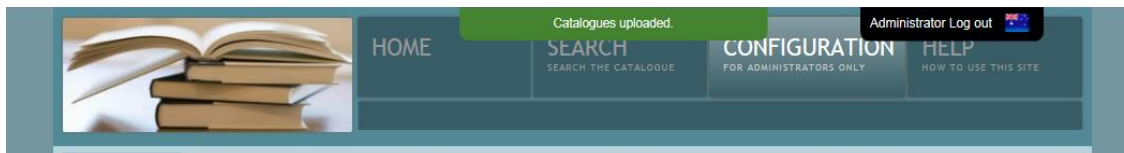
The screenshot shows a button with an upload icon and the text 'Upload' next to a text input field containing the number '35306'.

Please wait while the process executes

The process will notify on success

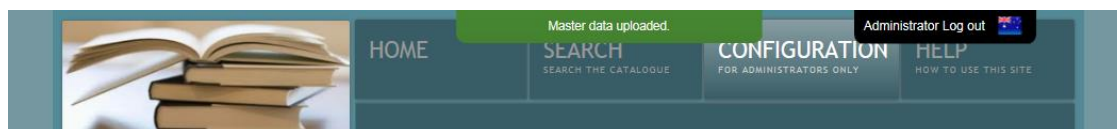


4. Start the upload of **Upload all Catalogues**

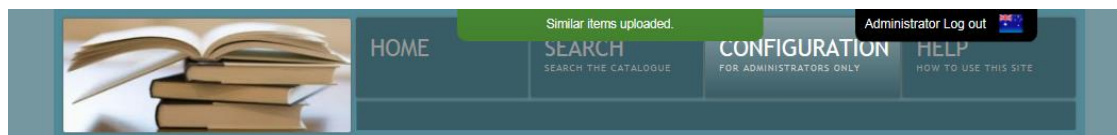


If the single Catalogue completed successfully, the process to upload all catalogue items can be started. This may take between 10 and 60 minutes, depending on the number of catalogue records and the performance of the server.

5. Start the upload of **Master data** (takes about 2 minutes)



6. Start the upload of **Suggestions** (about 15 - 20 minutes)



7. Open is now configured and ready for use – with its default settings

Other Configuration

1. Log in as an Administrator on OpenOPAC and set customised Configurations for OpenOPAC, including Home Page, Theme colours, image, Library name, searches, the screen displays and all the settings required for their library. See relevant sections in this Guide

Supervisor Settings within Amlib

Go to Main/Supervisor/Installation/Default settings/Other TAB. Scroll down to the parameters beginning with OPEN.

- The most important parameter is OPEN Web Enquiry enable. This must be set to Y if using OpenOPAC.
- Other settings in Installation will be described later in the Guide. If offering JoinOnline, there MUST be a default Borrower Type and Status set in the parameters. Otherwise this cannot be used.

Internet Settings

1. Controlling Language and Regional Settings – see Appendix 3 – ensures that the currency and dates display correctly
2. Turn Compatibility Mode Off: In some browsers, specifically IE (Internet Explorer) this is required to get OpenOPAC to display correctly. See Appendix 4.

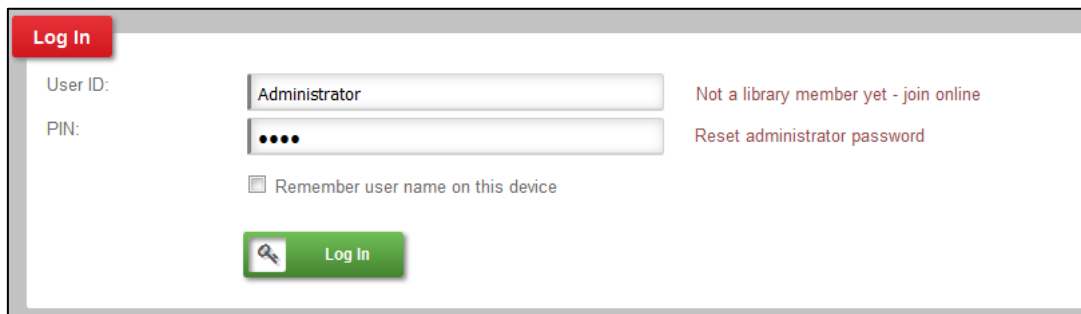
OpenOPAC Settings

Configuration is available once the Administrator has been logged in using the Login Button near the Flag.

Logging in as an Administrator

1. In the upper right hand section of **OpenOPAC** select **Login**
2. The Login box will display
3. Enter the **User ID** of **Administrator**
4. Enter the **Password** of **1234** (it is possible to alter this later for security reasons)

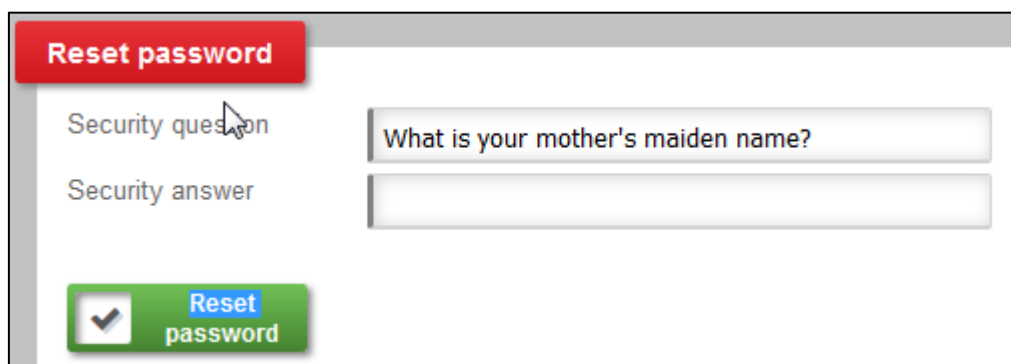
Note: The Login and Passwords are case sensitive



The screenshot shows a 'Log In' form with a red header. It contains two input fields: 'User ID:' with the text 'Administrator' and 'PIN:' with four dots. To the right of the PIN field is a link that says 'Reset administrator password'. Below the input fields is a checkbox labeled 'Remember user name on this device'. At the bottom is a green 'Log In' button with a key icon.

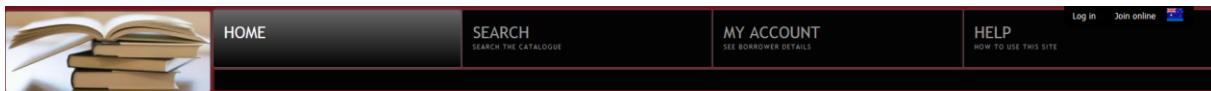
Reset administrator password

1. When logging in as Administrator
2. An option to Reset administrator password is possible via a link
3. A Reset box will display
4. Enter the answer to the Security question in the Security answer field
5. If correct the password will be reset to the default.
6. It can be later changed in the Configuration/Security Tab

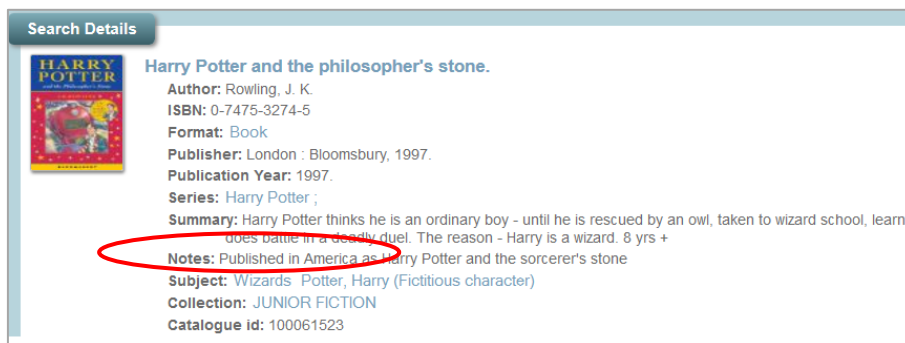


The screenshot shows a 'Reset password' form with a red header. It contains two input fields: 'Security question' with the text 'What is your mother's maiden name?' and 'Security answer' which is empty. At the bottom is a green 'Reset password' button with a checkmark icon.

Note: You can select the checkbox “Remember user name on this device, if appropriate, so it remembers the username if using your own PC or Mobile device



Note when signed in as an Administrator, when you conduct searches and look at the bibliographic record you will notice you can see the catalogue reference number

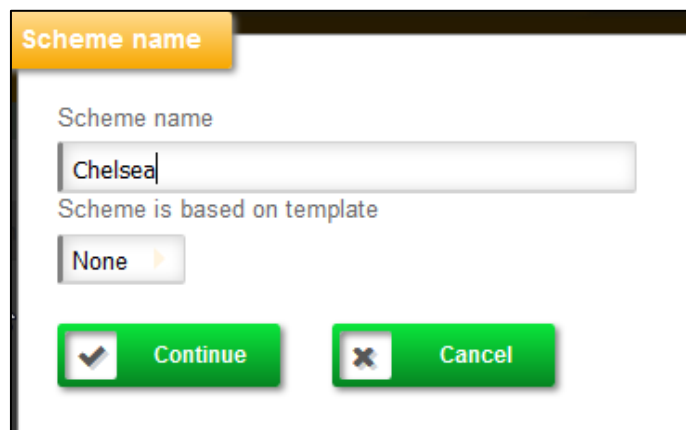


This is never viewable to patrons whether they are logged in or not



Once signed into Administrator a series of TABs will display. These include:

1. Colours
2. Visibility
3. Visibility (mobile)
4. Parameters
5. Enrichment
6. Marc Fields
7. Format groups
8. Search
9. Custom text
10. Upload
11. Security



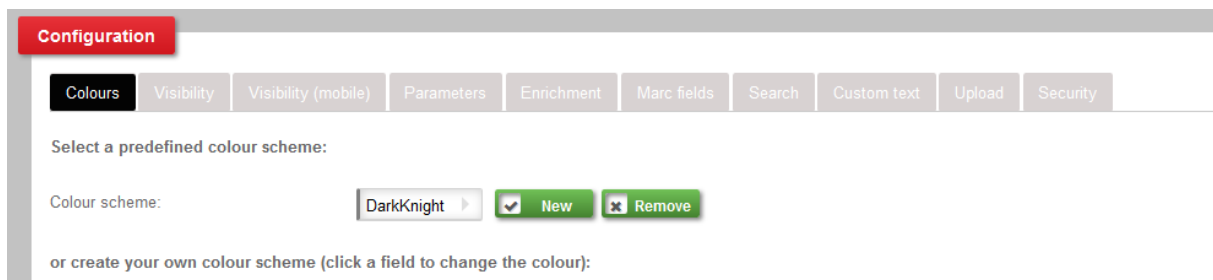
1. The full entry window will display where the colour can be changed for each of the segments as required.
2. Ensure the New name is displayed at the top of the Colour Scheme colours before customising

Colours

To view the current scheme colours, change the scheme, create a new scheme or delete a scheme. See also Appendix 6 for more details

Choosing a Colour Scheme

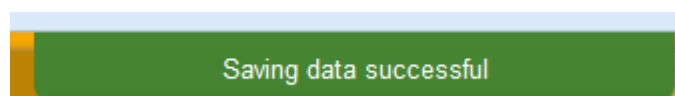
1. Once logged in as Administrator select the **Colours** TAB



1. The Colours page will display where a predefined Colour theme can be chosen from the Colour scheme dropdown
2. Highlight the colour to choose



2. Select **Save** at the base of the screen to update the settings. The colours will then change when the page is refreshed
3. If you select **New** you can base it on one of the created themes and just change a few of the colours if desired
4. A confirmation message will display at the top of the Window



Creating a New Colour Scheme

It is possible to create a scheme that is not one of the predefined themes and may suit your site better. Please see Appendix 11 for some hints on how to achieve the right colour hue

3. Click the **New** button
4. Enter the new **Scheme Name**
5. Enter the "Scheme is based on template" from the Drop-down options if required (if a Scheme is close to a predefined Colour scheme. You can select a template to base your design on an existing template and get a starting point for the colours or you can start from scratch. If starting from scratch, the scheme can be based on the template **None**
6. Click **Continue**

Note: To assist in determining the correct section for each colour, a diagram explaining which each section is available on that window. Click to enlarge the image for clearer viewing

The screenshot shows the OpenOPAC library system interface. The top navigation bar includes 'HOME', 'CONFIGURATION', and 'HELP'. Below this is a search bar with the query 'summer' and a 'Search Catalogue' button. A left sidebar contains 'Filters' for Availability, Locations, Formats, etc. The main 'Result List' shows search results for 'summer' with details like title, subjects, and a table of items available in different locations. Numbered callouts (1-11) point to specific UI elements: 1. Home banner image; 2. Configuration link; 3. Help link; 4. Reserve button; 5. Search bar; 6. Filters sidebar; 7. Availability status; 8. Search button; 9. Result list title; 10. Table header; 11. Reserve button.

Location:	Status:	Reserved:	Due date:	Collection:	Format:	Acquired:	Reserve
DEBT COLLECTOR	Available	0		JUNIOR	Book	27/01/2010	Reserve
Main Library	Available	0		JUNIORGARTEN	Book	20/02/2005	Reserve

Select a predefined colour scheme:

Colour scheme: New Remove

or create your own colour scheme (click a field to change the colour):

1. Main background colour:	<input type="text" value="#e7dadd"/>	
2. Main menu background colour:	<input type="text" value="#8D212F"/>	
3. Main menu button colour:	<input type="text" value="#510b14"/>	
4. Content area background colour:	<input type="text" value="#f4aeb1"/>	
5. Section header colour:	<input type="text" value="#8D212F"/>	Gradient (%): <input type="text" value="30"/>
6. Filter header colour:	<input type="text" value="#FBDDDE"/>	Gradient (%): <input type="text" value="10"/>
7. Hyperlink colour:	<input type="text" value="#A44D69"/>	
8. Button colour:	<input type="text" value="#D03D48"/>	Gradient (%): <input type="text" value="20"/>
9. Tab header colour:	<input type="text" value="#FBDDDE"/>	Gradient (%): <input type="text" value="25"/>
10. Selected button colour:	<input type="text" value="#D03D48"/>	
Light background colour:	<input type="text" value="#c5dde2"/>	
Error message colour:	<input type="text" value="#E80E18"/>	
Info message colour:	<input type="text" value="#448230"/>	
Main menu button text colour:	<input type="text" value="#FFFFFF"/>	
Button text colour:	<input type="text" value="#FFFFFF"/>	
Filter headers text colour:	<input type="text" value="#999999"/>	
Tab headers text colour:	<input type="text" value="#999999"/>	
Panel tab text colour:	<input type="text" value="#FFFFFF"/>	
Light background text colour:	<input type="text" value="#6b6b6b"/>	
Error message text colour:	<input type="text" value="#FFFFFF"/>	
Info message text colour:	<input type="text" value="#FFFFFF"/>	

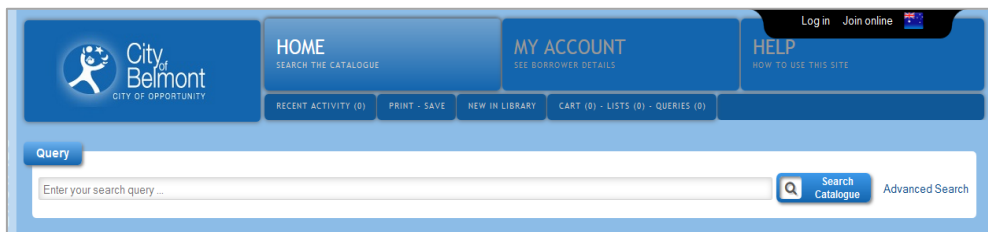
7. The Numbers on the left hand-side of this screen correspond with the Numbers within the diagram
8. Click in the Colour Value box to change and customize the colour
9. A Colour Wheel will display



10. Click on the wheel to select the Colour
11. The Hex Colour value will automatically display in the box
12. Click **Close** to select that colour value
13. Click **Save** at the base of the window to save the Colour Scheme



Please note: After saving, some browsers keep the old colour settings in the cache. *Clearing the browsers cache* will prevent this (for most browsers pressing **Ctrl F5** will do this)



Visibility

1. Once logged in as Administrator select the **Visibility** TAB
2. There are 4 lists to configure:
 - Search result list – the first listing of results
 - Search result list – copies
 - Details view (bibliographic view)
 - Details view – copies
3. **Tick** the boxes to determine which details show on the search result list and in the details list. The unchecked ones are hidden
4. Click **Save** once complete

Note: the fields that have * next to them are being used for searching, so it would be confusing for users to hide those fields

Note: the items that have ** next to them are the fields being used for filtering

Colours
Visibility
Visibility (mobile)
Parameters
Enrichment
Marc fields
Search
Custom text
Upload
Security

The selected items are shown on the search result list and in the details list, the unchecked ones are hidden

Search result list	Search result list - copies	Details view	Details view - copies
<input checked="" type="checkbox"/> Authors *	<input checked="" type="checkbox"/> Due date	<input checked="" type="checkbox"/> Authors *	<input checked="" type="checkbox"/> Due date
<input checked="" type="checkbox"/> Contributors *	<input checked="" type="checkbox"/> Location **	<input checked="" type="checkbox"/> Contributors *	<input checked="" type="checkbox"/> Location **
<input type="checkbox"/> Summary	<input checked="" type="checkbox"/> Floor location	<input checked="" type="checkbox"/> Summary	<input checked="" type="checkbox"/> Floor location
<input type="checkbox"/> Format **	<input checked="" type="checkbox"/> Reservations count	<input checked="" type="checkbox"/> Format **	<input checked="" type="checkbox"/> Reservations count
<input type="checkbox"/> Isbn *	<input checked="" type="checkbox"/> Status	<input checked="" type="checkbox"/> Isbn *	<input checked="" type="checkbox"/> Status
<input type="checkbox"/> Issn	<input checked="" type="checkbox"/> Call number	<input checked="" type="checkbox"/> Issn	<input checked="" type="checkbox"/> Call number
<input type="checkbox"/> Collection **	<input checked="" type="checkbox"/> Copy title	<input checked="" type="checkbox"/> Collection **	<input checked="" type="checkbox"/> Copy title
<input type="checkbox"/> Series *	<input checked="" type="checkbox"/> Collection **	<input checked="" type="checkbox"/> Series *	<input checked="" type="checkbox"/> Collection **
<input type="checkbox"/> Physical description	<input checked="" type="checkbox"/> Format **	<input checked="" type="checkbox"/> Physical description	<input checked="" type="checkbox"/> Format **
<input type="checkbox"/> Publication year **	<input checked="" type="checkbox"/> Date received	<input checked="" type="checkbox"/> Publication year **	<input checked="" type="checkbox"/> Date received
<input type="checkbox"/> Publisher **		<input checked="" type="checkbox"/> Publisher **	
<input type="checkbox"/> Subject *		<input checked="" type="checkbox"/> Subject *	
<input checked="" type="checkbox"/> Title *		<input checked="" type="checkbox"/> Title *	
<input type="checkbox"/> Other Title *		<input checked="" type="checkbox"/> Other Title *	
<input type="checkbox"/> Other links		<input checked="" type="checkbox"/> Other links	
<input type="checkbox"/> Notes		<input checked="" type="checkbox"/> Notes	
<input type="checkbox"/> Calculated ranking		<input type="checkbox"/> Calculated ranking	
<input type="checkbox"/> Search term occurrence		<input type="checkbox"/> Search term occurrence	

* These fields are being used for searching, it would be confusing for users to hide those fields.

** These fields are being used for filtering.

* These fields are being used for searching, it would be confusing for users to hide those fields.

** These fields are being used for filtering.

Save
 Cancel

Visibility (mobile)

NOTE: Only select the most important options for your library, to get an optimal display on **mobile devices**

From this screen you are able to set up what the users will see on their **Mobile devices**, and how your records will be searched and displayed.

1. Once logged in as Administrator select the **Visibility (Mobile)** TAB
2. There are 4 lists to configure:
 - Search result list – the first listing of results
 - Search result list – copies
 - Details view (bibliographic view)
 - Details view – copies shown under the bibliographic record
3. **Tick** the boxes to determine which details show on the search result list and in the details list. The unchecked ones are hidden
4. Click **Save** once complete

Configuration

Colours | Visibility | **Visibility (mobile)** | Parameters | Enrichment | Marc fields | Search | Custom text | Upload | Security

The selected items are shown on the search result list and in the details list, the unchecked ones are hidden

Search result list	Search result list - copies	Details view	Details view - copies
<input type="checkbox"/> Authors *	<input checked="" type="checkbox"/> Due date	<input checked="" type="checkbox"/> Authors *	<input checked="" type="checkbox"/> Due date
<input type="checkbox"/> Contributors *	<input checked="" type="checkbox"/> Location **	<input checked="" type="checkbox"/> Contributors *	<input checked="" type="checkbox"/> Location **
<input type="checkbox"/> Summary	<input type="checkbox"/> Floor location	<input checked="" type="checkbox"/> Summary	<input checked="" type="checkbox"/> Floor location
<input type="checkbox"/> Format **	<input checked="" type="checkbox"/> Reservations count	<input checked="" type="checkbox"/> Format **	<input checked="" type="checkbox"/> Reservations count
<input type="checkbox"/> Isbn *	<input checked="" type="checkbox"/> Status	<input checked="" type="checkbox"/> Isbn *	<input checked="" type="checkbox"/> Status
<input type="checkbox"/> Issn	<input checked="" type="checkbox"/> Call number	<input checked="" type="checkbox"/> Issn	<input checked="" type="checkbox"/> Call number
<input type="checkbox"/> Collection **	<input checked="" type="checkbox"/> Copy title	<input checked="" type="checkbox"/> Collection **	<input checked="" type="checkbox"/> Copy title
<input type="checkbox"/> Series *	<input checked="" type="checkbox"/> Collection **	<input checked="" type="checkbox"/> Series *	<input checked="" type="checkbox"/> Collection **
<input type="checkbox"/> Physical description	<input checked="" type="checkbox"/> Format **	<input checked="" type="checkbox"/> Physical description	<input checked="" type="checkbox"/> Format **
<input type="checkbox"/> Publication year **	<input type="checkbox"/> Date received	<input checked="" type="checkbox"/> Publication year **	<input checked="" type="checkbox"/> Date received
<input type="checkbox"/> Publisher **		<input checked="" type="checkbox"/> Publisher **	
<input type="checkbox"/> Subject *		<input checked="" type="checkbox"/> Subject *	
<input checked="" type="checkbox"/> Title *		<input checked="" type="checkbox"/> Title *	
<input checked="" type="checkbox"/> Other Title *		<input checked="" type="checkbox"/> Other Title *	
<input type="checkbox"/> Other links		<input checked="" type="checkbox"/> Other links	
<input type="checkbox"/> Notes		<input checked="" type="checkbox"/> Notes	
<input type="checkbox"/> Calculated ranking		<input type="checkbox"/> Calculated ranking	
<input checked="" type="checkbox"/> Search term occurrence		<input type="checkbox"/> Search term occurrence	

* These fields are being used for searching, it would be confusing for users to hide those fields.
** These fields are being used for filtering.

Save Cancel

Parameters

This configures the setting of parameters for:

- OPAC options
 - Name and logo
 - Sort options
 - Default settings – Join online, show suggestions, show reviews, allow reservations etc.
- SMTP details – set up email settings required to allow emails to be sent from *OpenOPAC*

The screenshot shows the 'Parameters' configuration page in OpenOPAC. The 'Parameters' tab is active. The 'Opac options' section contains the following settings:

- Library name: Oracle Library
- Default sort order: Relevance
- Log level: 3. Warn
- Download current log file: Log file
- Allow join online:
- Allow reservation of catalogue items:
- Allow reservation of stock items:
- Allow renewal:
- Allow change patron details:
- Allow requests: All
- Hide copy information on initial search results:
- Show suggestions: desktop mobile
- Show reviews: desktop mobile
- Main logo image: Custom logo uploaded (with a 'Remove' button)
- Currency symbol: \$

The 'SMTP Options' section contains the following settings:

- SMTP host: brick.oclc.com.au
- SMTP port: 25
- SMTP user name: (empty field)
- SMTP password: (empty field)
- SMTP enable SSL:
- SMTP reply email: marvin@yourdomain.com

At the bottom of the page are 'Save' and 'Cancel' buttons.

OPAC Options

1. Once logged in as Administrator select the **Parameters** TAB
2. Scroll down to the **Opac Options** section

Opac options

Library name:

Default sort order:

Log level:

Download current log file:

Allow join online:

Allow reservation of catalogue items:

Allow reservation of stock items:

Allow renewal:


Allow change patron details:

Allow requests:

Hide copy information on initial search results:

Show suggestions: desktop mobile

Show reviews: desktop mobile

Main logo image: Custom logo uploaded  Image (jpg, gif, png) should be less than 0.5 Mb (better: less than 20 Kb) and is converted to 340 x 117 px

Currency symbol:

This enables the entry of:

- **Library Name**

Enter the **Library Name** in the box. This will then display on the side of the Main Screen of *OpenOPAC*

Library name:

- **Default Sort Order**

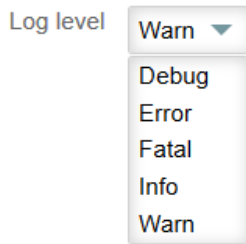
Enter the **Default Sort order**: Choose from the options in the dropdown box

Note: Relevance is the recommended Sort Option for the default. This is ranked by whether the Search Terms appear anywhere in the Amlib bibliographic record. Search terms appearing in the Title, Author or Subject field are ranked highest. The combinations of the term is then ranked on a scaling system for the presence of the terms and the proximity of the terms to each other

Relevance

- Relevance
- Authors (A -> Z)
- Authors (Z -> A)
- Title (A -> Z)
- Title (Z -> A)
- Latest publication year first
- Oldest publication year first

- **Log Level**



This should be set at **WARN** unless this setting has been requested to be changed by Support staff at OCLC, to create a detailed log file to investigate an issue or error being reported. The **Log Level** specifies the amount of details in the log files.

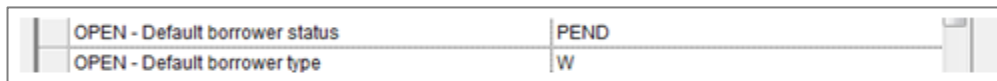
- **Download Current Log File**

Use this option to upload the latest Log File. Usually only used if Amlib Support asks for a Log regarding a problem that needs resolving

- **Join Online**

Tick **Join online** if you wish to allow this facility

If you wish to allow Join online the parameters need to be set within Supervisor, Installation, Other for the relevant Locations.



The Text for the Terms and Conditions should also be set in the Configuration settings of OpenOPAC with the Administration set up.

The SMTP settings will also be required as the new borrower will receive two emails in the process.

- **Allow Reservations of catalogue items**

Tick **allow reservations** if you wish to allow users to reserve all items for a catalogue. The Reserve will then be placed as a First available for all copies of the Catalogue

- **Allow Reservations of stock items**

Tick **Allow reservations of stock items** if you wish to allow reserves on individual items. This is important if you wish to allow reservation of individual Periodical/Magazine issues that may share the same Catalogue as the Main entry Catalogue

- **Allow Renewal**

Tick **Allow Renewal** if you wish to allow users to renew items currently on loan (Subject to the circulation and Supervisor/Installation/Other/OpenOPAC rules set – whether they owe money, have overdues etc.)

- **Allow change patron details**

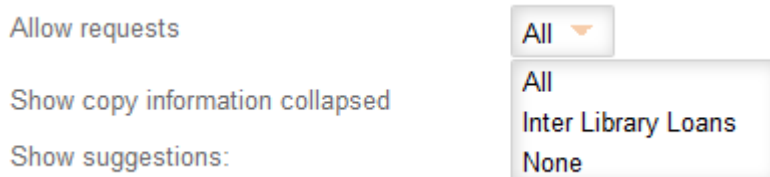
Tick **Allow change patron details** if you wish to allow users to alter the Patron details

* This includes being able to change their personal details and their PIN online when they are signed in OR you can turn this option off so it's not possible for them to change personal details and their PIN

Any Online changes can be followed up by Library Staff, by checking the Online Changes table for review

- **Allow Requests**

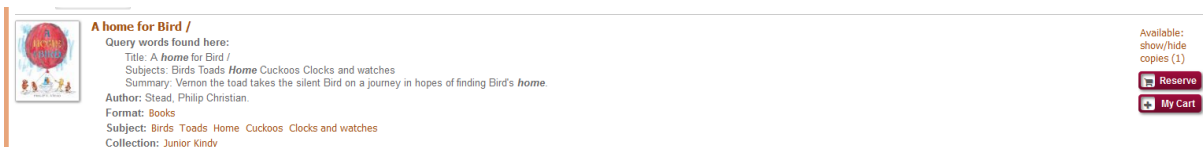
Tick **Allow Request** if you wish to allow users to be able to request ILL or Purchase Requests. Click the Drop-down box to choose which option is required:



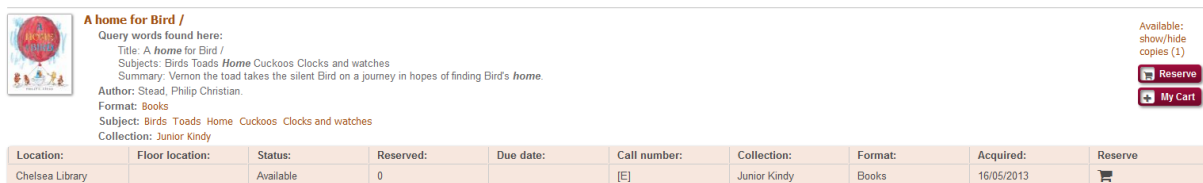
- * All (Purchase Requests as well as Inter Library Loans)
- * Inter Library Loans (Inter Library Loans Only and not Purchase Requests)
- * None (No Purchase Requests and no Inter Library Loans)

- **Show Copy Information on initial search**

The Copy or Holdings can be hidden (collapsed) so that it only shows once the Title or Show Copies is selected. If the parameter is ticked, the Copy information is hidden until selected



Alternatively, Copy information can be shown when the search is first completed. If the parameter is unticked, it displays on the initial window



- **Show Suggestions**

Tick **Show suggestions** if you wish to allow users to see suggestions from what other items have been popular or searched for recently

- **Show Reviews**

Tick **Show reviews** if you wish to allow this. Reviews are from [Good Reads](#), patrons can join up to Good reads, so they can submit their own reviews if they wish or just read the ones provided by Good Reads.

Adding a LOGO

1. Click the **Browse** to find the **Main Logo Image** if required. Once found, click **Upload** to select

Image (jpg, gif, png) should be less than 0.5 Mb (better: less than 20 Kb) and is converted to 340 x 117 px

Note: The size of image is important for optimal resolution and display. The Image can be a jpg, gif, png Image file and should be **less than 0.5 Mb** (better: less than 20 Kb) and is converted to **340 x 117 pixels** – This size fits the placeholder best. Sometimes your logo is not rectangular, so it may be preferable to create a rectangular one in Paint NET, and put more background colour behind it Click **Save** at the base of the screen after setting the OPAC options

- **Currency Symbols**

Set the Currency symbol to reflect the correct currency displaying on the **My Accounts** screen.

Currency symbol

SMTP Options

If patrons will be able to email their search results or queries to themselves, after conducting a search on *OPENOPAC* the SMPT and Email Options will need to be completed

1. Once logged in as Administrator select the **Parameters** TAB
2. Go to the **SMTP Options** section
3. Enter the **SMTP host** name or IP address
4. Enter the **SMTP Port**
5. Enter the **SMTP User Name**
6. Tick if **SMTP Enable SSL** is to be enabled: This allows for the SMTP Client using a *Secure Sockets Layer (SSL)* to encrypt the connection for your email. If you want an unencrypted connection **DO NOT** tick the **SMPT ENABLE SSL**
7. Enter the **SMTP email address**
8. Click **Save** at the base of the screen after setting the OPAC options

SMTP options:

SMTP host:

SMTP port:

SMTP user name:

SMTP password:

SMTP Enable SSL:

SMTP email address:

Enrichment

Configuration

Colours | Visibility | Visibility (mobile) | Parameters | **Enrichment** | Marc fields | Search | Custom text | Upload | Security

? Click here to maximise/minimise help text

First enrichment provider information

Type:

Use for covers

Parameters:

Content to be shown

Second enrichment provider information

Type:

Use for covers

Parameters:

Content to be shown

An enrichment provider can be selected if subscribed, as well as the additional elements from that subscriber depending on the level of subscription.

Up to two providers can be entered and one chosen to use for Cover images.

Enrichment providers may be:

- None
- LibraryThing
- LibraryThingFree
- SyndeticsPlus
- LocalStoredImages

If a match is found for the Cover image, the images will display automatically.



Cat.

Author: Clutton-Brock, Juliet.

Format: Text

Publisher: Pymble, N.S.W. : Harper Collins, 1992.

Series: Collins eyewitness guides.



The illustrated cat.

Author: Suares, Jean-Claude.

Format: Text

Publisher: Brookvale, N.S.W. : Aust. and New Zealand Book Co., 1977.

1. Select the Enrichment Provider from the Dropdown options

? Click here to maximise/minimise help text

First enrichment provider information

Type: None

Use for covers

Parameters:

Content to be shown

LibraryThing
LibraryThingFree
SyndeticsPlus
LocalStoredImages
None

2. Tick the Use for Covers if appropriate
3. Enter the Parameters depending on the Provider selected
 - a. Use the Click here to maximize/minimize help text to copy and paste in the requirements

For example: for Syndetics enter the **SyndeticsPlusClient=.....** (the Client Number) in the Parameter box and the *htm* relevant to the elements to which your library is subscribed, in the **Content to be shown** box. This will vary between sites.

```
Syndetics:  
Parameters = SyndeticsPlusClient=....;  
Content to be shown =  
  
<div id="syn_summary" class="syn_bottomspace"></div>  
<div id="syn_anotes" class="syn_bottomspace"></div>  
<div id="syn_awards" class="syn_bottomspace"></div>  
<div id="syn_blreview" class="syn_bottomspace"></div>  
<div id="syn_abreview" class="syn_bottomspace"></div>  
<div id="syn_chreview" class="syn_bottomspace"></div>  
<div id="syn_criticasreview" class="syn_bottomspace"></div>  
<div id="syn_dbchapter" class="syn_bottomspace"></div>  
<div id="syn_ljreview" class="syn_bottomspace"></div>  
<div id="syn_nyreview" class="syn_bottomspace"></div>  
<div id="syn_pwreview" class="syn_bottomspace"></div>  
<div id="syn_sljreview" class="syn_bottomspace"></div>  
<div id="syn_series" class="syn_bottomspace"></div>  
<div id="syn_toc" class="syn_bottomspace"></div>  
<div id="syn_fiction" class="syn_bottomspace"></div>  
<div id="syn_fiction_search" class="syn_bottomspace"></div>  
<div id="syn_avprofile" class="syn_bottomspace"></div>  
<div id="syn_avsummary" class="syn_bottomspace"></div>  
<div id="syn_hbreview" class="syn_bottomspace"></div>  
<div id="syn_kireview" class="syn_bottomspace"></div>  
<div id="syn_gmsummary" class="syn_bottomspace"></div>  
<div id="syn_guardianreview" class="syn_bottomspace"></div>  
<div id="syn_doodysreview" class="syn_bottomspace"></div>
```

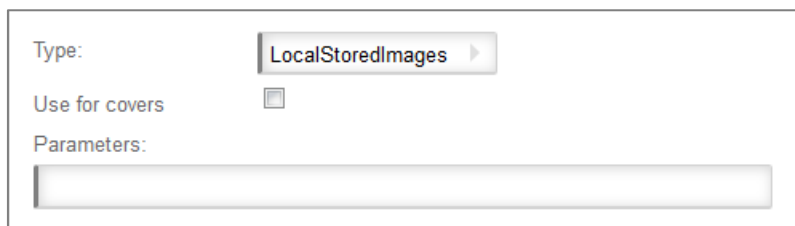
Subscribed Enrichment Provide

Includes:

- LibraryThing: Apply for a Dev Key if subscribed directly from LibraryThing
- LibraryThingFree: Option to provide free Book Cover Images – subscribed directly from LibraryThing which will also require a Dev Key in order to show covers
- Syndetics Plus: Contact support-anz@oclc.org for the code is required for Syndetics

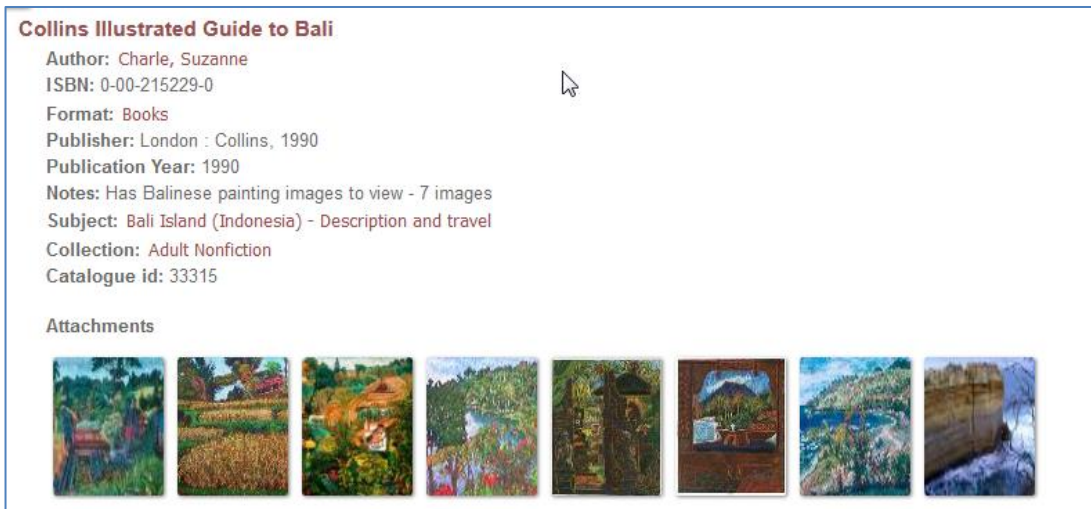
Local Images

1. These can include SCIS images as well as added images and other pdf files attached to catalogue records. See other documents on setting up a shared Image Path in Amlib/Supervisor/Installation to store the images
2. When setting up in the Enrichment Tab of OpenOPAC, leave the parameters box blank.
3. If to be used for Cover images, tick Use for Covers option



The screenshot shows a configuration window for 'Local Images'. It includes a 'Type' dropdown menu set to 'LocalStoredImages', a 'Use for covers' checkbox which is currently unchecked, and a 'Parameters' text input field which is empty.

4. If not to be shown as cover images, they will display at the base of the Catalogue record [you may to ensure you have Pop-up Blockers turned OFF]

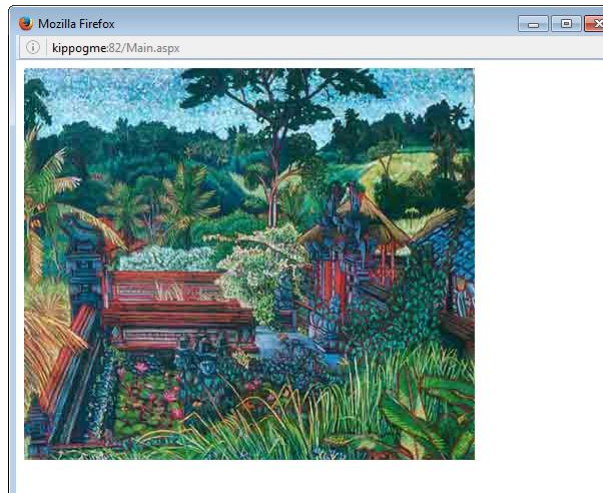


The screenshot displays a catalogue record for the book 'Collins Illustrated Guide to Bali'. The record includes the following details:

- Author:** Charle, Suzanne
- ISBN:** 0-00-215229-0
- Format:** Books
- Publisher:** London : Collins, 1990
- Publication Year:** 1990
- Notes:** Has Balinese painting images to view - 7 images
- Subject:** Bali Island (Indonesia) - Description and travel
- Collection:** Adult Nonfiction
- Catalogue id:** 33315

Below the text, there is an 'Attachments' section containing a horizontal row of seven small thumbnail images, each representing a different scene from the book's illustrations.

5. Clicking any Image or pdf will enlarge the image and show separately



6. **If not** using another provider the first image you have attached can be used as a book cover image on both the result list & Bib record by selecting the **use for cover** option



SCIS (Education Services Australia) have Cover images available. The Images.zip file contains images for items matched in the Order file (Note: Not all SCIS records have cover images).

The Images.zip file can be saved, extracted and attached to the Catalogue data in Amlib as an Image attachment. The image is not part of the Marc file so the image will need to be added individually to each catalogue record, after the Marc file has been downloaded.

Note: To alert your patrons to images being attached on the Catalogue record, it is possible to allow notes to be seen on the results view. Then add 'see attached images' in your catalogue records to a 504 marc tag or one of your 500 tags - which you have selected in the marc fields tab in configuration.

Marc fields

Define the Marc Tags for searching and filtering. The Default Tags are shown in grey to the right, but can be modified. Specific subfields can be identified, for example it works better if only the 'a' and 'b' subfield of the 245 tag are entered to display, rather than the full 245 tag (due to punctuation)

This should be done as part of the initial Installation

1. Once logged in as Administrator select the **Marc Fields** TAB
2. The Marc field mapping window will display
3. Modify the relevant boxes as required. A full Stop is placed between each Marc Tag if more than one Marc Tag is identified
4. Click **Save** when complete

Marc field mapping

Title: *	245a, 245b,	Default: 245a,245b
Other Title: *	246	Default: 246
Author: *	100a, 110a	Default: 100a
ISBN: *	020a	Default: 020a
ISSN:	022a	Default: 022a
Publisher: **	264,260	Default: 260
Publication year: **	260c	Default: 260c
Languages:	041, 546	Default: 041, 546
Physical description:	300	Default: 300
Notes:	500, 504, 505	Default: 500, 504
Summary:	520	Default: 520
Subjects: *	600, 610, 611, 630, 650, 651,655	Default: 600, 610, 611, 630, 650, 651
Contributors: *	700,710	Default: 700
Other links:	856	Default: 856
Series: *	490,440	Default: 440, 490

* These fields are used for searching
** These fields are used for filtering

Save Cancel

NOTE: This needs to be set in place before the first initial load of Catalogues so the records display as required [see [OpenOPAC installation guide](#)].

Select > the **Marc Fields** tab and add the Marc Tags you want to display. There will be some default ones already in place that you can remove or you can add more, depending on your own records and what you want displayed.

Note: Some tags have an * next to them, this means that these are the ones being used for searching and returning results

Note: Some tags have ** next to them, that means these tags are being used for filtering purposes, so keep this in mind when selecting what tags you wish to be displayed

Format Groups

It is possible to group the Amlib **Form codes** into broader Groups so that the Result Filter on the Left-hand side of OpenOPAC displays the Groups defined.

An automatic load of the Form codes used in Amlib displays in the Format window.

1. Once logged in as Administrator select the **Formats** TAB
2. The Form codes used in Amlib will display
3. Enter the required Format in the box to the right
4. Click **Save** when complete

Format mapping	
Archive file	Non Book
Audio cassette	Audio Visual & Digital
Audio CD	Audio Visual & Digital
Book	Print
CD Notes	Audio Visual & Digital
CD ROM	Audio Visual & Digital
Chart	Non Book
Comics	Print
Computer manual	Equipment & Computer
Computer software	Equipment & Computer
DVD	Audio Visual & Digital
DVD notes	Audio Visual & Digital
DVD Title	Audio Visual & Digital
Equipment - ADM	Equipment & Computer

Once this has been set when searches are performed in OpenOPAC, the Format Filters on the left reflect these categories

- Equipment & Computer (26)
 - Restricted Hardware (14)
 - Hardware (12)
- Print (17)
 - Periodical (16)
 - Photo Album (1)
- Audio Visual & Digital (14)
 - DVD (7)
 - CD ROM (6)
 - DVD notes (1)
- URL (3)
 - Web site (3)
- Non Book (2)
 - Archive file (2)

If **ALL** the categories are to be cleared select the **Delete All** button on the right

Search

A preloaded set of common synonyms are available as a default. It is possible to add other words to improve the results of returned searches. For example: computer game, Wii games, Play station, Nintendo – Any of these will be returned if one of these words are typed into a search

Synonyms

Synonyms:

```
gb,gib,gigabyte,gigabytes
mb,mib,megabyte,megabytes
television,tv
abettor,abetter
abettors,abettors
abnormalize,abnormalise
abnormalized,abnormalised
abnormalizing,abnormalising
abolitionize,abolitionise
abolitionized,abolitionised
abolitionizing,abolitionising
abridgment,abridgement
abridgments,abridgements
absinthe,absinth
absinthes,absinths
academize,academise
academized,academised
academizing,academising
```

Stopwords:

```
a
an
and
are
as
at
be
but
by
for
if
in
into
is
it
no
not
of
```



Once logged in as Administrator select the **Search TAB**

The **Synonyms:** window will display

Add extra lines of searching terms as required. It does not matter where the lines are added. Enter a comma between terms

Please note this **is not** a 'see and see also listing', it just allows **synonyms** to be search to increase the search results when one term is used rather than another

For example you may like to add these:

aeroplane, airplane, airliner, aircraft, plane, airship

lift, elevator, escalator

gb, gib ,gigabyte ,gigabytes

mb, megabyte, megabytes

television, tv

Click **Save** when complete

Stopwords

Enter words that are not required for searching. These words are filtered out from the Search Index and result so that unnecessary targets can be avoided.

Words can be added or removed from this list, but care needs to be given due to repercussions of this action.

Click **Save** when complete

Custom text

This configuration allows for:

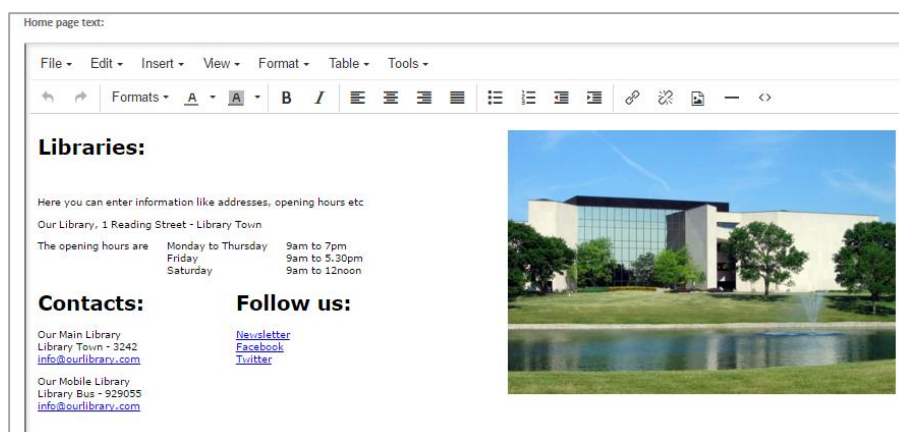
- The Home page can be configured to include Site specific details and images
- Default text determined to be used when patrons join online.

Home page text:

This is used set up a home page with a specific image, information, location of branches, opening hours etc...

This will appear in the Home page TAB before a search is conducted.

- an image of the library or a location map etc
- Details about the library & opening hours
- Contact details
- Other links to social media if required



Hint: select View > Show blocks as this will show you where you can sit your text & images, as its HTML coded in the background – you can switch to HTML code by selecting Tools, if you are familiar with this instead.

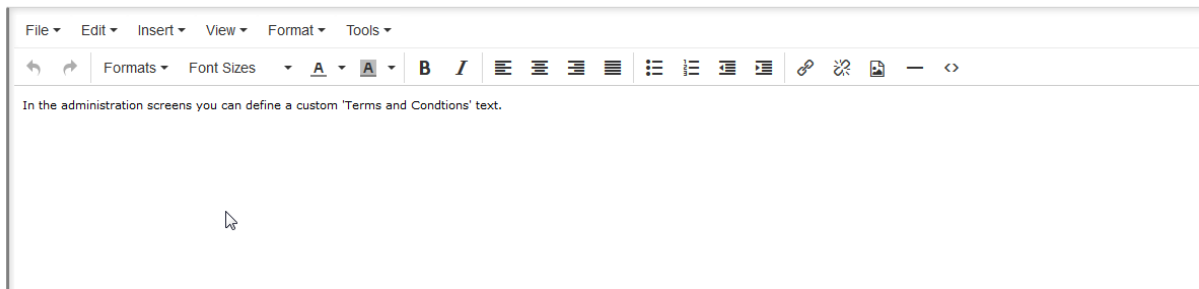
Terms and Conditions

The terms and conditions for the library membership can be typed into this space.

This is used when if patrons can join online. The terms and conditions can be agreed upon, prior to allow the patron to join online.

1. Click in the Terms and Conditions for new patrons box
2. Enter the Text required
3. Formatting can be used to change Font sizes, change colour and align
4. Click the **Save** button when completed

Terms and Conditions for new patrons:



The new Patron will need to select this agreeing to the terms & conditions.

 I have read and agree to the [Terms and Conditions](#)

Upload

Upload new or changed Catalogues to OpenOPAC as well as changes to Codes and Parameters.

Upload all Catalogues: Used when installing OpenOPAC initially, or when you have had a major change in your records and want a fresh uploaded catalogue in OpenOPAC

Initial upload:

Upload all Catalogues:

Upload only changed Catalogues:

Upload one Catalogue:

Clear search index:

Upload Masterdata:

Upload Suggestions:

Reset memory:

Upload only changed Catalogues: When catalogue changes are made and the changes are to be available in OpenOPAC immediately, not waiting for the automatic service to do this which is about a 15 minute delay

Upload one Catalogue: Used mainly for the first time when installing OpenOPAC, as a check to ensure services and everything is connected and working correctly. It can also be used to ensure that the Catalogue changes for one Catalogue are to be found in the results immediately rather than awaiting the automatic service

Clear Search Index: Only used if you want to completely clear everything in OpenOPAC & reload all records again by using the initial upload [Upload all Catalogues]

Upload Masterdata: If codes are created or modified, in Amlib to Locations, Form codes, Site codes, Status etc. this will allow these to be used and displayed within OpenOPAC. Also restart your IIS service for changes to appear

Upload Suggestions: If 'Similar items' option is set in Administrator, this will load these into the OpenOPAC.

Reset Memory: This clears all cached values, effectively causing the values being reread from Amlib. Values like Masterdata, Circulation settings, parameters etc. Used when you have made changes to this type of setting within the Amlib client.

Reset memory:



Security

Configuration

Colours Visibility Visibility (mobile) Parameters Enrichment Marc fields Search Custom text Upload Security

Security question: What is your mother's maiden name?

Security answer: Smithson

Save Cancel

Security Question

1. Enter the security question
1. Enter the security answer
2. Click **Save**

This will be required if the Administrator password is to be reset at login

Change the Pincode

1. Click **Change Pincode** to change the Administrator password
2. Enter the current **PIN**
3. Type in the new **PIN**
4. Type in the PIN again to **Confirm PIN**
5. Click **Save**

Change Pincode

Current pin: ●●●●

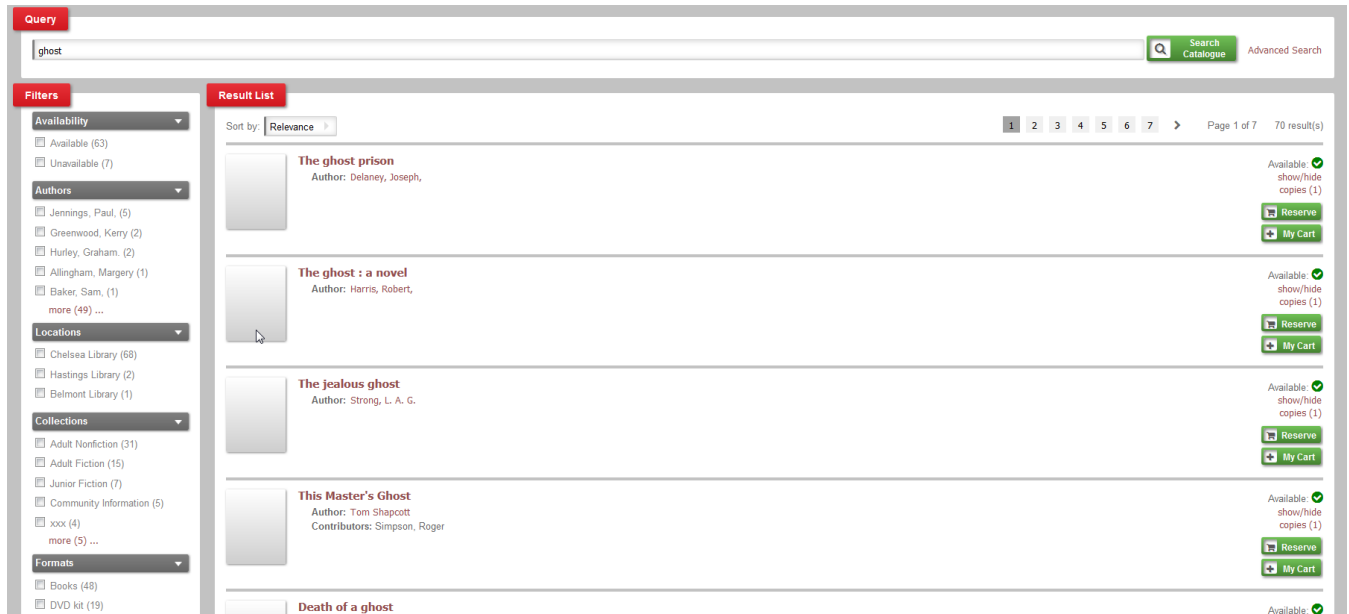
New pin: ●●●●

Confirm pin: ●●●●

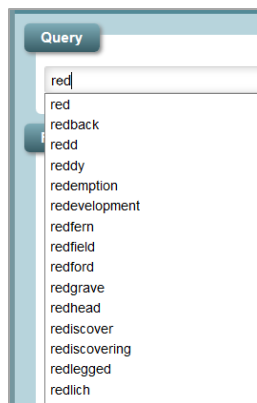
Save Cancel

USING SEARCH OPTIONS

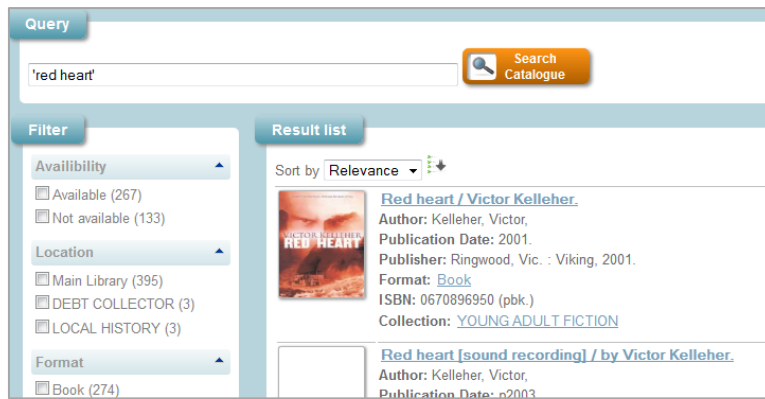
Quick Search



1. Enter a few significant keywords from your Title, Subject, etc. into the Query box and then the click **Search Catalogue** button
2. To see more information about a specific item, click the hyperlinked title
3. Once you begin to type a common word into the query box, you will be given a list of prompts to save you typing and assist in spelling



4. To narrow down your search results, use the Minus symbol between terms '-' or **NOT** to exclude words. For example Paris – Fashion or Paris NOT Fashion.
5. Use **OR** to combine search words. This will get many more results
6. If you want to search for specific words found together use apostrophes around the terms. For example, if you wish to find the terms **Red** and **Heart** together, use '**Red heart**'



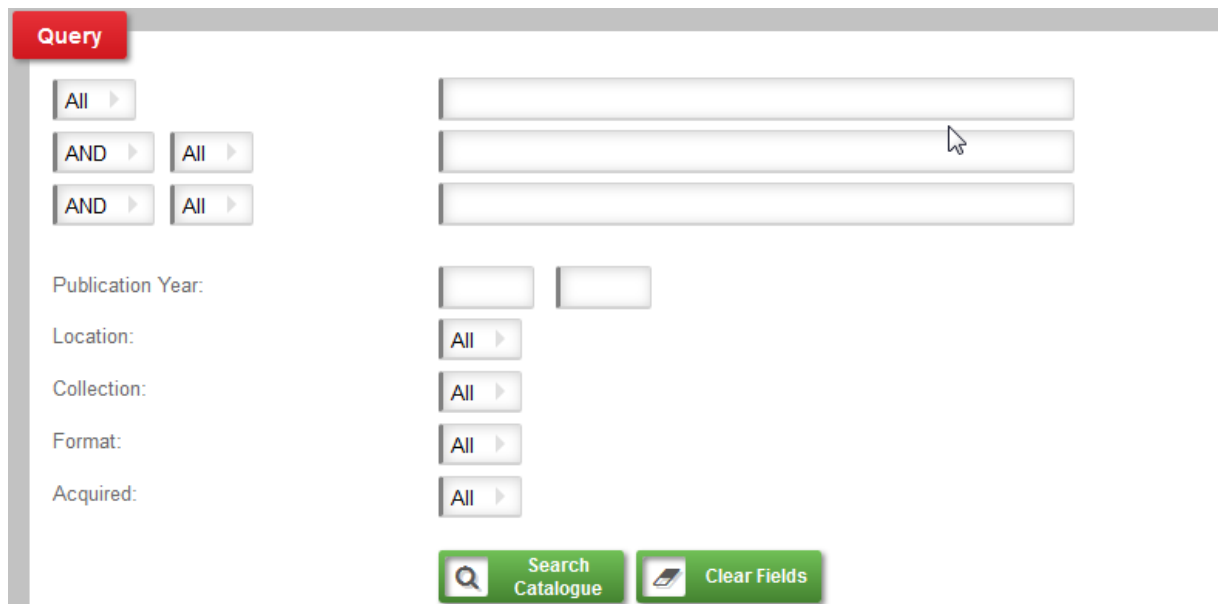
7. Truncation allows the search of a term and its variations by entering a minimum of the first three letters of the term followed by a question mark symbol (?) or an asterisk (*)

Advanced search

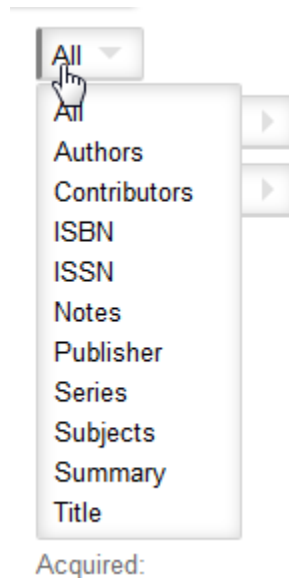
1. Click the **Advanced Search** hyperlink to the right of the Search Catalogue button



2. A Query window will display



3. Click the **first drop-down** to set the Search criteria

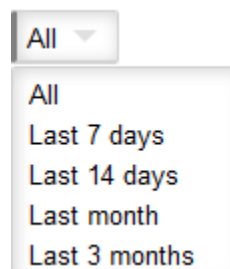


The options are All, , Authors, Contributors, ISBN, ISSN, Notes, Publisher, Series, Subjects, Summary and Title

4. Select an **option**
5. Boolean Search Operators (**AND, OR, NOT**) can be used when using multiple Fields. Click the AND drop-down to select other operators as required
6. Filters can further define the search by:
 - **Publication Year:** Enter the beginning and ending Punctuation years

Publication Year:

- **Location:** Select from the drop-down Location options
- **Collection:** Select from the drop-down Stats codes
- **Format:** Select from the drop-down Form codes or Format Groups (if configured)
- **Acquired:** (new item search)



Note: Select as many or as few filters you required

7. Enter the search criteria and click **Search Catalogue** button to view the results
8. Once the results display the Advanced Search options collapse and links are available to:
 - Click here to maximize the Advanced Search View
 - Click Quick Search

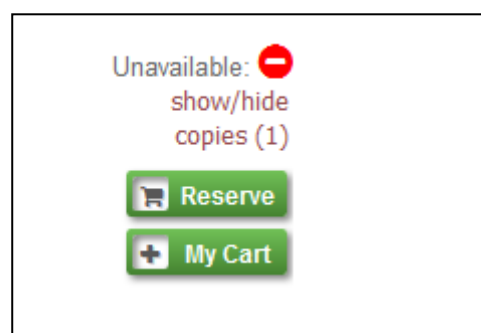
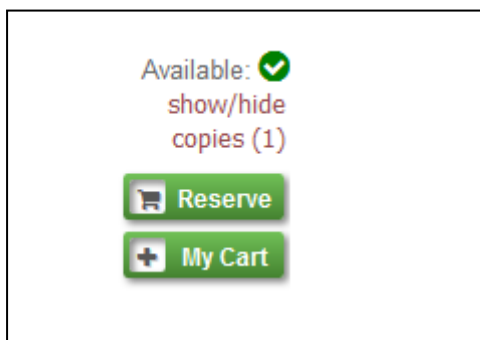
[Click here to maximise the Advanced Search View](#)
[Quick Search](#)

8. Or it is possible to select the Home or Search TABs or Click Recent Searches

Result list

Defaults can be set in Configuration as to the details visible within the Result list and whether the Copy information is hidden or displayed on the first display of results.

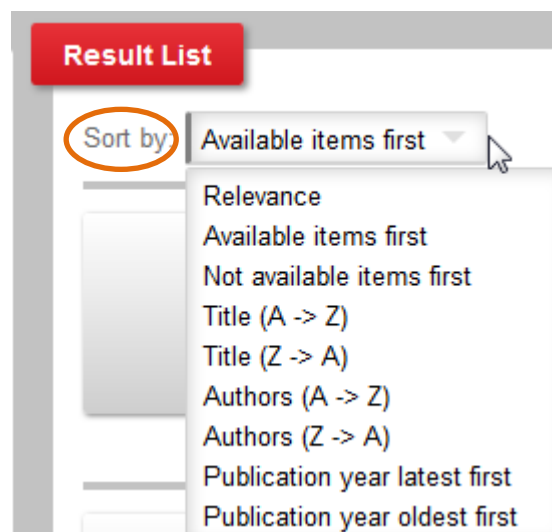
- Visibility view – sets the results for the first screen result view and Catalogue view
- Visibility (mobile) – sets the results for the first screen result view and Catalogue for Mobile
- Parameters – sets whether the copy information is displayed or hidden on initial results



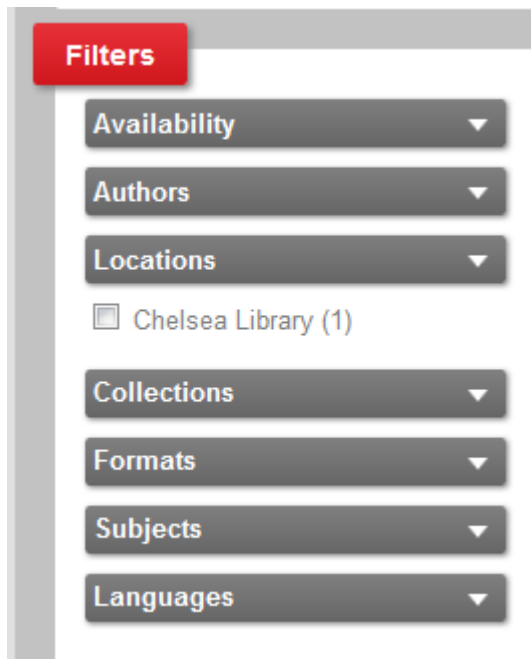
1. **Available/Unavailable:** Gives an indication if the items are available to loan.
2. **Show / Hide copies:** Can be set to display automatically in the Result list or click to show /hide copies. The details will also display at the base of the Catalogue information.

Location:	Floor location:	Status:	Reserved:	Due date:	Call number:	Collection:	Format:	Acqui
Chelsea Library	DISPLAY	Available	0		J597.8 SLAT	Junior Nonfiction	Books	26/03/

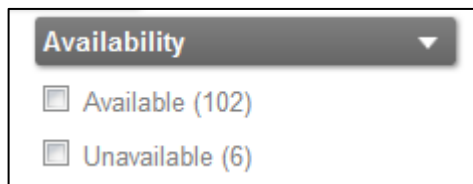
3. **Sort Order:** Click the drop-down Sort order to change the order of the results if required. The default Sort option is generally Relevance. Other Sort options are shown below:



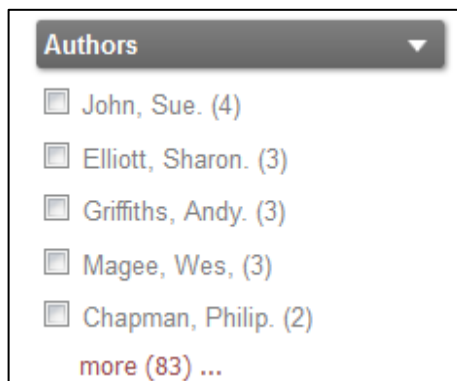
4. **Filters:** Refine the results by using the filters on the left hand side which enables the search to be drilled down successfully. These filters include:



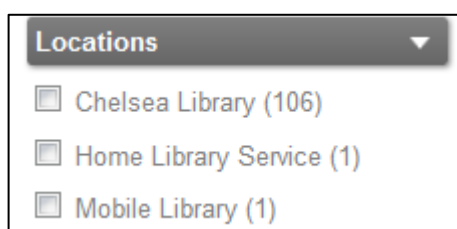
- **Availability**



- **Authors**



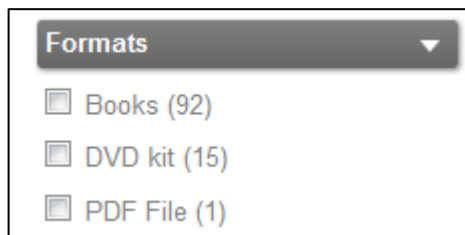
- **Location**



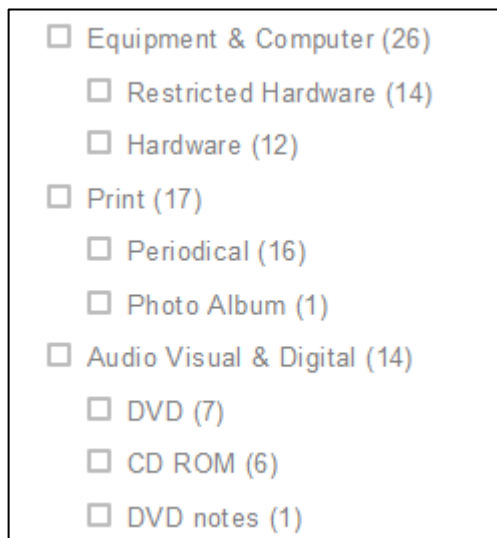
- **Collection: Stats Codes**



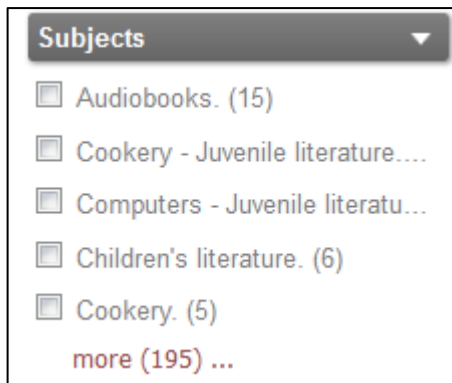
- **Format: Form Codes** (can be set with Format Groups)



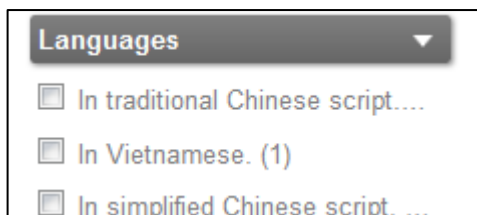
With **Format Groups** – set in Administrator/Configuration/Format Groups



- **Subject**



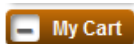
- **Language** (Comes from a preset Tag within the Catalogue)



5. **Reserve button:** Displays if set within configuration



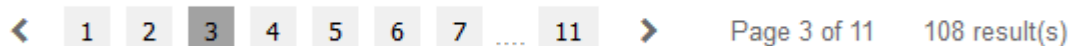
6. **+ My Cart button:** Items are able to be selected and added to a Cart using the button.



Once selected the **+** changes to a **-**. To remove Items from your cart while on results list, select the button again and the button will change back to a **+**

7. **Title:** Click to see Bibliographic and Copy details

8. **Number of records** found for the search term displays at the top of the page showing the number of pages and hyperlinks to the pages



Location as filters for items

It is possible to set items with certain Locations to show/not show in Opac.

To determine which Locations can be viewed and which are hidden, the settings within Main > Supervisor > Installation > Other TAB of the Amlib client are checked.

Description	Value
Location is Valid for Holdings	Y
Location is Valid for OPAC Enquiries	Y
Location is Valid for Registrations & Circulation	Y

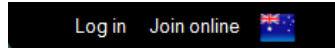
If Location is Valid for OPAC Enquiries, the Location will show. If Location has a Value of "N" then the Location will not be included in the filter and the items hidden from view

Restart IIS and refresh your browser, to enable the changes to your locations to display.

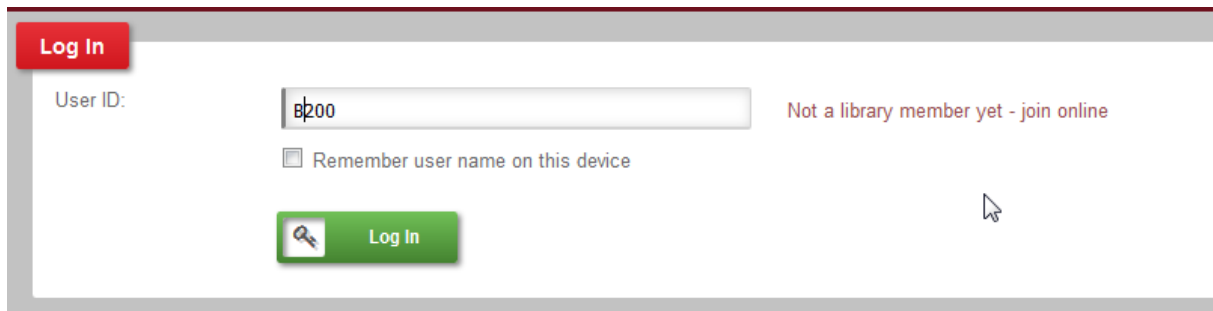
LOGGING IN

It is necessary to Login to *OpenOPACs* if you wish to view **My Account** information or to **Reserve** items. You also need to be logged if saving any My Cart items to My List.

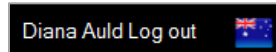
1. Go to either '**Borrower Account**' and log in there or choose the **Log in** link at the top right-hand side of the screen



2. The Log In Window will display
3. Enter your **Barcode** into User Name
4. Enter if the **PIN** (if configured to use)
5. Click "Remember user name on this device" if appropriate





6. Click **Log in** Button
7. The name of the User will display near the flag



8. The details of the **Borrower** will display with access to the details using TABs in the Details window

RESERVE ITEMS

Depending on settings chosen by the library, you will be able to either reserve ALL copies by selecting the  **Reserve** button next to the title or you may be able to reserve a specific copy of a record by opening the **Available / Not Available** Hyperlink to access the Copy information and select a trolley  to reserve the copy. [If there are no trolley displayed, then you will only be able to reserve by title only]

Note: The maximum number of reservations allowed within *OpenOPAC* will depend on the Circulation settings as set per Borrower Type in combination with the Form/Stats Code

Reservation Collection Locations

To determine which Locations can be chosen as Collect Locations, the settings within Main > Supervisor > Installation > Other TAB of the Amlib client are checked.

Description	Value
Location is Valid for Holdings	Y
Location is Valid for OPAC Enquiries	Y
Location is Valid for Registrations & Circulation	Y

The one that it checks is “Location is Valid for Registrations & Circulation”

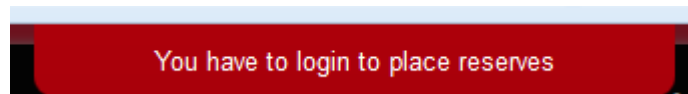
NOTE: if you already have OpenOPAC installed when you make these changes or before you upgrade to the latest version, you will need to access Configuration select the Initial Load tab and do the following:


Upload Catalogues, load Masterdata

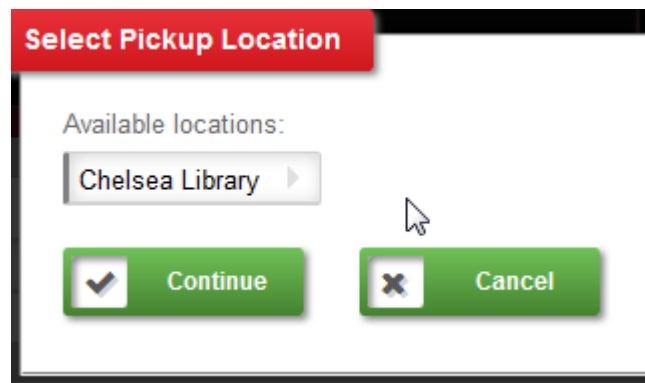
Restart IIS and refresh your browser, to enable the changes to your locations

To reserve all copies

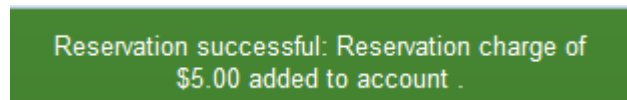
1. Ensure that you are logged in, which is necessary to Reserve items – if not, a pop-up box will display



1. Find the record that you wish to reserve the first available copy
2. Click the **Reserve Item** button  to reserve the first available copy
3. The **Select Pickup Location** box will display



4. Select the relevant location from the drop-down **Available Location** box
5. Click **Continue**
6. If successful a confirmation will display and if a charge is due it will also show in the message









7. Click **Close**

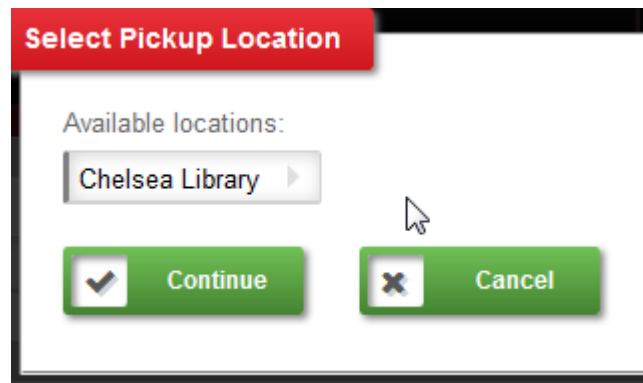
Reserve a specific Copy

This option is only available if the Configuration parameter is set to allow Reservation of Stockitems to allow reservation of specific items. This is important when allowing reservations of individual Periodical/Magazine copies

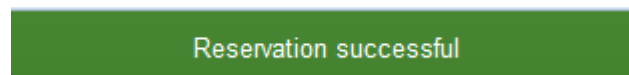
1. Ensure that you are logged in, which is necessary to Reserve items – if not, a pop-up box will display
2. Find the item that you wish to reserve
3. Click the **Available / Not available hyperlink** to access the copy information

Location:	Status:	Reserved:	Due date:	Call number:	Collection:	Format:	Reserve
Library Processing	Available	0		F ROW	Junior Fiction	Books	
Library Processing	Available	0		F ROW	Junior Fiction	Books	
Chelsea Library	Reserved	1		F ROW	Adult Nonfiction	Books	
Library Processing	Available	0		F ROW	Junior Fiction	Books	
Chelsea Library	On Loan	1	10/08/2006	F ROW	Junior Fiction	Books	

4. Click the **Trolley**  in the Reserve Column
5. The Select Pickup Location box will display
6. Select the relevant location from the drop-down **Available Location** box
7. Click **Continue**



8. If successful a confirmation will display




9. Click Close

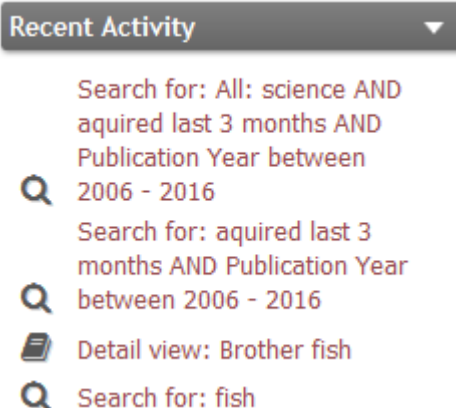
RECENT ACTIVITY

To return to your original search result after conducting other searches and selecting filters and/or hyper-links to related records use Recent Activity to find the original search.

1. From the main Search Window select Recent Activity. The number of searches and other activities for the session displays in brackets

A dark rectangular button with the text "RECENT ACTIVITY (8)" in white, where the number 8 is in a lighter color.

2. The Recent Activity list is displayed

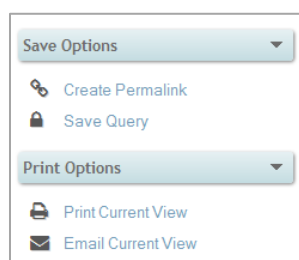


3. By clicking on one of the entries, the search is re-executed and the search results list displays

PRINT - SAVE QUERIES

Save Options

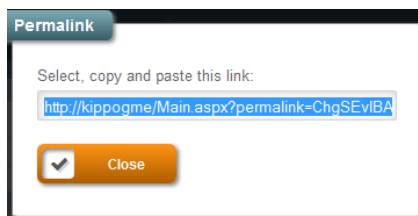
From the Print Save button at the Top of the Window there are Save and Print Options



Create Permalink

Save any of the **Queries/Search** results to display as a URL

1. Perform the search
2. Click **Print – Save**
3. The **Save Options** will display
4. Select Create Permalink
5. The Permalink Window will display with an automatically generated URL
6. This can then be copied or pasted to be used later via email etc.



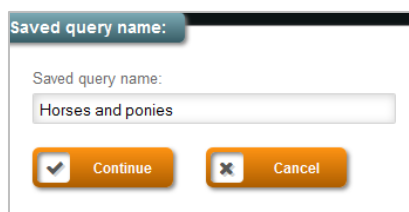
7. Click **Close**

If necessary, a URL shortener program can be used to keep the permalink in a shorter version than that created

Save A Query

Allows the saving of the actual search terms used. If you return at a later date and use this saved query, the exact same query will be run. However there may be more results, if items have been added to the library collection since the last time the query was chosen

1. Perform the search
2. Click **Print – Save**
3. The **Save Options** will display
4. Click **Save Query**
5. Enter the **Saved query name**



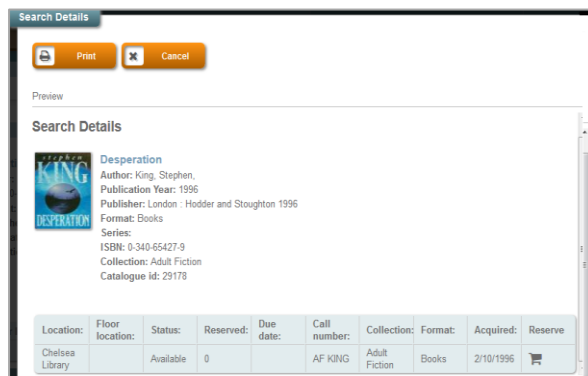
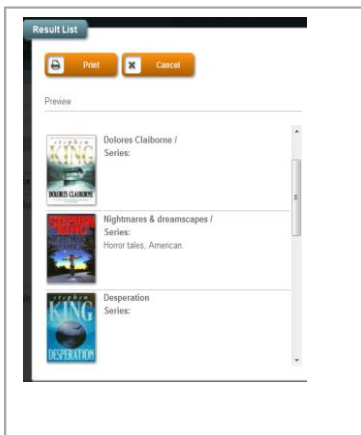
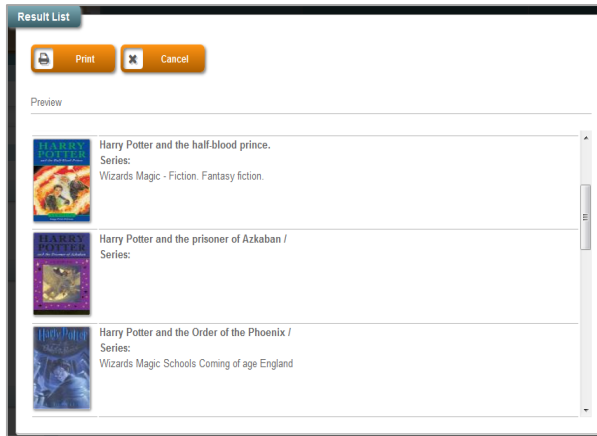
6. Click **Continue**
7. The Saved Query can now be accessed from the Cart- Lists – Queries button

Print Options

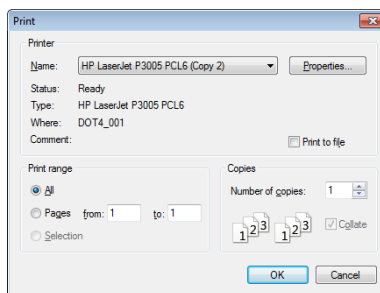
Print Current View – from your **Search Result** screen, **My Cart** view and **Bibliographic** View

Also allows the printing of the Results list to a selected Printer

1. Perform the search
2. Click **Print – Save**
3. The **Print Options** will display
4. Click **Print Current View**
5. The Result List Print Preview will display



6. Click the **Print Button** to select a Printer



7. Click **OK**

Email

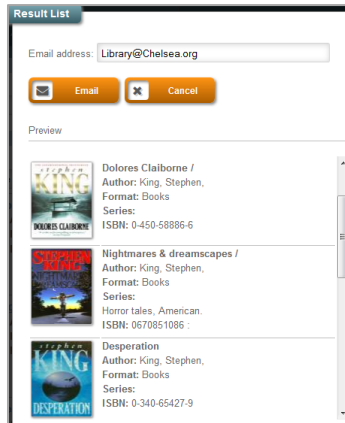
Email Current View

Note:

- Before the facility is available, the configuration for SMTP needs to be set up in the Administrator settings

- Ensure you add rept.exe as an exception to your Virus Program if you have one, so that the email function work.
- Allows the **emailing** of the Results list

1. Perform the search
2. Click **Print – Save**
3. The **Print Options** will display
4. Click **Email Current View**
5. The Result List Print Preview will display



6. Enter the **Email address**
7. Click the **Email** Button to send the email
 - a. If the email was unsuccessful a message will display at the top of the window. It will be necessary to check the Administrator Configuration and your **SMTP** settings

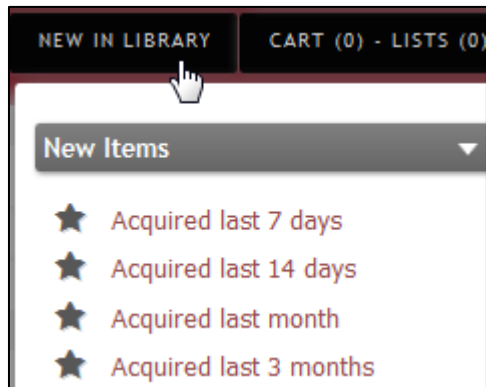
Sending email failed: Failure sending mail.

- b. Or if successful

Sending email successful

NEW IN LIBRARY

Recently added items can be viewed by selecting **New in library** button at the top of the OpenOPAC window. Also available in Advanced Search



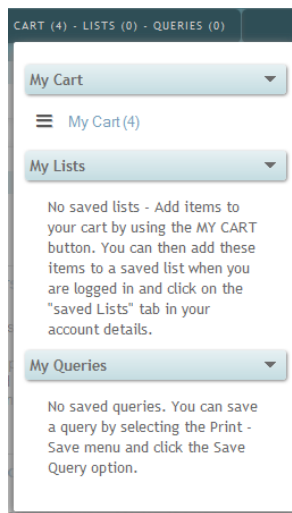
MY CART

It is possible to create a Cart of items to group together to view later. It is not necessary to be logged in to do this. However, to transfer the items from the Cart to My Lists it is necessary to log in.

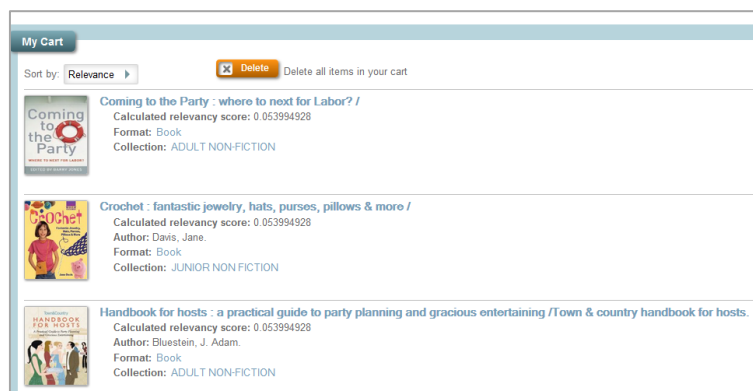
1. Perform a search
2. From the Results list, click the +Cart button to add to a Cart
3. The Cart at the top of the window will show an increment each time a +Cart item is added

CART (4) - LISTS (0) - QUERIES (0)

4. To view the items in the Cart click the CART hyperlink at the top of the Window. A summary of My Cart lists along with My Lists and My Queries

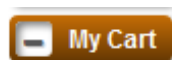


1. To view the contents of the Cart click on the **My Cart** Hyperlink
2. The My Cart Window will display

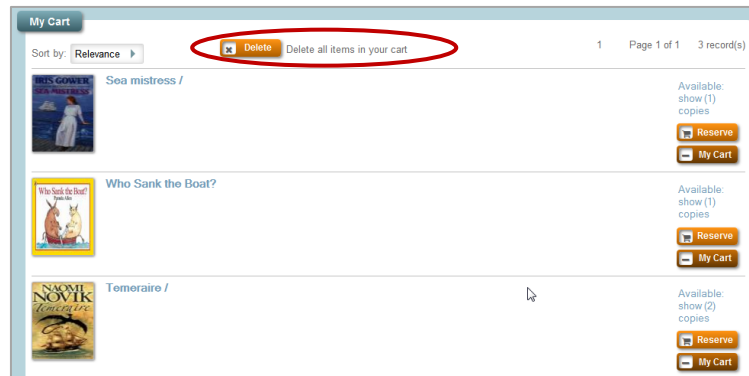


3.

4. To *remove an item* from your cart select the **-My Cart** Button and the item is removed. You will notice that the My Cart total will decrease by one each time the -My Cart button is selected. It will not be removed until My Cart is selected again and it will redisplay with the correct number of items



- To **delete ALL items** in the cart, click on the **X Delete** button at the top of the Window. No confirmation is given. All items will be removed from the Cart



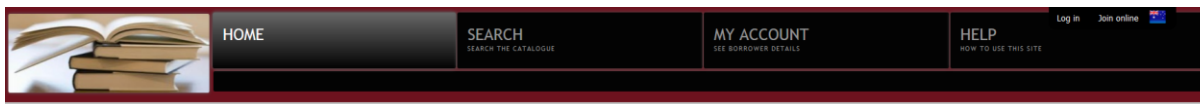
The number of items contained in the Cart will now show as **0**

CART (0) - LISTS (0) - QUERIES (0)

Note: Log into **My Account** to create **Saved Lists** from the items in the **Cart**

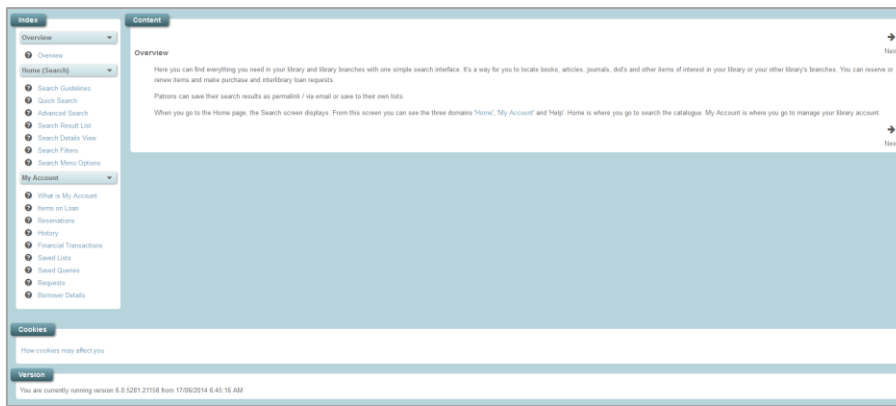
HELP

Online Help is found on the Main Window.

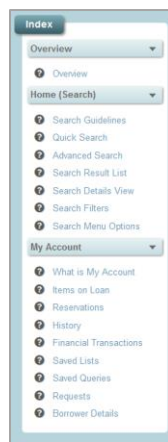


Details can be found including:

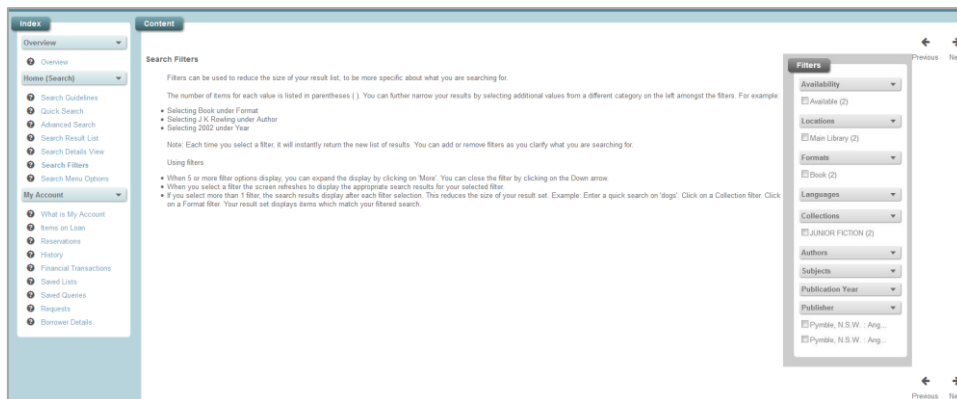
1. **Index** to Help topics
 2. **Overview**
 3. **Home (Search)** - A guide to **searching** and **strategies** to find relevant items using
 - a. Search Guidelines
 - i. **Keyword** searching
 - ii. **Including** and **excluding** terms
 - b. **Quick** Search
 - c. **Advanced** Search
 - d. Search **Results** List
 - e. Search **Details** View
 - f. Search **Filters**
 - g. Search **Menu** Options
 4. **My Account**
 - a. What is **My Account**
 - b. **Items on Loan**
 - c. **Reservations**
 - d. **History**
 - e. **Financial Transactions**
 - f. **Saved Lists**
 - g. **Saved Queries**
 - h. **Requests**
 - i. **Borrower Details**
 5. Information about **Cookies** – How Cookies may affect you
 6. Information about the current **Version**
1. Click the **Help** button – **How to use this Site**
 2. The **Index** and **Content** details will display



3. Click the **Index** to find specific information



4. The details of the topic will display on the right in the **Contents** section



5. Use the **Previous** and **Next Arrow Keys** to scroll through the Help Topics or click on a different topic from the Index

6. Click **Cookies** to see how these may affect you – See Appendix for more information

7. Click **Version** to view current Version details. For example

Version (found at the bottom of the Help screen)

Version

You are currently running version 6.3.771.0 from 20/04/2017 9:48:24 AM

MY ACCOUNT

A summary and details will display when My Account is chosen.

Borrower
 Name: Mr Andrew J Carrigan
 Barcode: B202
 Current loans: 1 (1 overdue)
 Current reservations: 4
 Outstanding amount: \$ 15.00
 Current requests: 0
 Memos:

Details

Items on Loan | Reservations | History | Financial Transactions | Saved Lists | Saved Queries | Requests | Borrower Details

Sort by: Latest date first | Filter | Renew Item

	Title:	Author:	Barcode:	Date issued:	Date due:
<input type="checkbox"/>	Real men don't eat quiche / Bruce Feirstein	Feirstein, Bruce	980473392	5/04/2016	10/05/2016

Borrower

- Name
- Barcode
- Current loans
- Current reservations
- Outstanding amount – Financials owing
- Current requests
- Memos – Memos can be created in Borrower Details of Amlib with a Show set to **O**
 - When the Borrower logs into their Account any **Opac** or **Reservation Memos** will display

Memos for this Borrower

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

Barcode: B279 | Name: Auld, Diana | Number of Memos: 1

Show	Date	End Date	Type	Memo Details	stk Item no if applic
O	05/08/2014	20/12/2041		Left umbrella at Circulation desk last visit. It is being held by Library Staff. Please enquire next time you come in	

Borrower
 Name: Mrs Diana M Auld
 Barcode: B279
 Current loans: 2 (2 expired)
 Current reservations: 3
 Outstanding amount: \$ 26.00
 Current requests: 2
 Memos:
 5/08/2014 Left umbrella at Circulation desk last visit. It is being held by Library Staff. Please enquire next time you come in

Any memo where “Show” is set to “O” will display in the Borrower’s My Details screen where specified. This includes all automatically generated memos and memos manually input by staff. If there is a memo on a borrower’s record you do not want displayed then use “N” in the show column. If staff want to see it then set this to “Y”

Memo Show

Y = It only shows in the Amlib client as a Pop-up BUT not display in OpenOPAC

N = No Pop-up appears, but is visible in memo list for borrower in the Amlib Client

O = Pop-up in Library AND Appears in OpenOPAC

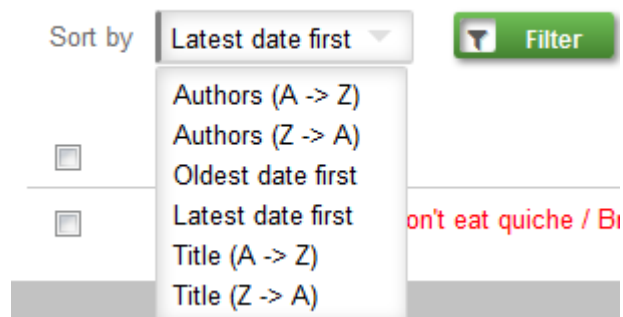
Details

Details include TABs for:

- Items on loan which includes Renewals
- Reservations
- History
- Financial Transactions
- Saved Lists
- Saved Queries
- Requests
- Borrower Details

Items on Loan

1. Click the **Items on Loan** TAB to view current Loans
2. Select the Sort by options from the drop-down box



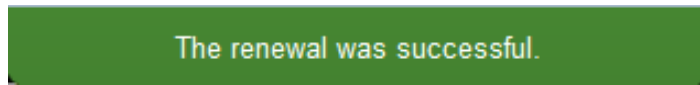
3. Click the **Filter** button to display the loans in the chosen Sort Order
4. The items will display

	Title:	Author:	Barcode:	Date issued:	Date due:
<input type="checkbox"/>	Away with the faines [electronic resource] / Kerry Greenwood ; read by Stephanie Daniel.	Greenwood, Kerry	STOCK00371440B	28/07/2014	1/09/2014
<input type="checkbox"/>	Pigs might fly / Emily Rodda ; illustrated by Noela Young	Rodda, Emily, 1948-	980131456	28/07/2014	1/09/2014

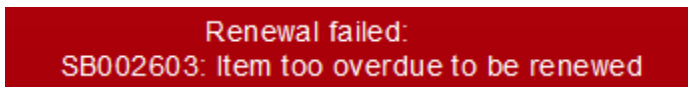
Renewals

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1. To **Renew** items tick the checkbox/es for the item/s and click the Renew item button. The item may not be renewed depending on Borrower privileges, balance owing, number of days overdue etc.
2. A confirmation message will display if successful



- a. If the Renewal was unsuccessful, a message will display depending on the reason



There are three factors to be considered regarding allowing renewals in *OpenOPAC*:

1. Allow Renewals in OpenOPAC Configuration parameters (accessed if logged into Administrator)
2. The *Circulation* parameters
3. The *Supervisor Installation* parameters

Supervisor Installation parameters that will control renewals

1. Go to **Main > Supervisor >Default Screen >Installation > Other Tab**
2. Scroll down to the OPENstatements

OPEN - Maximum Amount for Borrower owing	20.00
OPEN - Maximum overdue days for Item renewal	100

Circulation Parameters

- Borrower Type must be allowed to renew items

Bor Type	Description	(H)ourly (O)vernight (D)aily (T)erm (S)emeter (Y)ear	Can Loan (Y/N)	Loan Qty	Loan Days	Grace Period Days	Can Renew (Y/N)	Qty Renew	Can Rsv (Y/N)	Rsv Qty
A	Adult	D	Y	2	14	0	Y	2	Y	5
B	Branch	D	Y	20	21	0	Y	20	Y	10
H	Housebound	D	Y	20	14	0	Y	20	Y	10

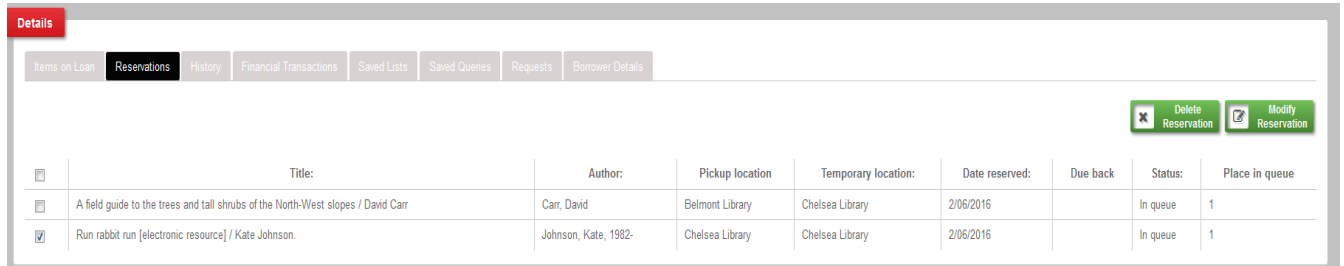
- Borrower Types also limit the number of times someone can renew
- Items may be reserved by another borrower (and therefore unable to be renewed)
- Items cannot be renewed the same day they were borrowed
- Item may exceed maximum number of days overdue

Please Note: The **Renew All** option is available when all items borrowed, meet all renew

requirements

Reservations

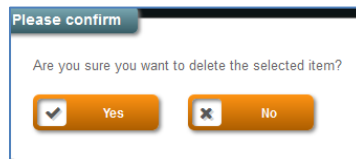
1. Click the **Reservations** TAB to view current Reservations



	Title:	Author:	Pickup location	Temporary location:	Date reserved:	Due back	Status:	Place in queue
<input type="checkbox"/>	A field guide to the trees and tall shrubs of the North-West slopes / David Carr	Carr, David	Belmont Library	Chelsea Library	2/06/2016		In queue	1
<input checked="" type="checkbox"/>	Run rabbit run [electronic resource] / Kate Johnson.	Johnson, Kate, 1982-	Chelsea Library	Chelsea Library	2/06/2016		In queue	1

2. To **delete** a Reservation

- a. Click on the **Reservations TAB** in the Details section of MY ACCOUNT
- b. Tick the Reservations that you wish to delete
- c. Click the **X Delete Reservation** button
- d. A confirmation message will display



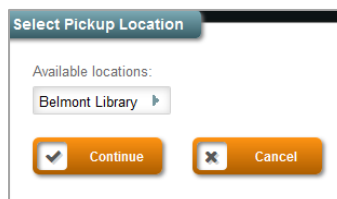
- e. Click **Yes** to confirm

Item(s) successfully deleted.

3. To **modify** a Reservation

It is possible to alter the **Pickup Location** for a current Reservation

- a. Click on the **Reservations TAB** in the Details section of MY ACCOUNT
- b. Tick the Reservations that you wish to modify
- c. Click the **X Modify Reservation** button
- d. The **Select Pickup Location** window will display
- e. Select the Pickup Location from the drop-down list



- f. Click **Continue**

Reservation successfully modified.

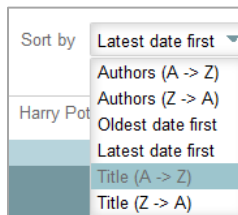
Note: Pickup locations will display for those Locations where Supervisor/Installation/Other Locations are Valid for Registration and Circulation

History

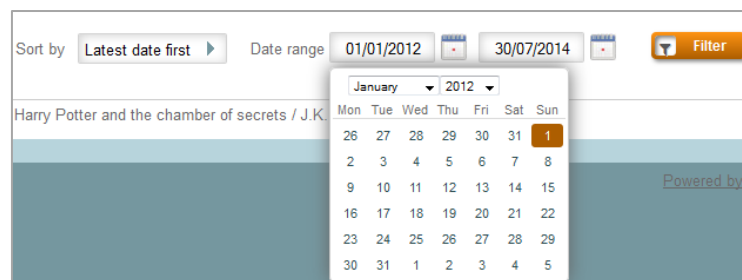
1. Click on the **History TAB** in the Details section of MY ACCOUNT
2. The History displays but a Filter is available for
 - a. Sort Options
 - b. A date range

Title:	Author:	Barcode:	Date issued:	Date returned:
The brown bag lunch : A collection of recipes and tips for the perfect portable lunch / Susan Epstein	Epstein, Susan	980397166		1/04/2016
Laptop 003		AL11600609862B		1/04/2016
Great walks : Vol. 15 No. 1, Jan-Feb 2015		STOCK00490725B		24/08/2015

3. Select the **Sort By** Option from the drop-down box



4. Select the **Beginning Date range** from a Calendar



5. Select the **Final Date range** from a Calendar
6. Click **Filter** to view the History by that Sort order and Date range

Financial transactions

To **view** the Financial Transactions click on the **Financial Transactions TAB**

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1. Click on the **Financial Transactions** TAB in the Details section of MY ACCOUNT

Date:	Invoice number:	Title:	Reason:	Amount charged:	Amount paid:
1/04/2016		Pat the pet : a lift-the-flap book. / 813.16	Renewed item was overdue	\$ 2.10	\$ 2.10
1/04/2016		The angry beavers. / JF ANG	Renewed item was overdue	\$ 2.10	\$ 2.10
1/04/2016		Farm 123 : a lift-the-flap book / Rod Ca / CAMPBEL	Renewed item was overdue	\$ 2.10	\$ 2.10
1/04/2016		The big balloon / Axel Scheffler. / SCHEFFLER, AXE	Renewed item was overdue	\$ 2.10	\$ 2.10
1/04/2016		The guts / Roddy Doyle. / DOYLE, RODDY, 1958- / F	Renewed item was overdue	\$ 2.10	\$ 2.10
1/04/2016		Damage Control (Episode 1)	Renewed item was overdue	\$ 2.10	\$ 2.10
1/04/2016		Animal pharm episode 1of 2: Food For Thought	Renewed item was overdue	\$ 2.10	\$ 2.10
1/04/2016		The night way to keep rabbits / Written / ROBINSO	Renewed item was overdue	\$ 2.10	\$ 2.10
1/04/2016		One, two, three, oops! / by Michael Cole / COLEMAN	Renewed item was overdue	\$ 2.10	\$ 2.10

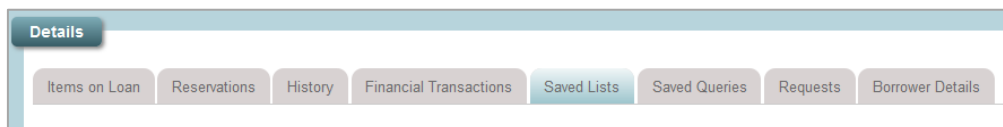
Total paid: \$ 18.90
Total charged: \$ 18.90
Total outstanding: \$ 0.00

2. The details display showing
 - a. Total paid
 - b. Total charged
 - c. Total outstanding
 - d. Details of all Financial Transactions

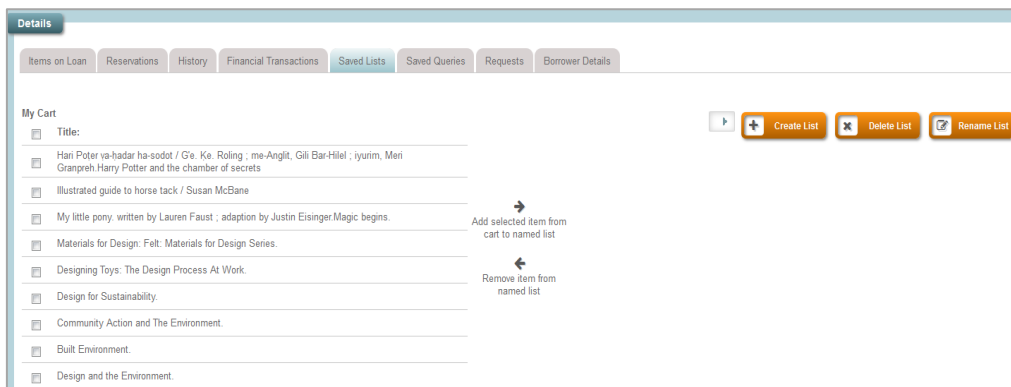
Saved lists

It is possible to save the items from a cart to a saved list to revisit at a later date. Everything you save into a list when in your **Borrower Account Detail Screen** will remain in your saved lists, until the lists are deleted or items removed manually

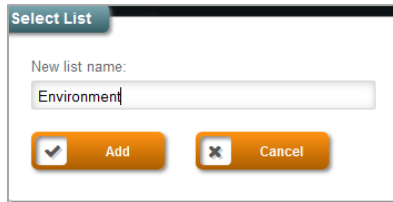
1. Add items from your **Cart** by using the **+ Cart** button
2. Click on the **Saved List** TAB in the Details section of MY ACCOUNT



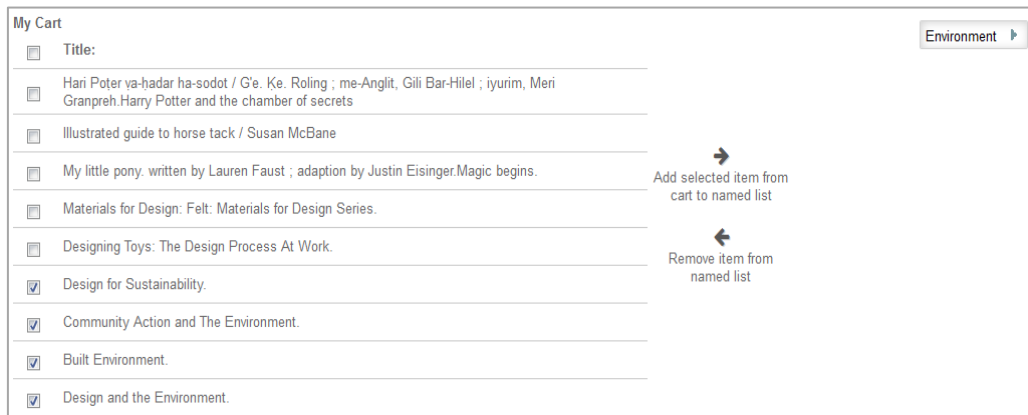
3. The Cart will display



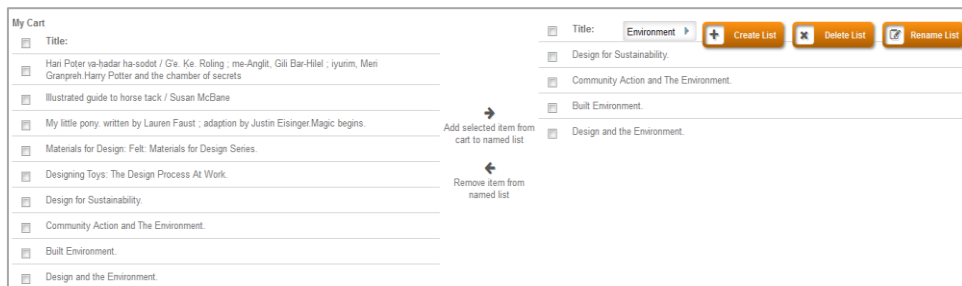
4. Create a list by clicking the **Create List** button
5. The Select List window will display where a New list name can be entered
6. Click **vAdd** to add the New List



7. Create other Lists in the same way as required
8. To transfer the items from the Cart to the Saved List
 - a. **Select** the **Saved List** from the Drop-down box of Lists – for example Environment
 - b. **Tick** the items from the Cart to be transferred to the Saved List

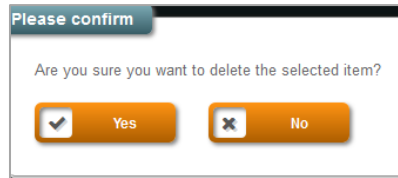


- c. Click the Add selected item from cart to named list arrow
- d. The items will be transferred to the Saved List



Note: The items remain in the Cart as it is possible to add the same items to multiple Lists

9. To **remove** individual items from a List
 - a. Click the Saved List from the drop-down set of Saved Lists
 - b. **Tick** the items to be removed from the list items on the right
 - c. Click the **Remove item from cart to named list** arrow
 - d. The items will be removed from the list
10. To **delete** a Saved List
 - a. Click the Saved List from the drop-down set of Saved Lists
 - b. Click the **X Delete** List button
 - c. A confirmation message will display



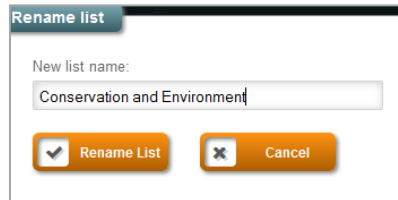
- d. Click **Yes** to confirm

Saved list(s) has been deleted.

- e. Click **Close**

11. To **rename** a Saved List

- a. Click the Saved List from the drop-down set of Saved Lists
- b. Click the **Rename List** button
- c. Enter the New list name
- d. A confirmation message will display



- e. Click **Rename List** to confirm

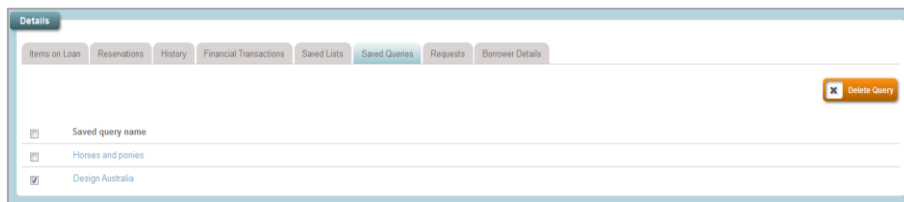
Saved list(s) has been renamed.

- f. Click **Close**

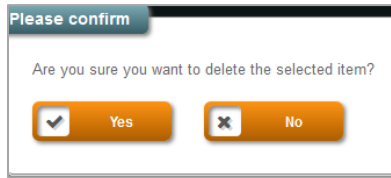
Saved queries

To view **Saved Queries** click on the Saved Lists Queries TAB

1. To **delete** a Saved Query
 - a. Click on the **Saved Queries TAB** in the Details section of MY ACCOUNT
 - b. Tick the Saved Queries that you wish to delete



- c. Click the **X Delete Query** button
 - a. A confirmation message will display



- b. Click **Yes** to confirm

Requests

Enables the submission of requests for items that the library currently does not hold.

The Request types available are determined by the parameters set in Configuration.

- * All (Purchase Requests as well as Inter Library Loans)
- * Inter Library Loans (Inter Library Loans Only and not Purchase Requests)
- * None (No Purchase Requests and no Inter Library Loans)

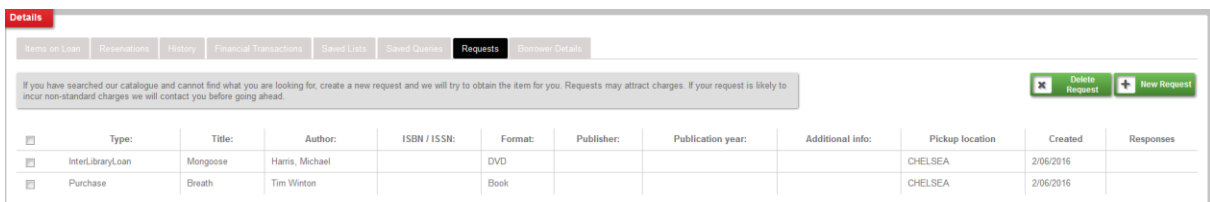
The form is available to be filled out and submitted via *OpenOPAC*, which then becomes available in the Supervisor/Opac/OpacSuggest screen to further process and add a Reply

Create a New Request

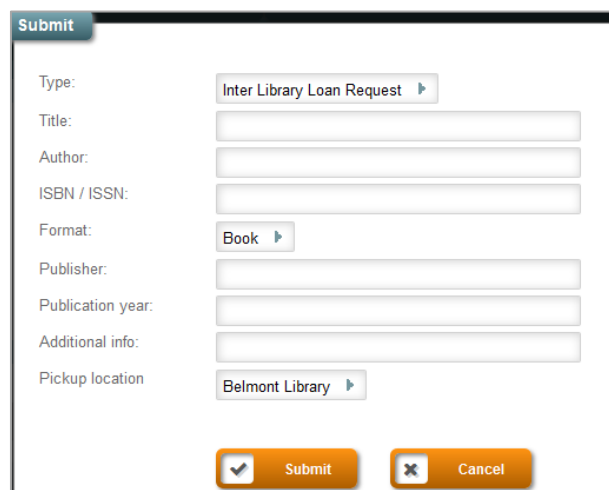
1. Click on the **Request** TAB in the Details section of MY ACCOUNT
2. The Text is shown: "If you have searched our catalogue and cannot find what you are looking for, create a new request and we will try to obtain the item for you. Requests may attract charges. If your request is likely to incur non-standard charges we will contact you before going ahead"



3. Click the **+New Request** Button



4. The Submit Window will display



Submit

Type:

Title:

Author:

ISBN / ISSN:

Format:

Publisher:

Publication year:

Additional info:

Pickup location:

5. Select the Type from the drop-down box

Type: Inter Library Loan Request
Title: Inter Library Loan Request *
Author: Purchase Request *

6. Select **Inter Library Loan Request** or **Purchase Request**
7. Fill in the Details
 - a. Title – mandatory
 - b. Author – mandatory
 - c. ISSN/ISBN if known
 - d. Form – choose from the drop-down listing:
 - i. Book
 - ii. Article, Magazine etc.
 - iii. Other (Audio, DVD etc.). If selected a Text box appears where the required Format can be entered

Submit

Type: Inter Library Loan Request
Title: Mongoose
Author: Harris, Michael
ISBN / ISSN:
Format: Other (Audio, DVD, etc.)
Publisher: DVD
Publisher:
Publication year:
Additional info:
Pickup location: Chelsea Library

Submit Cancel

- e. Publisher – if known
- f. Publication year – if known
- g. Additional info – if required
- h. Pickup Location – select from drop-down list

Pickup location: Belmont Library
Belmont Library
Central Processes
Chelsea Library
DIY
Hastings Library
Home Library Service

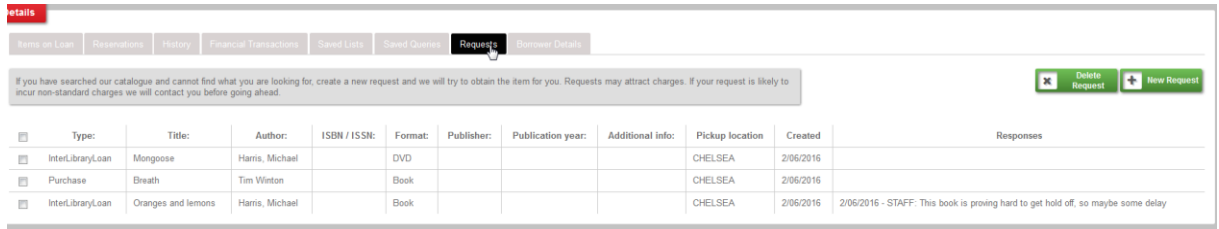
Cancel

8. Click **Subi....**
9. A confirmation message will display

Request was successfully transmitted, you will be notified when the item has arrived in the library.

10. Purchase and Inter Library Loan requests can be viewed from My Account/Requests

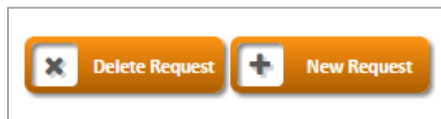
11. Library responses can be added about the Requests via Supervisor/Opacs/OpacSuggest



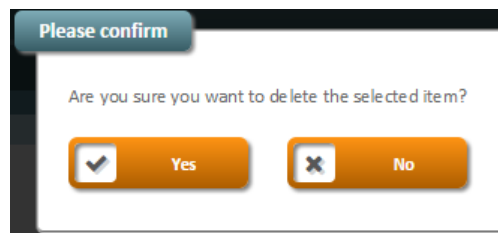
Type	Title	Author	ISBN / ISSN	Format	Publisher	Publication year	Additional info	Pickup location	Created	Responses
InterLibraryLoan	Mongoose	Harris, Michael		DVD				CHELSEA	2/06/2016	
Purchase	Breath	Tim Winton		Book				CHELSEA	2/06/2016	
InterLibraryLoan	Oranges and lemons	Harris, Michael		Book				CHELSEA	2/06/2016	2/06/2016 - STAFF: This book is proving hard to get hold off, so maybe some delay

Delete Request

It is possible to Delete Request



1. **Tick** the Request to delete
2. Click the **Delete Request** button
3. Confirm the deletion by selecting **Yes** or click No to Cancel



4. Selecting Yes will result in a message displaying:

Request(s) has been deleted.

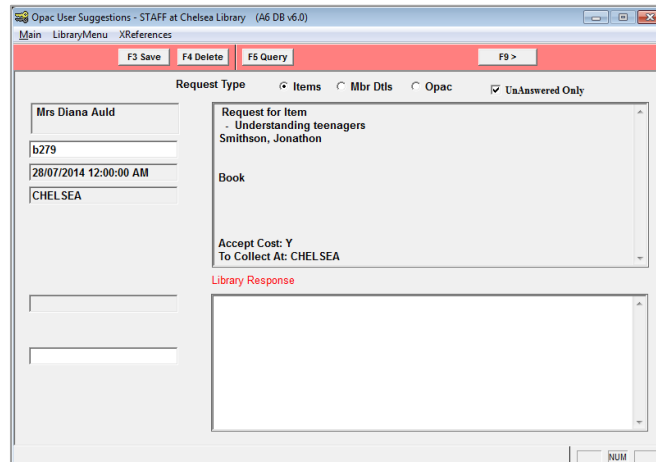
Note: Requests can be deleted in both Desktop and Mobile Versions. If a Borrower goes ahead with the deletion it will be deleted from the **Supervisor > OpacSuggests** window in the Amlib Client

Interaction of Amlib with OpenOPAC - once request is submitted

1. Login to Amlib Client
2. Go to **Main > Supervisor > Opacs > OpacSuggests** to check recent requests
3. The Opac Suggest window will display where requests can be viewed

4. Click the Request to be viewed at the top of the Window:
 - a. Items
 - b. Mbr Dtls (member details) – not used for OpenOPAC
 - c. Opac – not used for OpenOPAC
 - d. Tick UnAnsweredOnly if required

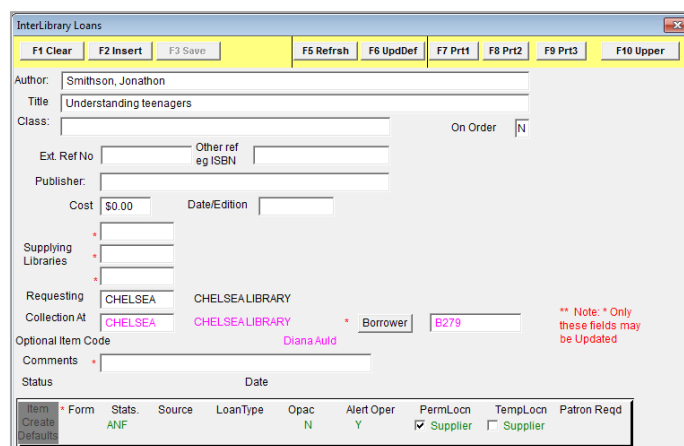
5. Use the **F9 Button** to arrow through the Suggests

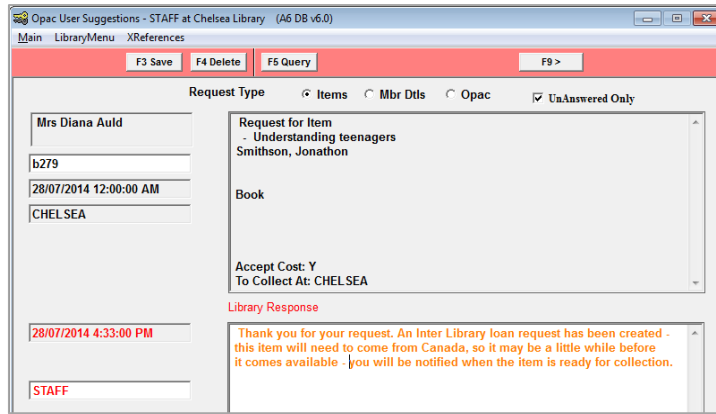


6. Use the XReference Menu to go **InterLibraryLoans** or **Orders**
7. A response is automatically created for the borrower which can be edited if required

Inter Library Loans

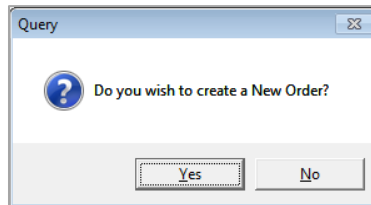
1. The ILL screen is filled out from the details entered on the form
2. The reservation is made for the Borrower requesting the item



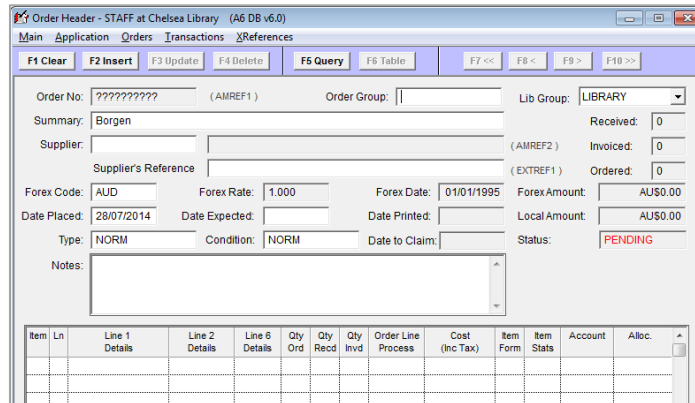


Orders

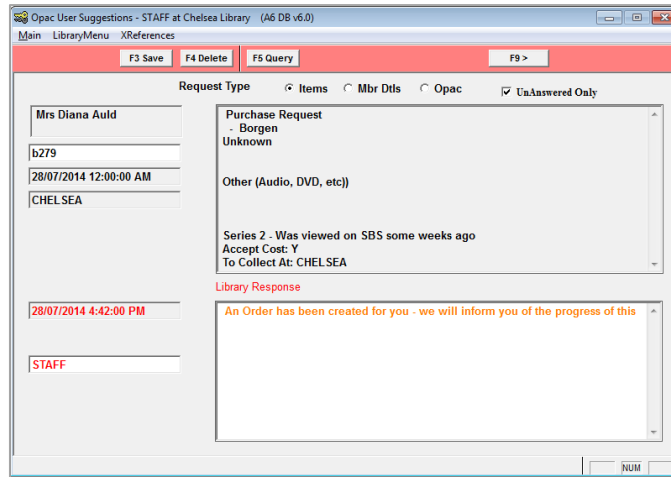
1. The Order screen is filled out from the details entered on the form
2. A message will display for confirmation
3. Click Yes to continue onto Order Header



4. The details from the form are filled into the Order Header
5. Continue filling in the details as required



6. A message will automatically generate in the Response Field of the **OpacSuggests**



7. The responses will be viewed in the *OpenOPAC* at next Login

Type	Title	Author	ISBN / ISSN	Format	Publisher	Publication year	Additional info	Pickup location	Created	Responses
InterLibraryLoan	Understanding teenagers	Smithson, Jonathan		Book				CHELSEA	28/07/2014	28/07/2014 - STAFF: Thank you for your request. An Inter Library loan request has been created- this item will need to come from Canada, so it may be a little while before it comes available - you will be notified when the item is ready for collection.
Purchase	Borgen	Unknown		Other (Audio, DVD, etc)			Series 2 - Was viewed on SBS some weeks ago	CHELSEA	28/07/2014	28/07/2014 - STAFF: An Order has been created for you - we will inform you of the progress of this.
InterLibraryLoan	Goons archive	Not sure		Book				BELMONT	28/07/2014	

Borrower details

The screenshot shows the 'Borrower Details' section of the OpenOPAC interface. It displays the following information for Mrs June Alicia Daniels: Barcode: B284, Address: 81 Junedan Rd, Library Town, WA, 6000, Phone: 9555 0300, Mobile phone: 0413457789, and Email address. There are buttons for 'Change My Details' and 'Change Piccode'.

Change My Details

1. Click on the **Borrower TAB** in the Details section of MY ACCOUNT
 - a. Details of Name, Barcode, Address, Phone, Mobile and Email Address displays
2. Click **Change My Details** to alter information
3. A **Change My Details** form will display

Change My Details

Title: Mrs

First name: June

Middle name: Alicia

Last name: Daniells

Address line 1: 81 Junedan Rd

Address line 2: Library Town

Address line 3: WA

Address line 4:

Postcode: 6000

Phone: 9555 0080

Mobile phone: 0413457789

Email address:

Date of birth: 5/10/1959

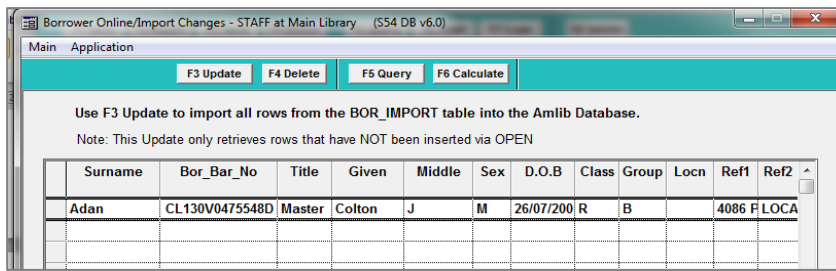
Sex: Female

4. Fill in the form as required and click **Save**

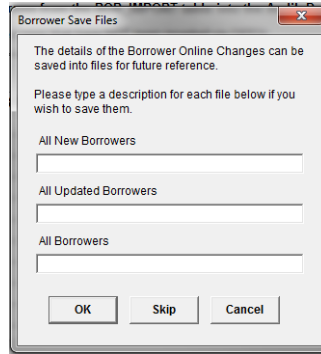
Note: Some fields are mandatory. If there are any other compulsory fields not filled in a warning message will be displayed, explaining what is still required, before information can be changed & saved.

Interaction of Amlib with OpenOPAC – changed borrowers

1. Any changes made to Borrower details can be viewed in the Amlib client within **Main > Borrowers > Borrower > Application > BorrowerOnline Changes.**
2. Any changes made by Patrons in **OpenOPAC** are shown in **Blue**. Update these borrowers from here once you have checked their changed details by selecting **F3 Update**



3. It is possible to save the changed Borrowers into Files or Skip the creation of Files

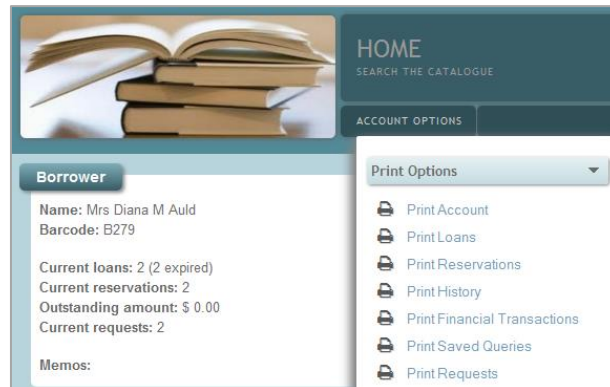


- **Note:** New join-online Borrowers do not appear on this table
- To search for all these NEW borrowers, you can also run a 'Borrower Where' search for **BarCode** Like **TEMP** or the **Borrower type** or **Borrower Status** used for these new OpenOPAC Borrowers – for example "W" as a Type or PEND as a Status as set in the Supervisor/Installation/Other parameters
- It is also possible to run or schedule an OPENReports report, to give you a report of new borrowers regularly if you wish.

ACCOUNT OPTIONS

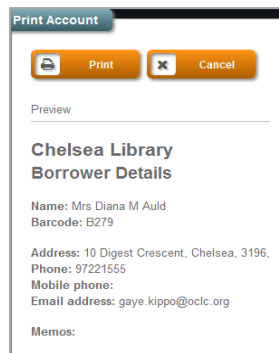
Click **Account Options** to view the Print Options from My Details

Print Options



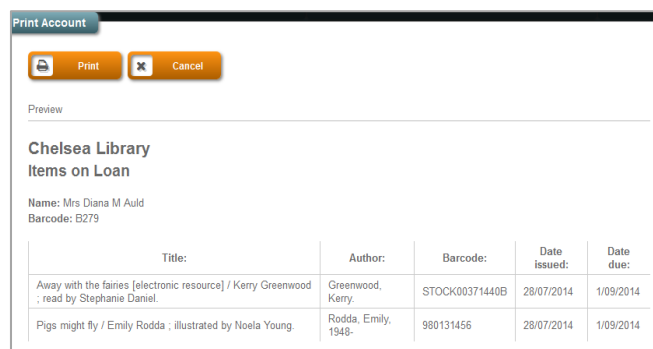
Print Account

1. Click **Print Account** – a Preview will display



2. Press **Print** to send to the Printer or Cancel
3. The Printer options will display

Print Loans



Print Reservations

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Print Account

Print Cancel

Preview

Chelsea Library Reservations

Name: Mrs Diana M Auld
Barcode: B279

Title:	Author:	Pickup location:	Temporary location:	Date issued:	Due back:	Status:	Reservation number:	Place in queue
4-H guide to training horses / Nathan Bowers and Katie Bowers Reiff.	Bowers, Nathan, 1988-	Hastings Library	Chelsea Library	25/07/2014		In queue	4747	1
Harry Potter and the chamber of secrets / J.K. Rowling.	Rowling, J.K. 1965-	Chelsea Library	Library Processing	25/07/2014		In queue	4748	1

Print History

Print Account

Print Cancel

Preview

Chelsea Library History

Name: Mrs Diana M Auld
Barcode: B279

Title:	Author:	Barcode:	Date returned:	Date issued:
Harry Potter and the chamber of secrets / J.K. Rowling.	Rowling, J.K. 1965-	16906	21/07/2014	

Print Financial Transactions

Print Account

Print Cancel

Preview

Chelsea Library Financial Transactions

Name: Mrs Diana M Auld
Barcode: B279

Date:	Invoice number:	Title:	Reason:	Amount paid:	Amount charged:
29/07/2014			Replacement card	\$ 0.00	\$ 1.00
29/07/2014		The homed viper / Gill Harvey.	Damaged Item	\$ 0.00	\$ 25.00
21/07/2014		Harry Potter and the chamber of secrets / J.K. Row	Returned Item was overdue	\$ 5.00	\$ 5.00
18/10/2013			Replacement card - ARRANGED BY MAIL	\$ 8.00	\$ 8.00

ode \$ 13.00
Total charged: \$ 39.00
Total outstanding: \$ 26.00

Print Saved Queries

Print Account

Print Cancel

Preview

Chelsea Library Saved Queries

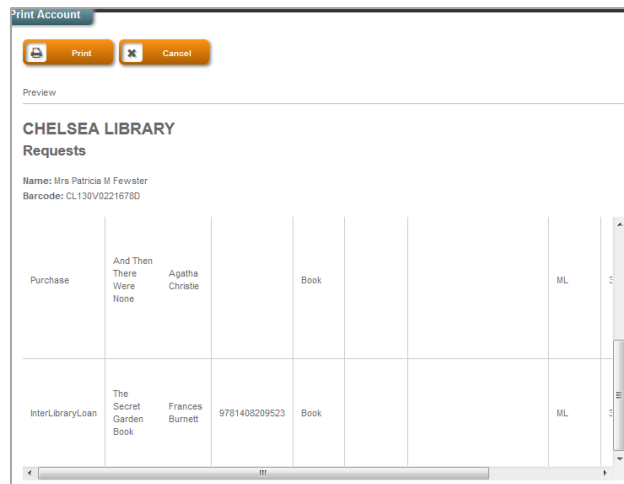
Name: Mrs Diana M Auld
Barcode: B279

Name:

Horses and ponies

Design Australia

Print Requests



REVIEWS

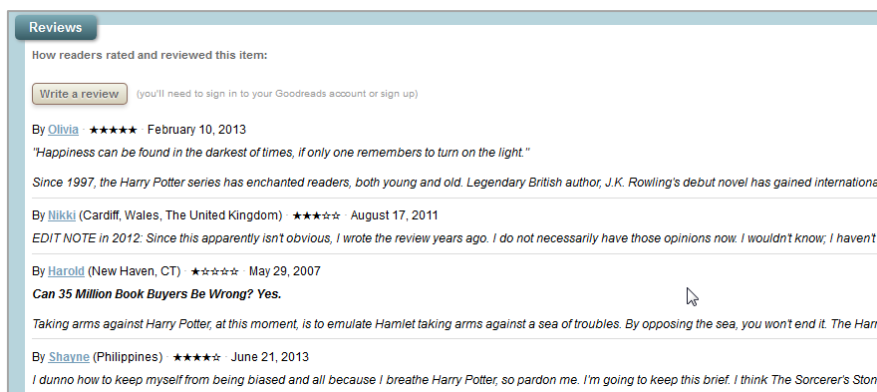
Using **Goodreads**, **Book reviews** others have written about the items you have chosen **OR** write your own review on a book you have recently read

Ensure that if you wish to use Bookreviews the option is ticked in **OpenOPAC> Login as Administrator> Parameters TAB: Show Reviews**

To **View** other's reviews, perform a **search**

Click on the **Title Hyperlink** to see the [Bibliographic details](#)

If it has **Reviews from Goodreads**, they will automatically display



To **create** your own reviews you need to have a Goodreads Account click on **Write your own Review**. You will be taken to the Goodreads site using an existing Account or sign up for a new Account

The screenshot shows a Goodreads page for a review of 'Harry Potter and the Deathly Hallows'. The page includes a navigation bar at the top with 'goodreads' and links for 'Home', 'My Books', 'Friends', 'Recommendations', and 'Explore'. The review is by 'Jason's review' and is dated 'Jun 22, 11'. It features a 5-star rating and a 'Want to Read' button. The review text discusses the author's perspective on the series as a work of art and its impact on children and young adults. There are also social sharing options for Facebook and a 'Share on Facebook' button.

goodreads Title / Author / ISBN Home My Books Friends Recommendations Explore register tour sign in

Jason's Reviews > Harry Potter and the Deathly Hallows

Harry Potter and the Deathly Hallows (Harry Potter #7)
by J.K. Rowling, Mary GrandPré (illustrator)

Jason's review
★★★★★
bookshelves: harry-potter, dead-tree-edition, for-kindle, reviewed, trill-me-cha-me-killi-me

This is just a pithy review on the *Harry Potter* series as a whole. It is not an in-depth analysis of the work in general, nor is it a review on any one particular installment.

Harry Potter is a work of art. I got made fun of once¹ when I was out to dinner with some friends, because while we were discussing these books I made the mistake of referring to them as "literature." I felt like I had to defend that assertion because, although the definition of literature is pretty broad, it seems like it should really only apply to works with some definable qualitative value or literary merit. In this case, my friends were wrong—Rowling explores themes and concepts in this series that I think are valuable to children and young adults who look to her characters for qualities they seek to emulate, and I believe her works will have lasting impact on this and future generations.

I've heard it said before that everything you need to know you've learned in kindergarten. Well, that might be somewhat of an oversimplification, but I do think children or young adults who grow into this series, seeing Harry and his friends mature as they themselves mature, can glean some pretty important life lessons from it. They are impressionable human beings who are learning about themselves and are starting to make the choices that reflect the kinds of people they want to be.

So what does *Harry Potter* teach them? Well, here is a bullet list of what it has taught me. And if you're good, I'll think about turning this into a PowerPoint presentation. Or maybe not.

Want to Read
★★★★★
Share on Facebook

JOIN ONLINE

Settings required

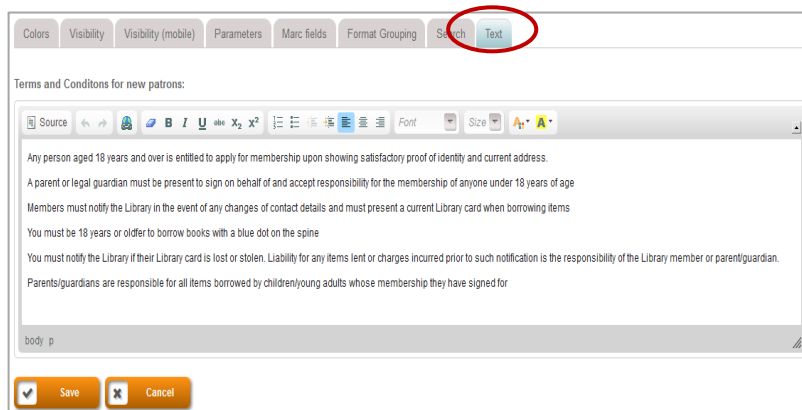
Prior to using this, parameters need to be set up in the Amlib Client and Administrator *OpenOPAC* settings:

1. Check setting in **OpenOPAC > Login as Administrator > Parameters TAB: Allow new patrons to Join Online**



Allow join online:

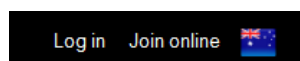
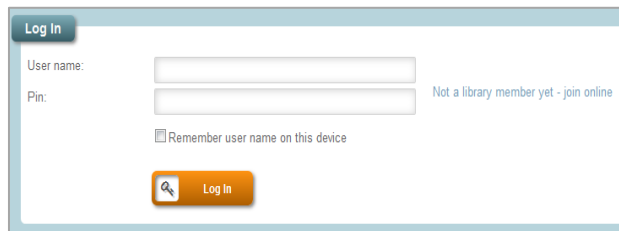
2. Set up your default text for your terms and conditions in the *OpenOPAC > Login as Administrator > Text TAB*



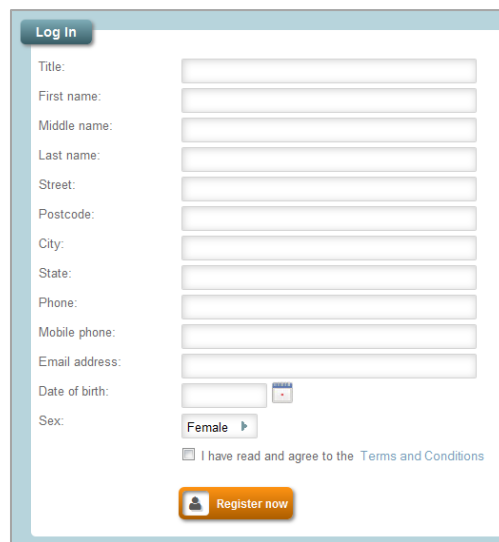
3. If set to allow, ensure that the new Online Borrower Status is set in the **Supervisor** module > **Installation > Other Tab > OPEN - Default borrower status** - for example **PEN** (Pending)
4. If set to allow, ensure that the new Online Borrower Type is set in the **Supervisor** module > **Installation > Other Tab > OPEN - Default borrower Type** - for example **WEB**

Join Online Process

1. If an *OpenOPAC* does not belong to the Library, it is possible to join online to be able to make reservations
2. At the Log In Window click the Hyperlink “Not a library member yet – join online” or Click the Join Online Hyperlink near the Flag



The **Log in** Window will display where the form can be filled in



Enter **Title** – Mr, Mrs, Ms etc. (mandatory)

Enter **First Name** – Given Name (mandatory)

Enter **Middle Name** (optional)

Enter **Last Name** – Surname (mandatory)

Enter **Street** – Street Address (mandatory)

Enter **City** – Town or Suburb (mandatory)

Enter **State** - (mandatory)

Enter **Phone** – Home phone (optional but must have at least one phone contact)

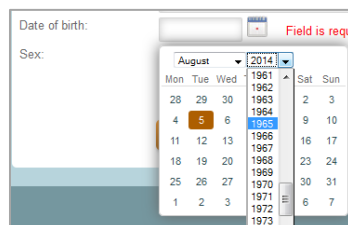
Enter **Mobile Phone**- (optional but must have at least one phone contact)

Enter **Email address**- (mandatory)

To enter **Date of Birth** -choose the **Calendar**

Select -**Male or Female**

[The mandatory fields are hard-coded and not adjustable in current version]



3. Enter **Sex** from drop-down **Female/Male** option

Sex:

4. Read and agree to the **Terms and Conditions**. To view this click the Hyperlink.

Note: These Terms and Conditions are entered by the Administrator in the **Custom Text TAB**

Terms and Conditions

A parent or legal guardian must be present to sign on behalf of and accept responsibility for the membership of anyone under 18 years of age
Member must notify the library in the event of any changes of contact details and must present a current Library card when borrowing items.

Close

5. Click **Close**
 6. Fill in the fields required and click **Register now**
 7. If the fields are not filled in correctly the mandatory Fields will show in **red**
 8. Fill in any Mandatory fields and click Register now again
 9. Select "I have read and agree to the terms and Conditions"
10. Two emails will then be sent to the Borrower:

- a. The first email is to confirm they actually did register online

Dear Mary,

you have successfully registered yourself in our library.

Finish your registration by clicking this confirmation link (or copy and paste in your browser):

<http://amlibtest01.oclc.com.au/Main.aspx?confirmationcode=2c7dcdbe-b9fc-4c08-8d85-a38100bc3cf7>

- b. The second email will give them a Temporary Barcode which they can use to login to reserve items

Dear Mary,

you have successfully created a new (temporary) account in our library.

Your new user name: **TEMP02448467**

Your new pin code: **B5485**

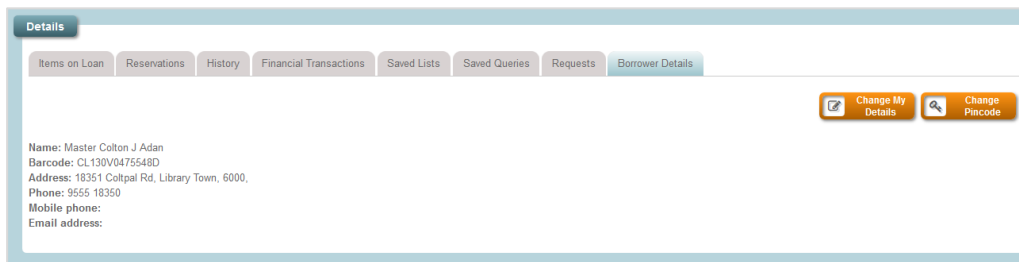
You should change this temporary pin code after logging on the first time!

Thank you!

Interaction of Amlib with OpenOPAC – New borrowers

1. Login to Amlib Client

2. New Borrowers are created in *OpenOPAC* can be found using a Borrower Where search with parameters of **BarCode** Like **TEMP** (or **Status LIKE PEND**, **BorType = WEB**, depending on the parameters set), which can then be saved into a File if required



The screenshot shows the 'Borrower Details' page in the OpenOPAC system. At the top, there is a navigation bar with tabs for 'Items on Loan', 'Reservations', 'History', 'Financial Transactions', 'Saved Lists', 'Saved Queries', 'Requests', and 'Borrower Details'. Below the navigation bar, there are two buttons: 'Change My Details' and 'Change Pincode'. The main content area displays the following information:

Name: Master Colton J Adan
Barcode: CL130V0475548D
Address: 18351 Coltpal Rd, Library Town, 6000,
Phone: 9555 18350
Mobile phone:
Email address:

WHICH CHANGES ARE INSTANTANEOUS AND WHICH ARE NOT

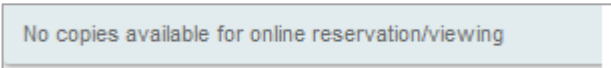
Changes that are instant

1. Most Stockitem changes are instant, for example : adding a new copy to an existing catalogue record if it already has Stockitems; Location; Format; Process
 - a. By re-conducting a search you will see the changes made
 - b. By logging back in as the Patron to see borrower changes
2. Reservations
3. Circulation /returns
4. Renewals
5. Borrower account updates as actions are performed, if a borrower logs out and back in- they will then be able to see these changes
6. If you delete the last Stockitem

What changes are NOT instant and requires a service to update records.

Items that appear in this LIST below will need the automatic service to run, before records will be updated and changes viewable OpenOPAC

1. If a catalogue record is modified, tags added, removed or modified
2. If it's a completely new catalogue record and a new Stockitem is added
3. If a catalogue record has been deleted, along with the last Stockitem
4. If a Stockitem is created without a catalogue record it won't be viewable, until a catalogue record has been added
5. All catalogue and the Stockitem must be **viewable**, if these settings are changed - it will need to be updated by the service before the change takes place
6. If you are deleting the last Stockitem and catalogue record – the Stockitem will be removed instantly and the catalogue record will be unavailable approximately 10 minutes after the change – once the service is run & the records are updated.



No copies available for online reservation/viewing

- a. If you add a catalogue record but don't add a Stockitem, it will NOT appear in OpenOPAC until the first Stockitem has been added

NOTE: If you have made one of these changes and you want the change to appear instantly in OpenOPAC.....

You will need to log in as the **Administrator** and select the **Configuration** area > select **Upload** tab and do the following:

- Select > Upload only changed Catalogues
- Click Save
- This will force the change – so it appears on OpenOPAC instantly

Other changes & what is required for them to display in OpenOPAC

In Open Opac the facet information [filters] on the left is based on the search results and obtained from the search indexes. This allows the search to be refined using the facet information.

1. If an existing item form, item stats code or location **description is changed** - You will need to log in as the **Administrator** and select the **Configuration** area > select **Upload** tab and do the following:

- Select > **Clear search index**
- Select > **Upload all Catalogues**
- Select > **Upload Masterdata**
- Select > **Upload Suggestions**
- Select > **Save**

This will reload the search indexes and make the updated description available for display in the facet.

2. If a new item form, item stats code or location code is added - You will need to log in as the **Administrator** and select the **Configuration** area > select **Upload** tab and do the following:

- Select > **Upload Masterdata**
- Select > **Save**

This will load the new code and description in Open Opac which can be used for selections such as a reservation collect location.


Amlib only allows deletion of a code if not used by items etc. – therefore the code would have already been removed from the search index via the normal update process such as item updates, deletes

3. To remove the actual code from OpenOPAC - You will need to log in as the **Administrator** and select the **Configuration** area > select **Upload** tab and do the following:

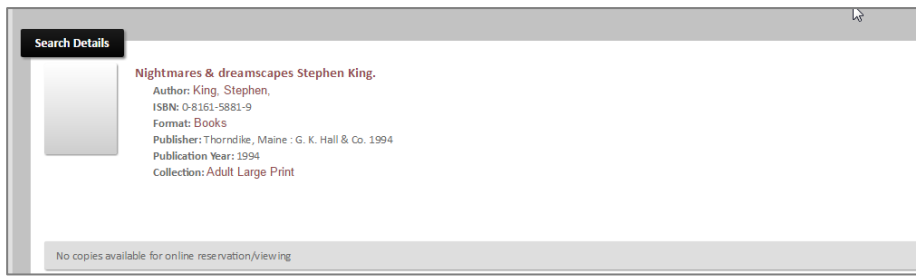
- Upload Masterdata
- Click Save

This will remove the deleted codes from OpenOPAC

4. When you remove the last stockitem and the catalogue record, it will instantly remove the stockitem from OpenOPAC. The title will still be searchable at first – though it will show as being not available. Once the service has run in the background automatically this catalogue record will be removed entirely and not be searchable or viewable.



No copies available for online reservation/viewing



Location as filters for items [left-hand side]

To ensure the correct list displays here for your patrons – the settings can be the same as you have for your reservation pick-up locations, unless there is one location that is in the library where items are kept that you want your patrons to be able to search, when using the filters – you would then change just that location and this setting below to **Y**



If you make this change after installing or upgrading OpenOPAC you will need to log in as the Administrator and select the configuration area > select Upload tab and do the following:

- Clear search index
- Upload all Catalogues
- Upload Masterdata
- Upload Suggestions
- Click Save

Restart IIS and **refresh your browser**, to enable the changes to your locations to display.

NOTE: All other actions: Modifying a stockitem; Adding an extra stockitem; Circulation/Status details of an item or Adding a Reserve either by the Amlib Client or by OpenOPACS are all instantaneous actions and appear immediately in OpenOPAC [as soon as the page is refreshed, the search re-conducted or When a borrower logs out and then logs back in].

REPORTS

Statistics Reports

Statistics can be used to create reports regarding *OpenOPAC* use. The most commonly used Web Stats Codes used are:

600	OPEN Search	All searches from OPEN including Basic and Advanced searches
601	OPEN Saved Search	The searches saved as My Queries
602	OPEN New Items search	Searches from the New Items window
603	OPEN Borrower	When the <i>OpenOPAC</i> user accesses My Account
604	OPEN Renew	When an item is renewed via <i>OpenOPAC</i>
605	OPEN Reserve	When an item is reserved via <i>OpenOPAC</i>
606	OPEN ILL	Items created as ILL requests
607	OPEN Join on line	Members joined via the OpenOPAC
608	OPEN Request	Members who have requested ILLs or new purchase suggestions via the OpenOPAC
609	OPEN Change Details	Members who have altered Address details via OpenOPAC
610	OPEN Change PIN	Members who have altered their PIN via OpenOPAC

These parameters can be checked in **Main > Supervisor > StatsParams** to ensure the Count is set to **Y**.

Stat Typ	Stats Description	Count (Y/N)	Money (Y/N)	Form (Y/N)	Item Type (Y/N)	Borr (Y/N)	Borr Group (Y/N)	Borr Class (Y/N)	Locn (Y/N)	Suburb (Y/N)	Ward (Y/N)
513	Web Reserve	Y	N	Y	Y	Y	Y	Y	Y	Y	Y
531	Web Join Online	Y	N	N	N	Y	N	N	Y	N	N
532	Web Requests	Y	N	N	N	Y	N	N	Y	N	N
533	Web Change Details	Y	N	N	N	Y	N	N	Y	N	N
600	OPEN Search	Y	N	N	N	N	N	N	Y	N	N
601	OPEN Saved Search	Y	N	N	N	N	N	N	Y	N	N
602	OPEN New Items Search	Y	N	N	N	N	N	N	Y	N	N
603	OPEN Borrower	Y	N	N	N	Y	N	N	Y	N	N
604	OPEN Renew	Y	N	Y	Y	Y	N	N	Y	N	N
605	OPEN Reserve	Y	N	Y	Y	Y	N	N	Y	N	N
606	OPEN ILL	Y	N	N	N	Y	N	N	Y	N	N
607	OPEN Join Online	Y	N	N	N	Y	N	N	Y	N	N
608	OPEN Request	Y	N	N	N	Y	N	N	Y	N	N
609	OPEN Change Details	Y	N	N	N	Y	N	N	Y	N	N
610	OPEN Change PIN	Y	N	N	N	Y	N	N	Y	N	N

To create a report – for example Summary by Location, Transtype, Year, Month (&stat200.qrp)

1. Access *Amlib* Client
2. Go to **Main > Reports > RepStatistics**.
3. Select **F1 New**
4. *Highlight* the Template Summary by Location, Transtype, Year, Month (&stat200.qrp) and click **Select**

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5. Type a *Description* – for example OpenOPAC Statistics 2016
6. Click **F3 Save**
7. Select **F7 Where**
 - Choose **Trans Type (Issue, Ret)**, the operator **>=** and enter **600** in the Box 3
 - Choose **Trans Year = 2016**, the operator **=** and enter **2016** in the Box 3

This will find all **OpenOPAC** statistics for this calendar year

&stat200.qrp		Summary by Location, TransType, Year, Month		03/06/2016	
OpenOPAC 2016					
CHELSEA - Chelsea Library					
600 - OPEN Search					
	2016	Total			
January	15	15			
February	259	259			
March	275	275			
April	208	208			
May	57	57			
June	144	144			
Total	958	958			
601 - OPEN Saved Search					
	2016	Total			
March	5	5			
May	4	4			
June	2	2			
Total	11	11			
603 - OPEN Borrower					
	2016	Total			
January	14	14			
February	9	9			
March	48	48			
April	27	27			
May	4	4			
June	18	18			
Total	120	120			
604 - OPEN Renew					
	2016	Total			
March	4	4			
June	1	1			
Total	5	5			
605 - OPEN Reserve					
	2016	Total			
March	22	22			
April	10	10			
June	4	4			
Total	36	36			

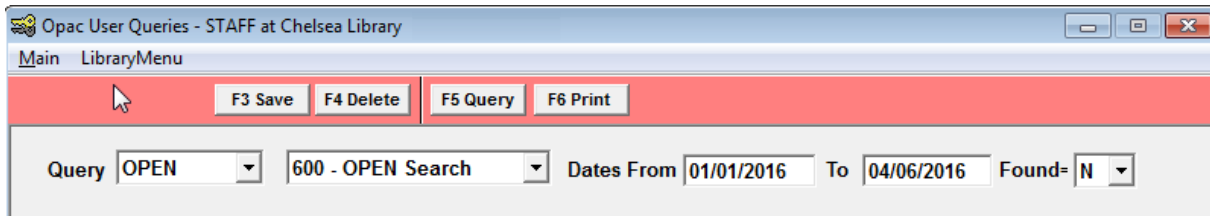
Successful and Unsuccessful Searches

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It is possible to report on Successful and Unsuccessful Searches within Supervisor

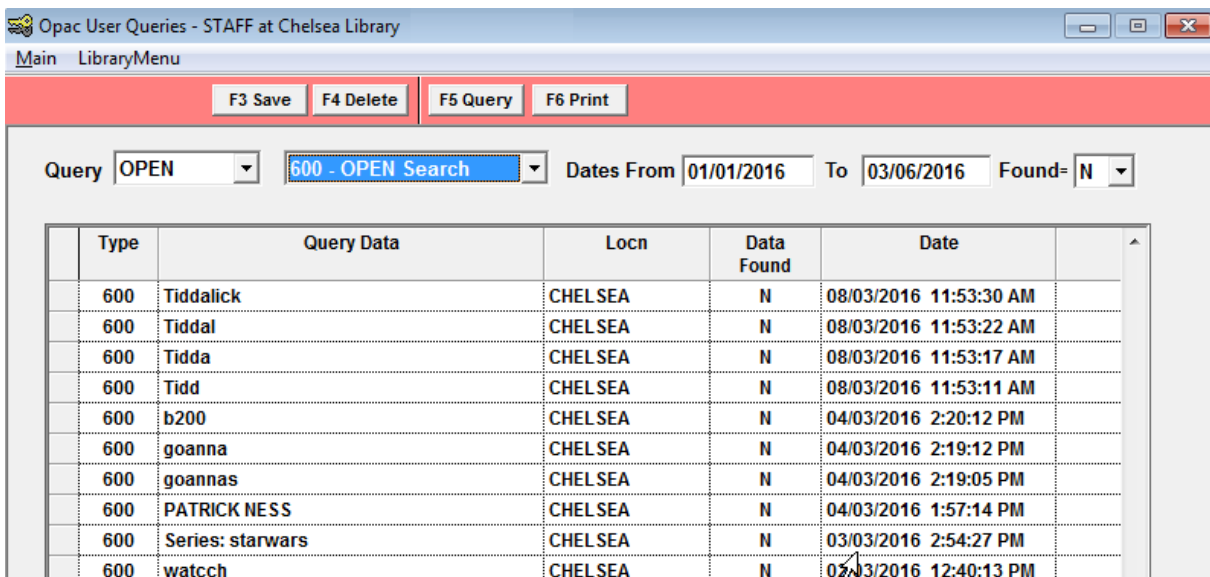
Opac User Queries

1. Access the Amlib client and go to the Supervisor Module
2. From LibraryMenu select Opacs/OpacQueries
3. Select **OPEN** from the Query drop-down box



The screenshot shows the 'Opac User Queries - STAFF at Chelsea Library' window. The 'Main LibraryMenu' bar contains buttons for 'F3 Save', 'F4 Delete', 'F5 Query', and 'F6 Print'. The search form includes a 'Query' dropdown set to 'OPEN', a search type dropdown set to '600 - OPEN Search', 'Dates From' set to '01/01/2016', 'To' set to '04/06/2016', and 'Found=' set to 'N'.

4. Select a **600 – OPEN SEARCH** is the only option
5. Enter the Dates From and To
6. (Optional) Select **Y** (for Yes) or **N** (for No) from the Found= drop-down box
7. **Y** = successful searches, **N** = unsuccessful searches or blank for all searches
8. Click the **F5 Query** button
9. A result list will then display



The screenshot shows the same window as above, but with the search results displayed in a table. The search criteria are: Query: OPEN, Search Type: 600 - OPEN Search, Dates From: 01/01/2016, To: 03/06/2016, Found=: N. The table has columns for Type, Query Data, Locn, Data Found, and Date.

Type	Query Data	Locn	Data Found	Date
600	Tiddalick	CHELSEA	N	08/03/2016 11:53:30 AM
600	Tiddal	CHELSEA	N	08/03/2016 11:53:22 AM
600	Tidda	CHELSEA	N	08/03/2016 11:53:17 AM
600	Tidd	CHELSEA	N	08/03/2016 11:53:11 AM
600	b200	CHELSEA	N	04/03/2016 2:20:12 PM
600	goanna	CHELSEA	N	04/03/2016 2:19:12 PM
600	goannas	CHELSEA	N	04/03/2016 2:19:05 PM
600	PATRICK NESS	CHELSEA	N	04/03/2016 1:57:14 PM
600	Series: starwars	CHELSEA	N	03/03/2016 2:54:27 PM
600	watcch	CHELSEA	N	03/03/2016 12:40:13 PM

APPENDIX 1: SUPERVISOR SETTINGS YOU MUST SET WHEN YOU USE OPENOPAC

Supervisor Settings

There are some settings in the Amlib Client specifically for the use of OpenOPAC that affects how OPEN is used or set up. Go to **Main > Supervisor > Default Screen > Installation > Other Tab > Scroll** down to you see these **OPENstatements**. For example, if PINS are required when logging in. The OPEN Web enquiry must be set to ensure the Catalogues are uploaded.

Description	Value
Only show reports for: (L)ocation, (G)roup, (O)perator, Show (A)ll	A
OPEN - Borrower PIN required (YN)	
OPEN - Default borrower status	PEND
OPEN - Default borrower type	W
OPEN - Log Search Terms (YN)	Y
OPEN - Maximum Amount for Borrower owing	9.00
OPEN - Maximum overdue days for Item renewal	20
OPEN - Only display RESRET memos when item is at collection location (YN)	Y
OPEN - Reserve on loan items only (YN)	N
OPEN Web enquiry enabled	Y

Explanation of Supervisor > Installation > Other Settings

PARAMETER	EXPLANATION	EXAMPLE
OPEN Borrower PIN required (YN)	When logging in if a PIN is required	Y
OPEN – Default borrower status	When a borrower joins online this is the Status that they will be given, until Library staff has processed the new patron and checked their details.	PEND
OPEN – Default borrower type	This is the default Borrower type given to a patron when they join online	WEB
OPEN – Log Search Terms (YN)	This enables a log file to be created of terms being searched by patrons, which can be viewed from Supervisor/Library Menu/Opacs/OpacQueries	Y
OPEN – Maximum Amount for Borrower owing	Renewals will only be allowed if the borrower owes no more than the amount set	5.00
OPEN – Maximum overdue days for Item renewal	Renewals will only be allowed if the item is no more than the amount of days overdue set	10

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OPEN – Only display RESRET memos when item is at collection location (YN)	If a reserve is placed, then a memo will be placed on the Borrower’s details, when it’s ready for collection at the chosen Location	Y
OPEN – Reserve on loan items only (YN)	If set to Y - A Reserve can only be placed on items that are currently on loan and not available on the shelves.	N
OPEN Web enquiry enabled ** IMPORTANT : Ensure this setting is set to Y before you begin to use OpenOPAC - any new Catalogues/Stockitems you upload/add will never appear in OpenOPAC, as the update tables will not be created until this is set to Y - even if you try and upload changed catalogues	This indicates that OpenOPAC is in use. Therefore it enables Open Transactions service, so that Catalogues and Stockitems are automatically transferred to the OpenOPAC for searching	Y

Supervisor – Installation – Installation Menu – Choose Location – Other - Valid for....settings

Chelsea Library	
Description	Value
Location is Valid for Holdings	Y
Location is Valid for OPAC Enquiries	Y
Location is Valid for Registrations & Circulation	Y

PARAMETER	EXPLANATION	EXAMPLE
Location is Valid for Holdings	Location is one that is used for Stockitems. If set to N then there will not be any results on the Holdings in OpenOPAC – just the Catalogue maybe found	Y
Location is Valid for OPAC Enquiries	Location is one that is available for OPAC searching. If set to N, there will be no records found for this location. For example some sites may want the Administration Items to be not valid for OPAC	Y
Location is Valid for Registrations & Circulation	Location is one that can be set for a Borrower when joining the Library and one that can have Loan Parameters set. If set to N, the Location will not be a Collect Location for Reservations	

APPENDIX 2 - COOKIES

By using this service, you agree that certain cookies are placed on your device.

You intend to make use of a web based service that is offered or powered by OCLC EMEA B.V. and its subsidiaries ('OCLC'). These web based services make use of certain cookies. This page intends to inform you about these cookies. To find out more about cookies in general, please visit www.aboutcookies.org. If you are interested to read OCLC's comprehensive privacy policy, please check the Website

Use of Cookies:

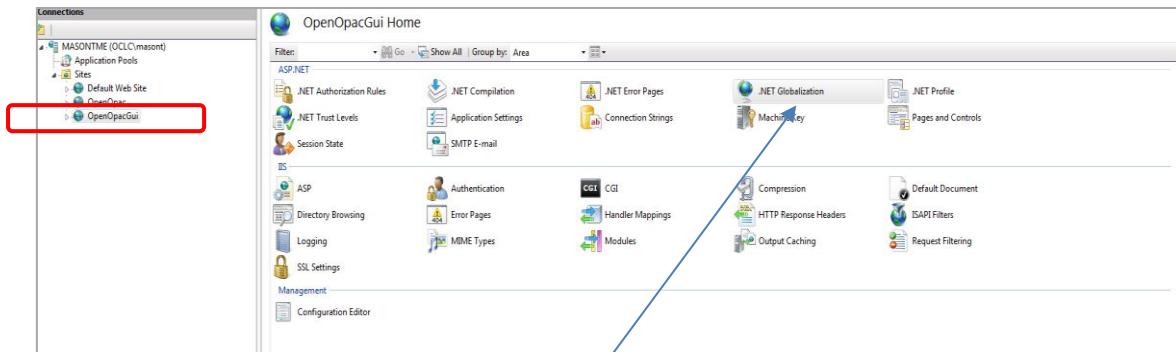
Cookies are small text files that are placed on your computer by websites that you visit. They are widely used in order to make websites work, or work more efficiently, as well as to provide information to the owners of the site. The table below explains the cookies OCLC services used and their purpose

Type	Name	Purpose
Necessary	ASP.NET_SessionId	Cookie containing an encrypted string of saved information about the searches that are current (page number, amount of items found, selected filters etc). This cookie cannot track your browsing activity. The cookie is deleted when the browser is closed or automatically after 20 minutes.
Necessary	OclcCookieConsentAsked	Cookie that stores value to recognise if the user of this site has agreed to store cookies on his/her computer. This cookie cannot track your browsing activity.
Functionality	OclcRememberLogin	Cookie that contains the barcode of the last logged in patron. This cookie will be removed if the checkbox 'remember me' is cleared.
Functionality	OclcJavaScriptWarning	Cookie for not reminding users that they don't have JavaScript enabled. In other words: this cookie is only active if the user turns off JavaScript.
Functionality	OclcCurrentCulture	Cookie that is only created if the current regional settings have been changed (the little flag symbol on the top right of the screen). The cookie contains the name of the current culture (eg: en-AU).
Necessary	ASPXAUTH	This cookie is essential for saving user log in information. This cookie cannot track your browsing activity. The cookie is deleted when the browser is closed or automatically after 20 minutes or after logging off.
Third-party		Depending on the provider of catalogue information that your library has chosen, these cookies contain information about the cover image, review or rating information etc.

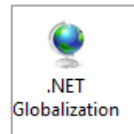
APPENDIX 3: LANGUAGE CONTROL OF BROWSERS VIA IIS SETTINGS

To control the language setting of all your browsers in your institution /library who are accessing the OpenOPAC, you will need to change 2 settings in IIS [Internet Information Services manager]

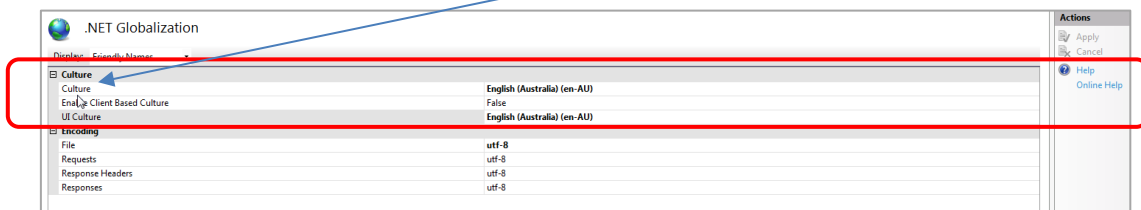
1. Open IIS7
2. Highlight **OpenOPACGui** in your sites folder on the left



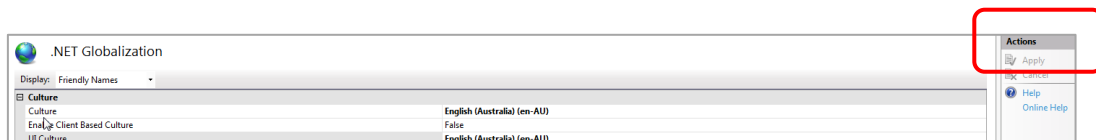
3. Select **Net.Globalisation** from the ASP.NET box under **OpenOPACGui** home Page



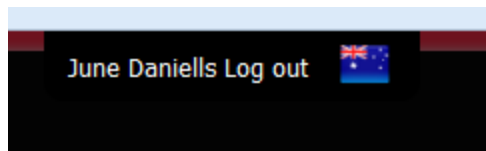
4. There will be a drop down menu besides **Culture** and **UI Culture**



5. Change both of these to **English (Australia) (en-AU)** and then select **Apply** in the top right hand corner.



This will ensure that the flag in the top right hand corner of your browser when you access the OpenOPAC will always be the Australian flag. This setting appears to affect Chrome, Firefox and IE.

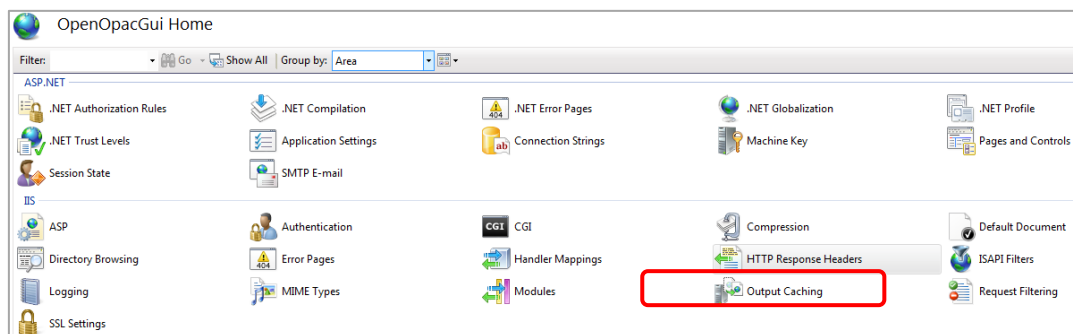


APPENDIX 4: FORCING COMPATIBILITY MODE IN IIS7

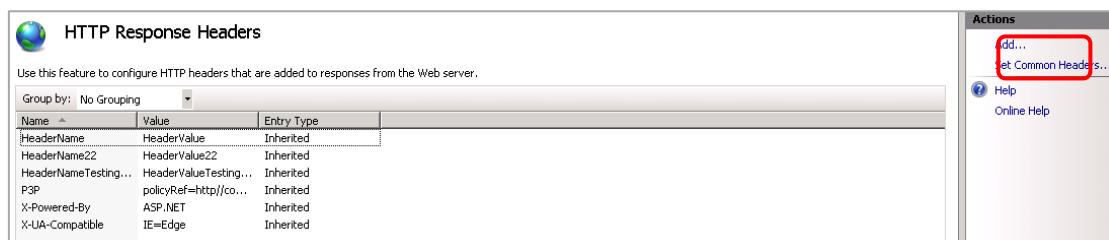
If OpenOPAC is opening in Compatibility Mode when using Internet Explorer it can be **turned off** via IIS. This is recommended if external users are accessing the website and having Compatibility Mode issues.

IIS 7 and IE 7 -9

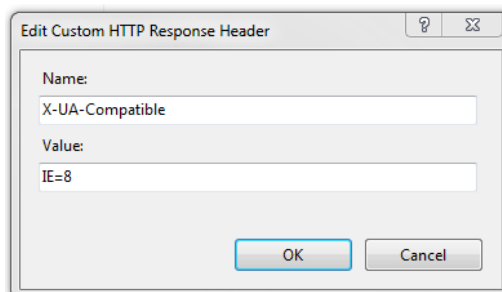
1. Open IIS [**Internet information Service Manager**]
2. Highlight **OpenOPACGui**
3. Select **HTTP Response Headers** from under **OpenOPACGui** home page



4. Select **Add** on right –top hand side



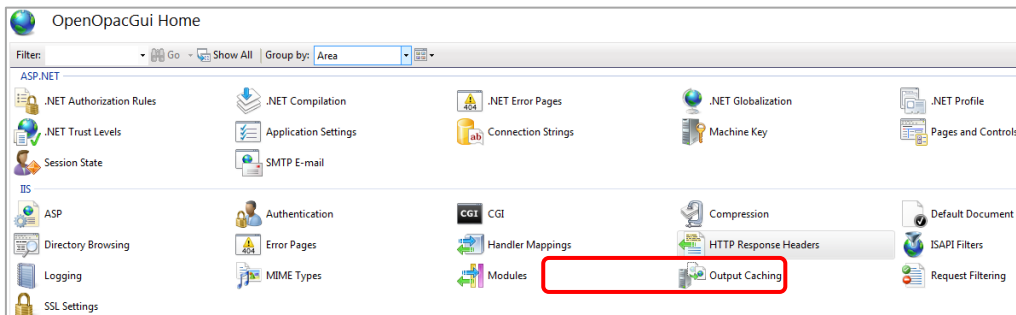
5. A pop-up box labelled **Add Customer HTTP Response Header** will appear



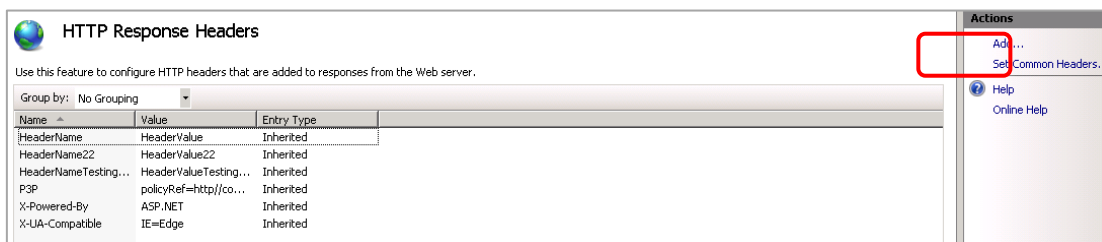
6. Type in **X-UA-Compatible** In the Name field
7. Type in **IE=8** Value field
8. Then select **OK**
9. This will cause **IIS** to open in Internet Explorer to display OpenOPAC as if it was Internet on Explorer 8.

IIS 7 and IE 10 -11

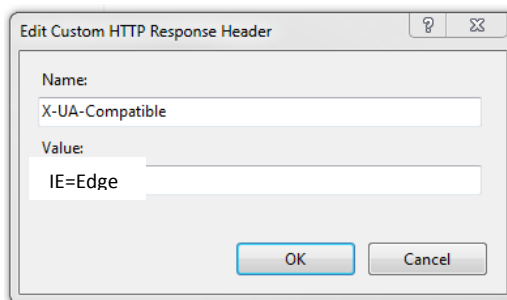
1. Open IIS [**Internet information Service Manager**]
2. Highlight **OpenOPACGui**
3. Select **HTTP Response Headers** from under **OpenOPACGui** home page



4. Select **Add** on right –top hand side



5. A pop-up box labelled **Add Customer HTTP Response Header** will appear



6. Type in **X-UA-Compatible** In the Name field
7. Type in **IE=EDGE** Value field
8. Then select **OK**
9. This will cause **IIS** to open in Internet Explorer to display OpenOPAC with compatibility mode turned off [**Warning Edge** is sometimes unstable and is considered the setting for non-production sites, if you have any issues using this setting, then try IE=8 as the value instead]

APPENDIX 5: TO HAVE A PUBLIC [EXTERNAL] FACING OPENOPAC

So that your **OpenOPAC** can be accessed from a webpage [publicly] such as a council site or maybe a school website, there are two choices depending on how your network is set up, what is accessible and what is not and what your institutions preferences are.

OpenOPAC can be installed anywhere on your Network, it does not need to be installed on your Amlib server or even on an Internal server, as long as OpenOPAC has access to the Amlib databases that is all that is required for it to run. Some clients will install this program on a Web-Server or in a De-militarized zone [DMZ] so it can be accessed by all anywhere. While others prefer to have their own internal set up.

If it has been installed on an Internal Server that has other important resources on it that you don't want public to access, but is fine for library to use. Then we suggest you set up a second install of OpenOPAC on a Web-server that can be accessed by the public.

If you want to set up a second install Of OpenOPAC for this purpose, so they can be accessed publicly on a council or school web-page – see point 2

1. If installing on a web-server or in a De-militarized zone (DMZ) only

1. Install OpenOPAC on a web server or in a De-militarized zone (DMZ)
2. Install it on a different port from the default HTML port 80 - such as port 81
3. Ensure you put in the correct Hostname for this webserver when installing for the Hostname
4. Ensure that port 1433 is open on the webserver [for two-way traffic] – so it can access the Amlib databases – this is the only access OpenOPAC needs (everything else can be locked down and not accessible)
5. If using an enrichment provider such as Amazon.com or Syndetics etc. You will need to ensure that this web-server allows access to these sites by either adding them as exceptions to the firewall rules or add them as trusted sites. Otherwise images and content will not appear.
6. Also either have pop-up blockers turned off or sites such as www.amazon.com or <http://www.syndetics.com/> enter them as exceptions to the pop-up blocker rule or add as trusted sites

2. If this is a Second Install of OpenOPAC - You will need to do the following

1. Install another OpenOPAC on a web server or in a De-militarized zone (DMZ)
2. Install it on a different port 83 to your internal one
3. Ensure you put in the correct Hostname for this webserver when installing for the Hostname
4. Ensure that port 1433 is open on the webserver [for two-way traffic] – so it can access the Amlib databases – this is the only access OpenOPAC needs (everything else can be locked down and not accessible)
5. If Library is using an enrichment provider such as Amazon.com or Syndetics etc. You will need to ensure that this web-server allows access to these sites by either adding them as exceptions to the firewall rules or adding them as trusted sites. Otherwise images and content will not appear.
6. Also either have pop-up blockers turned off or sites such as www.amazon.com or <http://www.syndetics.com/> enter them as exceptions to the pop-up blocker rule or add as trusted sites
7. Then configure it the same as their internal one was configured 6. Load all catalogues etc..... 7. This **new URL** can put as a hyperlink on their council /library website that will go straight to OpenOPAC – giving them public access.

APPENDIX 6: CUSTOMISING COLOURS

For setting colours in OpenOPACS - to match your logo and colours - creating a new Theme

To get your correct colours from your logo or banner

1. Take screenshot of your Logo
2. Open it in Paint.NET or Paint, use the colour picker, hover over the colour you need and write down its red, Green and Blue Values
3. Then go to the site below using these numbers for each colour you want to use, to get the HEX value you will need to enter into OpenOPACS
4. Often you need shades of these main colours to blend into your theme and as there are so many to choose from, you may like to use the other site below that gives you the matching shades of the HEX values you want to use.

This is great site to get the Hex values if you know the Red, Green and Blue values of a colour

<http://www.rgbtohex.net/>

This site is great once you have the HEX value to get matching shades of your school colours.

<http://www.color-hex.com/color/06513d>

If your logo is NOT a rectangular in shape

1. You will need to create a **NEW Logo** that is **340 pixels x 115 pixels**.
2. The easiest way to do this is to first open you LOGO in Paint.NET or Paint
3. Then select 'new' and create a new image, setting the size you need it to be [340px X 115px]
4. Go back to your original Logo and select sections you want on the New logo, copy and paste them onto the new logo canvas [you may need to re-size them a little to fit]
5. Place all the parts of the logo you want to use, in this way until happy with result. [You may need to add some background colour if logo image does not fill entire space].

Save file in a .GIF, .PNG, or .JPG format and upload via the configuration screen for administrators.

APPENDIX 7: CUSTOMISING A HOME PAGE

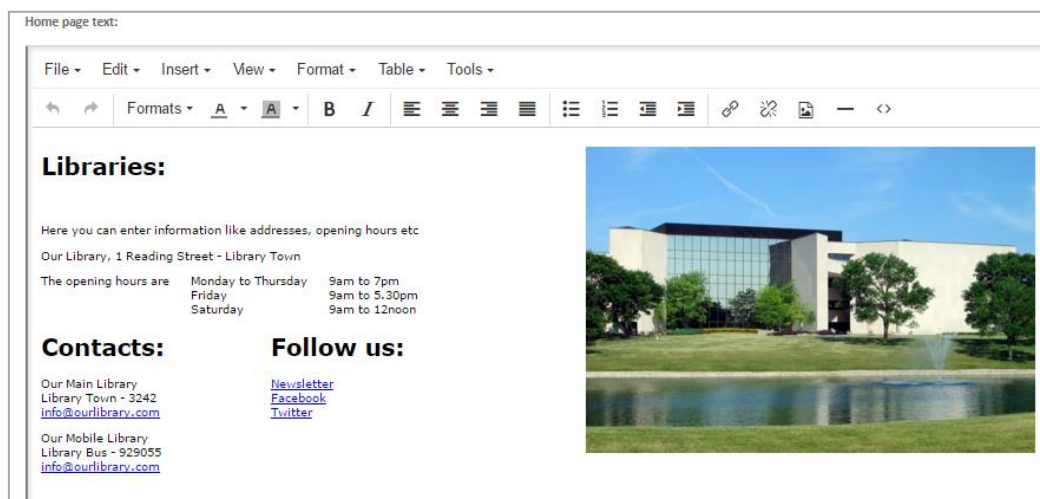
The Home Page can be used to include:

- A customised image and/or a Location map
- Details and information about the library – for example:
 - Location of branches
 - Opening hours
 - Contact details
- Relevant Links to useful pages
- Links to Social Media that patrons may be interested – for example Twitter, Facebook etc.

It can be deleted to leave the Page empty if preferred.

This will appear under your Home page before a search is conducted.

If you wish to use the NEW Front page option: This needs to be setup when logged in as the **Administrator > Configuration > Custom text** tab.



Configuration

When logged in as Administrator, configuration settings can be done including colours, visibility, parameters, enrichment content and the Marc Fields in OpenOPAC.

It is also possible to set the Default Text for Terms and Conditions and set up the Home Page Text and picture as required.

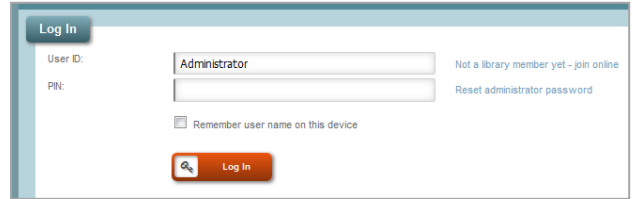
Go to My Account and Login. The default Username and Password are:

Username: Administrator

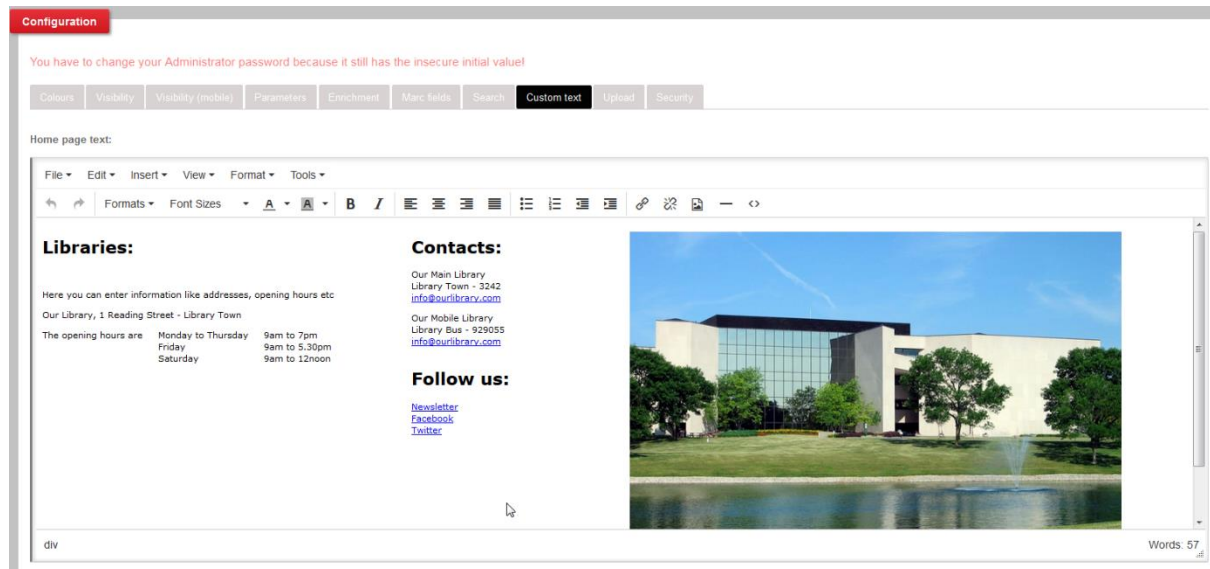
Password: 1234

Steps in the Process

1. Login as Administrator
2. From Configuration, select Custom Text Button
3. From the Home page text section you are able to alter the Text and/or Image



Hint: select View > Show blocks as this will show you where you can sit your text & images, as its HTML coded in the background – you can switch to HTML code by selecting Tools, if you are familiar with this instead.

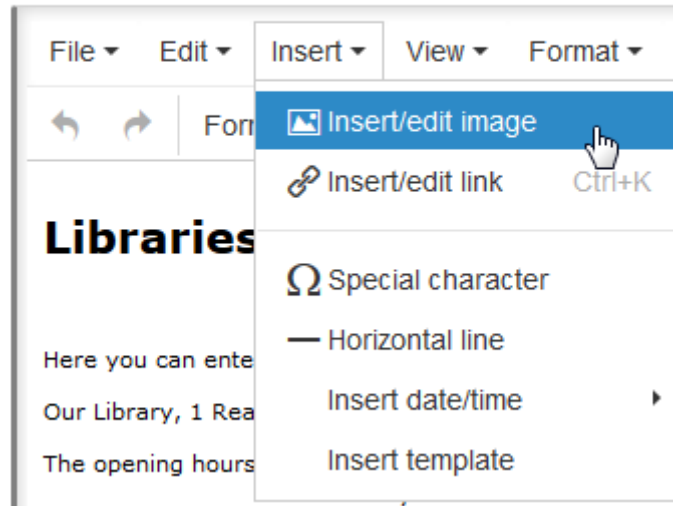


Change the Image

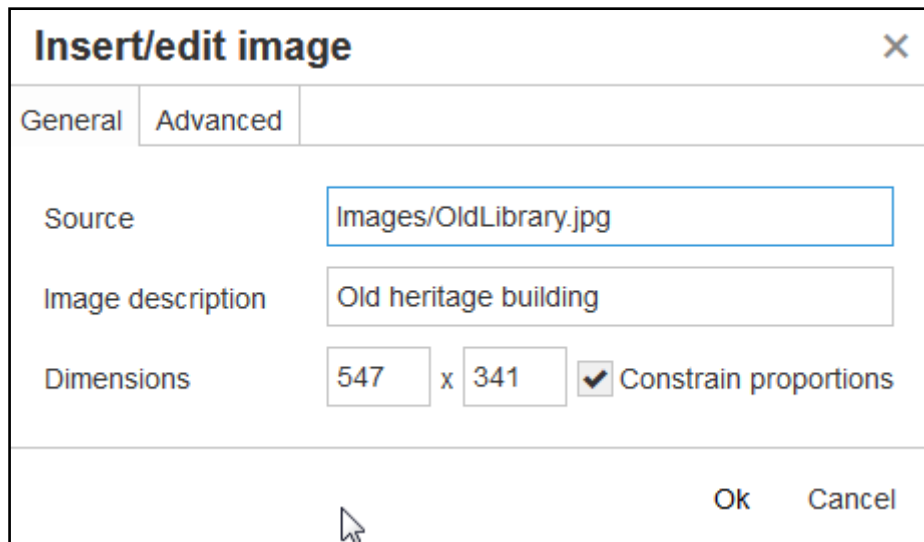
Copy your chosen image to the OpenOPAC Server in the "inetpub\wwwroot\OCLC Open Frontend\Frontend\Images folder OR take note of where the chosen image will be found

1. Click the existing Image
2. Click Insert Menu and Insert/edit Image

Home page text:



3. Change the Image name to that of the chosen Image or enter the path of the Image in the Source Field



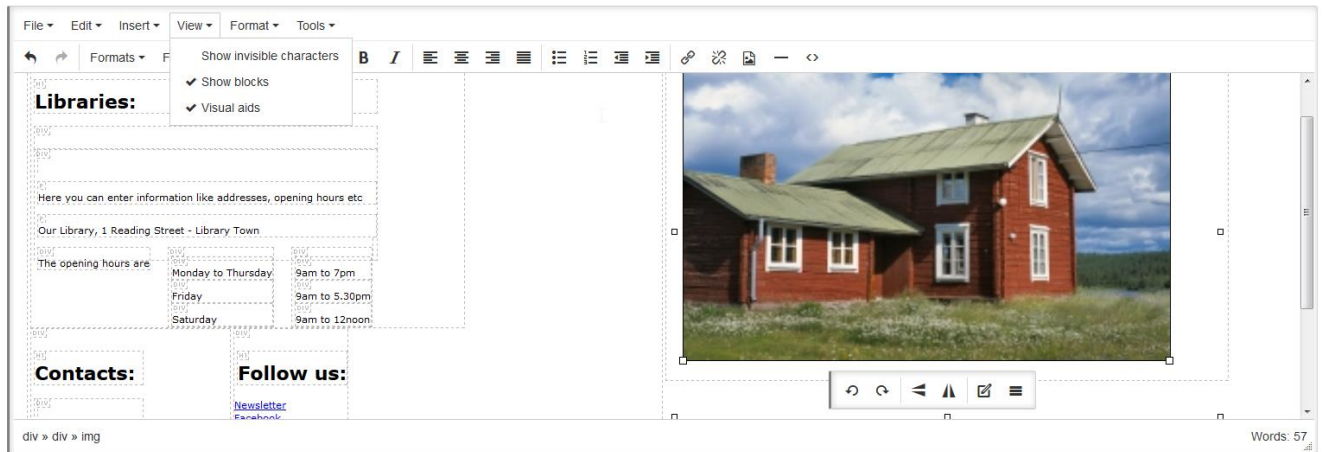
4. Enter the Image Description (Optional)
5. Enter the Dimensions or keep the existing dimensions of the saved image
6. Click Ok to save

Changing the Text

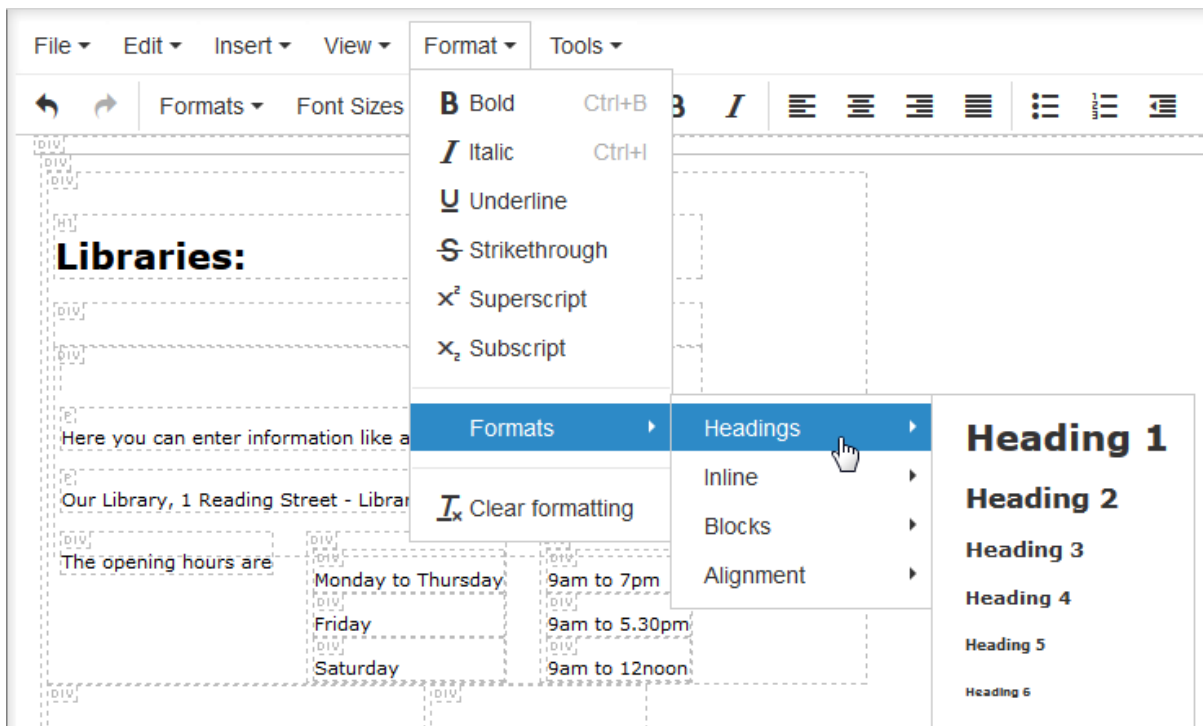
1. Consider choosing View – Show blocks so that you can see the Text areas used by the sample

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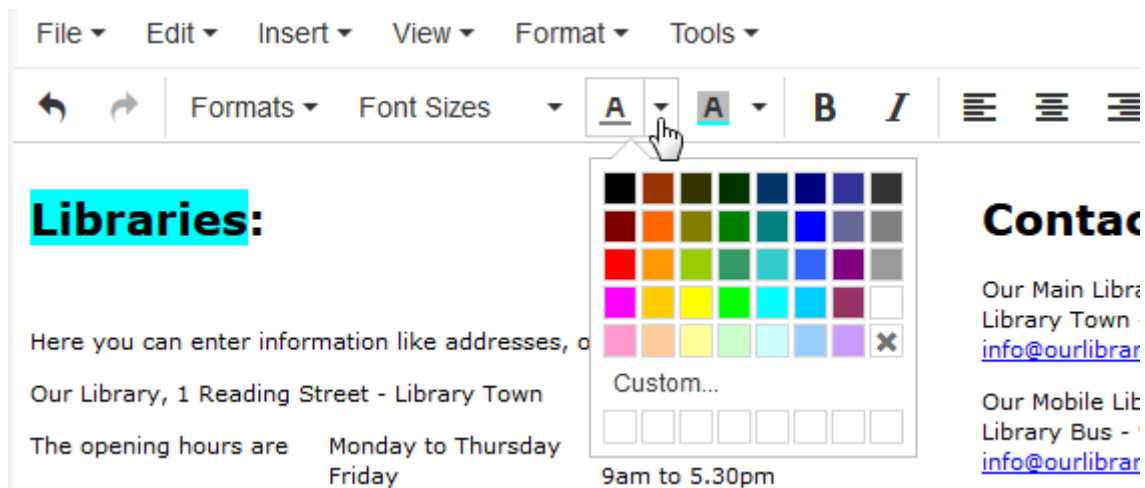
Home page text:



2. Change the Text to suit your relevant details
3. It is possible to alter the Format and Alignment of the Text for Headings and making the Text Bold, Italic, Underlined etc. and the Heading Style. Use the Format button to use these Tools



4. It is also possible to add different Fonts sizes, as well as Text and Background colour using the menu options from the top next to Formats

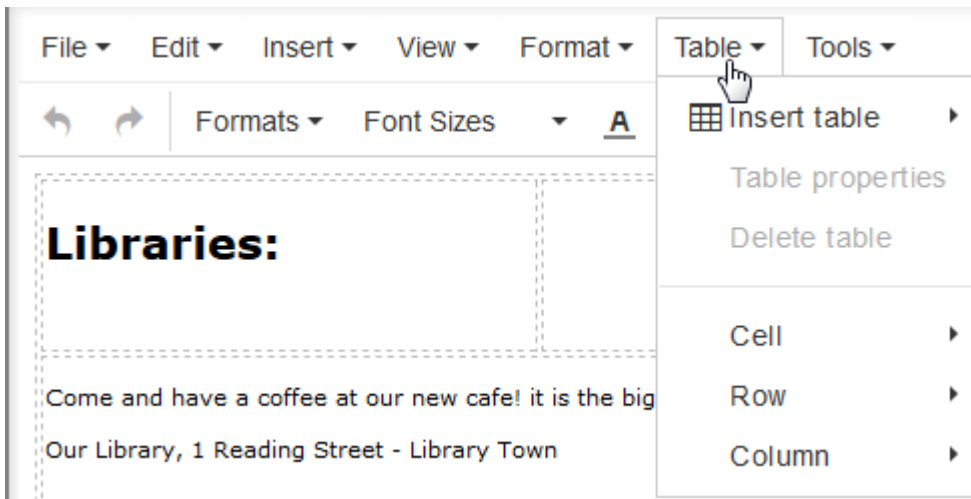


5. It is also possible to add URL links using Insert/edit Link. Enter the relevant details and press Ok



6. It is also possible to edit the html directly by accessing the Tools menu/ view Source
See Appendix 1 as an example of the original Source code

Table Menu



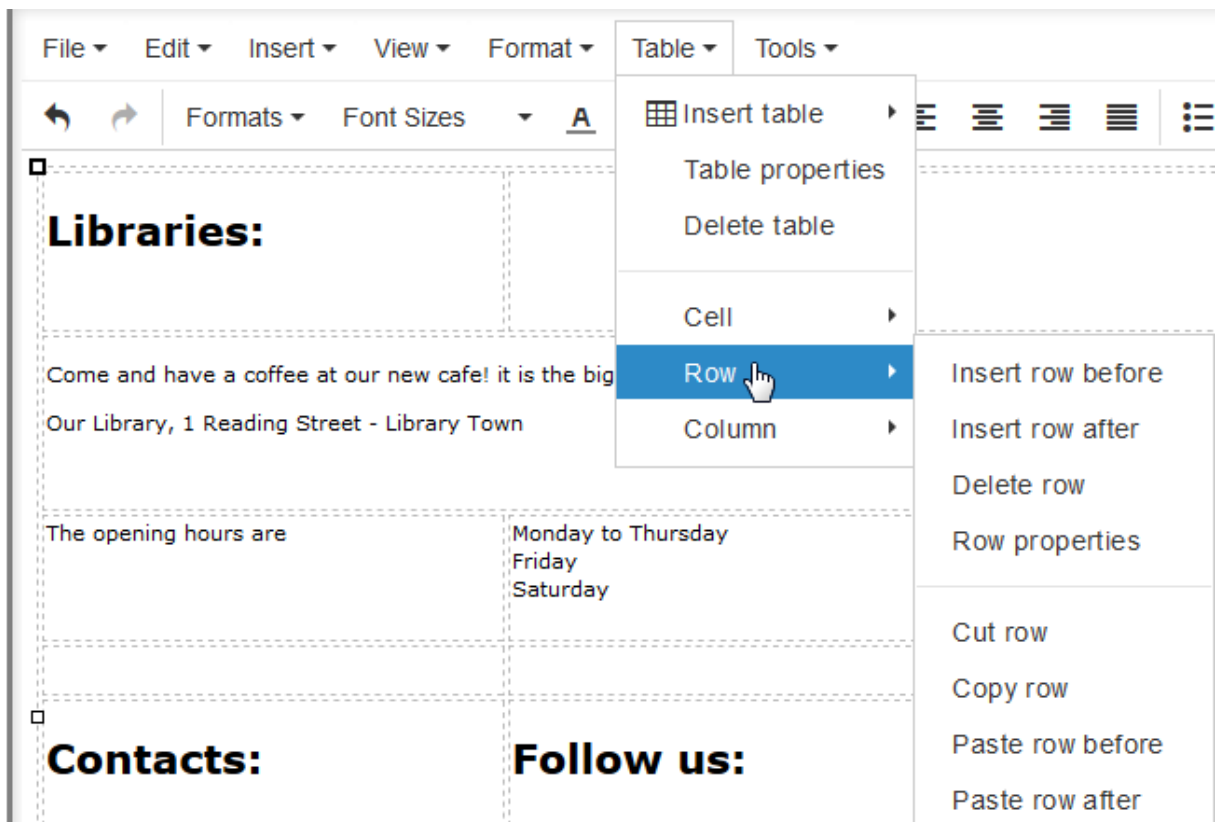
Use the Table Menu to Insert a Table, Cell, Row or Column.

Cell

It is possible to alter Cell properties, and to Merge or Split Cells

Rows

It is possible to alter Row properties, insert, delete and copy and paste Rows



Columns

It is possible to Delete and Insert columns into a Table

Save the Home Page

Once the changes are changed, ensure the green Save button is selected from the base of the Window.



Source code for Home Page

This can be used to copy back the Source code for the Original page in case the editing does not go to plan...

```
<div id="MainHomePageWrapper">
<div id="TextWrapper" style="float: left; width: 50%;">
<div id="DivLibraries" style="float: left; padding-right: 100px;">
<h1 id="pageTitle" class="ms-core-pageTitle"><span
id="DeltaPlaceHolderPageTitleInTitleArea">Libraries:</span></h1>
<div class="ms-displayInlineBlock ms-normalWrap"><a id="ms-pageDescriptionDiv" style="display:
none;"></a><span id="ms-pageDescriptionImage">&nbsp;</span><span id="ms-pageDescription"
class="ms-accessible"></span></div>
<div id="pageContent" class="pageContent">
<div id="ctl00_PlaceHolderMain_PageContent__ControlWrapper_RichHtmlField" class="ms-rtestate-
field" style="display: inline;">
<p>Here you can enter information like addresses, opening hours etc</p>
<p>Our Library, 1 Reading Street - Library Town</p>
<div style="float: left;">The opening hours are</div>
<div style="float: left; margin-left: 20px;">
<div>Monday to Thursday</div>
<div>Friday</div>
<div>Saturday</div>
</div>
<div style="float: left; margin-left: 20px;">
<div>9am to 7pm</div>
<div>9am to 5.30pm</div>
<div>9am to 12noon</div>
</div>
</div>
</div>
</div>
</div>
<div id="DivContacts" style="float: left; padding-right: 100px;">
```

```
<h1 id="pageTitle" class="ms-core-pageTitle"><span
id="DeltaPlaceholderPageTitleInTitleArea">Contacts:</span></h1>

<div id="ctl00_PlaceHolderMain_ctl00_ContactsDiv">

<div id="ctl00_PlaceHolderMain_ctl00_ContactsField_label" style="display: none;">Contact
Information</div>

<div id="ctl00_PlaceHolderMain_ctl00_ContactsField__ControlWrapper_RichHtmlField"
style="display: inline;">

<p>Our Main Library <br />Library Town - 3242<br /><a
href="mailto:info@ourlibrary.com">info@ourlibrary.com</a></p>

<p>Our Mobile Library<br />Library Bus - 929055<br /><a
href="mailto:info@ourlibrary.com">info@ourlibrary.com</a></p>

</div>

</div>

</div>

<div id="DivFollowUs" style="float: left;">

<h1 id="pageTitle" class="ms-core-pageTitle"><span
id="DeltaPlaceholderPageTitleInTitleArea">Follow us:</span></h1>

<a class="button2 button2-newsletter" href="http://www.ourlibrary.com/E-Newsletter.aspx"
target="_blank">Newsletter</a><br /><a class="button2 button2-facebook"
href="http://www.facebook.com/pages/OurLibrary" target="_blank">Facebook</a><br /><a
class="button2 button2-twitter" href="http://twitter.com/#!/OurLibrary"
target="_blank">Twitter</a></div>

</div>

<div id="DivImageWrapper" style="float: left; width: 43%; padding: 10px 0 20px 20px;"></div>

</div>
```