School Tasks in Amlib Manual

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OCLC Amlib Document Portal:
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OVERVIEW

This course is designed to familiarise schools with a number of commonly performed tasks and procedures.

It is a collection of guides covering such topics as managing borrower records, modifying Class descriptions, understanding loan types, setting circulation dates, updating the Calender with closed days, importing SCIS records, adding new items to the Stockitem module, modifying records using the Cataloguing worksheet, creating kits using the Master/Subsidiary function.

CHECKLIST OF TASKS FOR THE BEGINNING OF THE YEAR

☑ TASK	SCREEN	☑
Deletion of students/staff who have left – for example: Year 7s, Year 12s, Staff • Students can be Mass Deleted (Query those to be deleted, highlight the <u>List</u> and select **Table** > **MassBorrowerDelete**– those with loans, reservations or memos will remain)	**Borrower** screen > **Application**	
Changes of Class Descriptions (if applicable) • Class descriptions may need to be altered to reflect new teachers' names etc.	**Borrower** screen > **Application** > **BorrowerClasses**	
Office download to load new students (or manually change students through global changes) • Separate notes are available if necessary	**Borrower** screen > **Application** > **BorrowerImport**	
Add new staff (manually or through *Maze*)	**Borrower** screen > **Application**	
Date Changes for Global date, end of term, end of semester, end of year etc. • **Hint:** Leave enough time to follow up overdues – for example: **6/12/2008**	**Main** > **Supervisor** > **Installation** > **Circulation** tab	
Add Final Dates to Borrower Types (as applicable) • For Term Loans or Year Groups who leave earlier – for example: Yr 11s, 12s	**Borrower** screen > **Application** > **BorTypes**	
Add closed dates to calendar (Including Holidays)	**Main** > **Supervisor** > **Installation** > **Circulation** tab as well as **Calendar**	
Ensure that Backup procedures are in place and that logs of Backups are checked regularly	This is very important – contact our office if you are in doubt….	

BORROWER MAINTENANCE

A new calendar year for schools means new term times, new students, students who need deleting (some which probably still have loans or memos!).

- **Deletions:** Non-returning borrowers
- **Additions:** New students either manually or through a download from Administration (*SIS*, *Maze*, etc.)
- **Changes:** Dates, Class descriptions

Deletions

Deletion of the Students who have left

It is best to delete students who have left BEFORE adding new students. For example: in a Primary School this will be the Year 6 students. In a Secondary School, it is the year 12 students (at least those who have graduated).

The following instructions are for a Secondary School.

1. Launch the *Amlib* client

2. Go to **Main** > **Borrowers** > **Borrower** the Borrower Details screen will display:

3. In the Type field type the code – for example: **12**

4. Click the **F5 Query** button – the Borrower List table will display containing a list of the matching borrowers

5. Select the borrowers to be deleted by highlighting the rows

To highlight:

- All the borrowers: run the mouse down the left column
- Selected borrowers: press the **Ctrl** key and click with the left mouse button
- A range of borrowers: click the first borrower in the range, scroll to the the last borrower in the range, click the Shift key and click the last borrower (useful for highlighting all of a big list!)

6. From the menu, select **Table** > **Mass Borrower Deletion** – a prompt with display asking: **You are about to delete the Selected Borrowers. Do you want confirmation of delete messages?**
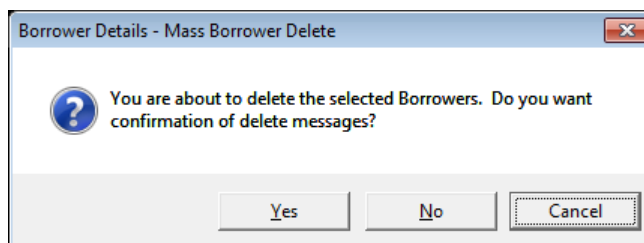
HINT: You have already highlighted the borrowers for deletion. Confirming each and every borrower to be deleted will slow down the process.

7. If you click the **No** button:

    a. All borrowers highlighted in the table will be deleted unless the borrower has loans, reservations or memos (no messages display)

    b. Once complete the following message will display: **All XX Borrowers have been deleted.**
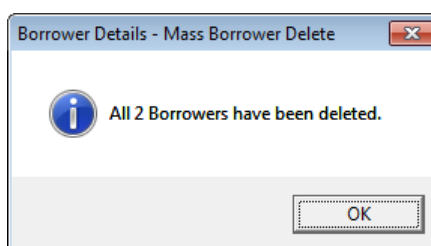
    c.   If there were borrowers that could not be deleted, then the following message will display: **Out of the XX Borrowers selected for deletion there were XX Borrowers that could not be deleted due to confirmation messages and/or Group Security issues.**
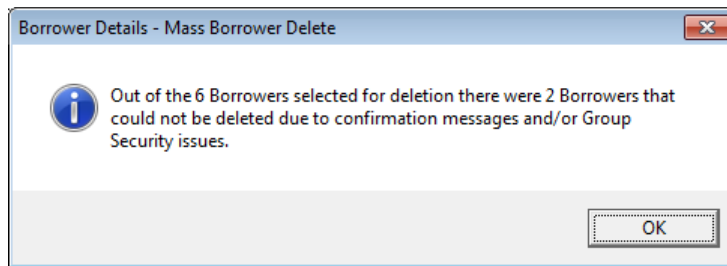
    d.   Click the **OK** button

8. If you click the **Yes** button:

    a.   Each borrower's ID will display:
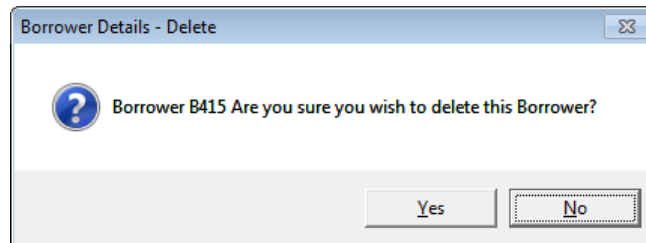
    b.   Messages will also display if the borrower cannot be deleted (for example: the borrower has loans, reservations, memos or owes money):
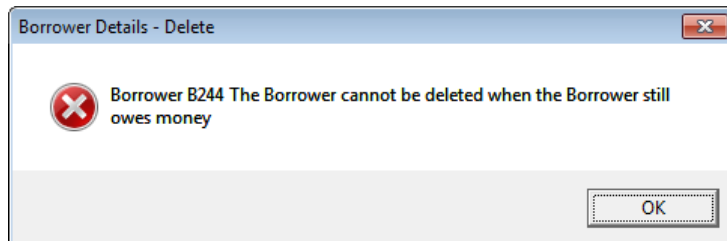
- Other Students who have left can be found and deleted by using **F4 Delete** in the <u>Borrower Details</u> screen

Please Note: Students with Loans, Reservations, Memos for fines owing will not be deleted. If a student has left with items showing on loan, if the books are unlikely to be returned, it is suggested that these items be returned from the patron and either made lost or deleted so that the student (or teacher!) can be deleted from your database.

Additions

New students need to be added. This can be done manually or automatically using a download from the Administration database. If you use separate barcodes in the library rather than the student ID, then these barcodes will need to be added to the records. This can be done by selecting the **New** Saved File created in the Import of patrons:

1. Launch the *Amlib* client

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

3. From the menu, select **File** > **DisplayFile** – the Borrower Saved Query Results screen will display

4. Select the **New** Saved File and click the **F9 Select** button – the Borrower List screen will display:

5. Double-click (or select the **<Enter>** key)on the first borrower on the list to display their record in the Borrower Details screen:

6.   For each student:

   a.   Wand in the new barcode

   b.   Click the **F3 Update** button to save the changes – a prompt will display with the following message: **The Borrower Barcode has been Changed. Continue with Update?**
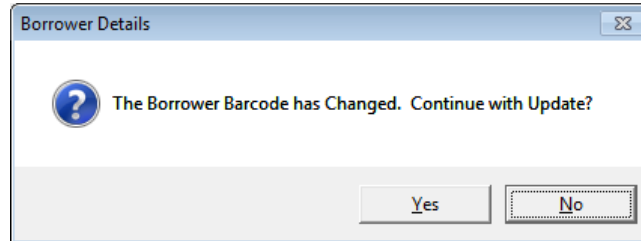
   c.   Click the Yes button – a prompt with the following message will display: **The Borrower Bar Code has been Updated.**
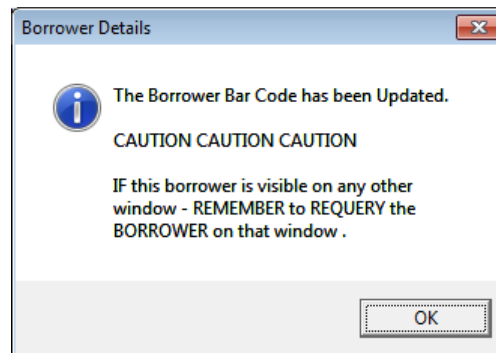
   d.   Click the **OK** button – a prompt with the following message will display: **The Borrower has been Updated.**
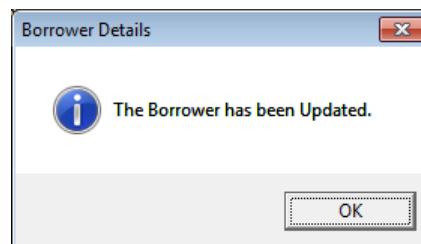
   e.   Click the **OK** button

7.   Click the **F9 button** to move to the next student in the list and repeat

8.   Continue until the class or file has been finished

Class Descriptions

Some of the Class descriptions may need to be change because of Staff, room changes, etc.

1. Launch the *Amlib* client

2. Go to **Main** > **Borrowers** > **BorrowerClasses** – the <u>Borrower Classes</u> screen will display

3. From the menu, select **File** > **DisplayFile** – the <u>Borrower Saved Query Results</u> screen will display
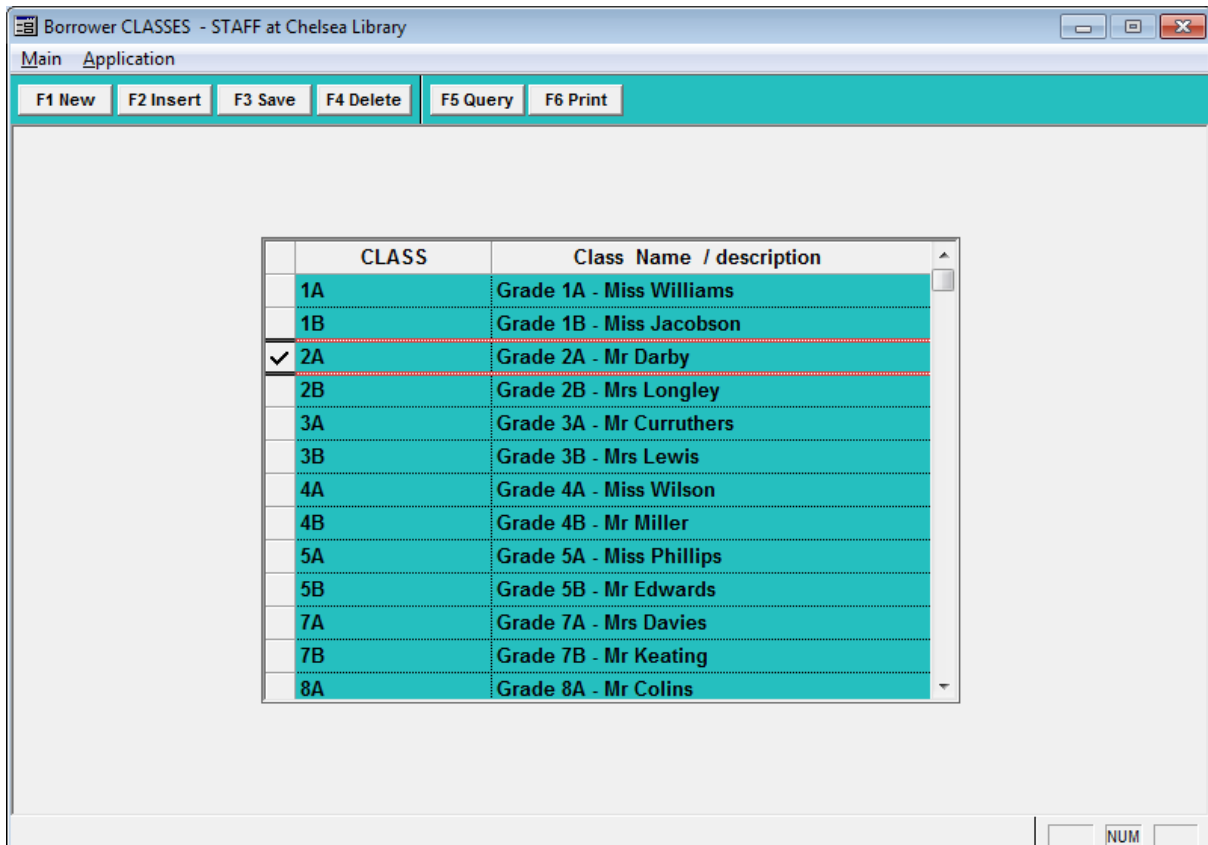
4. Make any alterations to the table

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

BORROWER IMPORT

The Borrower Import function enables sites to import borrower data from an Administration system (for example: *Cases*, *EDSAS*, *Maze*, *Synergetic*, etc) into the *Amlib* system.

This allows for:

- New borrowers, including address information, to be included in *Amlib* without having to manually enter them

- Updates of existing borrower records with new <u>Type</u>, <u>Class</u> codes, addresses etc.

This function is predominantly used by school libraries at the start of each year/semester to update their student records (or add new ones).

The program allows for the restoration of the old data if necessary.

It has a facility to "map" administrative codes to those used on your *Amlib* database. They **do not** have to be the same codes, but need to be matched to the corresponding codes so they will import correctly for each borrower record.

The data file to be imported can be copied from the administrative database onto a USB drive, CD or to a file accessible on the network. You will need to know the exact path so that you can access it during the Borrower download process (from your administrative database). Once the data file has been downloaded from the administrative database, it can be uploaded into *Amlib*.

The file sent to you should be in one of the following file formats:

- CSV (comma delimited)
- TAB delimited
- Pipe separated (|)

You can have empty fields in your import, but they must be left empty and not have the data moved across. For example: if you didn't have a Second Name or Preferred Name, you would leave two blank fields where they should be in your file:

11152	Ngo	Jessica		K5	0 KG	27/09/2001	F	KENT	a12345678	a12345678 a12345678	NSW	2137 8765 8313
11153	Alali	Yasmin		K5	1 1S	30/09/2000	F	KENT	Dr C and N	a12345678 STRATHFII	NSW	2135 9642 5229

Example format (CSV):

- **ANDERL,ANDERTON,LAURENCE,WILLIAM,LAURIE,1,RED,B1SJ,1/01/83,M,BB,MR & MRS W B ANDERSON, 5/165 KING EDWARD STREET,BAYSWATER,WA,6053,9462 1111**

If the above example left out the **RED** Group code, the data would be:

- **ANDERL,ANDERTON,LAURENCE,WILLIAM,LAURIE,1, ,B1SJ,1/01/83,M,BB,MR & MRS W B ANDERSON,5/165 KING EDWARD STREET,BAYSWATER,WA,6053,9462 1111**

Pipe (|) separated**:**

- **ANDERL|ANDERTON|LAURENCE|WILLIAM|LAURIE|1| |B1SJ |1/01/83|M|BB|MR & MRS W B ANDERSON|5/165 KING EDWARD STREET|BAYSWATER|WA|605|9462 1111**

Dates must be formatted in one of the following three ways:

- 11/12/09
- 11/12/2009
- 11 Dec 09

If there are trailing spaces in the data, the program strips these out and causes no problems with the download.

Format 1: MAZE, Synergetic, CASES, COSYCORNER

This format contains only 17-18 fields, which should be downloaded into a data file from the administrative software (for example: *MAZE*, *Synergetic*, *CASES*, *COSYCORNER*, etc.) in the sequence as shown below.

Mandatory Fields: The data must include **Borrower Shortname** (Unique ID/BarCode), **Surname** and **Type**. These cannot be left as null fields. Any unused fields should be left blank but included as null fields.

FIELD	CSV COLUMN	EXAMPLE
1. (Unique ID/BarCode) Borrower Short Name/MAZE Key	A	ANDERL
2. Surname	B	ANDERSON
3. Given	C	LAURENCE
4. Second Name (only imports initial)	D	WILLIAM
5. Preferred (overrides Borrower Given)	E	LAURIE
6. Type	F	1
7. Group	G	RED
8. Class	H	B1SJ
9. Date of Birth (or date of entry depending on what is used by the admin. database)	I	1/01/83
10. Sex	J	M
11. Location	K	BB
12. Contact name	L	MR & MRS W.B. ANDERSON
13. Contact Address Line 1	M	5/165 King Edward St
14. Contact Address Line 2	N	Bayswater
15. Contact Address Line 3	O	WA
16. Postcode	P	6053
17. Contact Phone Number	Q	9462 1111
18. Email (Optional)	R	john.smith@oclc.org

Format 3: SIS (WA Education Dept)

This format contains only 22 fields, which should be downloaded into a data file from the Administrative software (SIS) in the sequence as shown in below.

Please Note: All files must be in a standard **.CSV** format. Any unused fields should be left blank but included as null fields.

FIELD #	FIELD NAME	TYPE & SIZE	EXAMPLE
1	(Unique ID) ID/REF/BarCode	Alpha Numeric 15	1234
2	Type	Alpha Numeric 1	1 student 2 teaching staff 3 Non Teacher
3	Date of Birth	Date	12 JAN 1993
4	Sex	Alpha Numeric 1	M / F
5	Surname	Alpha Numeric 40	Smith
6	First name	Alpha Numeric 40	Jonathon
7	2nd name	Alpha Numeric 20	Peter
8	3rd name	Alpha Numeric 40	Paul
9	Preferred name	Alpha Numeric 40	John
10	Addr line 1	Alpha Numeric 40	151 Royal St
11	Addr line 2	Alpha Numeric 40	
12	Addr line 3	Alpha Numeric 40	
13	Suburb	Alpha Numeric 50	East Perth
14	State	Alpha Numeric 40	WA
15	Postcode	Alpha Numeric 10	6004
16	Phone 1	Alpha Numeric 30	9264 1111
17	Phone 2	Alpha Numeric 30	9264 1113
18	E-mail	Alpha Numeric 100	john.smith@oclc.org
19	Parent Salute	Alpha Numeric 60	Mr & Mrs Smith
20	Class	Alpha Numeric 15	Room 5
21	Group (Type)	Alpha Numeric 2	4 (K, P 12, up etc)
22	Entry Date	Date	22 SEP 1998

<u>Format 3: All Fields/EDSAS (SA Education Dept)</u>

You must have at least 19 columns, although you can go up to 25.

Mandatory Fields: Borrower Shortname(Unique ID/BarCode) and **Borrower Type**. Additionally, you *need* to have data in the Location column even if this does not come from your Admin system. If you do not store patron location against the student in your admin system, you can just put a **1** in every line of the file and match this 1 to your library location later.

Please Note: If the data file only contains **19** fields the Guardian details are copied from fields **12 – 16**. Any unused fields should be left blank but included as null fields.

FIELD	CSV COLUMN	EXAMPLE
1. (Unique ID /BarCode) Borrower Short Name	A	ANDERL or B9988
2. Surname	B	ANDERSON
3. Given Name	C	LAURENCE
4. Middle Name (only imports initial)	D	WILLIAM
5. Preferred Name (overrides Given)	E	LAURIE
6. Type	F	1
7. Group	G	RED
8. Class	H	10A
9. BirthDate	I	01/01/91
10. Sex	J	M
11. Location	K	BB
12. Address 3 Line 1 (Guardian Name)	L	MR & MRS ANDERSON
13. Address 1 Line 1	M	5/165 King Edward St
14. Address 1 Line 2	N	Bayswater
15. Address 1 Line 3	O	WA
16. P/Z Code	P	6053
17. Address 1 Tel.	Q	08 9462 1111
18. Email	R	laurie@oclc.org
19. (Other ID) Ref2	S	18846
20. Address 3 Line 2	T	8 Osborne Rd.
21. Address 3 Line 3	U	Innaloo
22. Address 3 Line 3 (merges with above)	V	WA
23. Address 3 Postcode/Zip Code	W	6017
24. Address 3 Tel.	X	08 9754 0000
25. Mobile/Cell	Y	0425 113 655

How Records Are Matched

The records will be matched in the following way:

1. <u>Unique ID/Other ID</u> – If the <u>Unique ID/Other ID</u> (BarCode/Ref2) from the file is found in Borrower, then the information for that patron will be overwritten with the data there, regardless of whether or not the name is the same. So if a student changes their surname, the new surname would come across in the import as long as the Borrower ID/Barcode is identical.

2. <u>Surname/Given Name</u> – If no matching Borrower ID/BarCode is found, the system will then do a search for any matching surnames and first names. If there is one match found, the system will overwrite that record with the data in your file.

3. <u>Date of Birth</u> – If more than one match is found for the surname and first name, the system will then try to locate the correct one using the date-of-birth. If a matching date-of-birth for that surname and first name is found, that record is updated. If the birthdates for these Borrowers are null then the Borrowers are considered duplicates (and the system creates a new record with an auto-generated **AMLIB** BarCode).

In the example below **John Goldsmith** changed his <u>Surname</u> to **Smith**. The <u>BarCode</u> in the *Amlib* borrower record was identical to the Unique Import Key (Unique ID), therefore the details were updated, showing the Borrower details with the new <u>Surname</u>.

UPD	B9999	Smith	John	D	Adult			12/06/196
UPD	B9988	Smith	Sarah	J	Adult		Mrs Harris	16/05/195
NEW	B9977	Peabody	Amy		Adult			22/09/198
NEW	B9966	Rumford	Emilia	P	Adult			10/03/197

- The Borrower Import will remove single quotes from any incoming names – for example: **O'Brien** becomes **OBrien**.

Suggested 'Pre-import' Tasks

You may wish to move all year 12 students (or year 6 students – for primary schools) into another class such as **Year 13** or **Year 7** using Mass Borrower Change. From there you can upgrade all other years and import new students. Any returning year 12 (or 6) students would be updated and moved back to class year 12 (6). All Remainder students can be dealt with as necessary.

Alternatively all students may be mass changed to a generic class via Mass Borrower Change, thus giving all students a single class. When doing then next import, all classes will be changed to the correct class. Any left with the generic class can be dealt with as necessary.

Before starting the import process, check the <u>Type</u>, <u>Group</u>, <u>Class</u> and <u>Location</u> tables in *Amlib* to ensure all required codes have been created. Check the <u>Location</u> table to ensure that the locations required have a <u>Valid for Borrower</u> setting of **Y**.
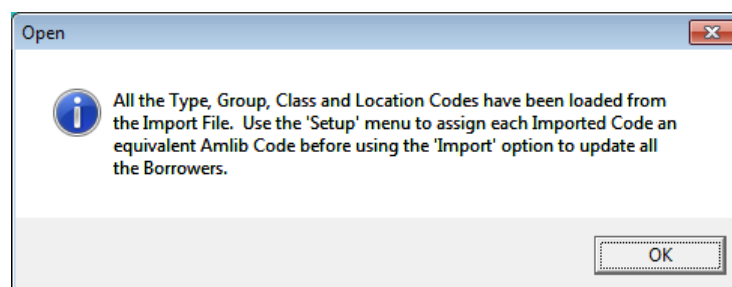
Importing Into Amlib

1. Launch the *Amlib* client

2. Go to **Main** > **Borrowers** > **BorrowerImport** – the Borrower Import screen will display:
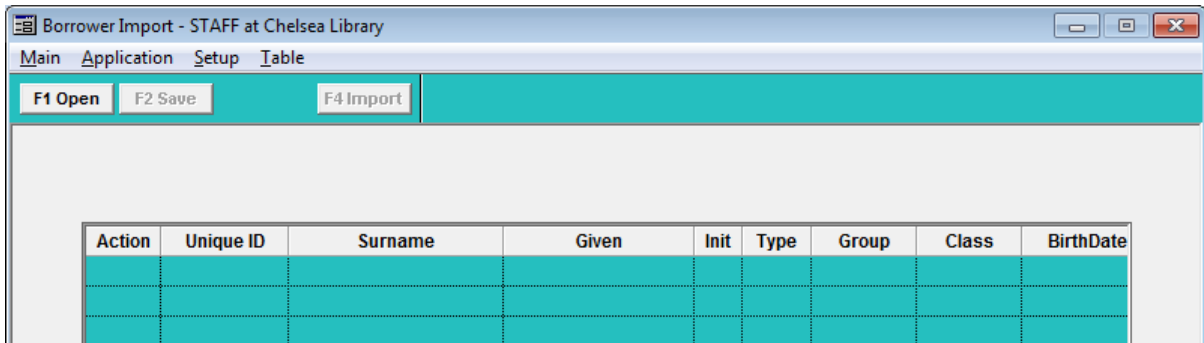
3. Click the **F1 Open** button – the Import File… screen will display:
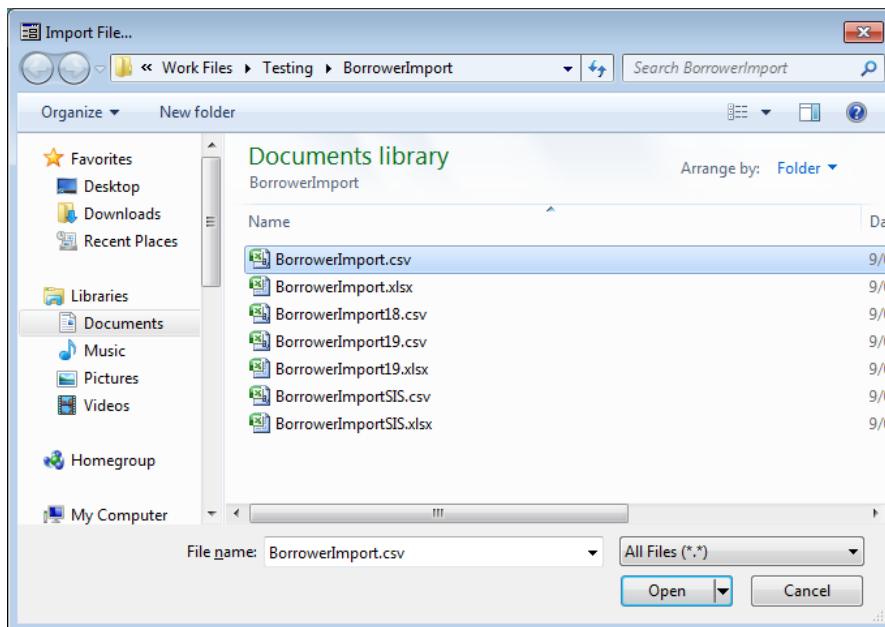
4. **Browse** to file to be uploaded, select (highlight) it and click on the **Open** button

5. Your data will appear in the Borrower Import screen and a prompt will display with the following message: **All the Type, Group, Class and Location Codes have been loaded from the Import File. Use the 'Setup' menu to assign each Imported Code an equivalent Amlib Code before using the 'Import' option to update all the Borrowers.**
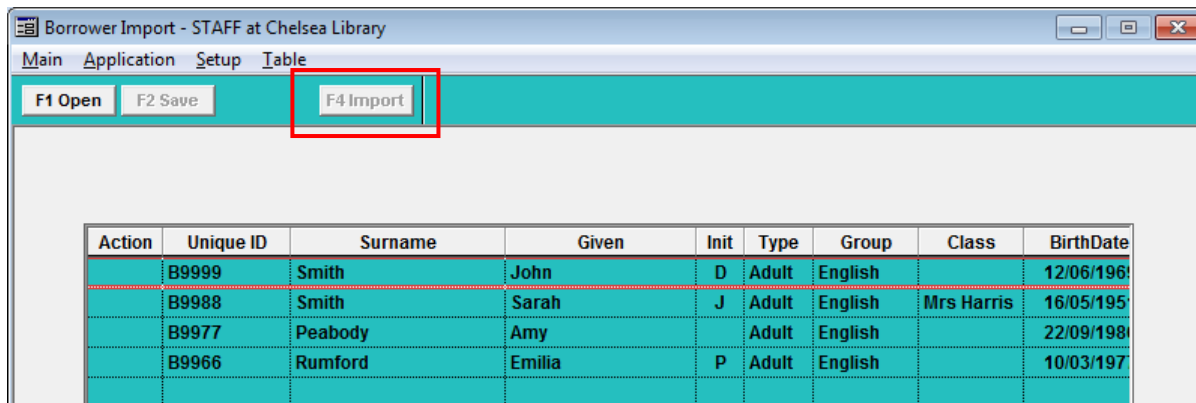
The data read from the Borrower Import File can be sorted or have the actions calculated prior to importing the data into *Amlib*.

6. To sort: From the menu, select **Sort By** > and select the sort field – the data can be sorted by **Surname**, **Given** name, Borrower **Type**, **Group** or **Class**.
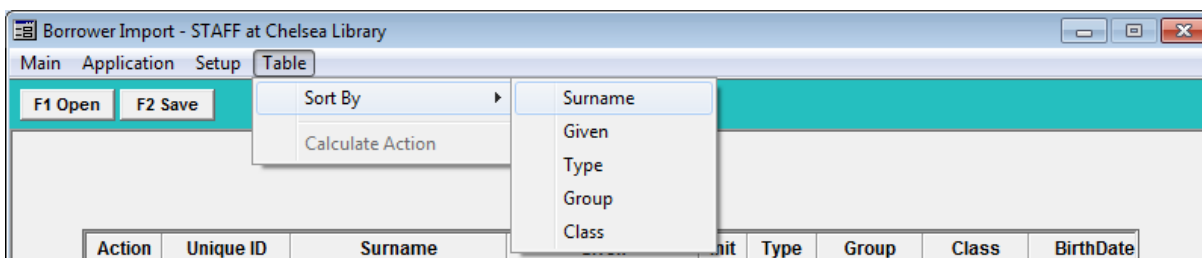
7. The calculate action option (**Table** > **Calculate Action**) will read the import data and state whether each student import will be **UPD**ated, **NEW** or a **DUP**licated student record
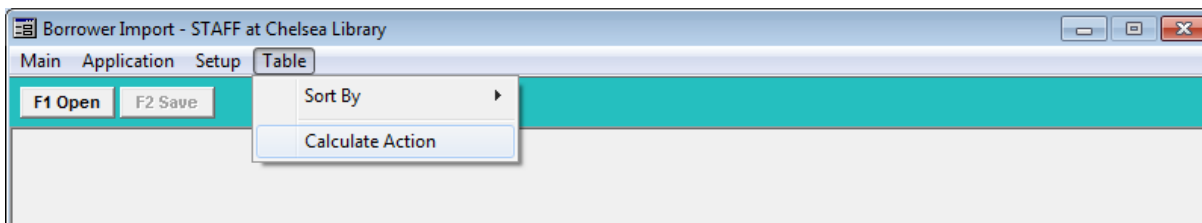

8. If the **F4 Import** button is *greyed* out, it indicates the mapping between the imported codes needs to be setup (or adjusted) to match the codes used within *Amlib*. If it's is bolded, the skip ahead to step 13

9. From the menu, select **Setup** and then select one of the following Borrower fields: **Types**, **Groups**, **Classes** or **Locations** – in the example below, we have selected **Types**:
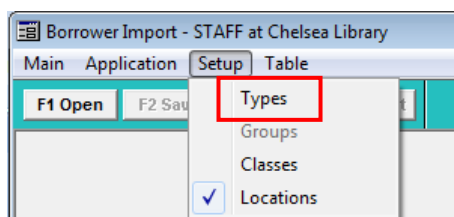
Please Note: If a selection is *greyed* out, this indicates there are no codes requiring mapping for that field. Once a field has been successfully mapped a **bolded tick** will appear at the front of the selection.

10. A <u>Setup</u> screen will display with two columns: The <u>Imported Type</u> and the <u>Amlib Type</u>. The <u>Imported Type</u> will be the data located in your **Borrower Type** column (Field 6/CSV column F) of your import file. The <u>Amlib Type</u> will be the codes located in the **Main** > **Borrowers** > **BorrowerTypes** screen.
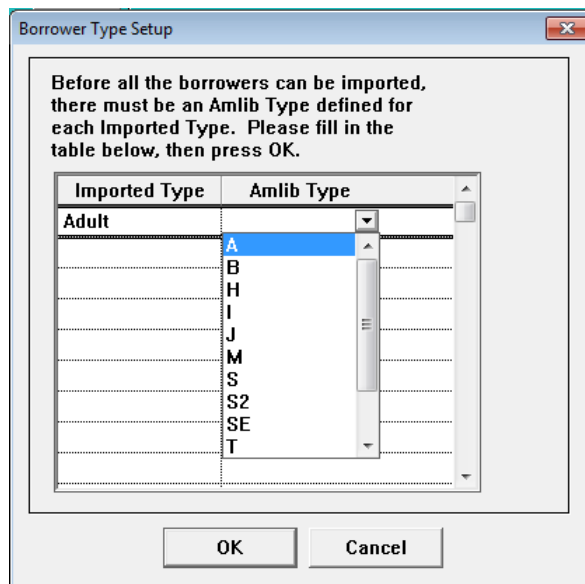
11. For each <u>Imported Type</u>, use the <u>Amlib Type</u> drop-down to select a **Borrower Type** you would like to match (map) it against

    Please Note: It is possible to map more than one <u>Imported Type</u> to the same <u>Amlib Type</u>.

12. You will need to do this for all the **bolded** selections in the **Setup** menu – when you have finished all the fields, they will all have a **bolded tick** next to them and the **F4 Import** button will then be active (**bolded**):
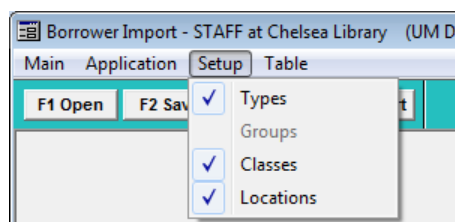

13. Click the **F4 Import** button – the <u>Borrower Import Files</u> screen will display – this screen allows you to create files to save **New**, **Updated** and **Duplicate** borrowers to. It also allows you to **Overwrite Given name(s) and initial(s)** and to **Use (their) Date of Birth for unique checking**.
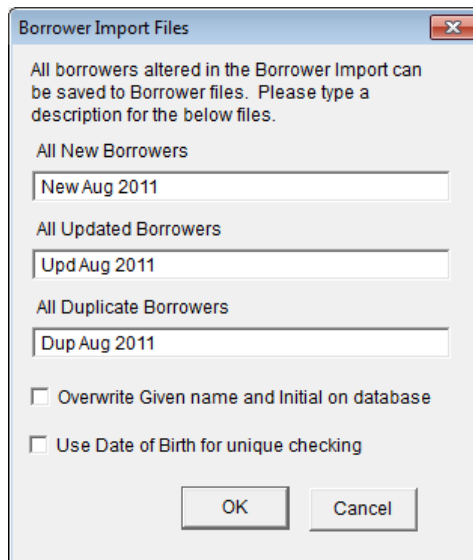
14. Type in the filenames, and **tick** the settings you would like to use, then click the **OK** button – a prompt will display asking if you wish to save any changed borrowers to a file for recovery purposes: **It is recommended that all changed Borrowers be written to a text file for recovery purposes. Do you want to save changed Borrowers to a file?**
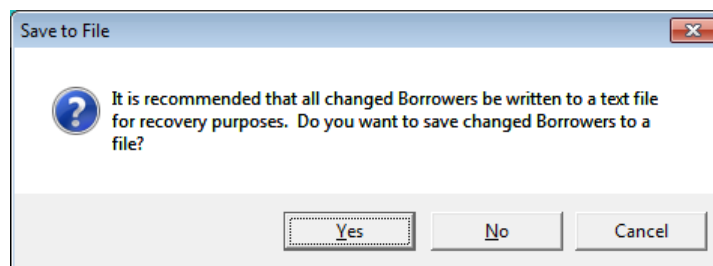

WARNING! This is your insurance for your borrower data and is thoroughly recommended!!

15. If you click the **Yes** button, a dialog box will display so that you can choose the file name for your original data and where to save it
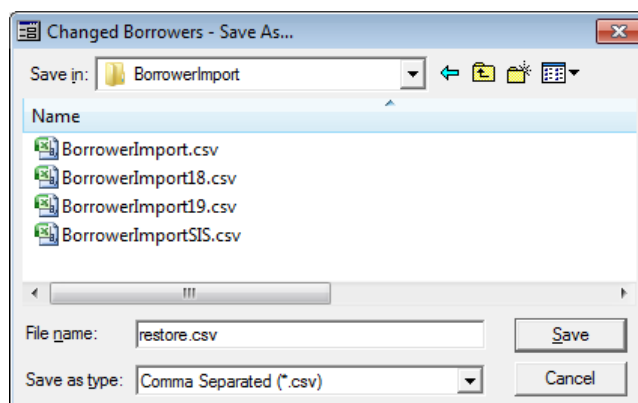
Please Note: In subsequent downloads, the **restore.txt** or **restore.csv** file will already exist and a message will display asking if you wish to overwrite this file. You would normally respond **Yes** to overwrite the file.

16. Once complete, a prompt will display notifying you that: **The Borrower Import is complete.**
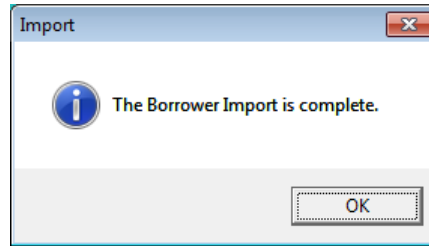
Please Note: The import process can take several minutes (for example: 1-3 seconds per borrower). The status of the import displays at the bottom of the screen.

17. If borrowers with duplicate Borrower IDs are imported, then you will receive notification of this as part of the completion notice: **The Borrower Import is complete. Some Duplicate Borrower ID's were detected – these Borrowers have been saved to the 'Duplicate ID' saved file.**
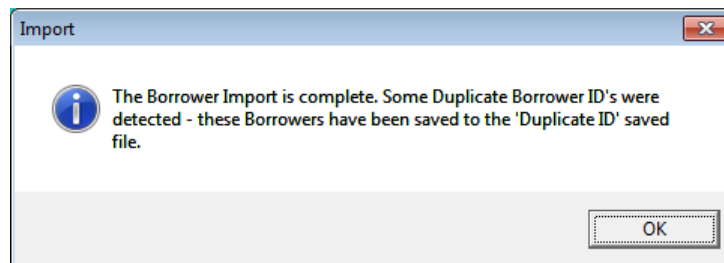
File Checking

1. An *Amlib* **Unique ID (BarCode)** was created for the borrower who had the same ID as someone else (**AMLIB0000...**):
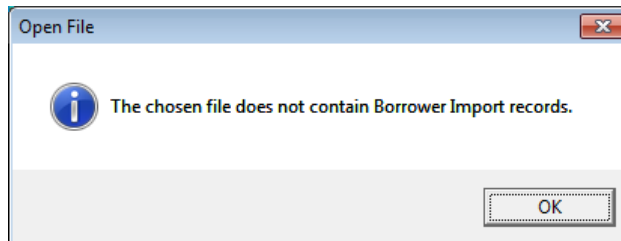

2. If you go into the main *Borrower* screen (**Main** > **Borrowers** > **Borrower**) and go to **File** > **DisplayFile** you will see your three files for new, updated and duplicate borrowers, and a file for any duplicate IDs if your import had any

Common Errors

- **The chosen file does not contain Borrower Import records.**

This could be caused by either having the information in the correct columns or having headings across the top of your document. Remove any headings and double check your file against the Import formats in this document.

- **The chosen file does not contain valid records.**
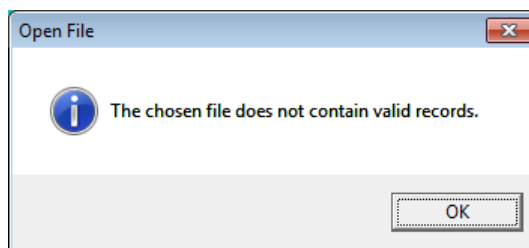
This could be caused by having headings across the top of your import file or it being saved in an incorrect format (for example: **.xlsx** and not **.csv**). Please remove any headings, ensuring that it only contains Borrower information and make sure it is in one of the three formats mentioned at the beginning of this document.

Please Note: It is always a good idea to run a Borrower Import on your test databases first, to ensure no errors happen. If you do not have a test databases, please contact Support via one of the above methods to find out how to set one up.

Borrower Import Matching

The following explains the exact method in which *Amlib* matches on borrower imported records:

1. Uses the *Unique ID* to **match** on Borrower <u>BarCode</u>
2. If *no matches* then uses the *Unique ID* to **match** on Borrower <u>Ref2</u>
3. If a *Preferred Name* has been Supplied:
    *   Matches on **Surname** and **Preferred** EXACTLY
4. If 2, *matches* on **Surname** and **Preferred** EXACTLY
5. If *Date-of-Birth* Supplied:
    *   **Searches** on **Surname**, **Preferred** and **Date-of-Birth**
6. If *no matches* and an **Initial** has been supplied:
    *   **Matches** on **Surname**, **Preferred** and **Initial**
7. If *no matches* and an **Initial** has NOT been supplied:
    *   **Matches** on **Surname**, **Preferred** and NULL **Initial**
8. If **no** *Date-of-Birth* Supplied:
9. If *no matches* and an **Initial** has been supplied
    *   *Matches* on **Surname**, **Preferred** and **Initial**
10. If *no matches* and an **Initial** has NOT been supplied
    *   *Matches* on **Surname**, **Preferred** and NULL Initial
11. If *no matches* on **Surname** and **Preferred** EXACTLY
    *   *Searches* on **Surname** EXACTLY and LIKE **Preferred** (for example: Preferred%)
12. If *no matches* then *matches* on **Surname** and **Given** EXACTLY
13. If 2, *matches* on **Surname** and **Given** EXACTLY
14. If *Date-of-Birth* Supplied:
    *   *Searches* on **Surname**, **Given** and **Date-of-Birth**
15. If *no matches* and an **Initial** has been supplied:
    *   *Matches* on **Surname**, **Given** and **Initial**
16. If *no matches* and an **Initial** has NOT been supplied
    *   *Matches* on **Surname**, **Given** and NULL **Initial**
17. If **no** *Date-of Birth* Supplied:
18. If **no matches** and an **Initial** has been supplied:
    *   *Matches* on **Surname**, **Given** and **Initial**
19. If no matches and an **Initial** has NOT been supplied:
    *   *Matches* on **Surname**, Given and NULL Initial
20. If no matches on **Surname** and **Given** EXACTLY
    *   *Searches* on **Surname** EXACTLY and LIKE **Given** (for example: Given Name)

BORROWER PICTURE IMPORT

The *Borrower Picture Import* utility allows the library to bulk import patron photographs from a file, usually provided by the student photographer.

Some important factors to ensure a successful import are:

1. Files may be either **.jpg** or **.gif** format only

2. All individual student photo files should be located within a ***single folder*** (if the photos are separated out into year level folders, then the import will need to be run for each year level)
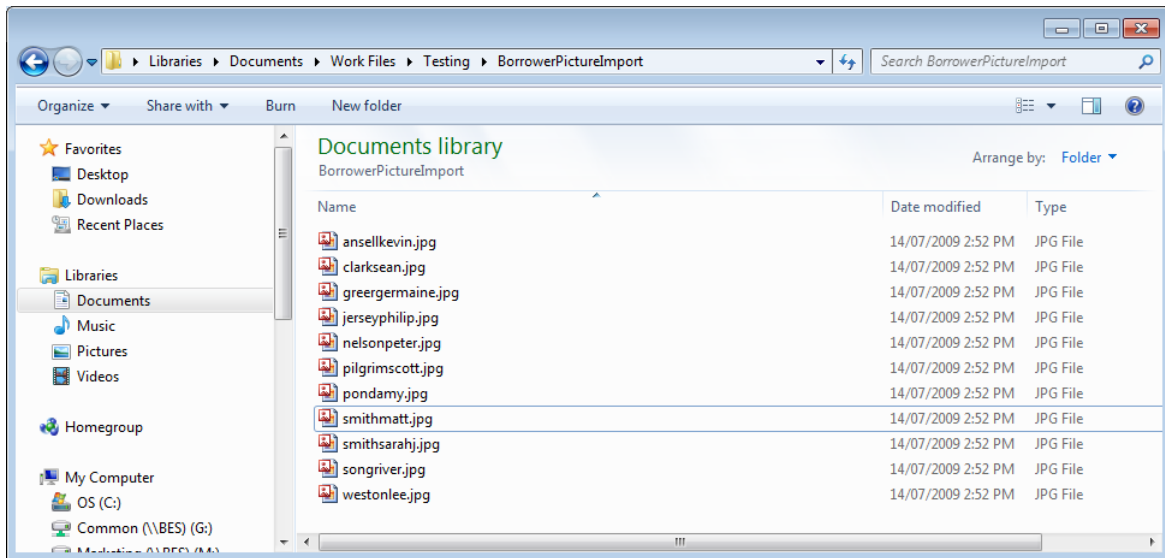
3. Image files must be named using the following conventions only (this is required for matching purposes):

   - Surname followed Given Name –for example: **smithsarah.jpg** or **smithsarah.gif** (if a middle initial is required to correctly identify multiple patrons with the same name it must be in the format *SurnameFirstnameInitial* – for example: **smithsarahj.jpg or smithsarahj.gif**)

   - Patron *barcode*– for example: **B37865.jpg** or **B9988.gif** and these must match the exact BarCode found in the *Amlib Borrower* screen

   - Exact data found in either the Ref1 or Ref2 field of the *Amlib Borrower* screen – for example: **R45787** or **S37586**

Set Up the Shared Image Directory

Ensure that there is a shared **Image** directory created on the *Amlib* server for the images to be saved into as part of the import process. For example: **\\libraryserver\Images.** The path will depend on the shared directory created but generally should be in the format of **\\ServerName\Images**.

Ensure that the Images directory exists in the relevant path and that this directory is able to be shared so that all computers on the network are able to see the pictures.

Setting up the Supervisor Parameters

1. Go to **Main** > **Supervisor** > **Installation** – the Installation screen will display

2. Click on the **Other** tab

3. Scroll down to the setting Location's Picture Directory and enter the directory file path: \\libraryserver\Images (being the file path determined above) – for example: **\amlib\mmedia\images**

4.   Click the **F3 Save** button

The parameter which sets the file types (**gifs** or **jpgs**) of the pictures is required next:

5.   Click on the **Borrower** tab

6.   Scroll down to the setting <u>Borrower images to be kept in files enter (eg .jpg or .gif)</u> and enter either **.jpg** or **.gif** depending on the type of files you are going to load
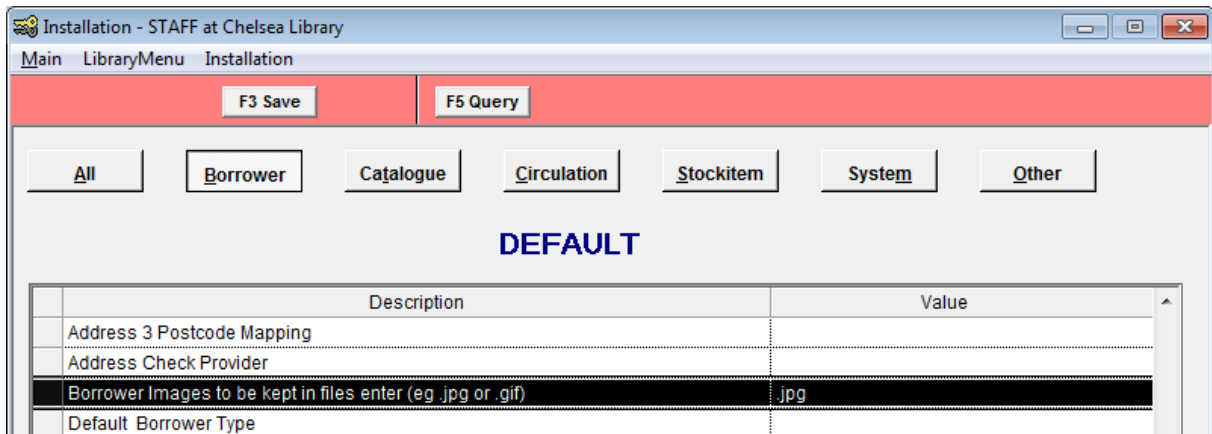

Both of these settings must then be copied to *all locations*:

7.   From the menu, select **Installation** > **Advanced Copy** – the <u>Advanced Parameter Copy</u> screen will display:
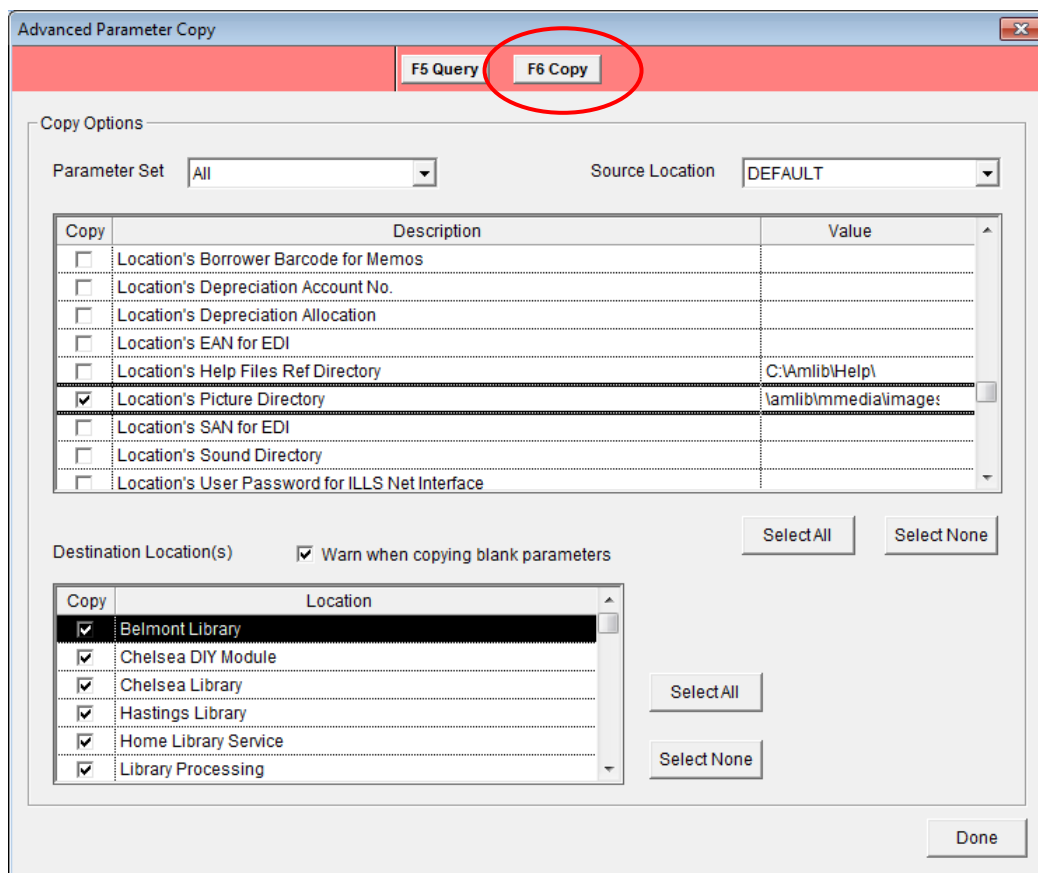
8. In the first box scroll to the setting <u>Borrower images to be kept in files enter (eg .jpg or .gif)</u> and tick this box and then scroll further down to <u>Location's Picture Directory</u> and tick the box beside it (this selects both parameters for copying to the other locations)

9. In the table below are the other locations: choose the **Select All** button next to this table to automatically tick all of the other locations

10. At the top of the screen click the **F6 Copy** button – a prompt with the following message will display: **The parameters have been copied.**
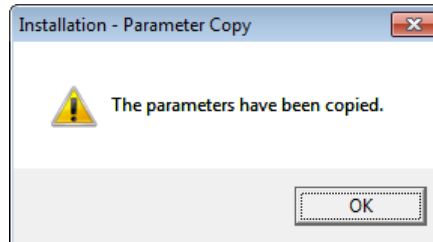
11. Click the **OK** button

12. Click the **Done** button in the bottom right-hand corner of the screen

13. Exit and restart the *Amlib* client for these settings to take effect

Running the Borrower Picture Import

1. Navigate to **Main** > **Borrowers** > **BorrowerPictureImport** – the <u>Borrower Picture Import</u> screen will display

2. This screen is broken up into 6 steps:

   a. (1) <u>Source Directory of Pictures:</u> select the **Browse** button and use the drop-down arrow to browse to where the image files are currently stored, whether this is on a drive, USB or CD-ROM – browse to the file folder, highlight any one file from the folder and click the **Open** button
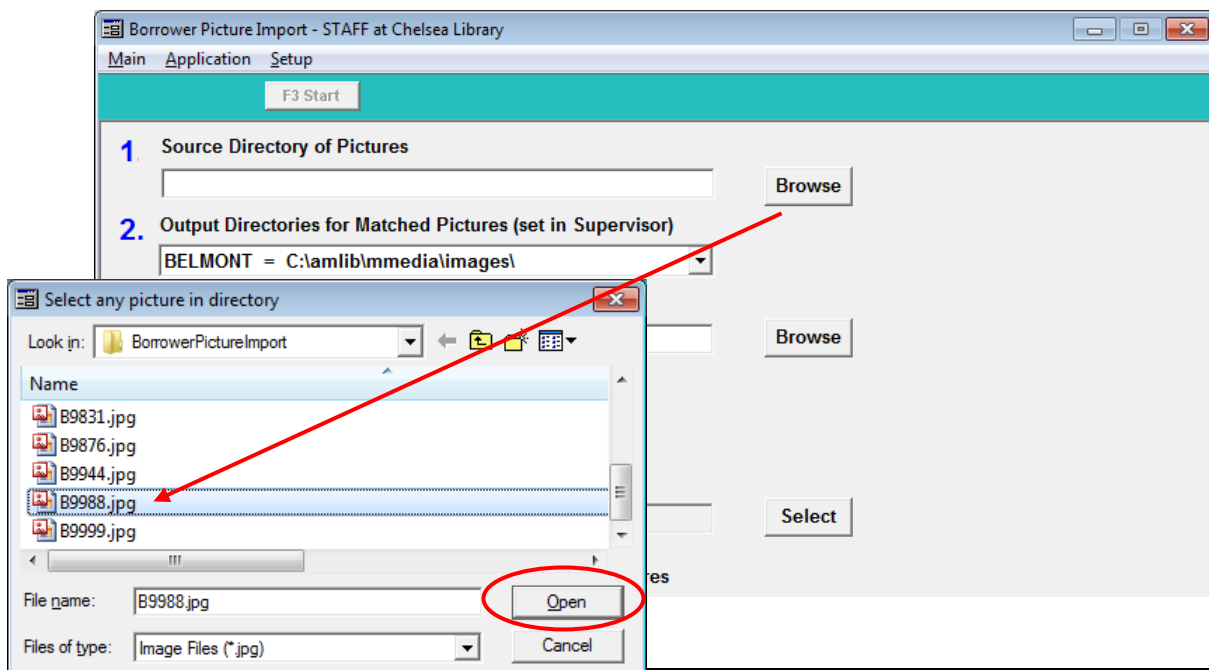
b. (2) <u>Output Directories for Matched Pictures (se in Supervisor)</u>: have previously been set in the Supervisor module (see above), so no changes need to be made here:
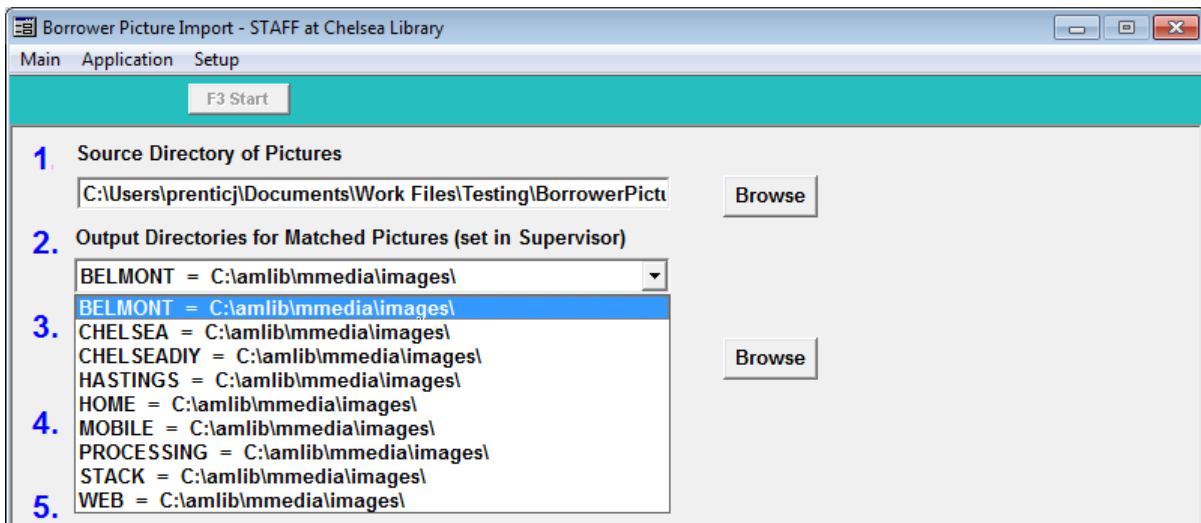
c. (3) <u>Output directory for Non Matched Pictures</u>: allows you to create a folder to save any photos that are not matched to patrons during the import process –**Browse** to a location where you would like to save these files, **Make a New Folder** if necessary and click the **OK** button when you have chosen a folder:
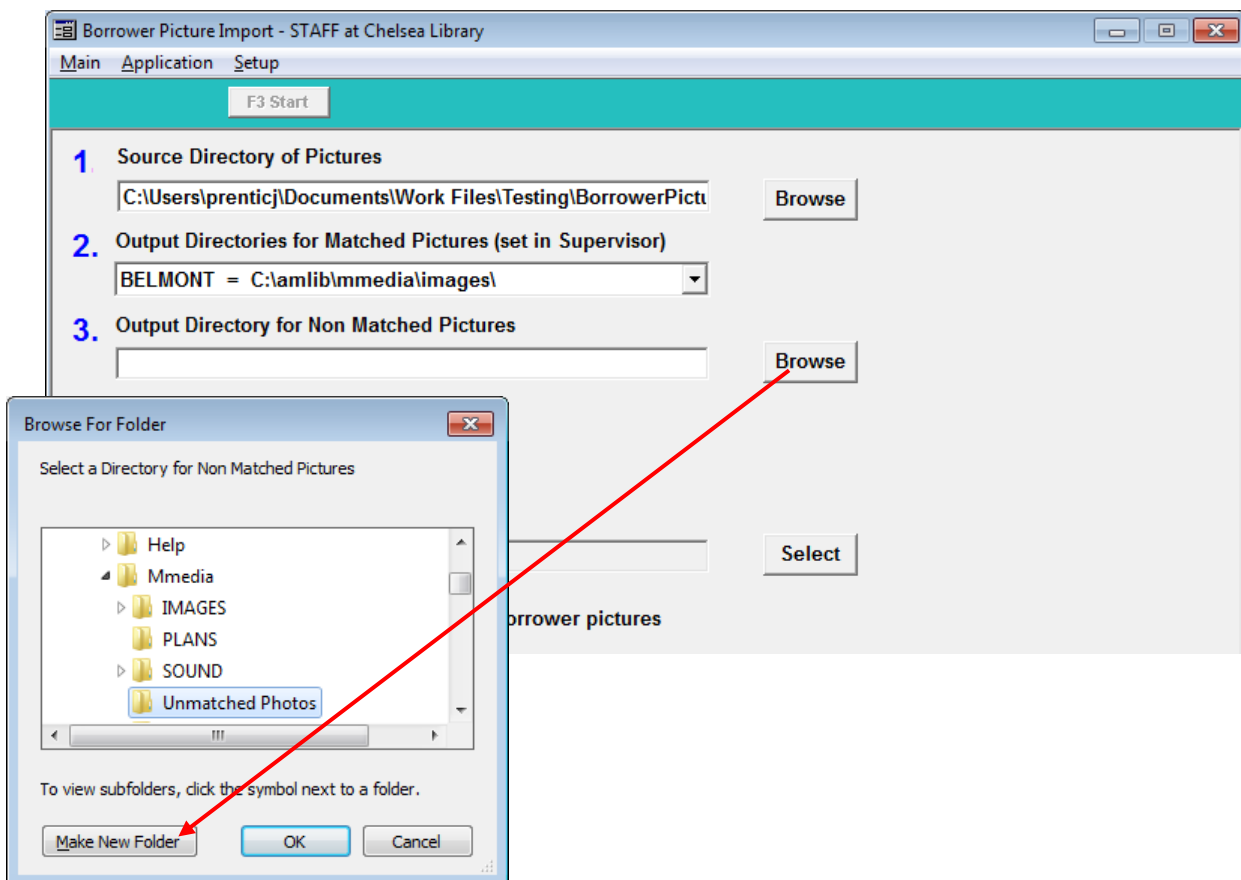
d. (4) Match picture filename on: from the drop-down choose what you intend to match against – this is wholly dependent on how your images files are named – for example: **Barcode**, **Name**, or data in **Ref1** or **Ref2**:

e. (5) <u>Saved file for matched borrowers</u>: create a file into which saved all patrons that are matched with a photo can be saved – choose the **Select** button to bring up the <u>Borrower Saved Query Results</u> screen, highlight a list (or click **F1 New**, enter <u>Details</u> and click **F3 Save**) and then click the **F9 Select** button to insert that file into the <u>Borrower Picture Import</u> screen

f. (6) When all of the necessary data has been entered, the **F3 Start** button will become bold

3. Click the **F3 Start** button to begin the import

4. When the import is complete – the a prompt will display indicating the number of **Pictures matched** – for example: **Pictures matched = 11 of 11**
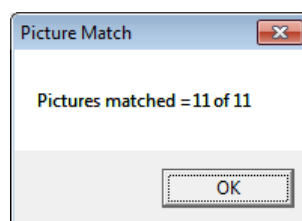
5. Click the **OK** button

6. Close the <u>Borrower Picture Import</u> screen and search for a patron in the *Borrower* or *Issues* module to see the matched displayed image:

MASS BORROWER CHANGE

Most school libraries use their Administration data to update patrons for the new Student year. If this is **not** available, it is possible to globally change students to their new classes or groups, as shown below.

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

1. Launch the *Amlib* client

2. Go to **Main** > **Borrowers** > **BorrowerWhere** – the <u>Borrower Where</u> screen will display

3. Create a Where clause – for example: <u>Group</u> = **CHI** (this will search for all Borrowers who are in that particular group)

    a. Highlight the field to search on: **Group**

    b. Choose <u>Operator</u>: **=**

    c. Enter the <u>Where</u> condition, or the exact data you want to find – for example: **CHI**

    d. Click the **Paste** button to insert the clause into the table

4. Click on the **F7 QtoFile** button – the <u>Borrower Saved Query Results</u> screen will now display:

5. Click on the **F1 New** button to create a new Saved File

6. Type in a name for the file in the <u>Details</u> column – for example: **Groups to Change**

7. Click on **F3 Save** button

8. Highlight the new Saved File and click on the **F9 Select** button to save results to this file

9. A prompt will display noting the number of borrowers contained in the file
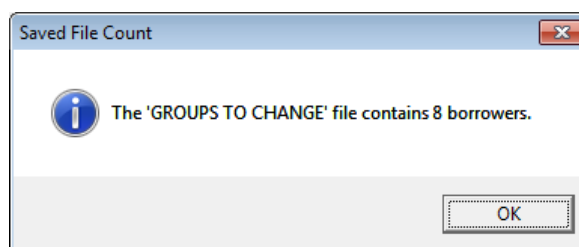
10. Click the **OK** button

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

12. Select **File** > DisplayFile – the <u>Borrower Saved Query Results</u> file screen will display
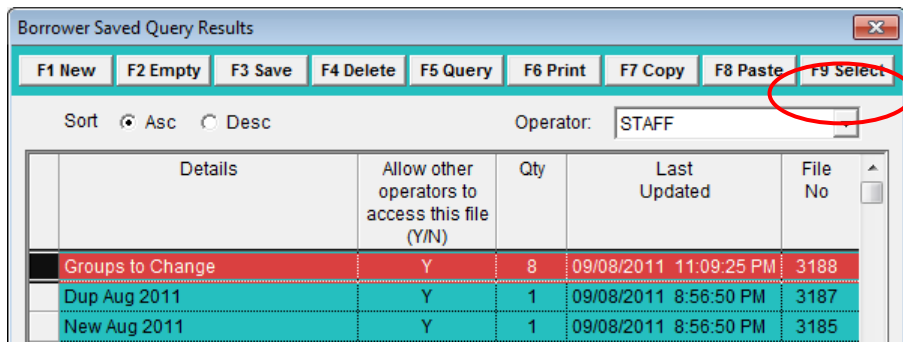
13. Highlight the required Saved File and click on the **F9 Select** button to display the file

14. From the Borrowers List screen, select **Table** > **Mass Borrower Change**
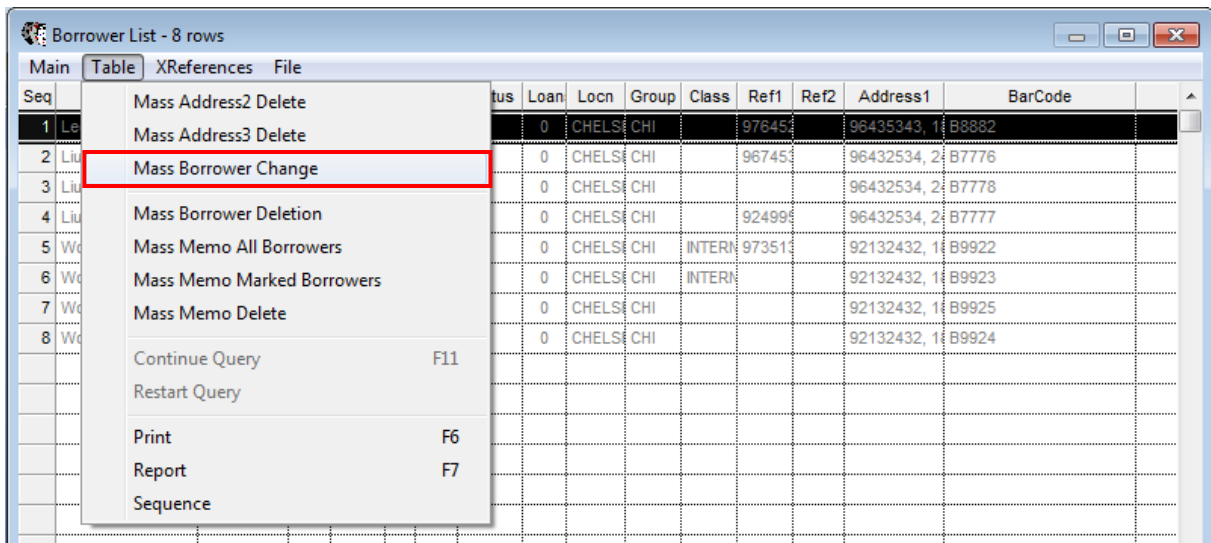
6. The Mass Change of Borrowers within a File screen will display:
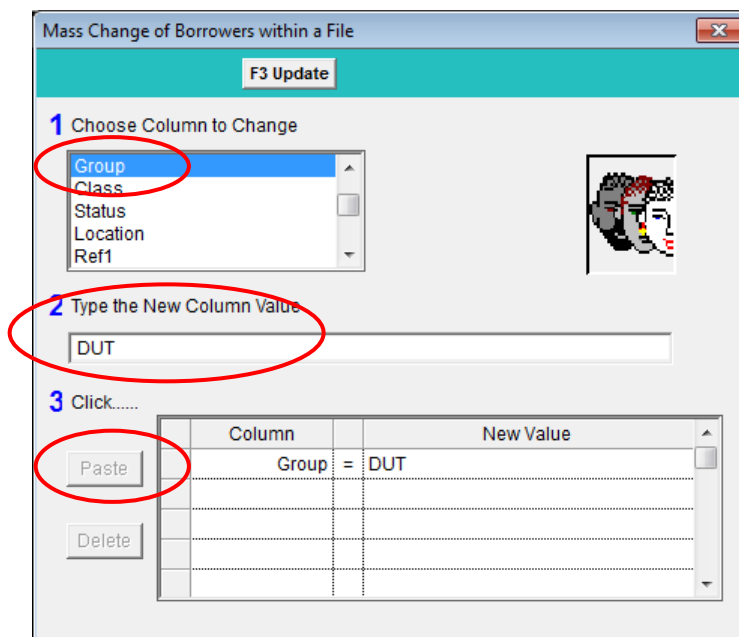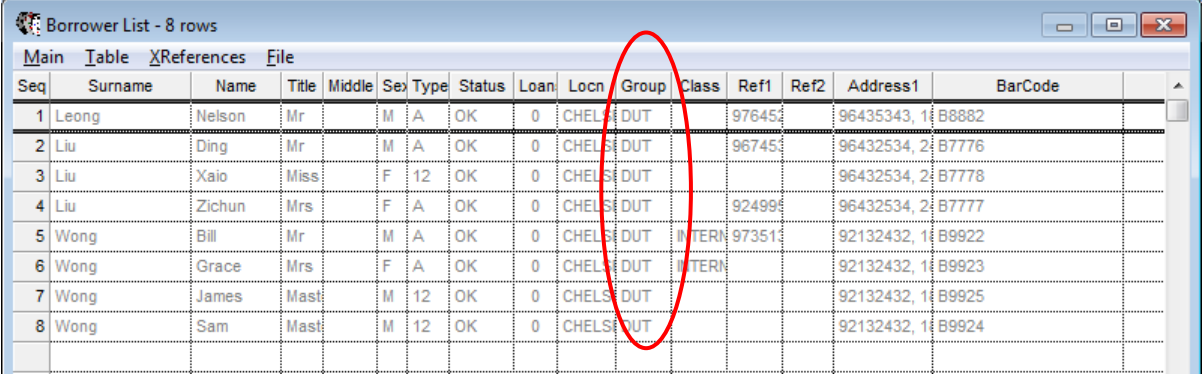
7. Enter the following settings:

a) Select the field you wish to change for all stockitems in the file example - **Group**

b) Type in the new value example, which is what you are changing all stockitems to be – for example: **DUT**

c) Click on the **Paste** button to insert the new criteria into the bottom table

d) Click on the **F3 Update** button to start the mass change

15. This will change all the Borrower Groups in this file so that they are now Dutch

HOW TO CREATE A BORROWER BARCODE LIST

Amlib has the facility to print lists of barcodes:

- Install the barcode font – see attached ZIP file

- Use the **&BARCODG.QRP** (list of barcodes: Name and Group) or **&BARCODE.QRP** (list of barcodes: Name only)

Install Barcode Fonts

1. Unzip the attached **Barcode Fonts.zip** file

2. Create a folder named **Barcode Fonts**

3. Copy the **Barcode Fonts** folder into your *Amlib* folder on the **C:** drive or network server

4. On your PC:

   a. Go to **Start** > **Control Panel** > **Fonts**

   b. From the <u>File</u> menu, select **Install New Font...**

   c. Find the <u>Amlib</u> folder and double-click the **Barcode Fonts** folder
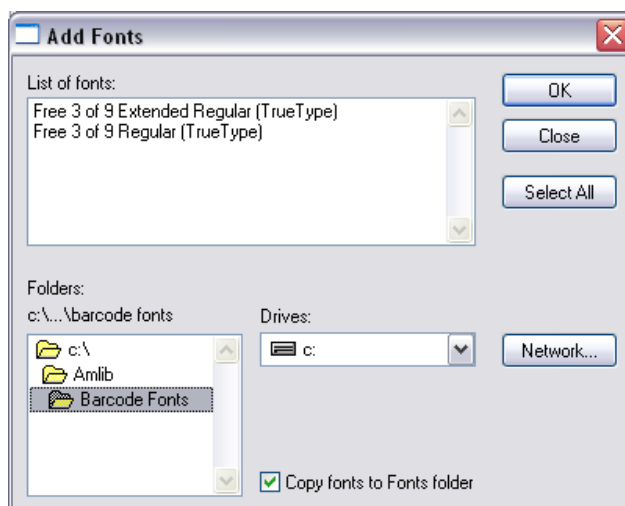
   d. Choose **Select All** to select both font files

   e. Click the **OK** button

The fonts will then be loaded.

Save the Template

- Save both the **&BARCODE.QRP** and **&BARCODG.QRP** templates into the **Amlib/Reports** folder on the *Amlib* server. This will make the template available for use for all users. Alternatively, you may save it into a local folder on your PC – but please be aware, that the template (once loaded) will only be available for use on that PC.

Load the Template

1. Launch the *Amlib* client

2. Go to **Main** > **Reports** > **RepAddNew** – the Report Files screen will display

3. Select **Borrower** from the Report Entity drop-down menu

4. Click the **F1 New** button – the Borrower - New Report File screen will display
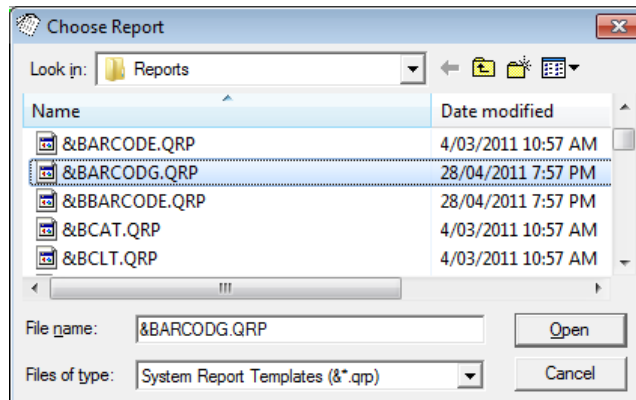
5. Type in a Description – for example: **Barcodes by Group**

6. Click on the **Browse** button – the Choose Report screen will display:

7. Change the Files of Type: dropdown to **System Report Templates (&*.qrp)**

8. Navigate to the **Amlib/Reports** folder on your *Amlib* server and locate the **&BARCODG.QRP** template to be loaded (if the template has been loaded onto your PC – then navigate to the local folder)

9. Click the **Open** button

10. Choose Type = **Borrower (Default)**

11. You can leave Default Stats Code and Default Detail Stats Code blank

12. Update Entity (Y/N) = **N**

13. Click the **F3 Update** button

14. Repeat steps 5 - 14 to add in **&BARCODE.QRP** – **Barcodes by Name**

15. Close out of the <u>Report Files</u> screen

Create the Report

1. Go to **Main** > **Reports** > **RepBorrower** – the <u>Borrower Reports</u> screen will display

2. Click the **F1 New** button

3. Select the Barcode by Name (**&BARCODE.QRP**) or Barcode by Group (**&BARCODG.QRP**) – you will need to load separately

4. Type in a <u>Report Description</u> – for example: **Barcodes for Students**

5. Click the **F3 Save** button
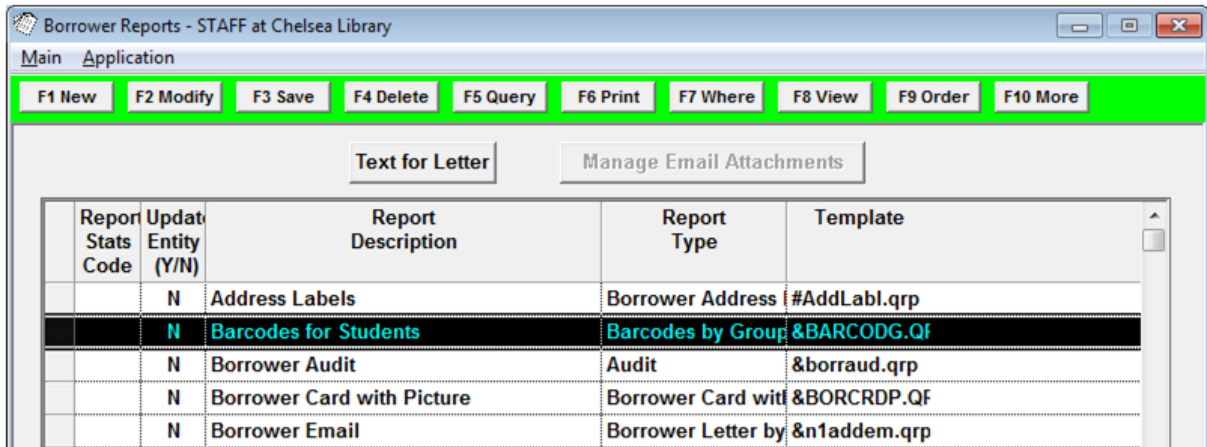
6. Click the **F7 Where** button – the <u>Borrower Reports – Where</u> screen will display

   a. Add in search criteria for **BorGroup**, **BorClass** and/or **BorType** (or whatever you wish to choose)

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

7. Click the **F9 Order** button – the Borrower Reports – Order By screen will display

   a. Use the arrow keys to add your sort by fields (for example: **BorGroup** and **Surname**)

   b. Click the **F3 Save** button when complete
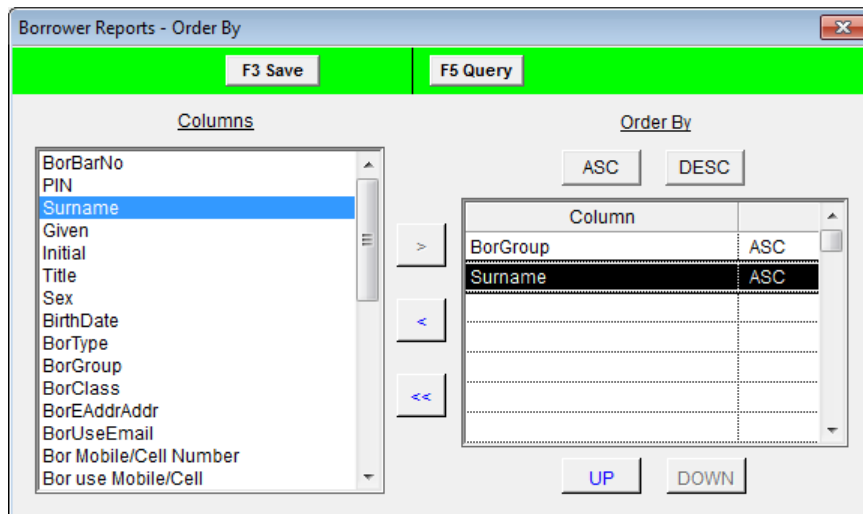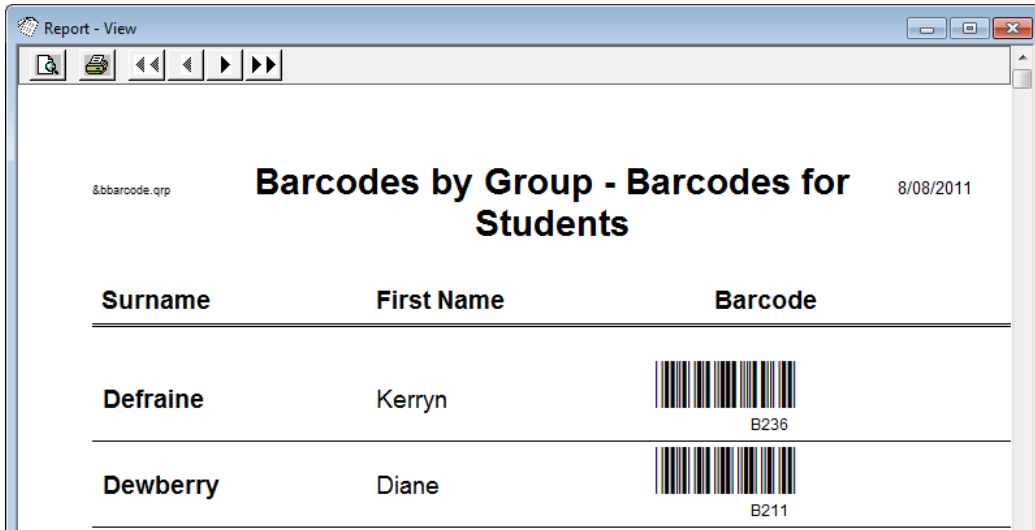
8. Click the **F8 View** button – a prompt with the following message will display: **This type of report may use a Saved File as a Source. Do you want to select the file now?**
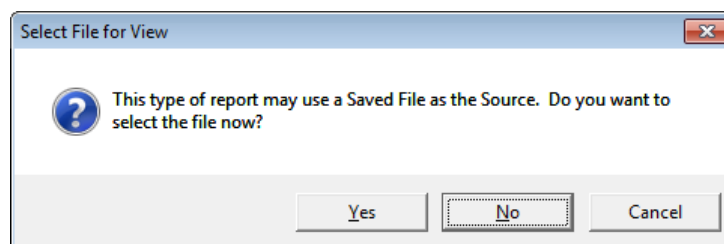
9. If you had previously entered no **F7 Where** parameters, you may wish to click the **Yes** button and select a Saved File from the list, otherwise click the **No** button

10. The Report – View screen will display:

11. You can **print** from this screen by choosing the printer icon at the top of the screen

START OF YEAR DATES

There are two sets of dates that require adjusting at the start of the year/semester/term: the *Supervisor* Installation settings and the Borrower Type settings.

Supervisor Settings

Default

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **Installation** – the Installation (**DEFAULT**) screen will display

3. Select the **Circulation** tab

4. Adjust the following settings:

    a. All items must be returned by the following date:

    b. All Semester loans are due back on the following date:

    c. All Term loans are due back on the following date:

    d. All Year loans are due back on the following date:

5. Dates must be entered in **DD/MM/YYYY** format – for example: **15/12/2011**

6. Click the **F3 Save** button

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

Location

It is also possible to adjust these settings by individual Location, allowing for a different set of dates to be entered. It is very important to check your other locations to make sure that old dates are not saved in there.

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

2. Select a location (for example: **Chelsea Library**) and click the **OK** button

3. The Installation screen for that location will then display – for example: **Chelsea Library**

4. Select the **Circulation** tab

5. If you would like to use the DEFAULT settings, then you can leave the date settings in this table blank, otherwise adjust the following settings (these settings will apply only to that location):

    a. All items must be returned by the following date:

    b. All Semester loans are due back on the following date:

    c. All Term loans are due back on the following date:

    d. All Year loans are due back on the following date:

6. Dates must be entered in **DD/MM/YYYY** format – for example: **15/12/2011**

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

8. Repeat for all other circulating locations (including WEB – the location used by the *NetOpacs*)

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

Borrower Settings

1. Launch the *Amlib* client

2. Go to **Main** > **Borrowers** > **BrorrowerTypes** – the Borrower Types screen will display:

For each borrower type it is possible to enter a Return By Date that overrides the *Supervisor* Date settings and allows for return dates to be set earlier (if the Return By Date is set after the *Supervisor* Date settings, then these *Supervisor* Dates will be the cut off point for returns).

3. Enter a date in **DD/MM/YYYY** format in the Return By Date field of a selected borrower Type – for example: **15/11/2011**

4. Repeat for any borrower Type where the Return By Date is required to be different

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

6. Exit the Borrower module (**Ctrl-L**) for these settings to take effect

DAYS CLOSED/HOLIDAYS (INSTALLATION & CALENDAR)

Days Closed

If the Libraries at all campuses are closed on common days (for example: weekends) it is possible to set these days closed in the *Supervisor* module:

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **Installation** – the Installation (**DEFAULT**) screen will display

3. Select the **Circulation** tab
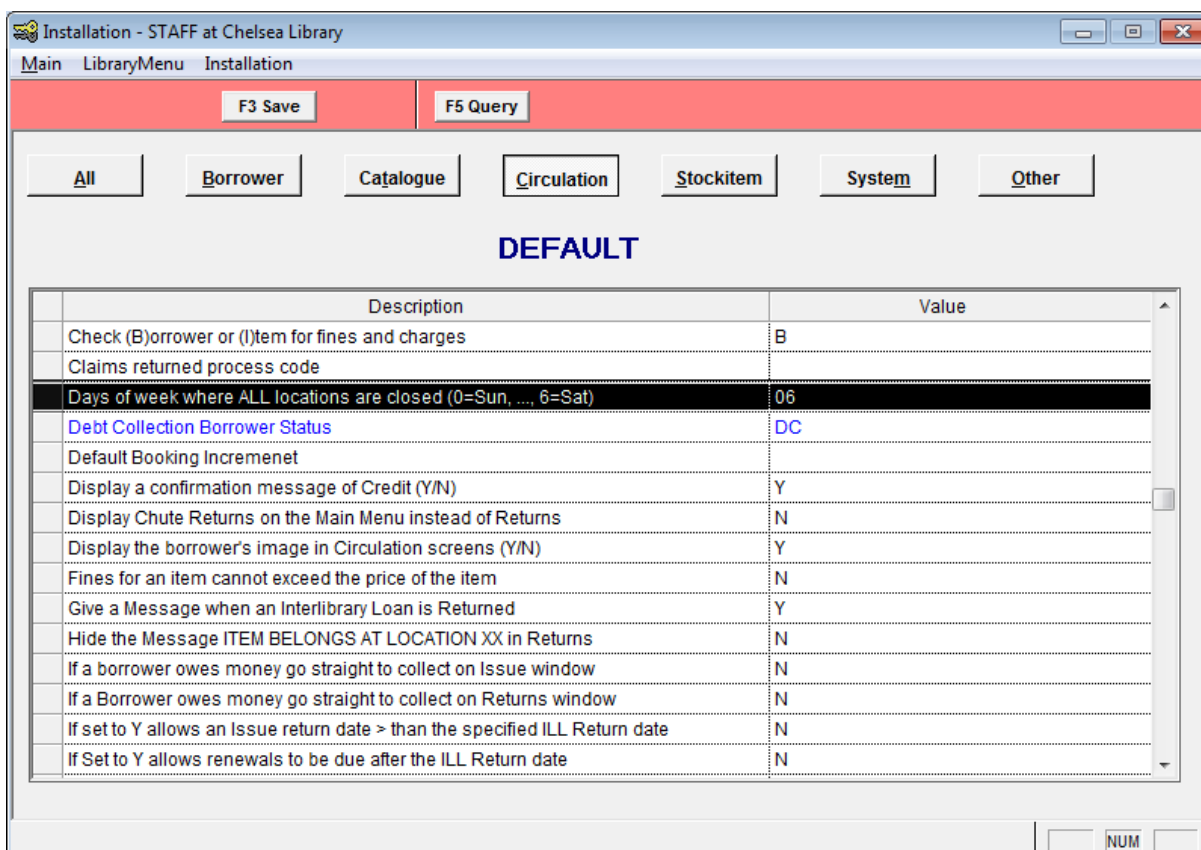
4. Adjust the following settings:

   - Days of the week when ALL Locations are closed (Sun=0, ..., Sat=6) – type in **06** if closed Saturday and Sunday

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

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

Holidays

It is possible to mark days (holidays) to be 'closed' in the calendar (for example: Easter).

When an item is issued, the program will ensure that it the item is not due for return on closed dates. Reservations will not be due for collection on closed dates. Dates may be entered as far in advance as desired.

To mark a date as a closed:

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **Calendar** – the Calendar screen will display

3. Use the **F7**, **F8**, **F9** and **F10** buttons to navigate to a month where you want to set a closed date:
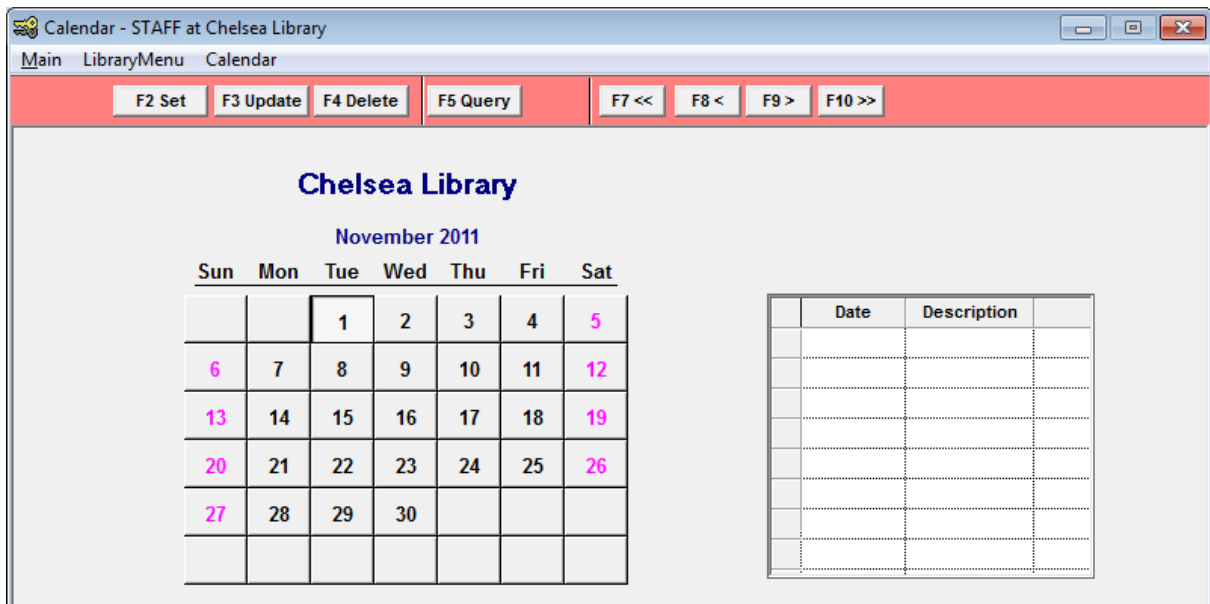
4. Select a date with your mouse – for example: **1 November 2011**

5. Click the **F2 Set** button – the Holiday prompt will display:
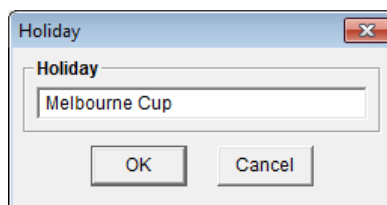
-   Type in a suitable description in the dialogue box – for example **Melbourne Cup** or **Term Break**

-   Click the **OK** button

6. The date will be marked in **red** (indicating it is closed) – the <u>Date</u> and <u>Description</u> will appear in the table to the right of the calendar:

7. Once the dates have been set, click the **F3 Update** button

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

Please Note: Where a Return By date falls on a closed date, the system allocates the next non-closed date past that date.

Arrow Keys [F7], [F8], [F9], [F10]

To scroll through the calendar you may use the **F7** through **F10** keys:

F7	<<	Scrolls to the beginning of the year. Clicking again, scrolls back to one year past
F8	<	Scrolls to the previous month for the year as displayed
F9	>	Scrolls to the next month for the year as displayed
F10	>>	Scrolls to the end of the year. Clicking again scrolls one year in advance

<u>Remove a Closed Date</u>

1. To remove a closed date, highlight the date

2. Click the **F4 Delete** button – this will **mark** [**x**]the Closed date for deletion

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

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

Copy a Closed Date to Other Locations

Closed dates in Calendar can be copied to other Locations.

1. From the menu, select **Calendar** > **Copy To All** – a prompt will display asking: **This will make every location have exactly the same holiday settings as 'XXX'. Continue?**

2. Click the **Yes** button – this will copy the closed settings to ALL locations

3. Once complete, a prompt will display with the following message: **Calendar successfully reproduced.**

4. Click the **OK** button

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

Different Closed Dates for Each Location

If different closed dates are required for different Locations.

1. From the menu, select **Calendar** > **Choose Location** – a Location prompt will display

2. Select the Location and click the **OK** button

3. The set the closed dates for this Location

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

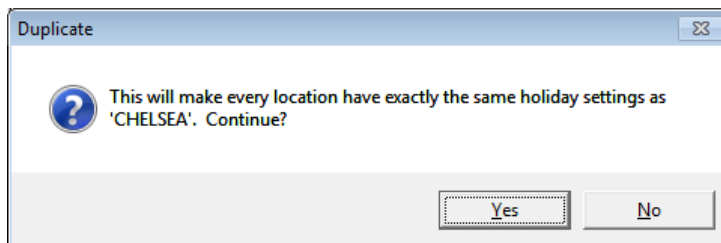5. Exit and restart the *Amlib* client for the new settings to take effect

SCIS MARC IMPORT

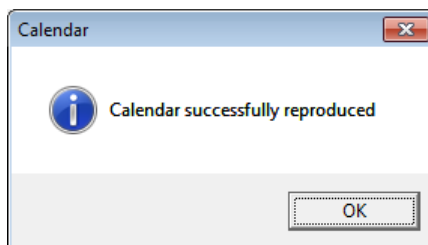### Accessing the Data for the Download

1. Launch the *Amlib* client

2. Go to **Main** > **Authorities** > **MarcTakeUp** (alternatively use **Ctrl + M**) – the Marc Import screen will display:
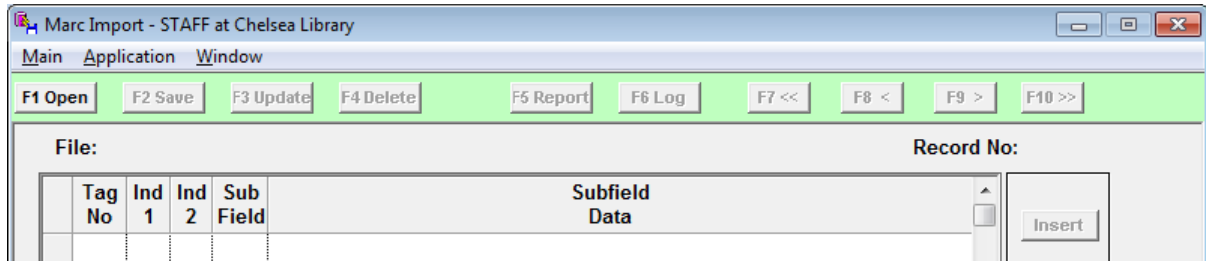
3. Click the **F1 Open** button to display the Open dialogue box

4. Locate the file to be processed by using the Look in: drop-down box – for example: if the file is on the C: drive, the Look in: box may say **Local Disk (C:)**

5. Once the file name has been located, use your mouse to select it and click on the **Open** button

There are two processing options: Bibliographic Data or Authority Data – this guide covers the import of Bibliographic Data.

Bibliographic Data

This option is to load records which are Bibliographic Data in machine readable format which can be imported into *Catalogue*, *Authority* and *Stockitem* (where appropriate) applications of *Amlib*.

1. The Marc Import – Open screen will display:
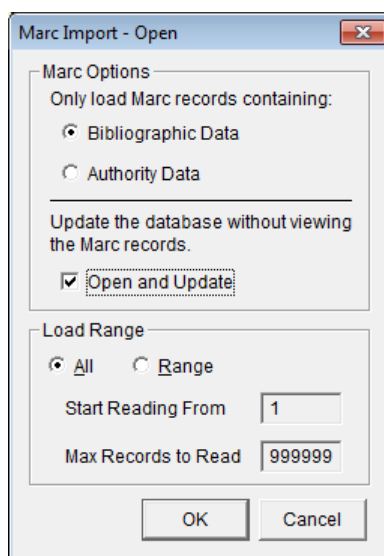
Please Note: If the Import file (*Bibliographic* or *Authority*) contains more than 9999 records, it is recommended that <u>Open and Update</u> is selected (ticked) so that all records can be loaded into the database. This eliminates the need to load in sections. The maximum records that can be viewed in the Holding file is 9999 records.

HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE
Marc Options	Bibliographic Data	Bibliographic data to be created for the Catalogue.	Data from external source (for example: *SCIS*, *SLOWA*, *Kinetica* etc. with USMARC Tags)
	Authority Data	Authority data for creation or updating of Authority Headings and/or cross references.	**See** and **See Also** Update from SCIS or other source
Update the database without viewing the Marc records	Open and Update	If checked (**ticked**), the imported items will not display in the Holding file.	The *Catalogue* will be **Update**d immediately
		If unchecked (**unticked**), the imported items will display in the Holding file.	Review records The *Catalogue* will not be updated until the **F3 Update** button is selected
Load Range	All	All records from the file are downloaded into a holding file.	All
	Range	Selected records from the file are downloaded into a holding file. If Range is selected, the next 2 fields have to be updated.	For example, 1 to 50

2. Complete the options using the above table:

   a. <u>Marc Options</u> = **Bibliographic Data**

   b. <u>Open and Update</u> = **ticked**, unless you want to review each individual MARC record

   c. <u>Load Range</u> = **All** (unless the file sizes are quite large)

3. Click on the **OK** button

Bibliographic Options

1. The <u>Bibliographic Options</u> screen will display:

HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE
Marc Details	We think the file contains	The data type is displayed Standard format	**SCIS** **ABN**
	Total Bibliographic records	The number of Bibliographic records will display	**32**
	Total Authority records (this will only display if the import is for Authority headings)	The number of Authority headings with See/See Also references will display	**0**

2. Select the appropriate <u>Each bibliographic record contains</u> setting:

Each Bibliographic record contains:	Catalogue data only	The system will determine the contents of the import file. If only Catalogue data exists in the file, this will be the Default option.	SCIS Data
	Full Catalogue & Stockitem data	The system will determine the contents of the import file. If both Catalogue and Stockitem data exists in the file, this will be the Default option. Please Note: This item can be selected to create "Dummy" Stockitems even though only Catalogue Data exists in the Import file.	SL OF WA Data
	Brief Catalogue and Order data	The system will determine the contents of the import file. If only brief Catalogue data and Order data exists in the file, this will be the default option.	AOL Data
When displaying the records show:	All tags in the file	All tags from the Import file will display in the Holding file for viewing. However, tags not defined in Amlib will not load into the Amlib Catalogue unless the Marc tag is defined.	If Tag 650v is not used in Amlib it WILL still display in the Holding file.
	Only tags defined in Amlib	Only tags used in Amlib will display in the Holding file.	If Tag 650v is not used in Amlib it will NOT display in the Holding file.

3. If the Marc Details are set to import **Full Catalogue & Stockitem data**, the Item Default and Item Prices sections will also display:

| HEADING	FIELD	EXPLANATION/OPTIONS	EXAMPLE
Item Defaults **Please specify default values for each item in the fields below**	Form	The default values set in the **Main** > **Supervisor** > **Installation** > **Stockitem** tab will display if defined. If these fields are not yet defined, codes which will apply to the items can be entered. Rules for automatic entries of Form and Stats codes depending on the Tags that are imported, and be set in Cat Defs in the Stockitem Form and Stats codes.	If during the Import, Cat definitions cannot be created, each Stockitem will have a default Form of **BK** (for example)
	Location		**CHELSEA**
	Lib Group		**LIBRARY**
	Stats Code		**ANF**
	Floor Loc (optional)		**DISPLAY**
	Process (optional)		**IN PROCESS**
Item Prices	Minimum price of an item	If the item price in the Import file is less than the price set here, enter the Minimum price	The Import price is **$8.00** but the Minimum price set here is **$10.00**, the price in the Stockitem will be **$10.00**
	Appreciate items by %	Items can be appreciated by a percentage – for example: GST of 10%	**10%**
	Depreciate old stockitems	Items to be depreciated will be dependent on the table set in **Stockitem** > **Application** > **Stats Group**	
	Use average prices if no price	Items will be given an average price, set in **Stockitem** > **Application** > **Stats Group**. If no price is entered in the Import File	

4. Click the **OK** button once you have completed modifying your settings

Please Note: Form and Stats Code defaults from the **Main** > **Supervisor** > **Installation** > **Stockitem** tab display automatically in the fields. If there are no defaults entered, the field will be blank. Location displays as the Login Location. Entry of these fields is optional. As the import of data is processed, the Stockitems will be given the default values if there are no catalogue definitions for the Form or Stats codes of the items. Form and Stats Code Cat definitions are found in **Main** > **StockItems** > **StockitemForms** or **StockitemStatsCodes** table for the particular code.

Reviewing Records to be Imported (Optional)

It is possible for the importer to review (and edit) the MARC data being imported.

1. If the importer has decided to review the records being imported (see Bibliographic Data step above), the Marc Import screen will display:
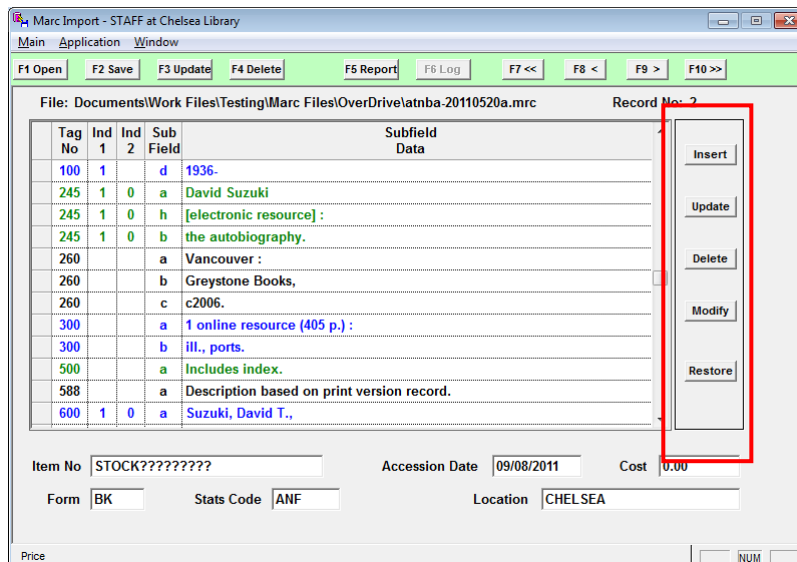
2. If you do wish to edit the data (prior to import), use the editing buttons on the right to change or delete the individual tags

    Please Note: Editing of the data prior to import is not essential. Changes can be made after the data has been imported into the Catalogue. Remember that not all the tags will necessarily be Imported, so if editing is considered necessary, change only the tags you know will be imported!

3. Use the **F7**, **F8**, **F9** and **F10** buttons to move between records

4. Once the data has been reviewed, click the **F3 Update** button

Find

It is possible to use the find function to locate any matching text, tag number or specific Subfield in the Holding File data being displayed. For example: use this facility to check all Author entries or Subject headings.

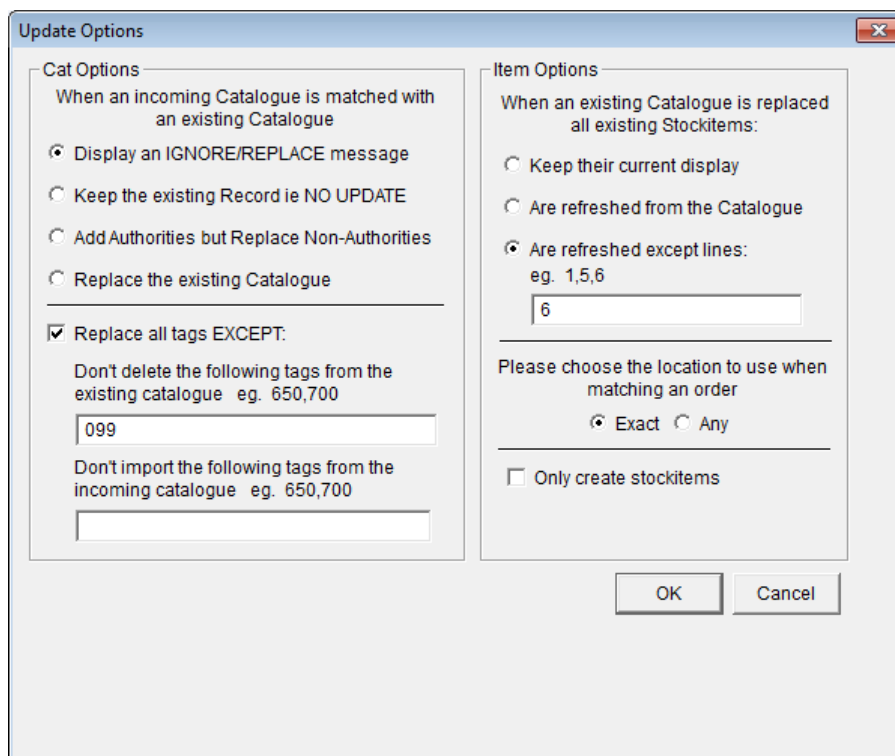1. From the main menu, select **Window** > **Find** – the MarcImport - Find screen will display:
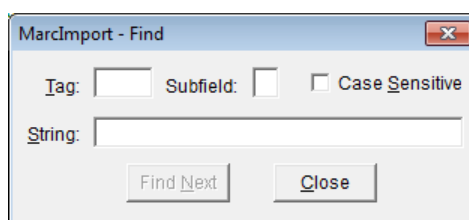
2. Type in the <u>Tag</u>, <u>Subfield</u> or <u>String</u> to find and click the **Find Next** button

3. It will then find any matching data in the record currently being displayed:
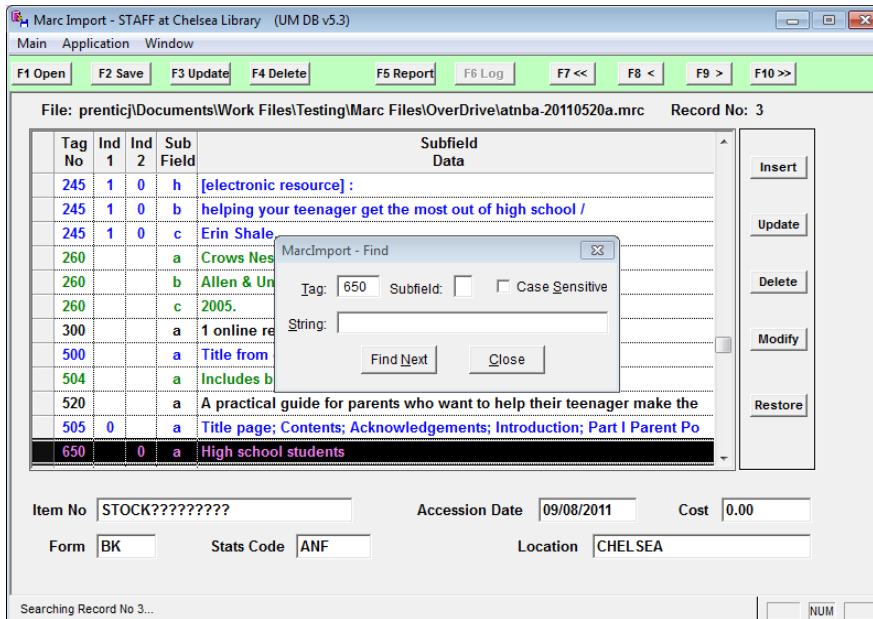
Catalogue Update Options

1. The <u>Update Options</u> screen will then display, allowing you to select the **Cat**(alogue) and (Stock)**Item Options**:

- <u>Cat Options</u>: When an incoming Catalogue is match with an existing Catalogue

- <u>Item Options</u>: When an existing Catalogue is replaced all existing items

PARAMETER	FIELD		EXPLANATION
Cat Options **When an incoming Catalogue is matched with an existing Catalogue:**	Display an IGNORE/REPLACE message		A message will display at each match occurs. At each match, the operator will get a choice to create a new catalog, replace the existing or to keep the existing details.
	Keep the existing Record ie NO UPDATE		No Update occurs for the Catalogue
	Add Authorities but Replace Non-Authorities		Does not replace existing Authorities but adds new Authorities to the record. However, it replaces any Non Authority data from the Import
	Replace the existing Catalogue ENTIRELY		All tags from the Import are used, overwriting any existing data
	FIELD	**OPTION**	**EXPLANATION**
	Replace all tags EXCEPT:	Don't delete the following tags from the existing catalogue eg. 650,700	This will vary according to the setting in **Main** > **Supervisor** > **Installation** > **Catalogue** tab: • MARCImport Replace: don't delete these tags from the existing cat • MARCImport Replace: don't import these tags from the existing cat Adds non-identical tags when importing all but specified Tags. Existing data in the specified Tags remains unchanged
		Don't import the following tags from the incoming catalogue eg. 650,700	Adds non-identical tags when importing. Does NOT import the new data in the specified Tags. Existing data in the specified Tags remains unchanged

PARAMETER	FIELD		EXPLANATION
Item Options **When an existing Catalogue is replaced, all existing Stockitems:**	Keep their current display		No existing Stockitems are refreshed – they remain the same
	Are refreshed from the Catalogue		All existing Stockitems are replaced by the new Catalogue details
	Are refreshed except lines: eg. 1,5,6		Enter the line numbers to be retained – for example: **6** (Line 6, which is usually Call Number). Line numbers correspond to the 6 lines of Stockitem display (for example: Line 1 is usually Title, Line 2 Author etc.)
	FIELD	**OPTION**	**EXPLANATION**
	Please choose the location to use when matching an order	**Exact**	Only order items where location is the same as the current Amlib location will be candidates for replacement
		Any	Stockitems on the file may replace any order item on the database
	Only create stockitems	**Checked**	The import of data will result in **no** Catalogue records being created. Only Stockitems will be created.
		Unchecked (Default)	Create Catalogue records as well as Stockitems

2. Enter the options you would like, then click the **OK** button – the <u>Saved Files</u> screen will display:
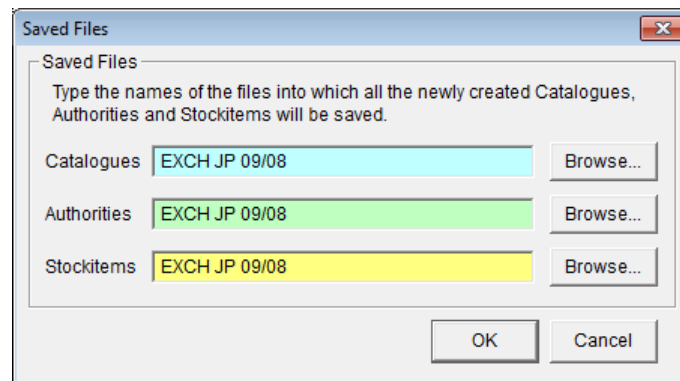

3. Type the names of the files into which all the newly created **Catalogues**, **Authorities** and/or **Stockitems** will be saved (if you do not want to check new items – for example: **Authorities**, do not enter a filename)

4. Click the **OK** button

HINT: These files assist in finding the newly created Catalogues, Authorities and/or Stockitems after the import. The Filenames are created so that you can identify the file later. A suggested Filename could be the type of data – for example: **SCIS** or **EXCHANGE**, the date and the initials of the staff member processing the data.

5. If confirmation of duplicate items has been requested in the parameters, a <u>Catalogue Match</u> screen will display every time a duplicate item is found:
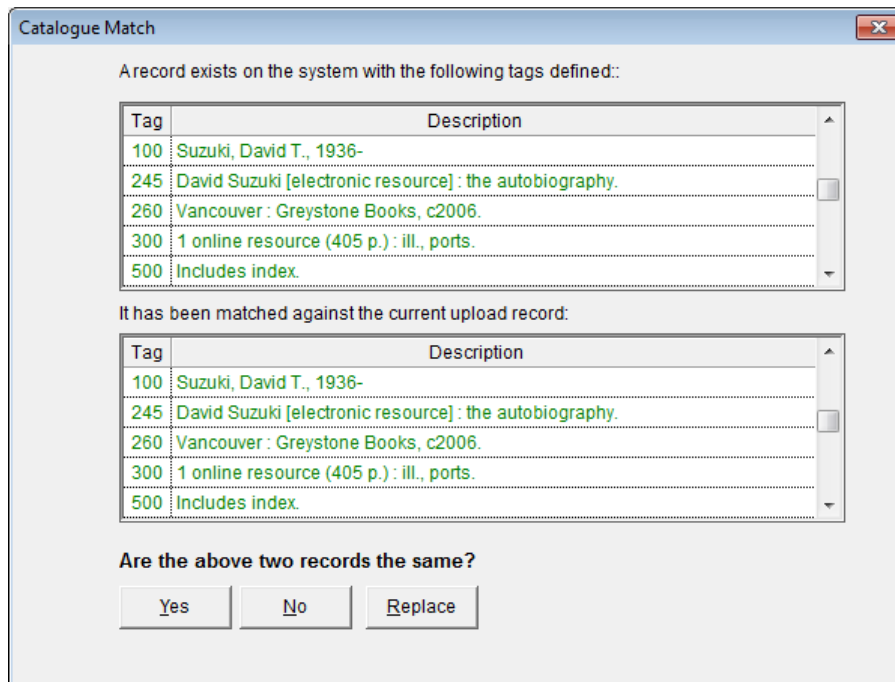

6. **Are the above two records the same?** Click the **Yes**, **No** or **Replace** button

OPTION	EXPLANATION
Yes	The catalogue entry that exists on the database will remain as displayed in the top box. A new Stockitem would need to be added if appropriate. The imported record will not be included in the New File created for Catalogue or Authorities
No	A new catalogue will be created with the data from the Imported data being used for the new catalogue record. The imported record will be included in the New File created for Catalogues or Authorities
Replace	The existing catalogue entry will remain but the data will be replaced with the data from the imported recorded. The imported record will not be included in the New File created for Catalogue but there may be some additions to the Authorities file

7. An <u>Update</u> prompt will display, indicating the progress of the import:
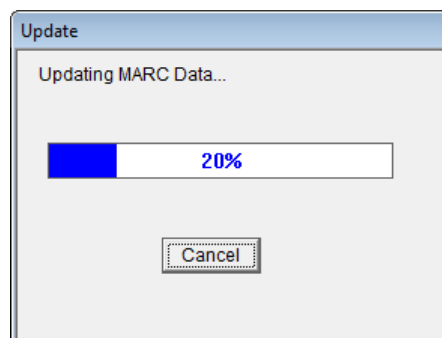
8. When the update is finished an Update prompt will display, showing the number of records Updated:
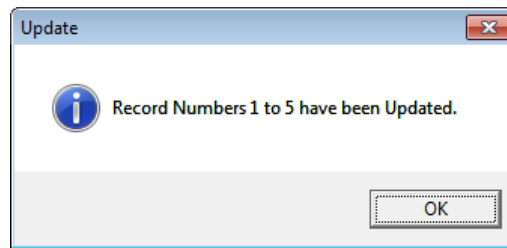
9. Click the **OK** button

10. You will be able to view the log by selecting the **F6 Log** button

F6 Marc Log

This log lists any errors that were experienced in the process of importing the file and also what action was taken with certain items. Most of the errors that display in the log are caused by the tag numbers not being defined on the Amlib database. This may be because we did not wish to use them in the Catalogue data but were present in the data file.

MODIFY A CATALOGUE RECORD USING THE WORKSHEET

It is now possible to edit an existing catalogue record using the Catalogue Work Sheet.

1. Launch the *Amlib* client

2. Go to **Main** > **Catalogue** > **Catalogue** (or the 🖻 icon) – the Catalog screen will display
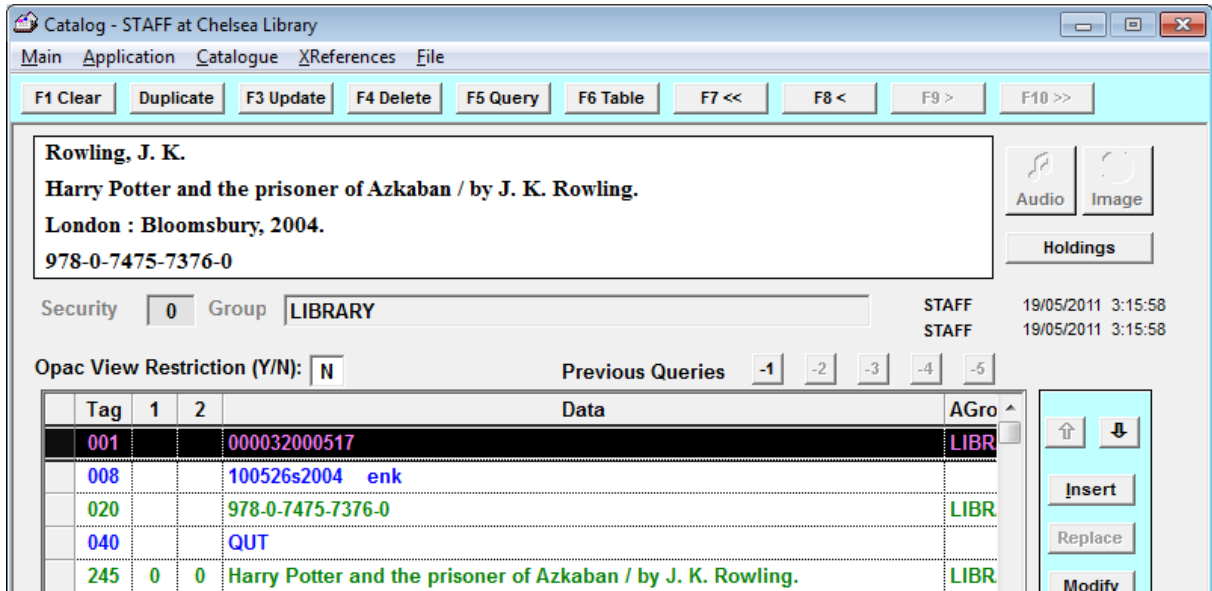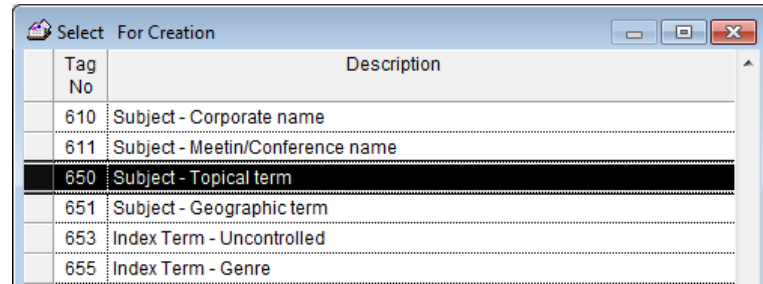
3. Locate the item to be modified using **F5 Query**:

4. From the menu, select **Catalogue** > **Catalog Modify using Worksheet** – the Work Sheet screen will display:
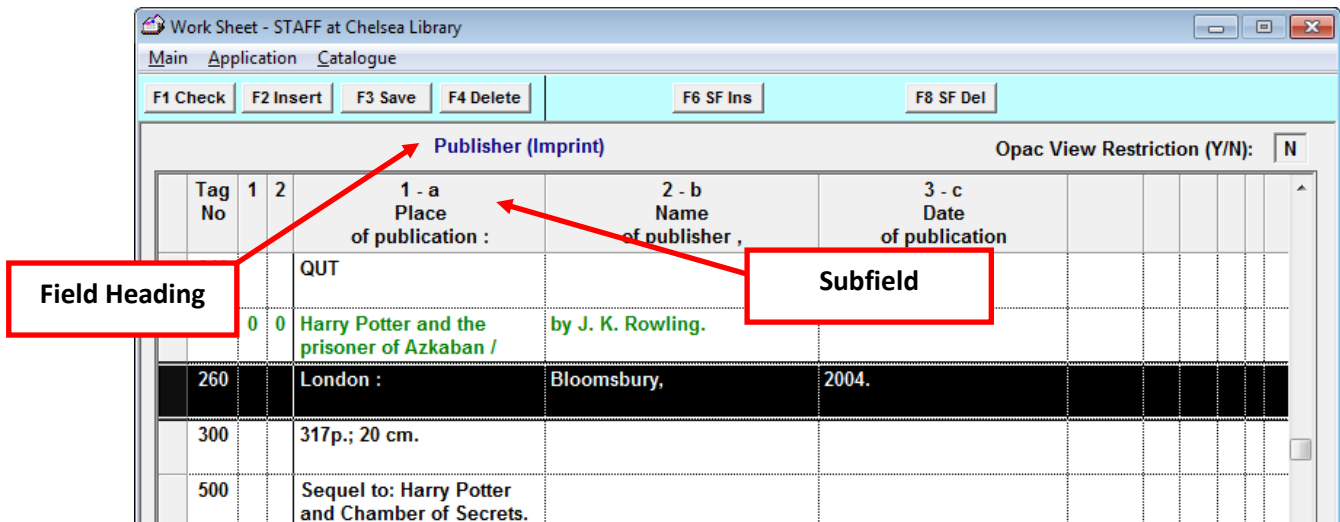
5. The catalogue record can then be edited/modified in the same manner as a new Catalogue record
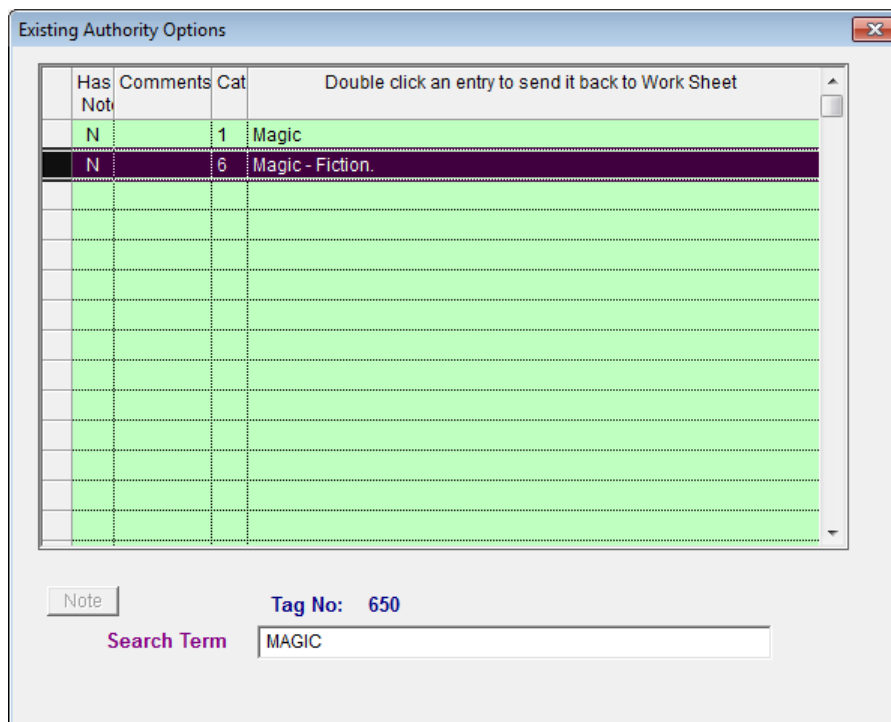
6. To enter additional tags, click the **F2 Insert** button – the <u>Select For Creation</u> table will display:

7. Find the required tag and double-click (or select and press **<enter>**) it to select it – a new entry with the selected Tag No will appear in the Work Sheet

8. Add the required data

9. Where the data is Authority based (for example: Author, Subject Heading, Series, etc.) a listing of Authorities can be viewed and selected – for example: to search for a particular Author, type the first few letters of the surname, highlight the row and double-click the row or press the **F1 Check** button

10. **Please Note:** Existing Authorities cannot be altered in the Work Sheet – if a new Authority is to be created (for example: one with a different subdivision), then the **F2 Insert** button should be used to enter it on a new line to that of the existing heading (the existing heading can be retained or removed using the **F4 Delete** button)

11. The <u>Existing Authority Options</u> screen will open displaying all matching Authorities and the number of Catalogue records which use each Authority:

12. To select an Authority in the table, simply double-click on it: the contents of the tag being checked will then change to match the selected Authority (the text will also change colour from black to **green**)

↓

13. Once selected (or if there is no matching Authority), click on the red [**X**] to close the selection table (if there were no Authorities found the contents of the tag being checked will turn **red**, if there were Authorities found but none were selected the contents will turn **pink**)

14. When the record is complete, click the **F3 Save** button

15. If new Authorities are to be created, a prompt will display with the following message: **Some new Authorities will be created. Continue with Save?** (the new Authorities will be highlighted in red, so you can check them)
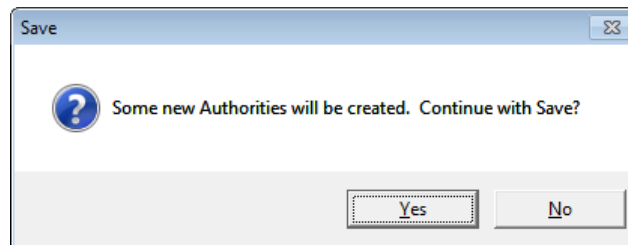
16. Click the **Yes** button

Editing of the record is now complete.

PROCESSING E-BOOKS & AUDIOBOOKS (WEBLINKS)

It is possible to load e-book and audiobooks holdings into *Amlib*.

- An e-book is a digital representation of a printed (hard copy) book. E-books are read via text - there is no sound capability and can be read (or viewed) with different software on a desktop, pocket PC, E-book reader, *iPad*, *Kindle*, smart Phone or other device that supports the file type that the book is in (for example: *Adobe Acrobat Reader*)

- An audiobook is a sound recording of a book. It may be in cassette tape, **CD**, **MP3** or **WMA** (Windows Media Audio) format. One listens to audiobooks via an iPod, MP3 player or on a PC.

- An e-audiobook is a downloadable audiobook (these are available from *OverDrive*)

E-books can be supplied via a vendor – for example: *OverDrive*, *Bolinda*, etc. See separate notes on setting this up.

NetOpacs

- *Amlib* can connect to e-book vendors using a **SIP2** connector and therefore validate membership to the library with use of barcodes to make e-books and audiobooks available via the *NetOpac* Interface

- Alterations to your *Amlib NetOpacs* – contact Amlib Support for a quote

Authority

Ensure the **856 – URL Authority** tag has been defined, and that there is **u** and **z** subfields:

1. Launch the *Amlib* client

2. Go to **Main** > **Authorities** > **MarcTags** – the <u>Marc Tags Within the System</u> screen will display:

3. Check to see if the **856 | Electronic location and access** tag is in the list of tags (it may be also be called **979 | URL Link**)

4. If it is NOT present, then you can add one as follows:

    a. Click the **F1 New** button

    b. Fill in the fields as shown in the table below:

HEADING	DETAILS
Tag No	**856**
Tag Description	**Electronic location and access**
Default Ind 1	<leave blank>
Default Ind 2	<leave blank>
Can the Tag be Repeated in a Catalogue (Y/N)	**Y**
Is the Tag an Authority that is only used in 1 Catalogue (Y/N)	**N**
Keyword Search Code	<leave blank>
Default Catalogue Show Sequence	**85600**
Allow Tag Xrefs with these comma sep list	**856**

    c. Click the **F3 Update** button to save the tag definitions

5. You will also need to check/create subfields for the **856** tag:

    a. Highlight the **856** Tag

    b. Click the **F7 SubF** button- the Tag Subfields table will display:

    c. Add an (**u**) and (**z**) subfield as shown in the table below

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

HEADING	DETAILS	
Subfield	**u**	**z**
Subfield Description	**URL**	**Descriptor**
Can be Repeated (Y/N)	**Y**	**Y**

Authority (Y/N)	Y	Y
Used In Search Key (Y/N)	Y	Y
Used In Marc Display (Y/N)	Y	Y
Create Keywords (Y/N)	N	N
Seq No	10	20
Also Create Tag	<leave blank>	<leave blank>
Also Create SubF	<leave blank>	<leave blank>

The **856** tag has now been configured.

Authority – Marc Take-Up

In many cases Marc records are available from vendors to download into *Amlib* using Marc Take-Up.

In most instances, users would select the option in Marc Take-Up to bring a Catalogue AND Stockitem into the system.
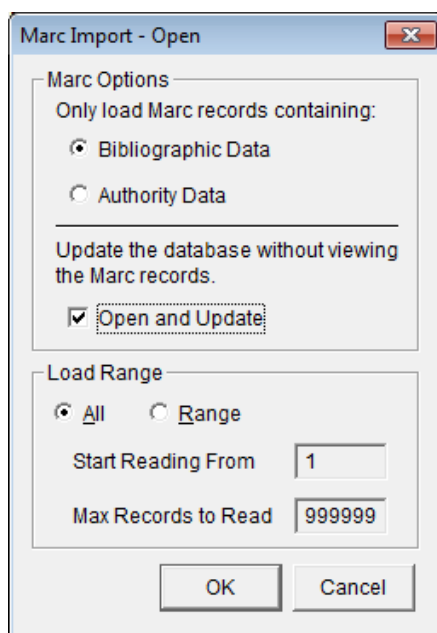
You are now ready to load the e-book or audiobook Marc (**.mrc**) file into *Amlib* via the normal Marc Take-Up window:

1. Launch the *Amlib* client

2. Go to **Main** > **Authorities** > **MarcTakeUp** – the Marc Import screen will open

3. Click the **F1 Open** button – the Open dialogue box will display

4. Navigate to your **E-book** (containing data from *OverDrive*, *Bolinda,* etc.) folder and select the relevant **.mrc** file
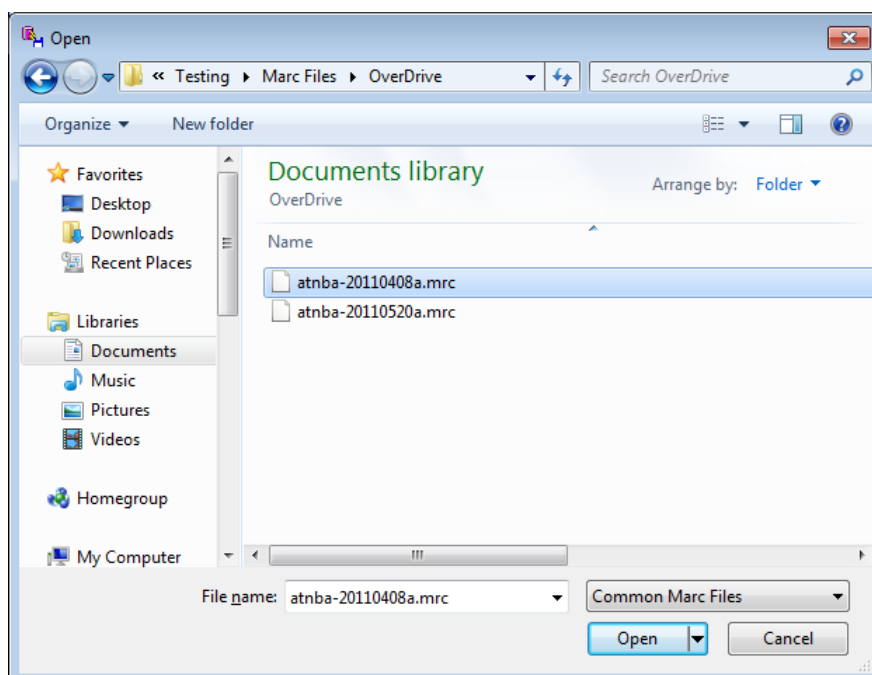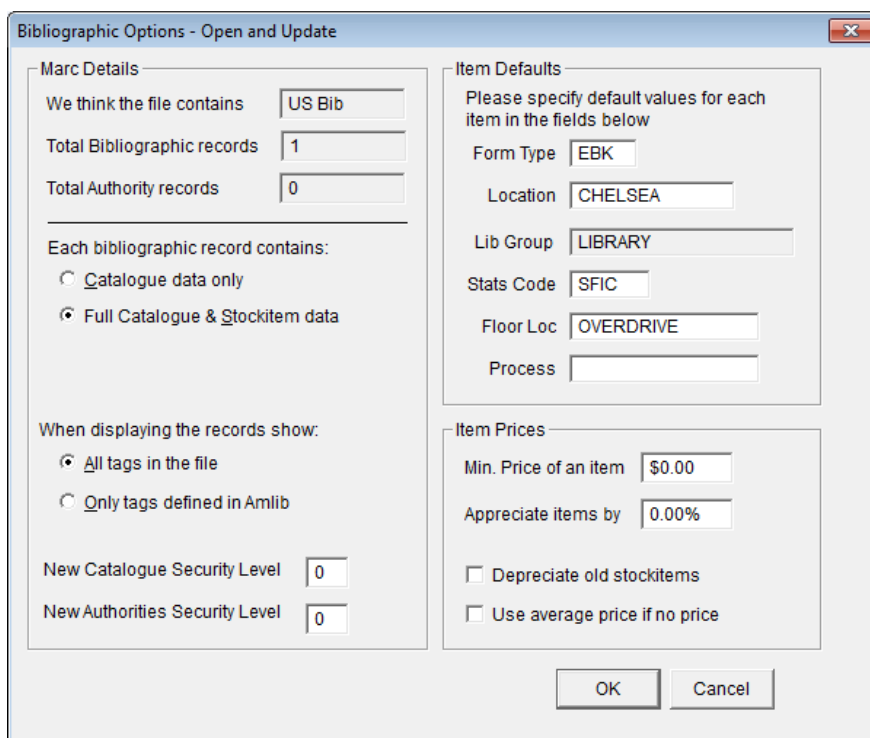
5. Once the file name has been located, use your mouse to highlight it and click on the **Open** button – the Marc Import – Open dialogue box will then display:

6. Complete the options using the above table:

   d. Marc Options = **Bibliographic Data**

   e. Open and Update = **ticked**, unless you want to view each individual MARC record

   f. Load Range = **All** (unless the file sizes are quite large)

7. Click the **OK** button – the Bibliographic Options screen will then display***:

8. Ensure the following Marc Details are selected:

    g. <u>Each bibliographic record contains</u> =**Full Catalogue & Stockitem data**

    h. <u>When displaying the records show</u> = All tags in file

9. Complete the following Item Defaults:

    i. <u>Form</u> = type in an applicable Stockitem <u>Form Code</u> – for example: **EBK**

    j. <u>Location</u> = an applicable location code – for example: **SLIB**

    k. <u>Stats Code</u> = an applicable Stockitem <u>Stats Code</u> – for example: **SFIC**

    l. <u>Floor Location</u> = could be useful to have a specific Floor Location – for example:
Overdrive

10. Click on the **OK** button when complete

11. For users, who didn't **tick** the <u>Open and Update</u> option box at step 6 above, then the
following Marc Import screen will display:

    a. Review and alter the Marc record as required using the **Insert**, **Update**, **Delete**,
Modify and **Restore** buttons along the right-hand side of the screen

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

12. The Update Options window will then display, where Cat(alogue) and (Stock)Item Options can be selected:

13. Cat Options: When an incoming Catalogue is match with an existing Catalogue:

    m. Replace the existing Catalogue = **marked**

14. Item Options: When an existing Catalogue is replaced all existing Stockitems:

    n. Are refreshed except lines: **6**

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

16. A Saved Files screen will then display – enter the Saved File names to be used for the new e-books:
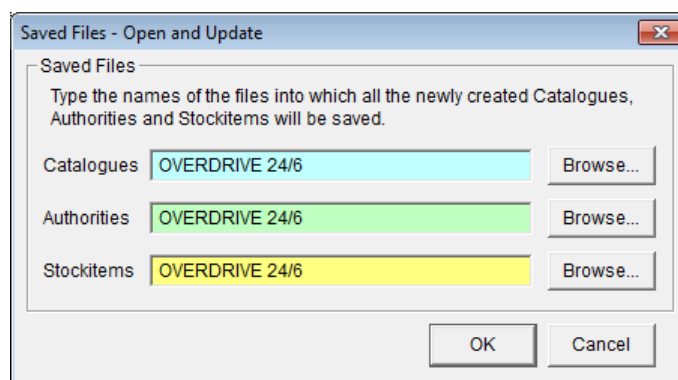
17. Type the names of the files into which all the newly created <u>Catalogues</u>, <u>Authorities</u> and/or <u>Stockitems</u> will be saved. If you do not want to check new items – for example: <u>Authorities</u>, do not enter a filename

18. Click the **OK** button

19. The Marc file will then be imported

Would you like to see a list of the imported records?

1. Open the *Authority*, *Catalogue* or *Stockitem* module(s)

2. From the menu, select **File** > **Display File** – the <u>Saved Query Results</u> screen will display:

3. Highlight the filename and click the **F9 Select** button

4. A <u>List</u> of imported items will then display

*** If your import failed to automatically create a set of stockitem records (and the <u>We think this file contains</u> field on the <u>Bibliographic Options – Open & Update</u> screen displayed **US AOL**, then it is probable that your Marc Import Definitions need changing – see <u>Marc Import Definitions</u> (below) for more information.

Stockitems

Think about how the Stockitems will be held:

- <u>Item No</u> (Barcode) – **STOCK** barcodes generated by *Amlib*

- <u>Form</u> – Create new Form code – (**ABK**) Audiobook and (**EBK**) E-book (<u>see below</u>)

- <u>Stats Code</u> – Create New Stats codes??

- <u>Floor</u> location or <u>Location</u> to indicate that are for downloading rather than to select from the shelves – for example a new <u>Floor</u> or <u>Location</u> of **OVERDRIVE**

- Set up would be similar to *ClickView* items

Form & Stats Codes (Optional)

It is possible to enter a unique <u>Form</u> (Format) code to be used with the *e-book* and *audiobook* records

1. Go to **Main > StockItems> StockitemForms** – the <u>Form Codes</u> table will display:

2. You can add one as follows:

   a. Click the **F1 New** or **F2 Insert** button

   b. Fill in the fields as shown in the table below:

HEADING	DETAILS
Form	**EBK**
Description	**E-Book**
Allow Loan	**N**
Floating?	**N**
Cat def Defined	<leave blank – will auto-complete>

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

NetOpacs Display

The *NetOpac* can be altered to give information about the records:

2.	**44 Charles Street [electronic resource] / Danielle Steel.**
	Steel, Danielle.
	Grand Haven : Brilliance Audio, 2011.
	Click here to download e-audio
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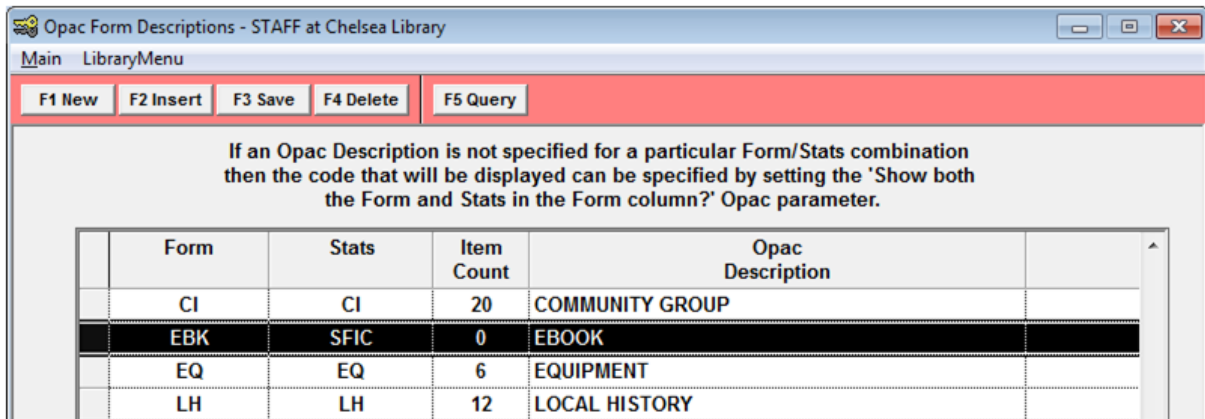
ISBN	978-1-423-38821-0 (electronic audio bk.) (1423388216)
Author	Steel, Danielle, 1948-
Title	44 Charles Street [electronic resource] / Danielle Steel.
Publication details	Grand Haven : Brilliance Audio, 2011.
Physical description	1 sound file : digital.
Series	Brilliance Audio on compact disc
Series	Brilliance Audio on compact disc
General note	Downloadable audio file.
General note	Title from: Title details screen.
General note	Unabridged.
General note	Duration: 08:48:16.
Performers	Read by Arthur Morey.
Summary	The plumbing was prone to leaks, the furniture rescued from garage sales. And every square inch was being devotedly restored to its original splendor -- even as a relationship fell to pieces. Now Francesca Thayer, newly separated from her lawyer boyfriend Todd, is desperate. The owner of a struggling art gallery, and suddenly the sole mortgage payer on her Greenwich Village townhouse, Francesca does the math and then the unimaginable. She puts out an advertisement for boarders...
Subject	Boardinghouses - Fiction.
Subject	West Village (New York, N.Y.) - Fiction.
Genre	Audiobooks.
Genre	Downloadable audio books.
Added Author	Morey, Arthur.
Internet link	Click here to download e-audio
Internet link	http://excerpts.contentreserve.com/FormatType-25/0857-1/478546-44CharlesStreet.wma

Other Things to Consider

If a new Form code or Stats code (or both) are used it is possible to set an Opac Description (which will display in the *NetOpacs*) the <u>Opac Form Descriptions</u>:
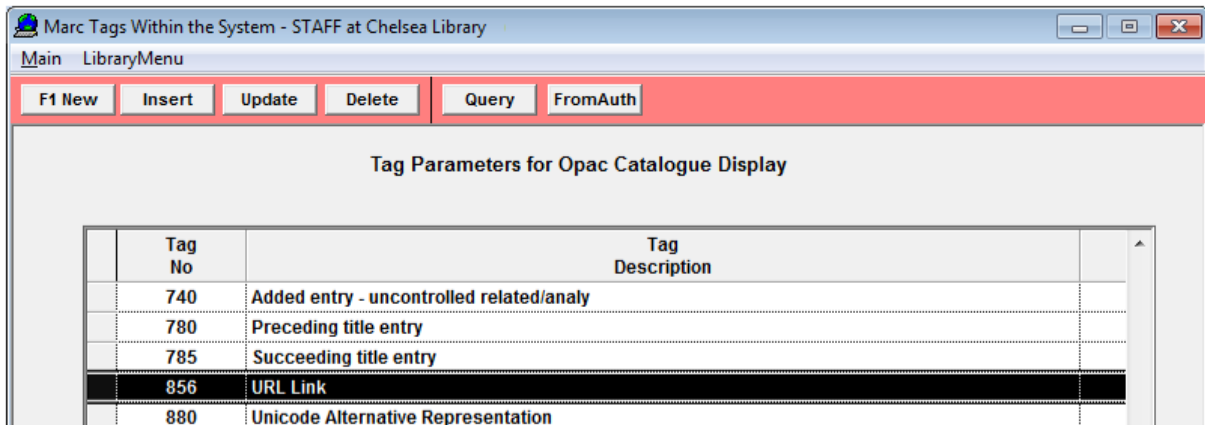
- **Main** > **Supervisor** > **Opacs** > **OpacFormDesc**

Ensure the **856** Tag is included on the <u>Marc Tags Within the System</u> screen:

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

Marc Import Definitions

1. Launch the *Amlib* client

2. Open the *Authorities* module

3. Go to **Application** > **MarcItemDefs** – the Marc Import Definitions screen will display:
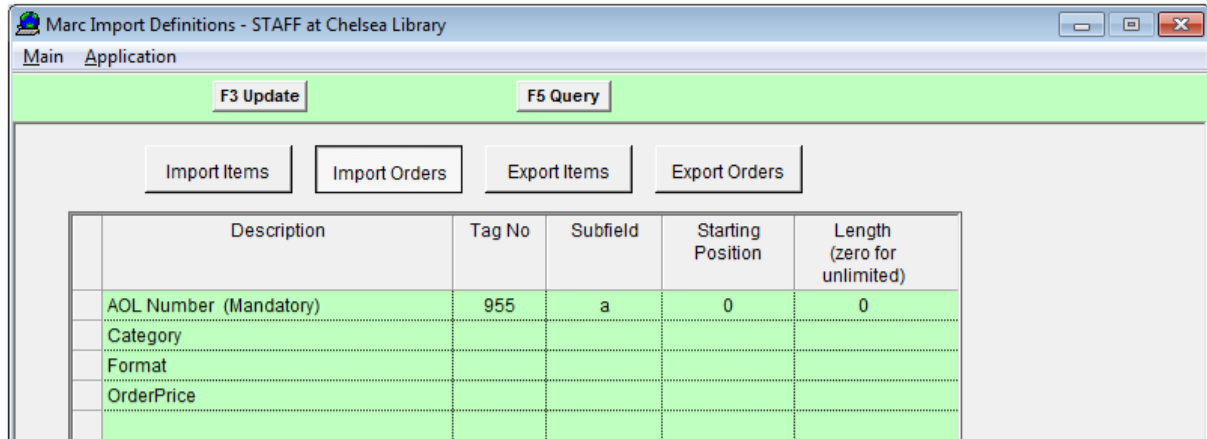
4. Select the **Import Orders** tab

5. Ensure the AOL Number (Mandatory) is not 001

6. If it is **001**, the change it to **955**

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

What you may like to discuss with your E-book/Audiobook Vendors

o. How many titles can a Borrower have at the same time?

p. How long will a Borrower get to keep the Titles checked out for?

q. How do they "return items"?

r. Can they renew the items I have checked out?

s. What happens when they place a title on hold?

t. How many items can they place on hold at the same time?

u. When a hold becomes available for check out, how long do they have to check out the title before the hold expires?

v. When the title is available for you, how will they be contacted?

w. How do they cancel a hold?

x. How do they change the email address that I entered when I placed a hold?

y. How do they rate titles?

z. If a new library card number is issued what needs to happen?

Adding Additional URLs to an Existing Catalogue Record

It is possible to add in a secondary URL to a Catalogue record with an existing URL.

1. Launch the *Amlib* client

2. Go to **Main** > **Catalogue** > **Catalogue** (or the [icon] icon) – the Catalog screen will display

3. Locate the item to be modified using **F5 Query**:
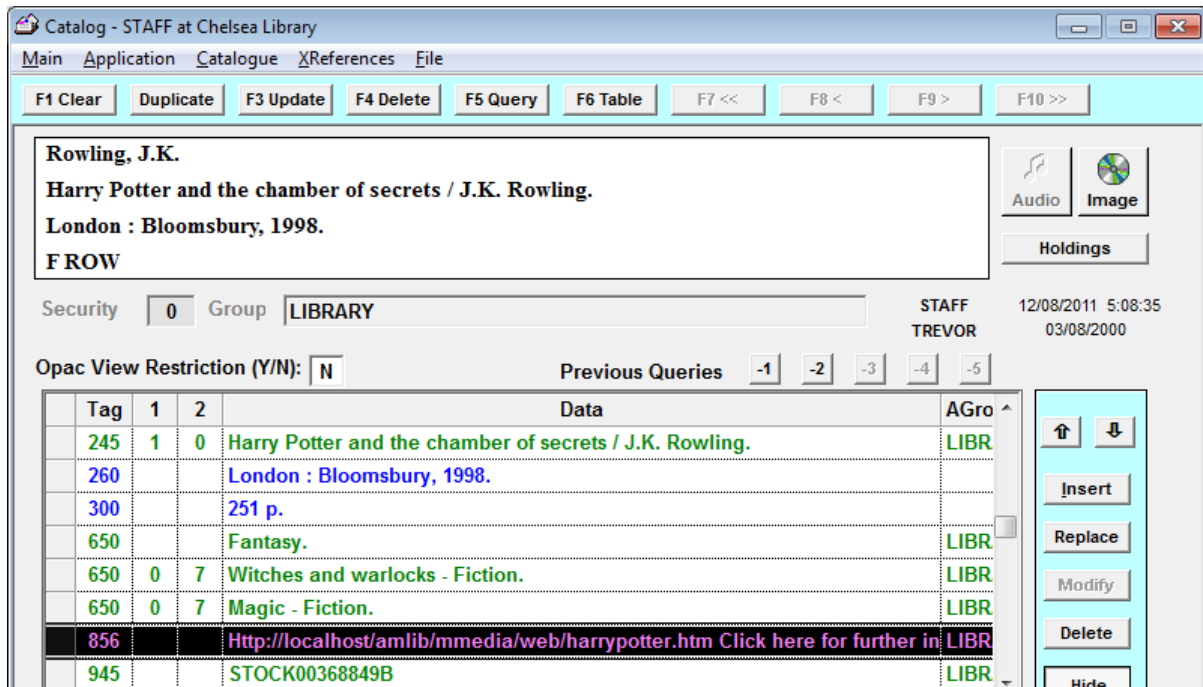
4. From the menu, select **Catalogue** > **Catalog Modify using Worksheet** – the Work Sheet screen will display

5. To enter additional **856** (URLs) tags, click the **F2 Insert** button – the Select For Creation table will display:
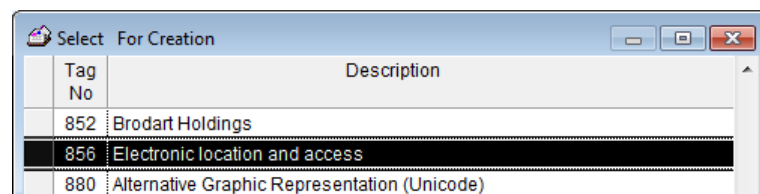
6. Scroll down to the **856 | Electronic location and access** tag and double-click (or select and press **<enter>**) it to select it – the new **856** tag will appear in the Work Sheet

7. Add the following data:

   a. 1 - u | URL

   b. 2 - z | Descriptor – for example: **Click here for alternative link**

650	0	7	Magic	Fiction.						
→	856		http://harrypotter.com	Click here for alternative link						
	856		Http://localhost/amlib/mm	Click here for further information						
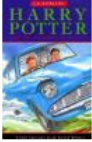
8. When the record is complete, click the **F3 Save** button – a prompt will display with the following message: **Some new Authorities will be created. Continue with Save?**
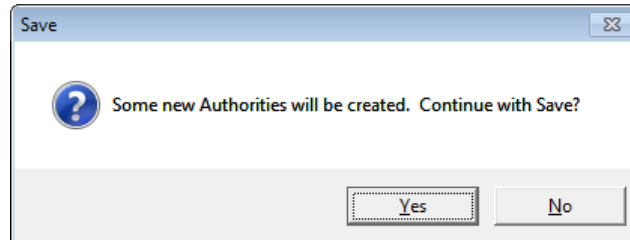
9. Click the **Yes** button

Editing of the Catalogue record is now complete.

The additional URL should now display in the *NetOpacs*:

1. **Harry Potter and the chamber of secrets / J.K. Rowling.**
   Rowling, J.K.
   Fantasy.
   ~~More Info via Syndetics / More Info~~ [via Amazon.com]
   Click here for further information
   Click here for alternative link

Select	Item Type	Call No	Status	Location	Reserve	Reviews
☐	JUNIOR NON FICTION	F ROW	Available with 0 reserves	Chelsea Library	Reserve Title	**Review this item** n/a n/a

CLICKVIEW

What is ClickView?

ClickView is a solution for providing on-demand access to a school's video library wherever learning is taking place.

Whether from a *Windows* PC, *Mac*, TV or web page, students and teachers can view any video from the entire library, at any time, at their own pace, in DVD-quality.

ClickView can be scaled to deliver video to hundreds of users at the same time across an existing network. It can also seamlessly integrate with a school's online applications, including library catalogues and learning management systems.

- For more information on *ClickView* refer to: http://www.clickview.com.au

Integration with Amlib Library Management System

Integration between *Amlib* and *ClickView* has been provided in *Amlib Version 5.2+* and includes the following features and benefits:

- *Amlib* converts **XML** export from *ClickView* (with details of programs, etc.) into a standard **Marc21** format file for easy import into the *Amlib* database as Catalogue and Item records
- Users can use the *Amlib NetOpacs* module (web-based search module) to search all materials stored within *Amlib* including *ClickView* records in a single search

Even though *ClickView* includes the entire *ClickView* catalogue each time the **XML** export is generated, *Amlib* provides the facility to match *ClickView* records previously imported - so that schools do not need to delete existing *ClickView* records whenever importing the latest *ClickView* **XML** file.

NetOpacs

- *Amlib* can connect the *Overdrive* web site using a **SIP2** connector and therefore validate membership to the library with use of barcodes via the *NetOpac* Interface
- Contact *Amlib Support* for further information about *Amlib* and SIP2 connections

CLICKVIEW IMPORT CONFIGURATION & PROCESS

A special function has been written to enable sites to load *ClickView* **XML** data. The function is found in the **raissue.exe** application supplied in the **Amlib** folder on the *Amlib* server. This application has been amended to read *ClickView* **XML** files. Using the *ClickView* **XML** file, a **MARC** file can be created which can then be imported into *Amlib* using the normal <u>Marc Take Up</u> process.

Amlib Client Configuration Settings

<u>979 Marc Tag</u>

Ensure the **979 – ClickView ID Authority tag** has been defined:

1. Launch the *Amlib* client

2. Go to **Main** > **Authorities** > **MarcTags** – the <u>Marc Tags Within the System</u> table will display

3. Check to see if the **979 | ClickView ID** tag is in the list of tags (it may be also be called **979 | Video ID**)

4. If it is NOT present, then you can add one as follows:

    a. Click the **F1 New** button

    b. Fill in the fields as shown in the table below:

HEADING	DETAILS
Tag No	**979**
Tag Description	**ClickView ID** or **Video ID**
Default Ind 1	<leave blank>
Default Ind 2	<leave blank>
Can the Tag be Repeated in a Catalogue (Y/N)	**N**
Is the Tag an Authority that is only used in 1 Catalogue (Y/N)	**Y**
Keyword Search Code	<leave blank>
Default Catalogue Show Sequence	**97900**
Allow Tag Xrefs with these comma sep list	**979**

    c.   Click the **F3 Update** button to save the tag definitions

5.   You will also need to create a Subfield for the **979** tag:

    a.   Highlight the **979** <u>Tag</u> that you have just created

    b.   Click the **F7 SubF** button- the <u>Tag Subfields</u> table will display:

	Sub-field	Subfield Description	Can be Repeated (Y/N)	Used In Search Key (Y/N)	Used In Marc Display (Y/N)	Create Key-words (Y/N)	Seq No	Also Create Tag	Also Create SubF
✓	a	ClickView Video ID	Y	Y	Y	N	10		

Tag Subfields — 979 ClickView ID

F1 New | F2 Insert | F3 Update | F4 Delete | F5 Query | F6 Print
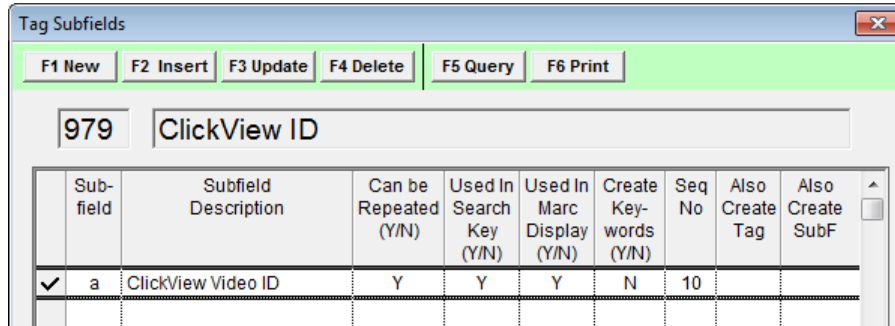
    c.   Add an (**a**) subfield as shown in the table below:

HEADING	DETAILS
Subfield	**a**
Subfield Description	**ClickView Video ID**
Can be Repeated (Y/N)	**Y**
Used in Search Key (Y/N)	**Y**
Used in Marc Display (Y/N)	**Y**
Create Keywords	**N**
Seq No	**10**
Also Create Tag	<leave blank>
Also Create SubF	<leave blank>

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

The **979** tag has now been configured.

856 Marc Tag

Ensure the **856 – URL Authority** tag has been defined, and that there is **u** and **z** subfields.

6. Launch the *Amlib* client

7. Go to **Main** > **Authorities** > MarcTags – the Marc Tags Within the System table will open

8. Check to see if the **856 | Electronic location and access** tag is in the list of tags (it may be also be called **979 | URL Link**)

9. If it is NOT present, then you can add one as follows:

   a. Click the **F1 New** button

   b. Fill in the fields as shown in the table below:

HEADING	DETAILS
Tag No	**856**
Tag Description	**Electronic Location and Access**
Default Ind 1	<leave blank>
Default Ind 2	<leave blank>
Can the Tag be Repeated in a Catalogue (Y/N)	**Y**
Is the Tag an Authority that is only used in 1 Catalogue (Y/N)	**N**
Keyword Search Code	<leave blank>
Default Catalogue Show Sequence	**85600**
Allow Tag Xrefs with these comma sep list	**856**

   c. Click the **F3 Update** button to save the tag definitions

10. You will also need to check/create a Subfield for the **856** tag:

   a. Highlight the **856** Tag that you have just created

b. Click the **F7 SubF** button- the <u>Tag Subfields</u> table will display:

c. Add the (**u**) and (**z**) subfields as shown in the table below:

HEADING	DETAILS	
Subfield	**u**	**z**
Subfield Description	**URL**	**Descriptor**
Can be Repeated (Y/N)	**N**	**Y**
Used in Search Key (Y/N)	**Y**	**Y**
Used in Marc Display (Y/N)	**Y**	**Y**
Create Keywords	**N**	**N**
Seq No	**10**	**20**
Also Create Tag	<leave blank>	<leave blank>
Also Create SubF	<leave blank>	<leave blank>

d. Click the **F3 Update** button when complete
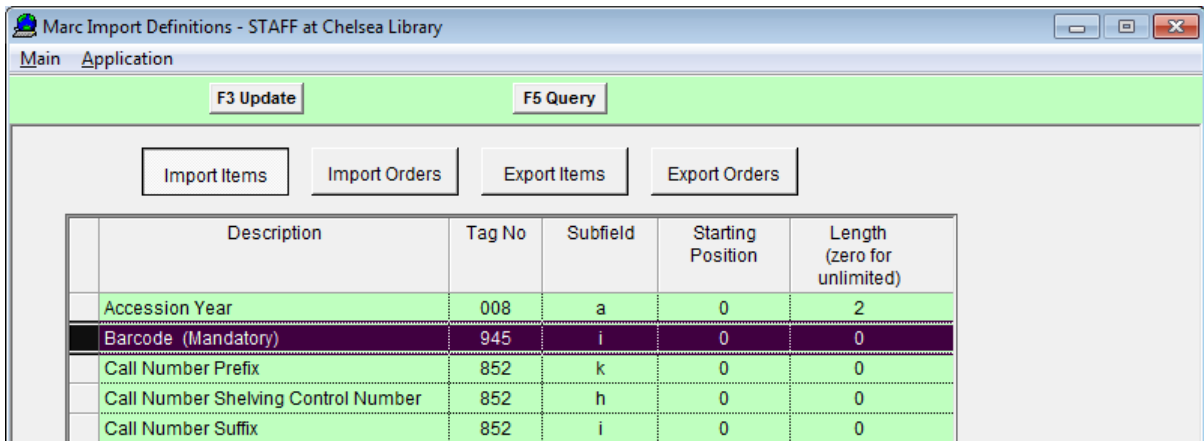
The **856** tag has now been configured.

Set the Barcode for Import

To load the items into *Amlib* with the *ClickView* barcode, the Authority Marc Definition table will need to be set up. This will only have to be done once. It will then be set for subsequent *ClickView* imports.

1. Launch the *Amlib* client

2. Open the *Authorities* module, and select **Application** > **MarcItemDefs** – the Marc Import Definitions table will display

3. Ensure the Import tab is selected:

4. Check to see if the Barcode (Mandatory) line has a definition. If this is set (for example: from a conversion) this does not need to be changed. The program will find it and locate the correct definitions. If the window is completely empty, you will need to define a tag for the Barcode.

5. If it is NOT present, then you can add one as follows:

    a. Fill in the fields as shown in the table below:

HEADING	DETAILS
Description	**Barcode (Mandatory)**
Tag No	**945**
Subfield	**i**
Starting Position	**0**
Length (zero for unlimited)	**0**

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

The Barcode has now been configured.

Supervisor Installation Parameters

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **Installation** – the Installation screen will display

3. Select the Catalogue tab:
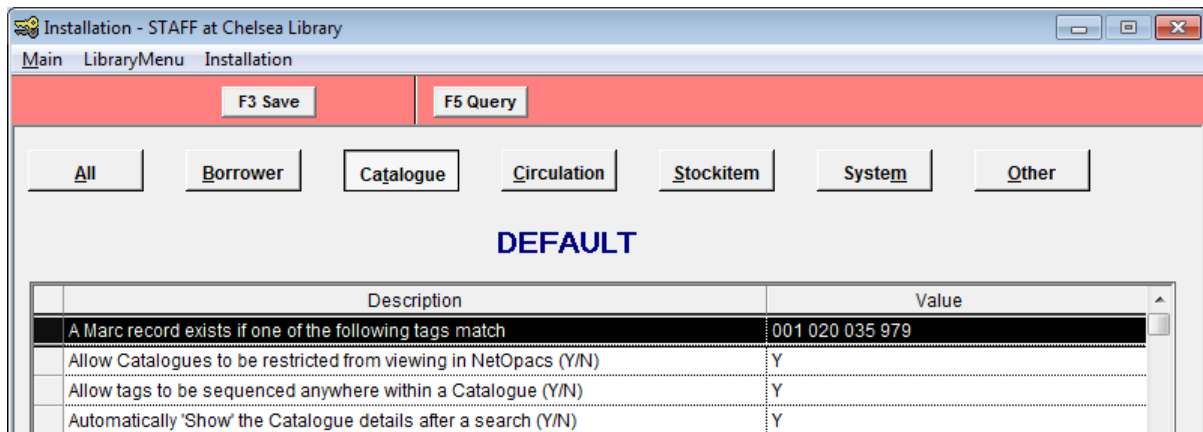
4. In the A Marc record exists if one of the following tags match parameter, check/add the **979** tag – this will ensure that the catalogue records will merge if the same *ClickView* record is imported again

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

The Installation parameters have now been configured.

Check Digits

Please Note: It may be necessary to set up a new Check Digit for *ClickView* items.

1. Launch the *Amlib* client

2. Go to **Main** > **Supervisor** > **CheckDigits** – the Check-digit Calculations table will display:
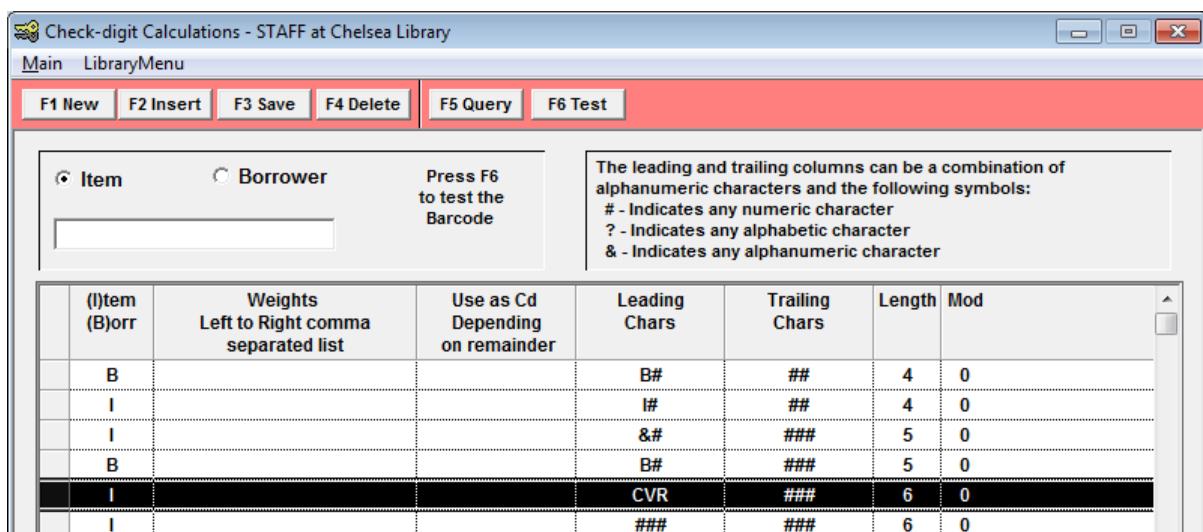
3. Click the **F1 New** or **F2 insert** button

4. Enter the following settings:

   a. (I)Item (B)Bor = **I**

   b. Leading Chars = **CVR**

   c. Trailing Chars = **###**

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

The <u>Check Digit</u> parameters have now been configured.

<u>Form & Stats Codes (Optional)</u>

It is possible to enter a unique Form (Format) code to be used with the *ClickView* records

1. Go to **Main** > **StockItems**> **StockitemForms** – the <u>Form Codes</u> table will display:

2. You can add one as follows:

   a. Click the **F1 New** or **F2 Insert** button

   b. Fill in the fields as shown in the table below:

HEADING	DETAILS
Form	**DVI**
Description	**Digital Video**
Allow Loan	**N**
Floating?	**N**
Cat def Defined	<leave blank – will auto-complete>

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

The <u>Form Code</u> has now been configured.

Converting ClickView XML Export to Marc21

Please Note: If any errors occur whilst using any XML facility in *Amlib* (for example: Supervisor spreadsheet export, rasissue, *ClickView* import) the user needs to have **Microsoft MSXML4.0** installed.

This can be downloaded from:
http://www.microsoft.com/downloads/details.aspx?familyid=3144b72b-b4f2-46da-b4b6-c5d7485f2b42&displaylang=en

Before you begin:

- Export your XML file from *ClickView*

It may be useful to create a **ClickView** folder for these files, to make it easier to locate when importing them into *Amlib* Marc Take Up.

1. Using Windows Explorer, locate the **Amlib** folder on your *Amlib* server

2. Find the **raissue.exe** application and **double-click** on it to open
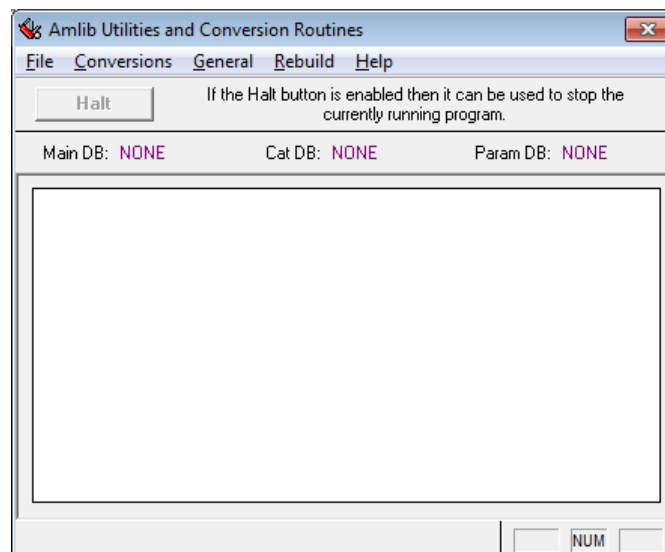
3. From the menu, select **File** > **Login...** – the Login screen will display

4. Type in your system administration Login name: and Password: – this is usually **SYSADM/SYSADM**

5. Select the relevant database from the Connect To: Database: drop-down: **Live** or **Test**
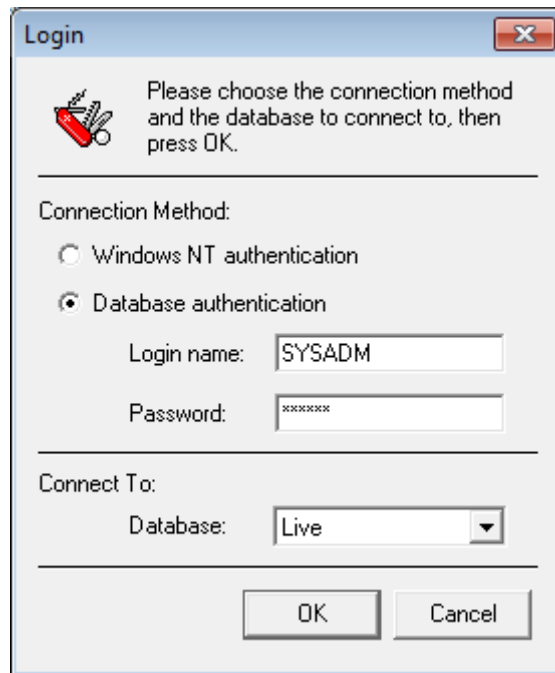
6. The Main DB:, Cat DB: and Param DB: fields will display the corresponding databases (this is usually **AMLIB**, **AMCAT** and **AMLOCAL** for the Live database and **TELIB**, **TECAT** and **TELOCAL** for the Test database)
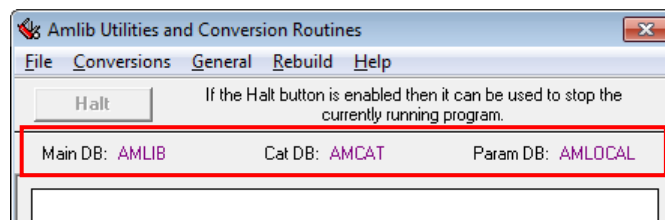
7. From the main menu, select **Conversions** > **ClickView** > **XMLCatalogue** – the Convert Tag screen will display
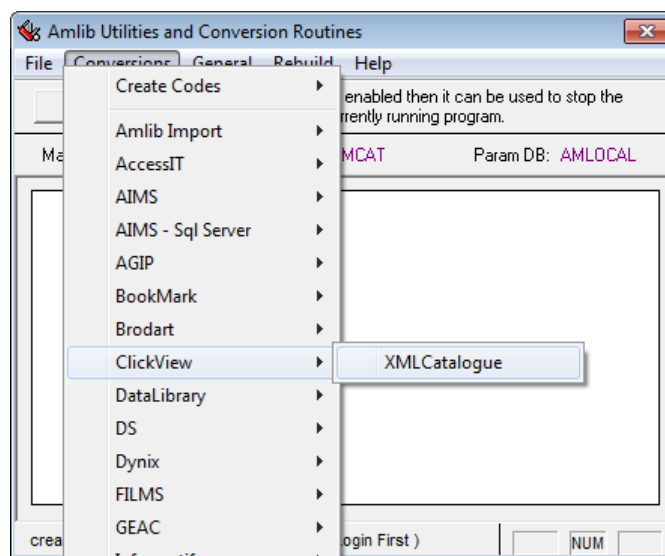
8. The default Tags will be defined

9. Check to see if the <u>Tags</u> have been assigned correctly – for example: <u>Video Description</u> may need to be **520** at your site (but MUST be a Non-Authority Tag)
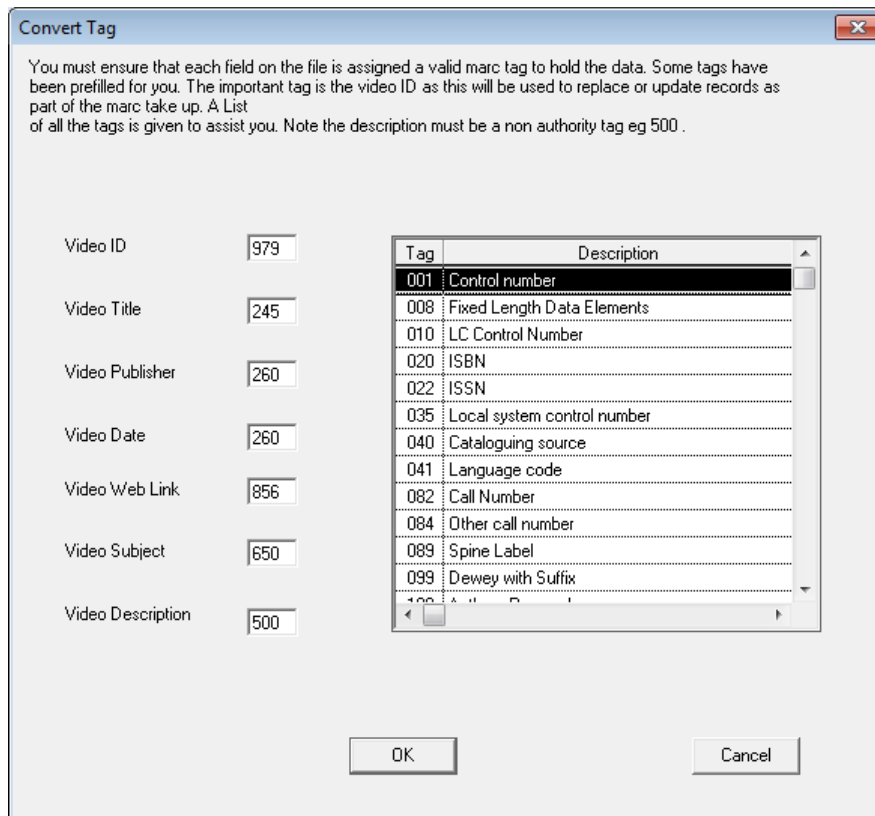
10. When set correctly, select the **OK** button to continue – the <u>ClickView Library Server</u> browse window will display
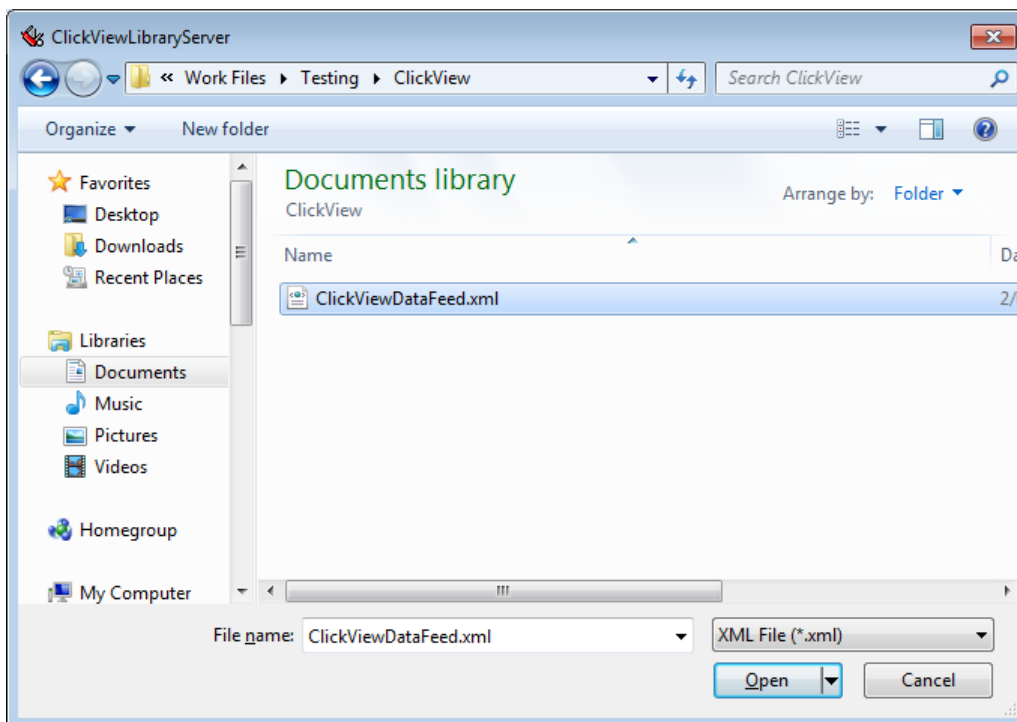
11. Navigate to the location of your saved exported *ClickView***.XML** file

12. Highlight the file and select the **Open** button

13. You will then be asked to create a destination file (which is where the converted XML data will be saved) - this file will have a **.MRC** extension (<u>Files of type:</u> **Marc Data**)
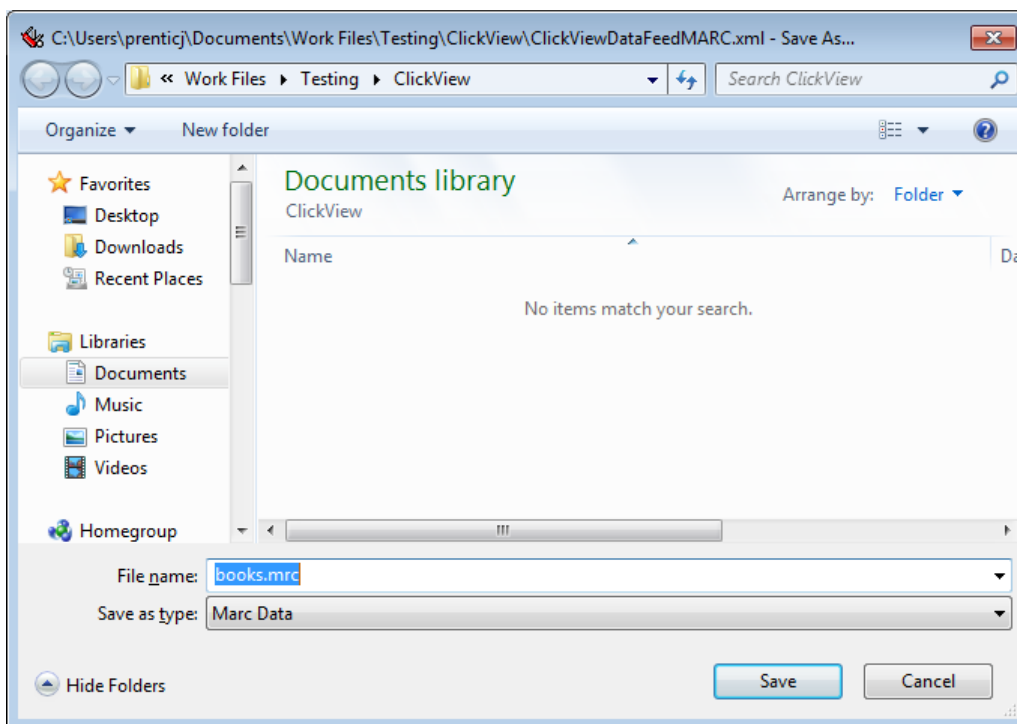
14. Click on the **Save** button – the conversion will then take place

15. The following message will display on completion: **Xml Conversion complete XX catalogues created. You may now use the output file in an authority marc take up** – where **XX** represents the number of records converted:
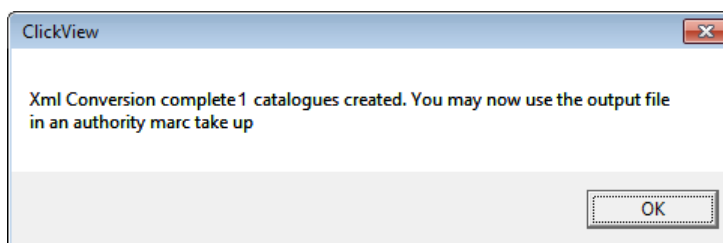
Loading ClickView Marc21 File into Amlib

You are now ready to load the *ClickView* Marc file into *Amlib* via the normal <u>Marc Take-Up</u> window.

20. Launch the *Amlib* client

21. Go to **Main** > **Authorities** > **MarcTakeUp** – the <u>Marc Import</u> screen will display

22. Click the **F1 Open** button – the <u>Open</u> dialogue box will display

23. Navigate to your **ClickView** folder and select the previously converted file
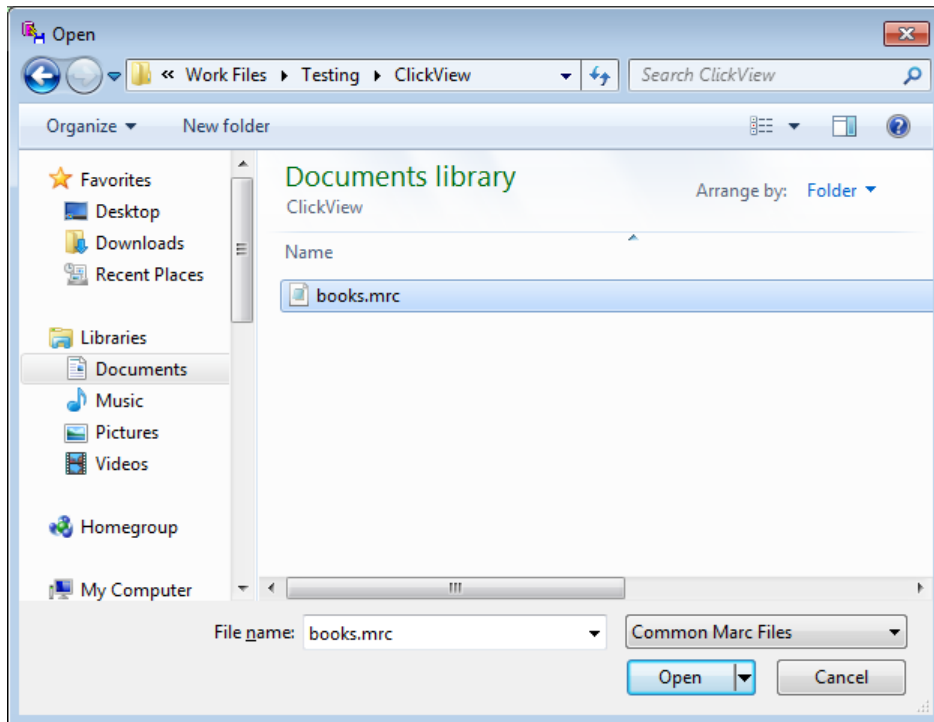
24. Once the file name has been located, use your mouse to select it and click on the **Open** button – the <u>Marc Import – Open</u> dialogue box will display:
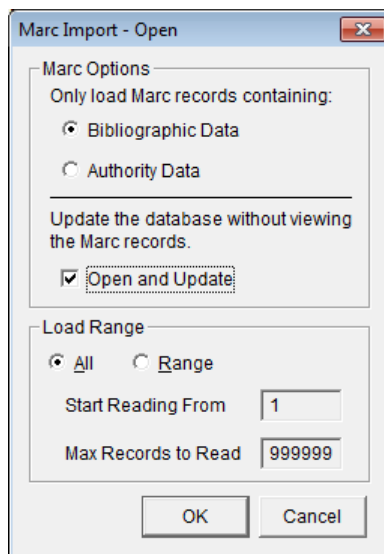
6. Complete the options using the above table:

    aa. <u>Marc Options</u> = **Bibliographic Data**

    bb. <u>Open and Update</u> = **ticked**, unless you want to view each individual Marc record

    cc. <u>Load Range</u> = **All** (unless the file sizes are quite large)

2. Click the **OK** button – the <u>Bibliographic Options</u> screen will then display

3. Ensure the following Marc Details are selected:

    a. <u>Each bibliographic record contains</u> =**Full Catalogue & Stockitem data**

    b. <u>When displaying the records show</u> = All tags in file

4. Complete the following Item Defaults:

    a. <u>Form</u> = type in an applicable Stockitem Form code (see <u>step 5</u> above) – for example: **DV**

    b. <u>Location</u> = an applicable location code – for example: **WEB**

    c. <u>Stats Code </u>= an applicable Stockitem Stats code – for example: **NF**

5. Click on the **OK** button when complete

6. An <u>Update Options</u> window will then display, where **Cat**(alogue) and (Stock)**Item Options** can be selected:

7. <u>Cat Options</u>: When an incoming Catalogue is match with an existing Catalogue:

   a. <u>Replace the existing Catalogue</u> = **marked**

8. <u>Item Options</u>: When an existing Catalogue is replaced all existing Stockitems:

   a. <u>Are refreshed except lines</u>: **6**

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

10. A <u>Saved Files</u> screen will display:

11. Type the names of the files into which all the newly created **Catalogues**, **Authorities** and/or **Stockitems** will be saved. If you do not want to check new items – for example: **Authorities**, do not enter a filename

12. Click the **OK** button

13. The <u>MARC</u> file will then be imported

Would you like to see a list of the imported records?

5. Navigate to the *Authorities*, *Catalogue* or *Stockitem* modules

6. From the menu, select **File** > **Display File** – the <u>Saved Query Results</u> table will display:

7. Highlight the filename and click the **F9 Select** button

8. A <u>List</u> of imported items will then display

COVER IMAGES DOWNLOADED FROM SCIS

SCIS (Curriculum Corporation) now have cover images available. The **images.zip** file contains images for items matched in the Order file (**Please 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 name of each image is the ISBN which will assist when uploading into *Amlib*.

- The image is not part of the Marc file so the image will need to be added individually after the Marc file has been downloaded.

Obtaining Images from SCIS

1. Import Orders from the *SCIS* webpage in the usual way.

2. The additional **images.zip** will appear in the COVER IMAGES/Get Images column. You can open it to see how many records have images. In this example, five records were ordered from *SCIS*, 3 have images and 2 do not contain image files.

3. Save the **images.zip** file in a folder in a location you are able to access later

4. After downloading, right-click on the filename and **Extract to current folder**
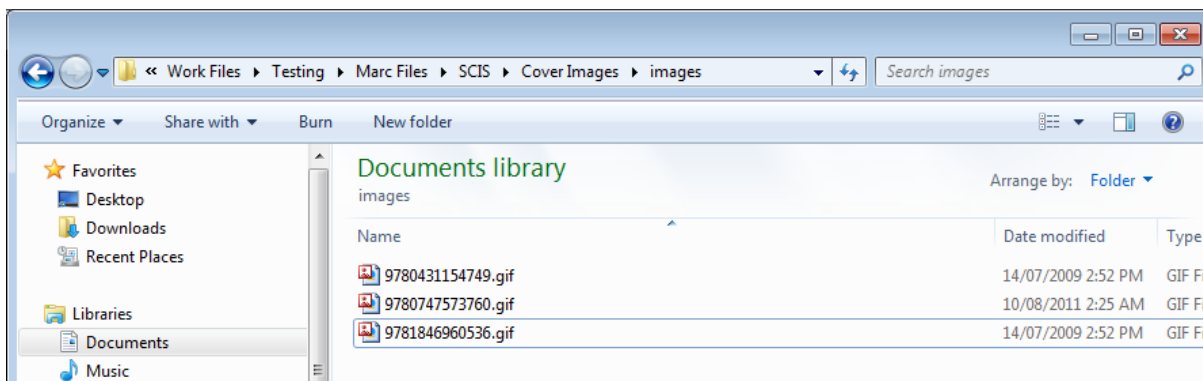
5. Import the *SCIS* Marc (**.mrc**) file using Marc Take-Up in the usual way

Attaching Images to Amlib Records

1. Find one of the Catalogue records recently uploaded (for example: from the Catalogue Saved File)

2. Check to see that there is an image for that ISBN
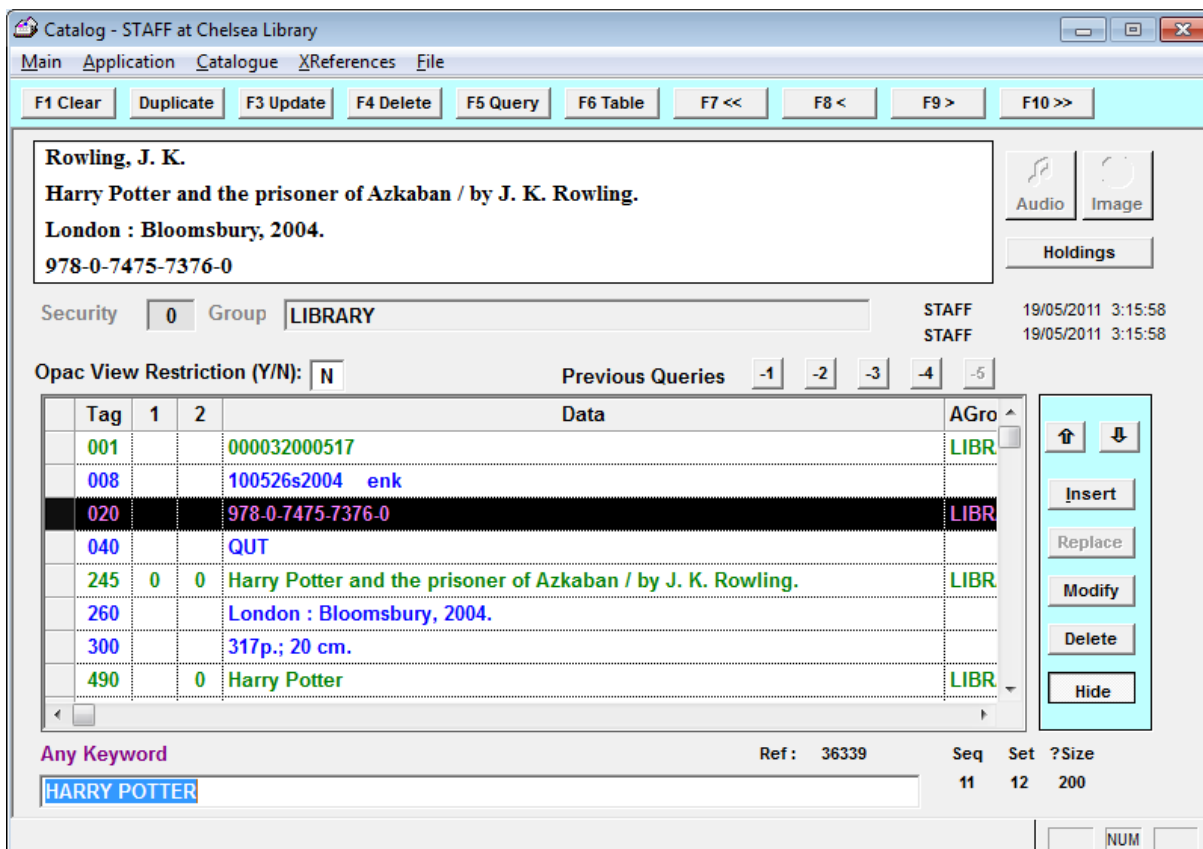
If an image exists, you are able to attach it:

3. From the menu, select Catalogue > **Picture Sounds** – the <u>Catalogue Media</u> screen will display:
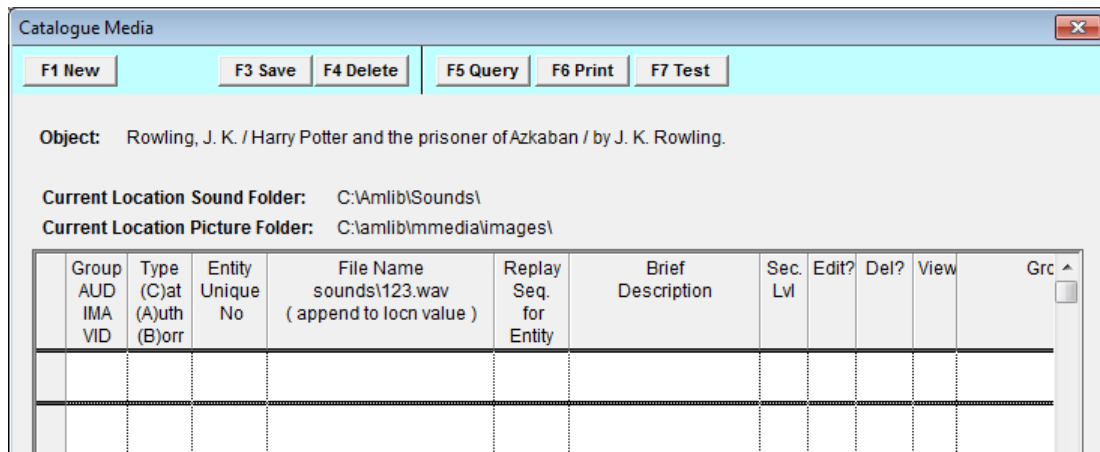
4. Click the **F1 New** button – navigate to the location of the saved images downloaded earlier:
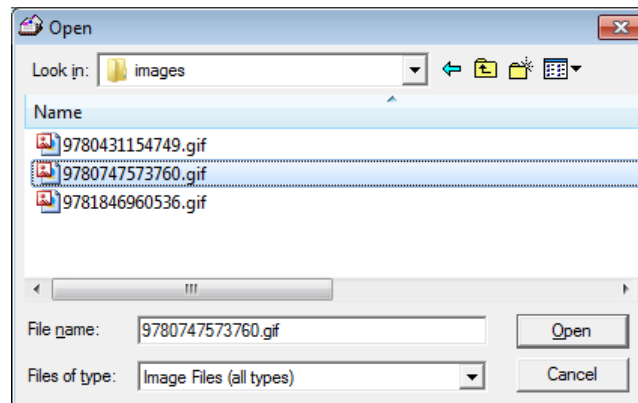
5. Select the image with the matching ISBN and click the **Open** button – it will be added to te Catalogue Media screen
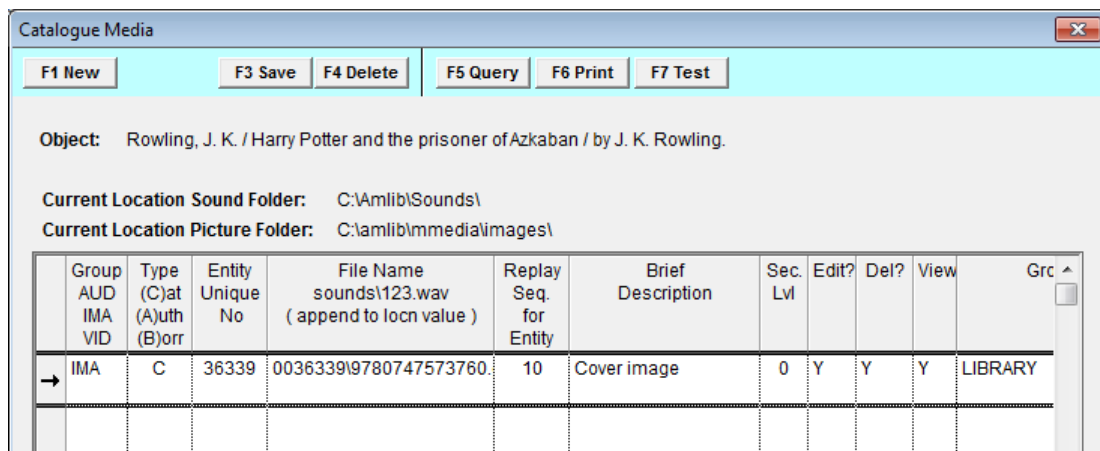
6. Enter the <u>Replay Seq. for Entity</u> (usually **10**) and a <u>Brief Description</u> (for example: **Cover image**)

7. Click the F3 Save button when complete

8. The Image can be tested by highlighting the new Image line and selecting the **F7 Test** button:

9. Close the Catalogue Media screen by clicking on the **red** [**X**] in the top right-hand corner

10. The Image icon should be now available on the Catalog screen
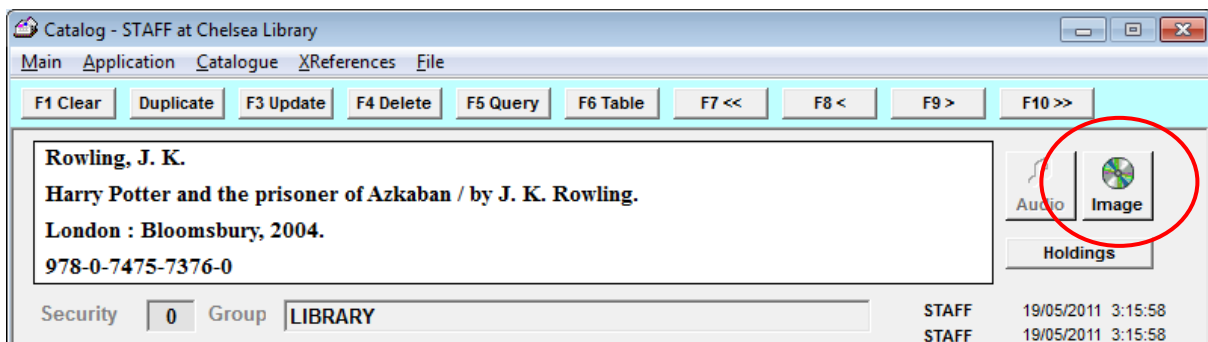
11. If the images are to display in *NetOpacs*, the *NetOpac* configuration file may need to be changed to display images (**NetOpacs/Amlib.ini**). The actual Item list template may also need altering to include a new placeholder. Contact *Amlib Support* for more information.
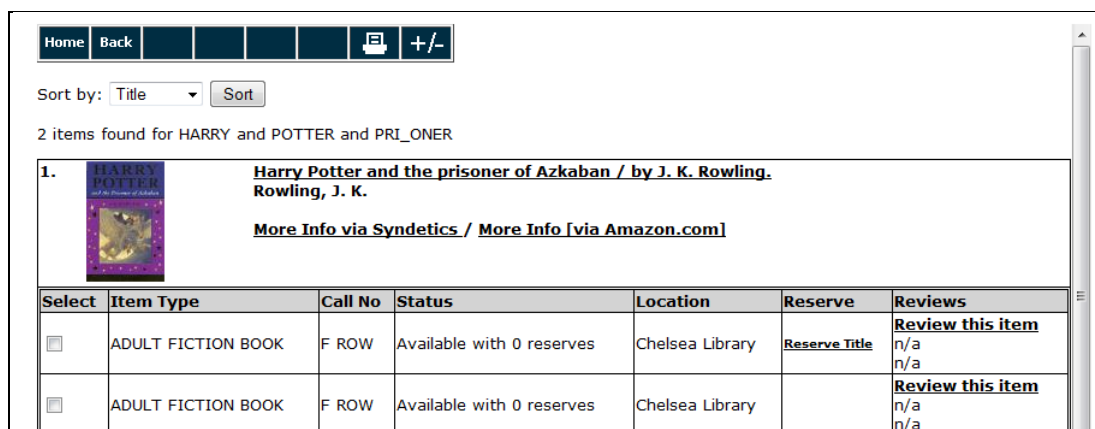
CREATING MASTER/SUBSIDIARY ITEMS (KIT LOANS)

It is possible to link stock items to one (*Master*) item. All the linked (or *Subsidiary* items) show as on loan when the Master is on loan. This is useful for sites that want to set up kits or videos (with programs catalogued separately) and do not wish to loan out the separate items independently.

Example 1: Videos with Multiple Programs

Title: ABC for Kids
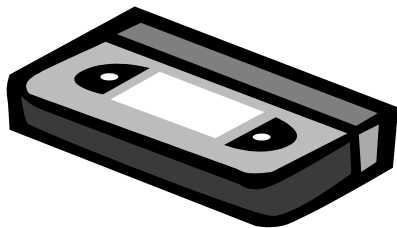
MASTER

SUBSIDIARY ITEMS

- Big red car (20 mins)
- Wiggle time (30 mins)

Example 2: Kits
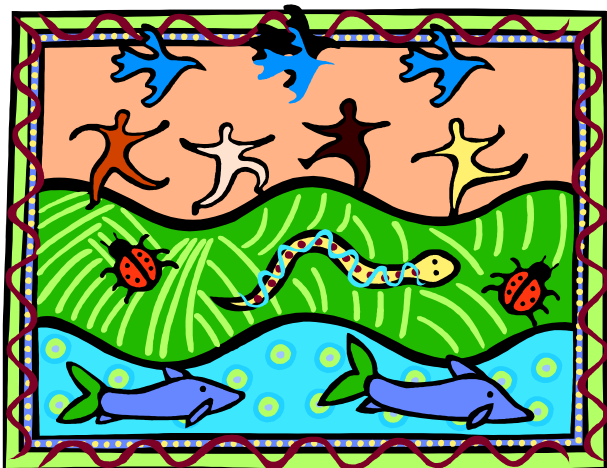
SUBSIDIARY ITEMS

- Teacher's Guide Book
- Video
- 24 plastic animals
- Sound cassette
- Worksheets
- Game

Kits can be added as a Master with Subsidiary items, or alternatively as a single item. Use the former for those instances where you would like the ancillary items to be searchable on the catalogue. Otherwise a Memo on the stock item which lists the ancillary items would suffice.

Creating a Master Record

1. Launch the *Amlib* client

2. Go to **Main** > **StockItems** > **Stockitem** – the Stockitem module will display

3. If you are creating a new stockitem: Enter the barcode that you wish to use for circulating the loan. If the item is a kit or box, scan the barcode into the **Item No** field. Otherwise, just do a **F5 Search** in the Stockitem module to locate the item which you would like to be the Master Item

HINT: A description relating to the item as a Master can be added to assist in listing Master Items.

4. From the menu, select **XReferences** > **SelectAsMaster**:
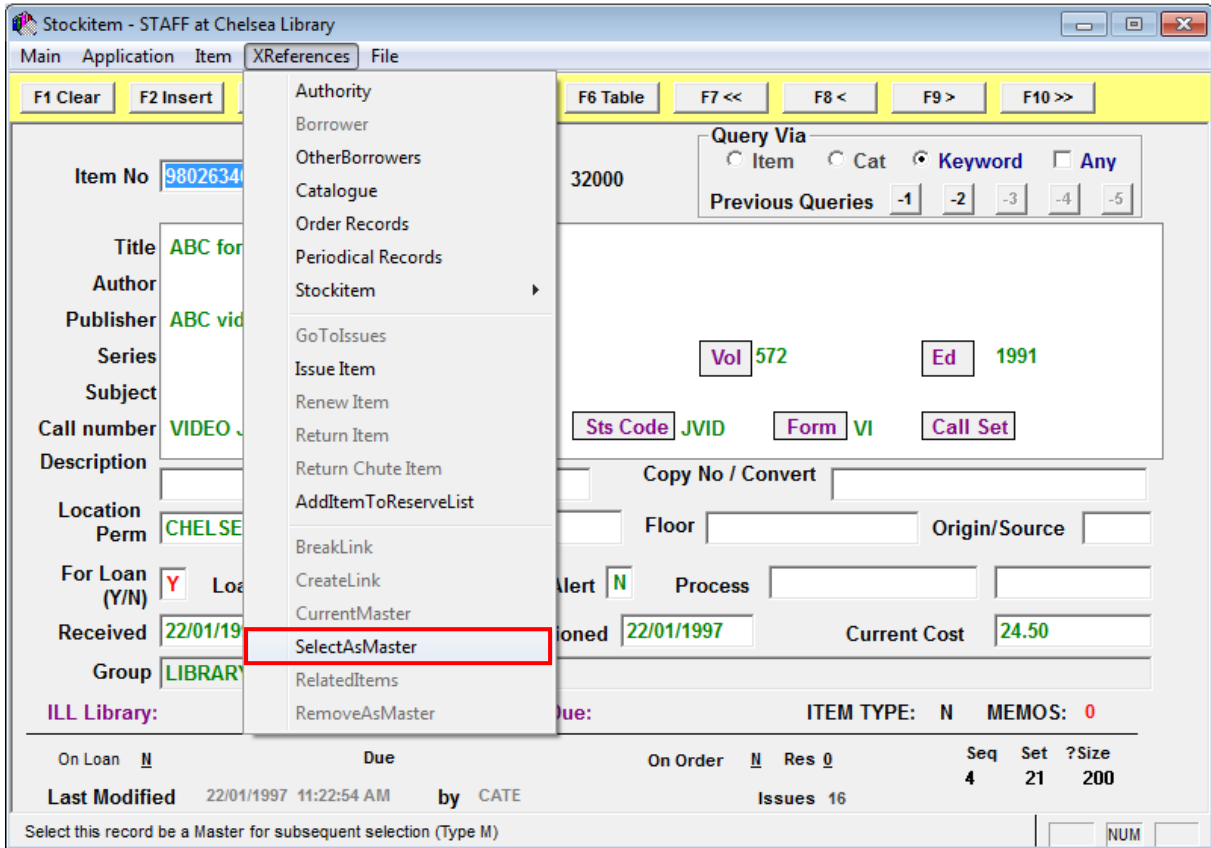
5. The following prompt will then display: **The Item has been selected as Master.**
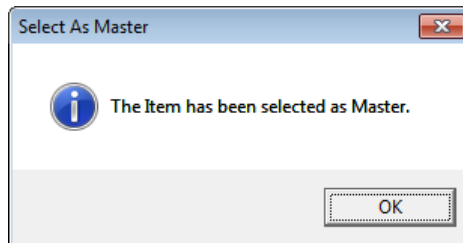
6. Once the item has been selected as a Master, the **ITEM TYPE:** will change from **N** (Normal) to **M** (Master):
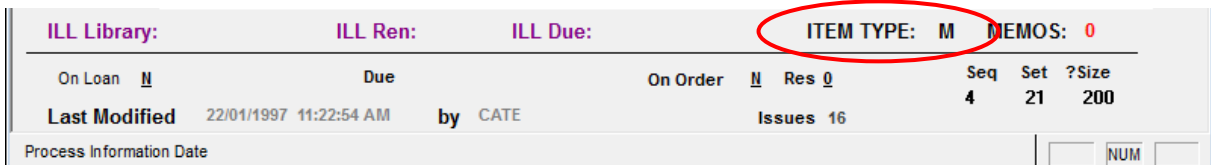
7. Click the **F1 Clear** button – the system will remember the last item to be made a Master Item

8. It is then possible to link other items to this Master Item. You can either create a new stockitem record (attached to the same catalogue record), or use **F5 Search** to locate the

stockitem in question (which can be linked to the same Catalogue record – or a separate record if you would like it to be searchable as a unique entity).

9. Once the stockitem to be linked is displayed on the screen, from the menu, select **XReferences** > **CreateLink** – a prompt will then display, asking you to confirm the **Link this Item with** the **Current Master**:
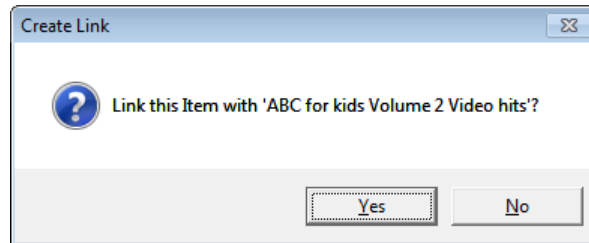
10. Click the **Yes** button to create the link – the following prompt will then display: **The item has now been Linked.**
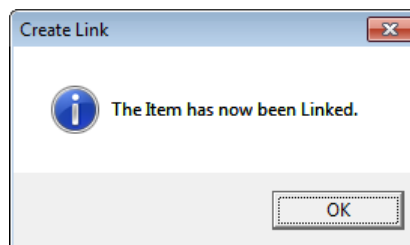
11. The Stockitem will now have an **ITEM TYPE:** of **S** (Subsidiary):

Circulating Linked Items

- When borrowing out linked Items, only the Master Item will display in the *Issues* module:

- Subsidiary items can be circulated independently of the Master – the following <u>Alert</u> will display if a Subsidiary item is circulated: **This is a Subsidiary item. It is not usually issued using its own barcode – normally the Master record must be issued.**
  Do you want to issue just this item?

- When the item is returned another <u>Alert</u> notice will display (see below for more details)

- Once the Master Item is out on loan, all linked items also show that they are out on loan to that borrower. In the *Borrower* module, from the menu, select **XReferences** > **ShowItemsOnLoan** to see the full list of items on issue to that borrower (including linked items):
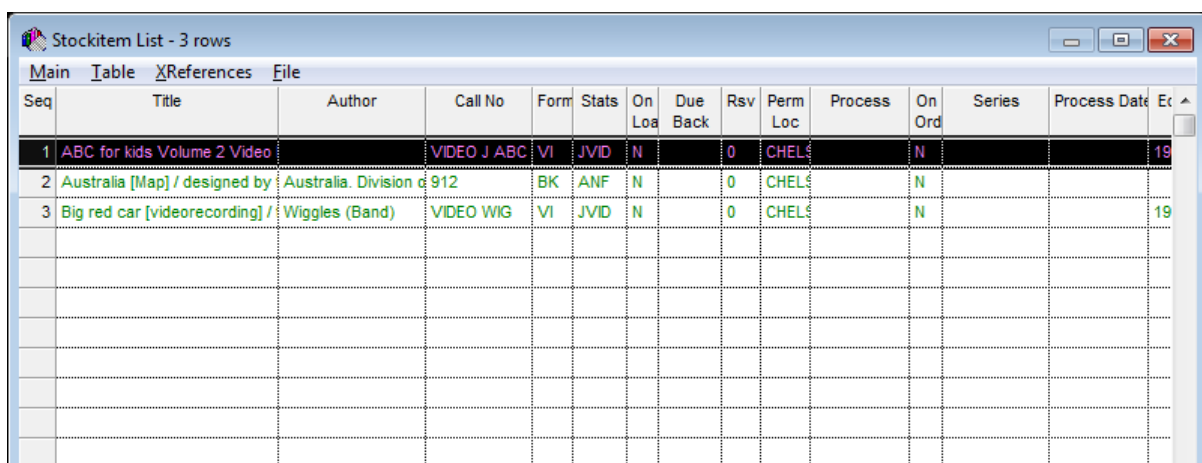
- To check the Master of any Stockitem with an ITEM TYPE of **S**, from the *Stockitem* module menu, select **XReferences** > **CurrentMaster** – the following prompt will display denoting **the current Master record:**
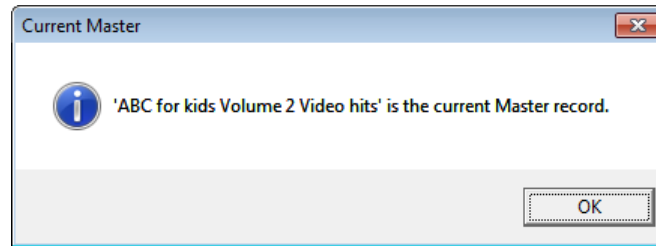
- To check a listing of linked items, from the *Stockitem* module menu, select **XReferences** > **RelatedItems** –a Stockitem List of Related Items will display:

Returning Master-Subsidiary Items

This procedure applies to checking in or scanning through the returns module any items that have been set up with a Master-Subsidiary relationship (for example, kits with several parts or boxes of books and other library items).

1. Launch the *Amlib* client

2. Go to **Main** > **Circulation** > **Returns** – the Returns screen will display

3. Check in the box or Master item – a prompt will display with the following message: **This is the Master Item. Return All Parts**
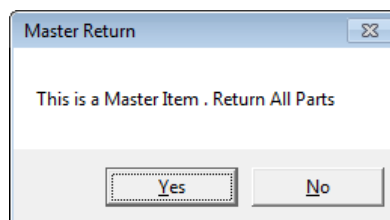
4. If you are sure that all items are present, click the **Yes** button (otherwise click the **No** button)

5. If you clicked the **Yes** button, the returned item will display in the <u>Returns</u> screen:

6. To return only some parts of the box or set, click the **No** button – the <u>Subsidiary Return Check</u> screen will display:

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

FIELD	EXPLANATION/OPTIONS	EXAMPLE
Process Code	A process code can be entered in this field to be automatically added to items with a **Y** in the Add Process? column.	
Alert	If set to **Y** a message will display at issues if the item is checked out to another borrower, to alert the operator to the Process Code on the item.	A message will appear at the issues screen to indicate that the item has a process code (see screen shot below). Click the **OK** button to proceed with the issue.
OPAC	If set to Y, the item will show on the OPAC.	If the item is missing, setting the OPAC to N will mean that library users will not see the item displayed and this will prevent them from asking for an item that is not available.
For Loan	If set to **Y**, this will allow the item to be borrowed if presented at the circulation counter.	For missing items or parts of a set, this may be set to **N** to stop the item from being borrowed until the process code is removed or the item is returned to its set.
Memo Type **Text**	Information contained in these fields will determine the memo placed on selected items. A Memo Type can be selected from the list of Memo Types. Additional or alternative text can be added in the Text field.	A Memo Type of **BULK LOAN** may have been created and selected in this screen. The Text may include the details of the set that was originally loaned out.
Return?	The system will check in/return any items with a **Y** in this column	If items are present, they can be checked in and those not present are marked with an **N** so they remain checked out and undergo normal overdue processes. Alternatively, all items may be checked in (mark items with a **Y** in this column) and a Process Code may be used instead.
Add Memo?	A memo will be added to those items marked with a **Y** in this column	A standard memo for bulk loans may be added to those items that are not present – to indicate what set they were originally loaned in, and that the parts had not been returned.
Add Process?	A Process Code (see above) will be added to any items with a **Y** in this column	Items may have a process of 'missing part' to indicate on the catalogue that they are part of set that is now incomplete.

8. Click the green **OK** button at the bottom of the screen to process the items as indicated

9. Items that were marked as **Y** for return will display on the returns screen:

10. If some items were marked as **N** for return, these will display as on loan to the original borrower:

11. Items that were marked with a **Y** for <u>Process Code</u>, will contain the corresponding <u>Process</u> in the *Stockitem* record:

12. If items were marked with a **Y** for <u>Memo</u>, the memo will display on the *Stockitem* record:

- When returning a linked item, if you attempt to return the Subsidiary Item rather than the Master Item, the following prompt will display: **This is a Subsidiary item. It cannot be returned using its own barcode – the Master record must be returned.**
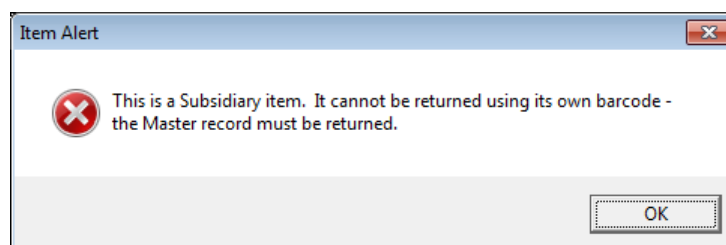
Supervisor Settings

It is possible to change the <u>System</u> settings so that when a Master Item is checked in via the <u>Returns</u> module, it automatically shows <u>Subsidiary Return Check</u> list of the Subsidiary Items:

1. Go to **Main** > **Supervisor** > **Installation** – the <u>Installation</u> (DEFAULT) screen will display

2. Select the <u>Circulation</u> tab

3. Scroll down and adjust the following setting: <u>Show subsidiary items when returning a master item (Y/N)</u> = **Y**
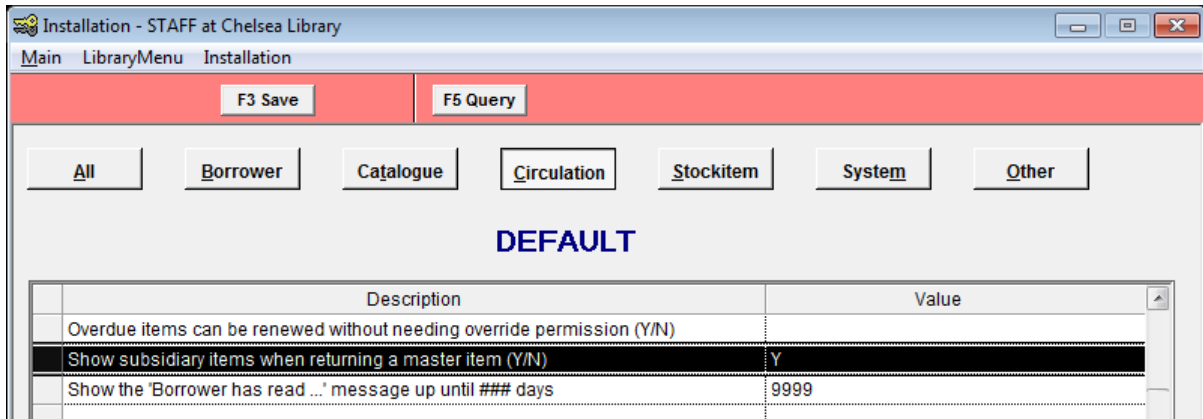
4. Click the **F3 Save** button

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

Alternate Method

HINT: Alternatively, you can attach a memo to the Master Item, so that a message displays with an indication of how many items are attached so that this can be checked:
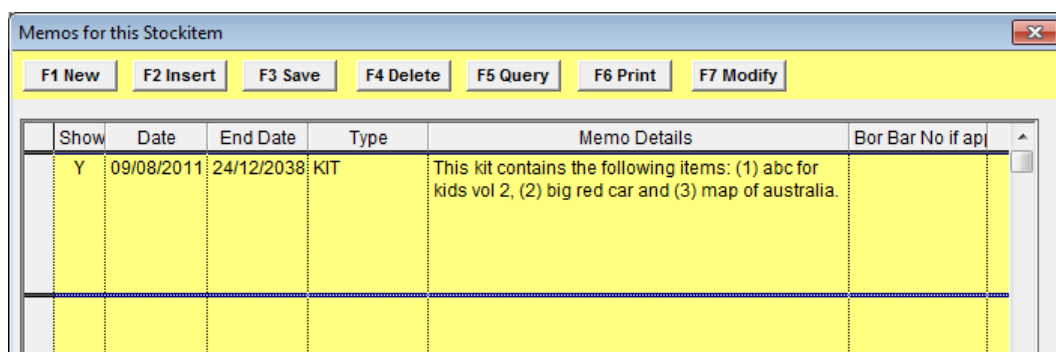
Delinking Items

- To break the link: from the *Stockitem* module menu, select **XReferences** > **BreakLink** – a prompt with the following message will display: **The Item has been unlinked from 'XXXX'**
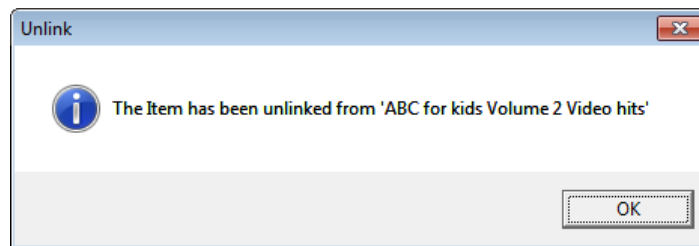
Please Note: You will be unable to delete a Master stockitem record if it has linked items. The Master cannot be removed as a Master until the items are first disconnected.

PREMIERS READING CHALLENGE

The **PRC Listmaker** program compares the contents of your library system's database against the items contained in the *Premier's Reading Challenge* booklists. **PRC Listmaker** displays all items matched. The list can then be printed or exported. Exported lists can be transferred into *MS Word*, *Excel* or another program. Various options are included to change the sort order, level and categories viewed.

PRC Listmaker now automatically tags items in your library catalogue that are not found in the PRC Booklists but which have the same series as titles that are on the booklists.

For assistance with the PRC Listmaker program contact:

- **Email:** support@librarysolutions.com.au
- **Phone:** 1800 241 709
- **Fax:** (03) 9469 4700

Please Note: DO NOT run the *PRC Listmaker* if you have more than one Catalogue record with the same ISBN in your database!

Saving Catalogue Stockitem Records to a File
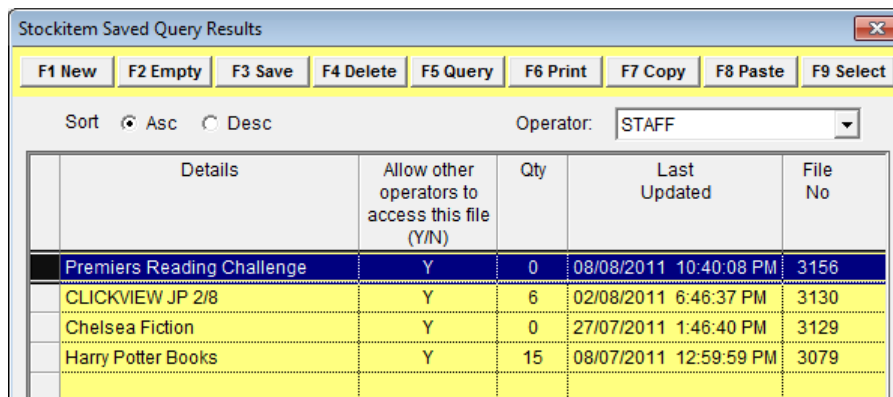
1. Launch the *Amlib* client

2. Go to **Main** > **StockItems** > **StockitemWhere** – the Stockitem Where Search screen will display

3. Enter the following Where statement:

   a. Choose Column to Search select **Item No**

   b. Choose Operator select ≠ (not equal to)

   c. Leave box (3) empty

   d. Click the **Paste** button
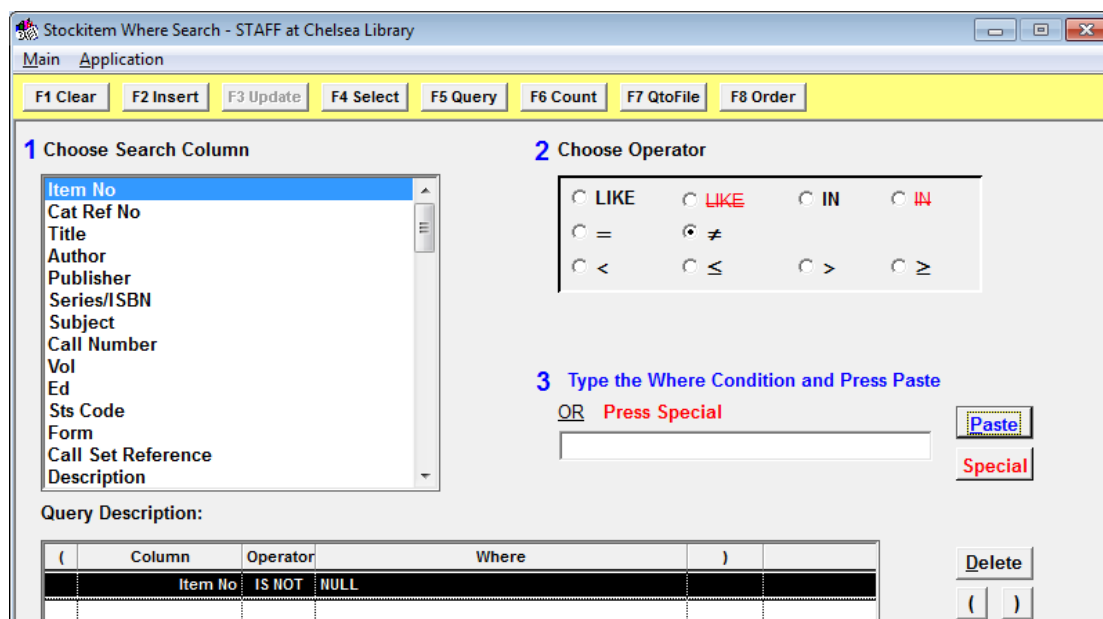
Please Note: You may also want to limit the Where statement by collection – for example:
Sts Code = JF

4. Click the **F7 QtoFile** button – the <u>Stockitem Saved Query Results</u> screen will display:

5. Click the **F1 New** button and give the file an appropriate <u>Details</u> name– for example:
Premiers Reading Challenge (as this is the file that will be used when exporting the data)

6. Click the **F3 Save** button to save the name of the file

7. Highlight the file and click the **F9 Select** button to transfer the list of items into the file

8. A prompt will display with the following message: **The 'PREMIERS READING CHALLENGE' file contains XXX stockitems.**
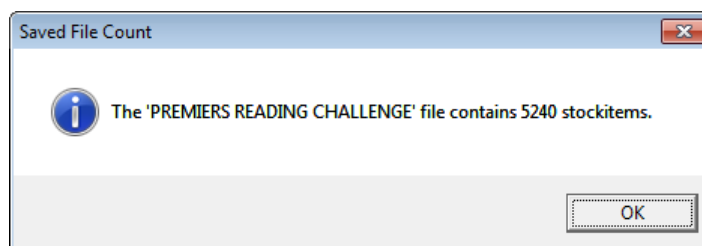
9. Click the **OK** button

The Saved File is now complete.

Check the Export Items Definitions

Before using Marc Export for the first time, you must check that the appropriate mapping has been done for **Marc Export**. This only needs to be done once.

1. Go to **Main** > **Authorities** > **Authorities** – the Authorities screen will display

2. From the menu, select **Application** > **MarcItemDefs** - the Marc Import Definitions screen will display

3. Click on the **Export Items** tab

Please Note: This table is used to set the parameters for the Export Items. To complete an export for the *Premiers Reading Challenge* it is necessary to enter as least one Marc tag in this screen: specifically the barcode tag.   As seen in the example below, more tags can be defined for an export to different systems, however for the PRC Listmaker only the barcode is required.

4. In the Tag No and Subfield columns enter the tag number that Barcode will go in (see Note below on choosing a tag if one is not already entered):

Description	Tag No	Subfield	Starting Position	Length (zero for unlimited)
Accession Year	945	a	38	2
Barcode	945	i	0	0
Call Number				
Call Number Prefix				
Call Number Shelving Control Number				
Call Number Suffix				
Catalog Reference No				
Circ Status of Item				
Floor Location				
Form Code				
Form Description				
Loan Type Code				
Loan Type Description				
Location Code				
Location Description				

Please Note: The Marc Tag does not need to be defined on the **Authority** > **MarcTags** screen to be used in the Export. Usually a **9xx** Tag is chosen as this is reserved as these are the Local Defined Tags. For example **945i** or **998a** are good choices.

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

Export the Records from Amlib

1. Go to **Main** > **Authorities** > **Authorities** – the <u>Authorities</u> screen will display

2. From the menu, select **Application** > **MarcExport** – the <u>Marc Export</u> screen will display

3. Enter the following parameters:

   a. (1) <u>Choose the</u> <u>Marc Export type:</u> select **Bibliographic Export from Stockitem File**
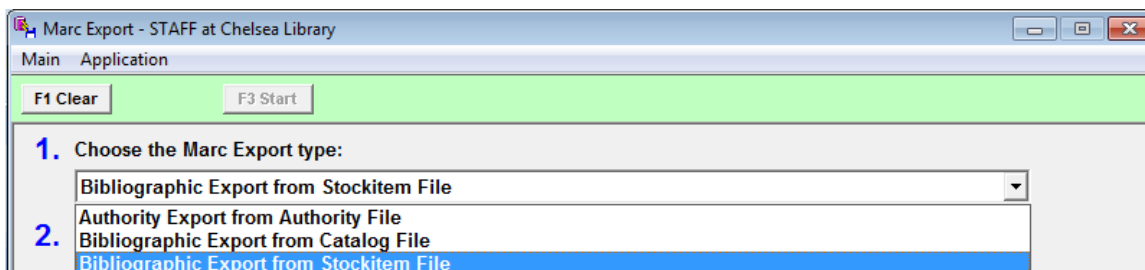
   b. (2) Change any options specific to the selected export type: select **Write each Marc record on a separate line in the Export File**
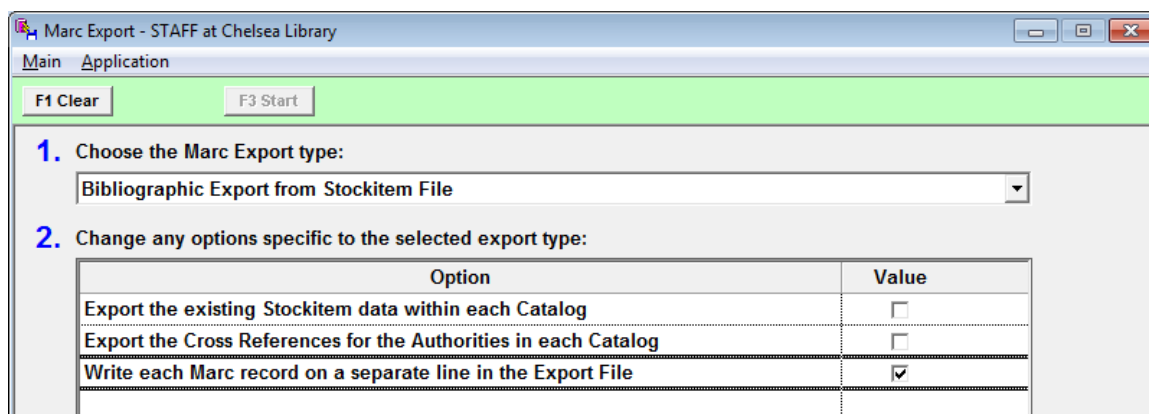
   c. Leave (3) blank

   d. (4) Select the Saved File to use in the export: click the **Saved File…** button – the <u>Stockitem Saved Query Results</u> screen will display:
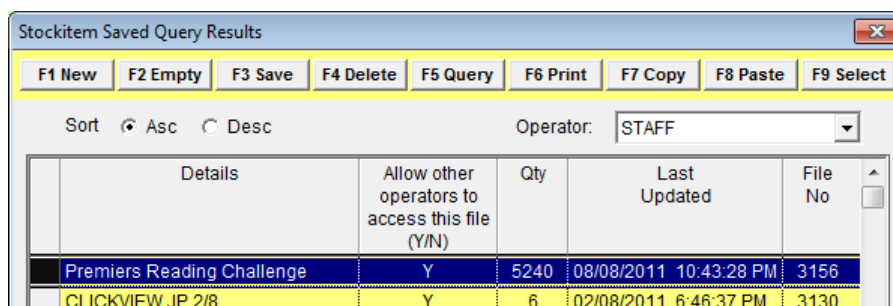
   e. Highlight the **Premiers Reading Challenge** file and click the **F9 Select** button

f.   (5) Ensure the Marc radio button is selected:
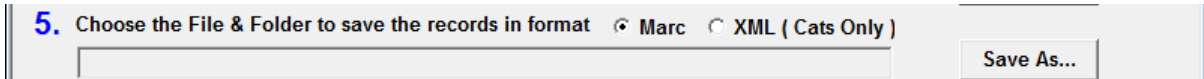
g.   Click the **Save As…** button – <u>Marc File – Save As…</u> screen will display:
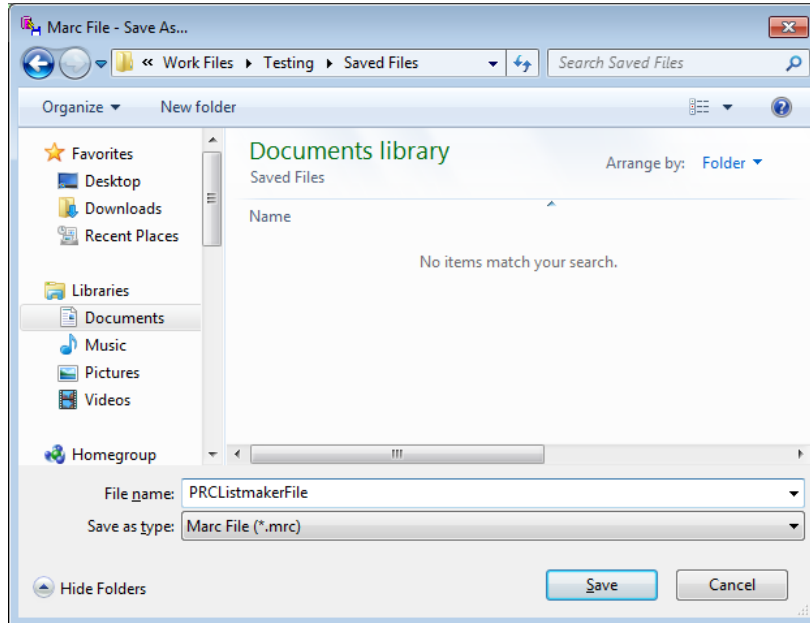
h.   Select a drive to save the file to, create a file name (for example: **PRCListmakerFile**)and click the **Save** button
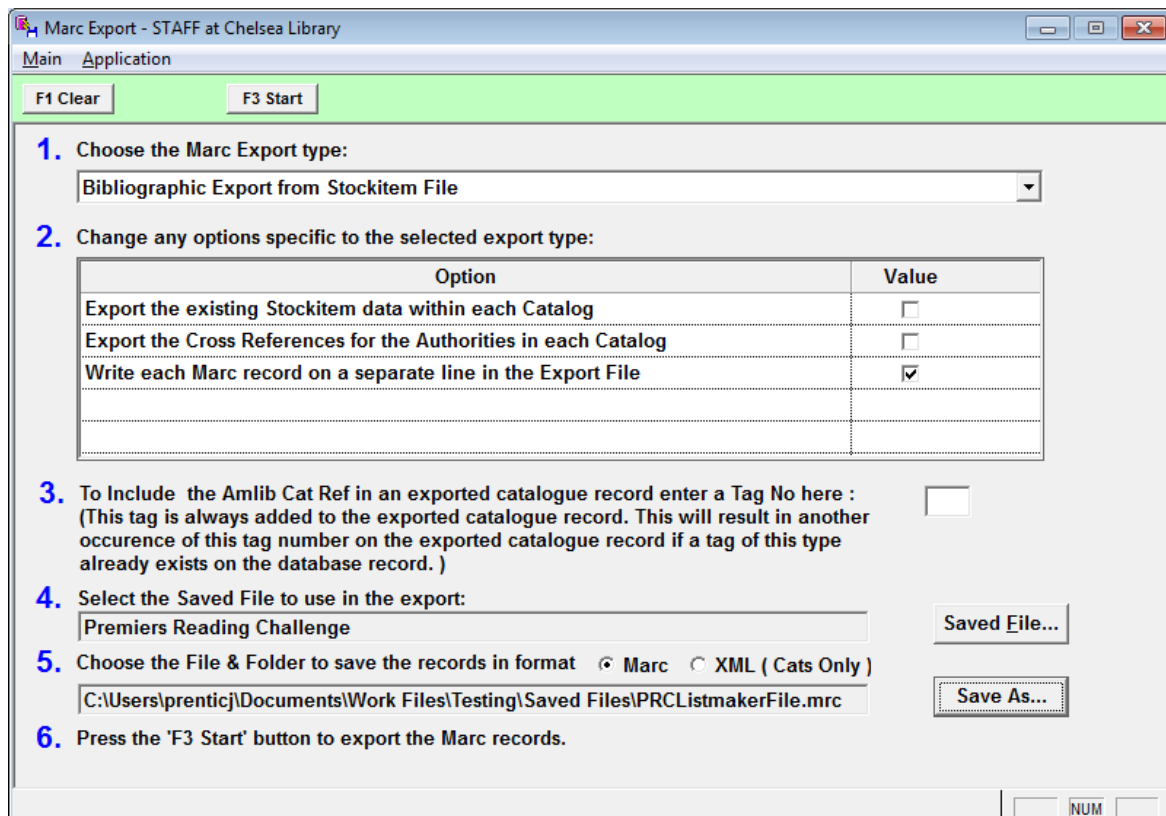
4. Select the **F3 Start** button – an <u>Export</u> processing prompt will display:
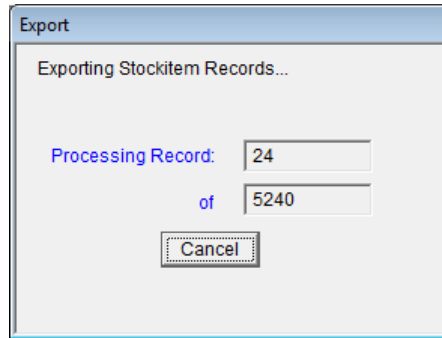
5. When complete, a prompt with the following message will display: **XXX records from the 'PREMIERS READING CHALLENGE' Saved File have been exported.**
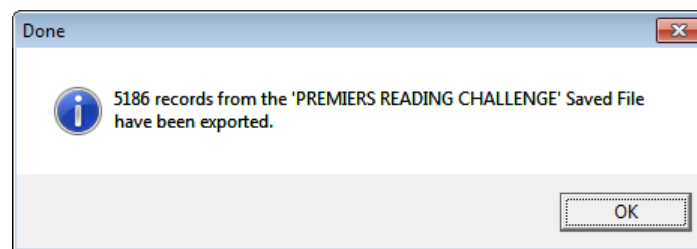
6. Click the **OK** button

PRC Listmaker

Download and install the *PRC Listmaker* client (this example uses the S.A. *PRC Listmaker*):

1. Launch the *PRC Listmaker* client
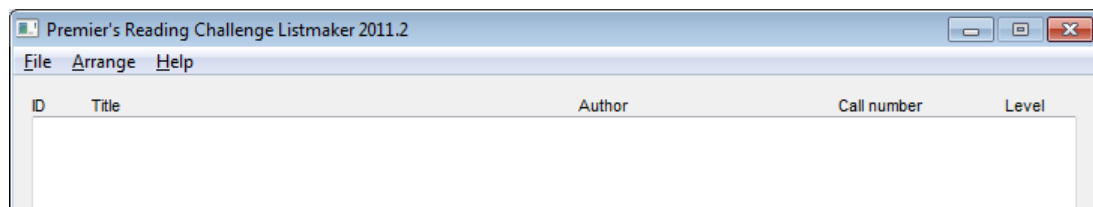
2. From the menu, select **File** > **Compare** – the <u>Compare Library Data</u> screen will display:
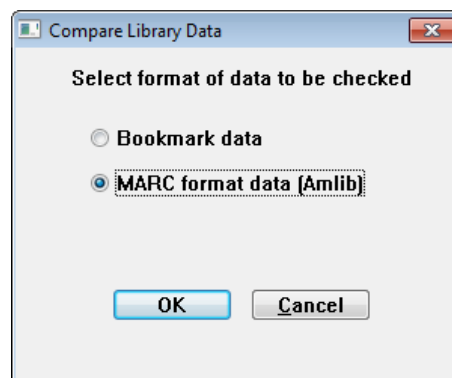
3. Select **MARC format data (Amlib)** and click the **OK** button

4. Navigate to the saved **.mrc** file, select it and click the **Open** button
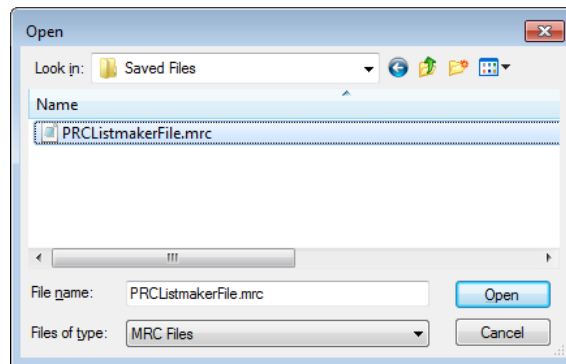
5. A prompt with the following message will display: **Do you want to tag the matched records in the data?**
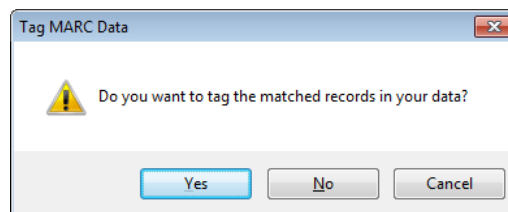
6. Click the **Yes** button – the file will then be scanned:
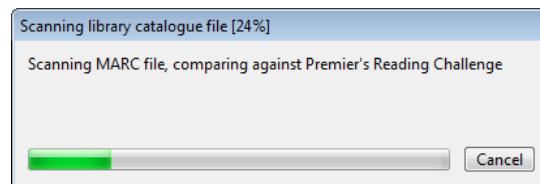
7. The result list will display when complete:
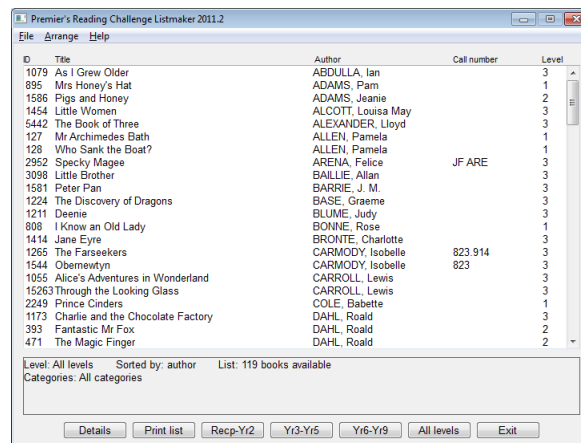
8. Click the **Exit** button – an **output.mrc** file of tagged items will have been created in the same folder that the export file was saved to

Importing the PRC output file into Amlib

The *PRC Listmaker Compare* process will produce a file called **output.mrc** which needs to be imported into *Amlib*.

1. Launch the *Amlib* client

2. Go to **Main** > **Authorities** > **MarcTakeUp** – the <u>Marc Import</u> screen will display:
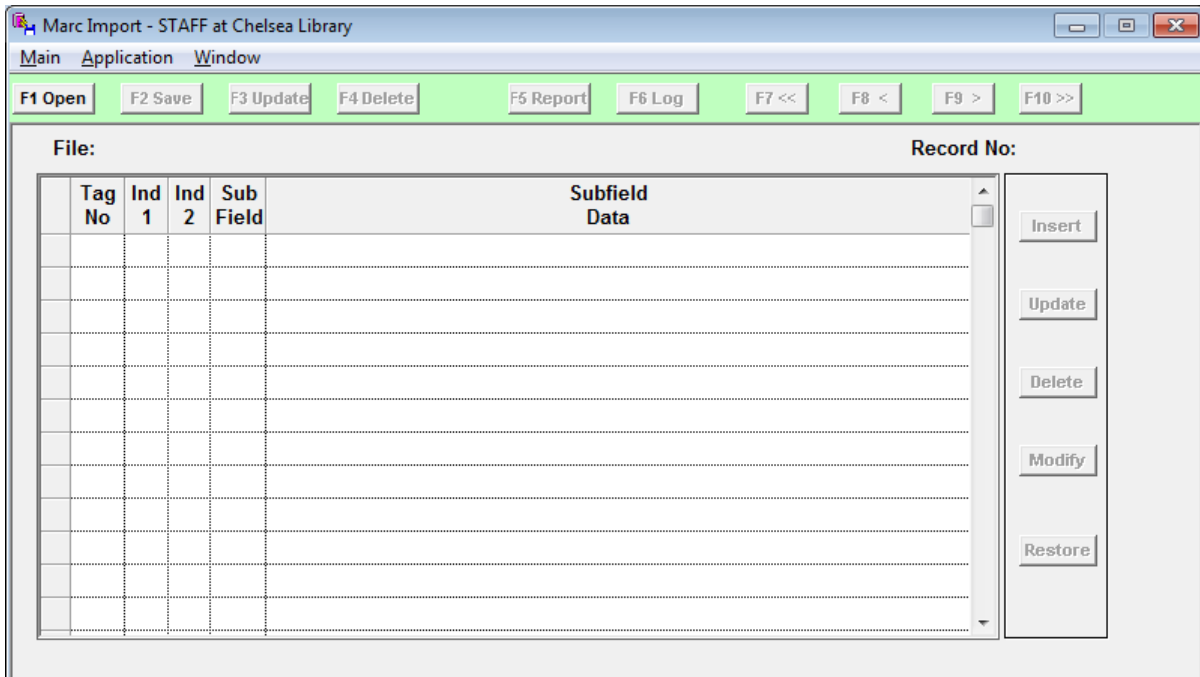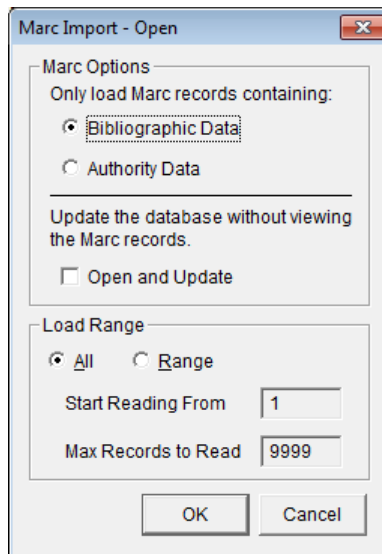
3. Click the **F1 Open** button to display the <u>Open</u> dialogue box:
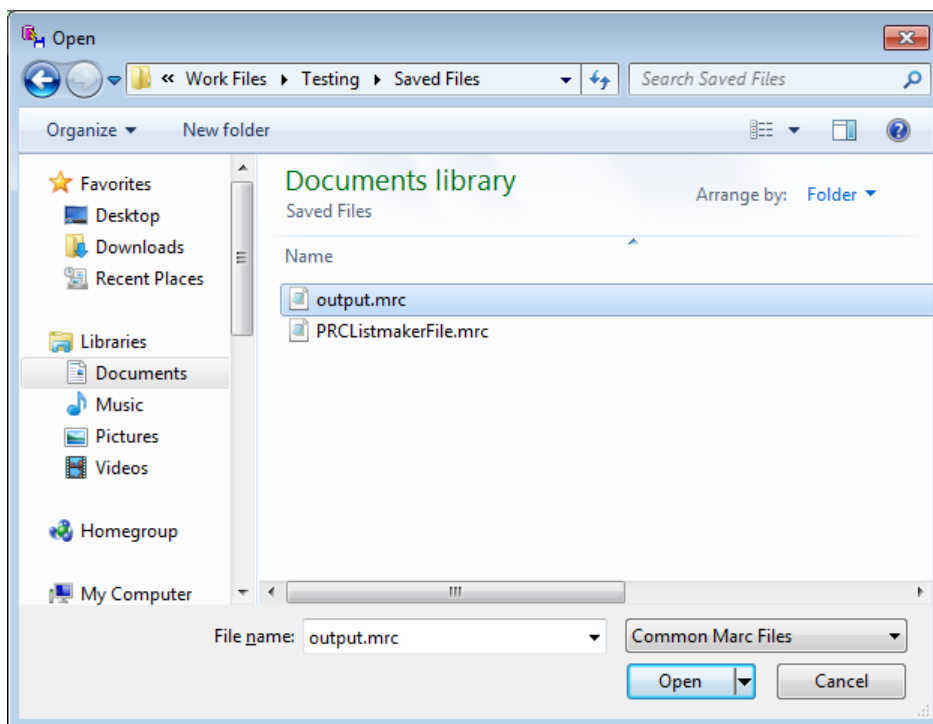
4. Browse to where the **output.mrc** file is saved, select the file and click the **Open** button – the Marc Import – Open screen will display:
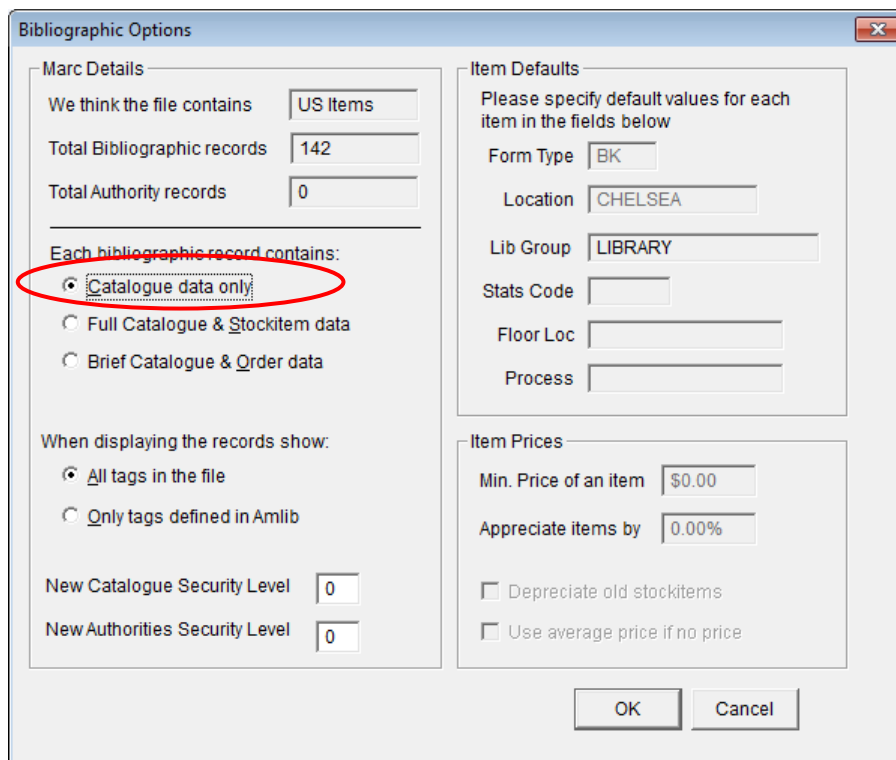
5. Complete the options as follows:

   a. Marc Options = **Bibliographic Data**

   b. Open and Update = **unticked**

   c. Load Range = **All**

6. Click on the **OK** button – the Bibliographic Options window will display, showing how many records are in the file (matched items from the *PRC Listmaker*):

7. Ensure the defaults are selected as above:

    a. Each Bibliographic record contains: **Catalogue data only**

    b. When displaying the records show: **All tags in the file**

8. Click the **OK** button – the Update Options – Open and Update screen will display:
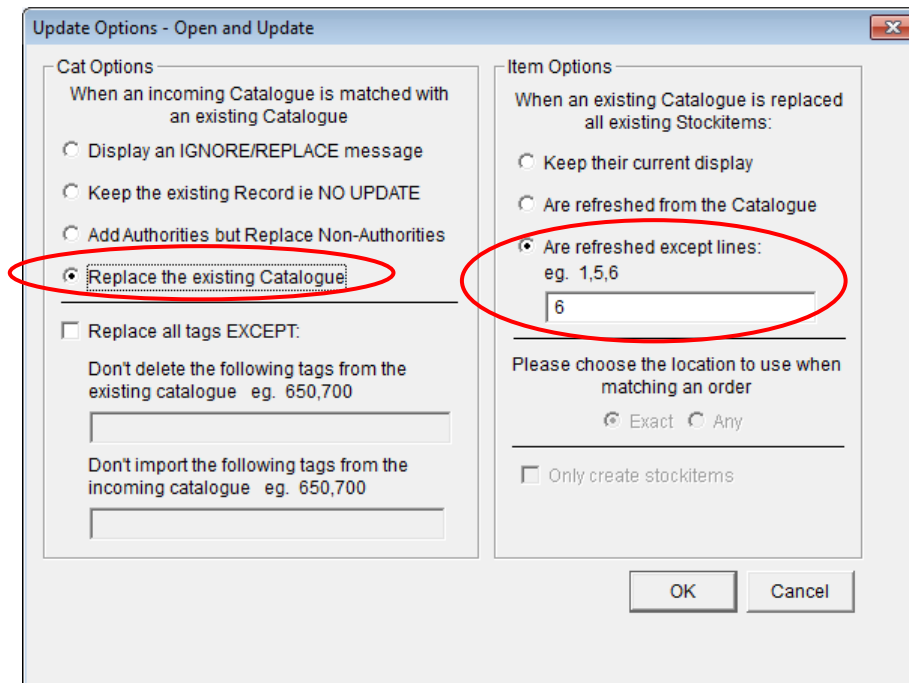
9. Ensure that the Update Options are set as follows:

    a. When an incoming Catalogue is matched with an existing Catalogue: **Replace the existing Catalogue**

    b. When an existing Catalogue is replaced all existing Stockitems: **Are refreshed except lines: 6**

10. Click the **OK** button – the Marc Import screen will display:
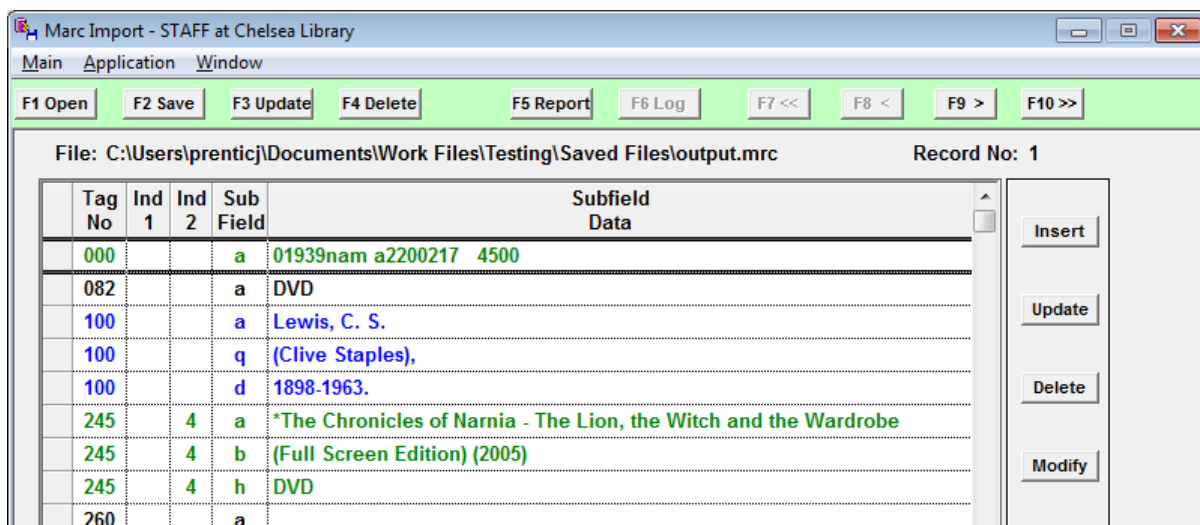
11. Click the **F3 Update** button – the <u>Saved Files – Open and Update</u> screen will display:
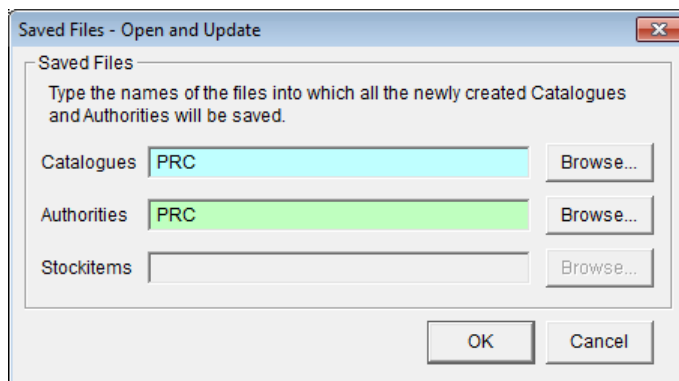
12. Type the names of the files into which all the newly created **Catalogues** and/or **Authorities** will be saved. If you do not want to check new items – for example: Authorities, do not enter a filename.

13. Click on the **OK** button – an <u>Update</u> processing prompt will display:
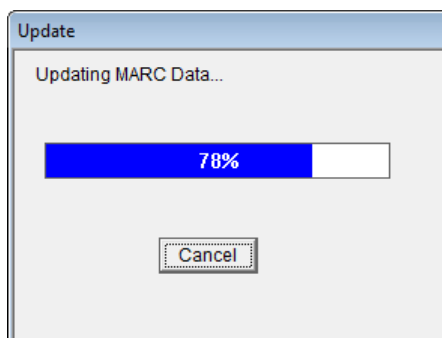
14. Once complete, a prompt will display with the following message: **Record Numbers X to XXX have been Updated.**
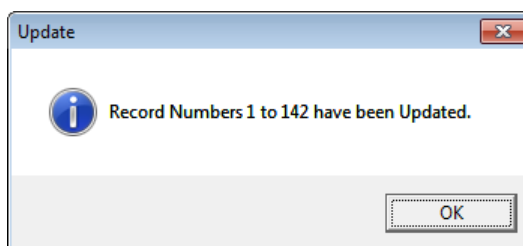
15. Click the **OK** button

The import of the tagged PRC records is now complete.

Tagged Catalogue and Stockitem Records

1. Viewing the records in the *Catalogue* module shows that the asterisk is added to the title and the level is added as a **490** Series tag to the record:

2. Viewing the item in the *Stockitem* module also shows the asterisk (*****) and a **PRC** series entry:
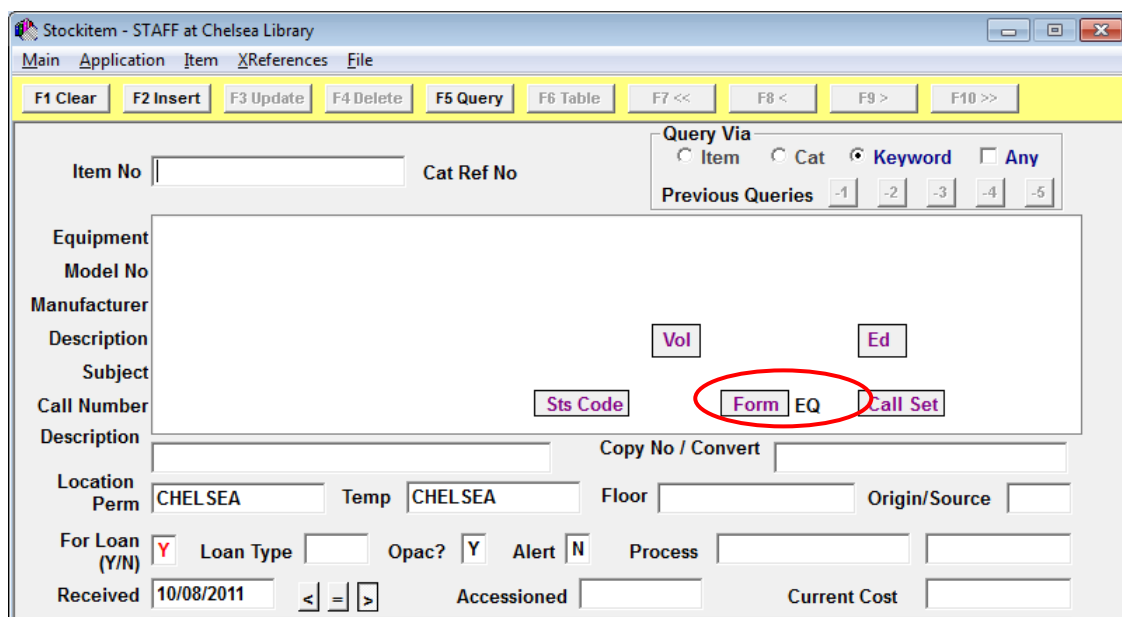
STOCKITEM MAINTENANCE

Add a New Item

It is sometimes necessary to create a Stockitem record that is not attached to a catalogue record – for example: a piece of equipment.

1. Launch the *Amlib* client

2. Go to **Main** > **StockItems** > **Stockitem** – the Stockitem screen will display

3. From the menu, select **Item** > **NewItem** – the New Stockitem table will display, prompting you to choose a **Form Type** for the new Stockitem:
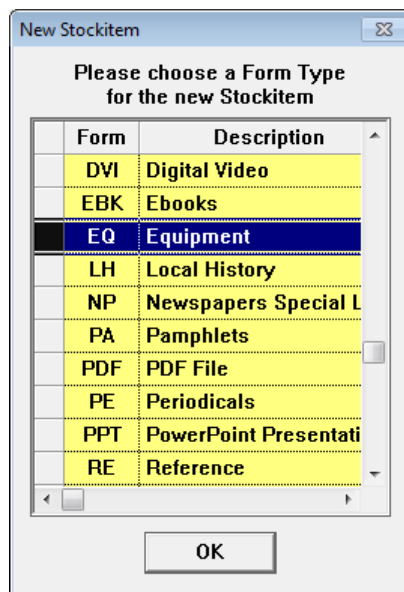
4. Select the **Form Type** (for example: **EQ – Equipment**) and click the **OK** button – the Stockitem screen will enter creation mode (with Form code selected):
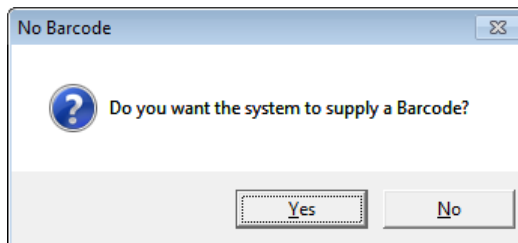
5. Add the required details

6. Click the **F2 Insert** button when complete

7. If you haven't wanded in a barcode, a prompt will display requesting if you would like to insert a system-generated Barcode:

8. Click the **Yes** button – a prompt will display with the following message: **The Item has been Inserted.**
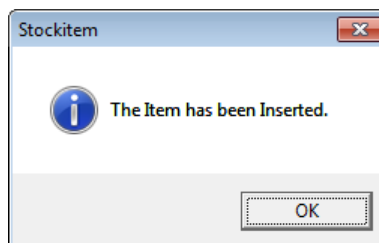
9. Click the **OK** button

The stockitem has been created.

Copies/Duplicates Items

To enter copies of the same catalogue item:

1. Launch the *Amlib* client

2. Go to **Main** > **StockItems** > **Stockitem** – the Stockitem screen will display

3. Search for the item to copy (duplicate) using **F5 Query**

4. Scan in a new barcode into the Item No field – the **F2 Insert** button will become active (**bolded**)

5. Change any other details as required – for example: Stats Code, Copy No and Floor location

10. Click the **F2 Insert** button when complete – a prompt will display with the following message: **The Item has been Inserted.**
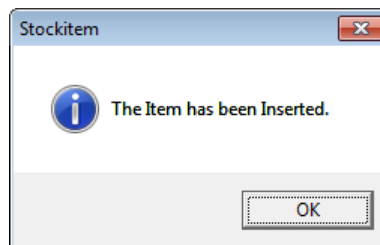
11. Click the **OK** button

The duplicate stockitem has been created.

Alter the Field Names Displayed for a Particular Stockitem Form Type

Some Stockitems (particularly equipment) do not conform to the standardised labels in use by the system. However, it is possible to modify the labels displayed for a particular Form type.

1. Launch the *Amlib* client

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

3. Highlight a Form – for example: **EQ** and select the **F9 Display** button – the Stock Display Tags screen will display:

4. Adjust as per the following example:

- Line 1: Label = **Equipment** | Tags to Display = **245**

- Line 2: Label = **Model No** | Tags to Display = **300**

- Line 3: Label = **Manufacturer** | Tags to Display = **260 710**

- Line 4: Label = **Description** | Tags to Display = **500**

- Line 5: Label = **Subject** | Tags to Display = **650 651 600**

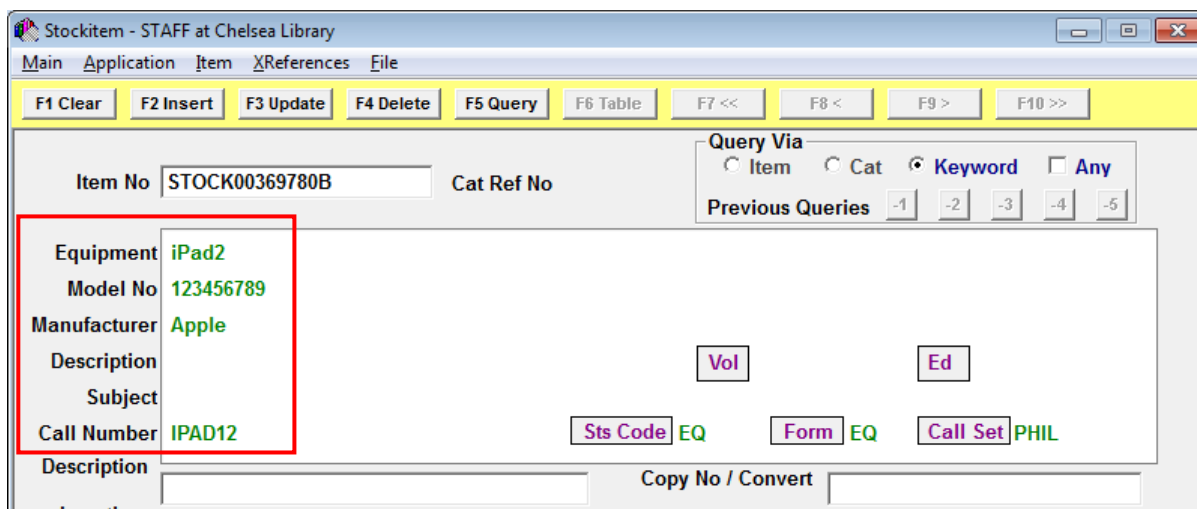- Line 6: Label = **Call Number** | Tags to Display = **984 082**

Please Note: Tags to display should type in order of preference (the first tag containing a value will then display).
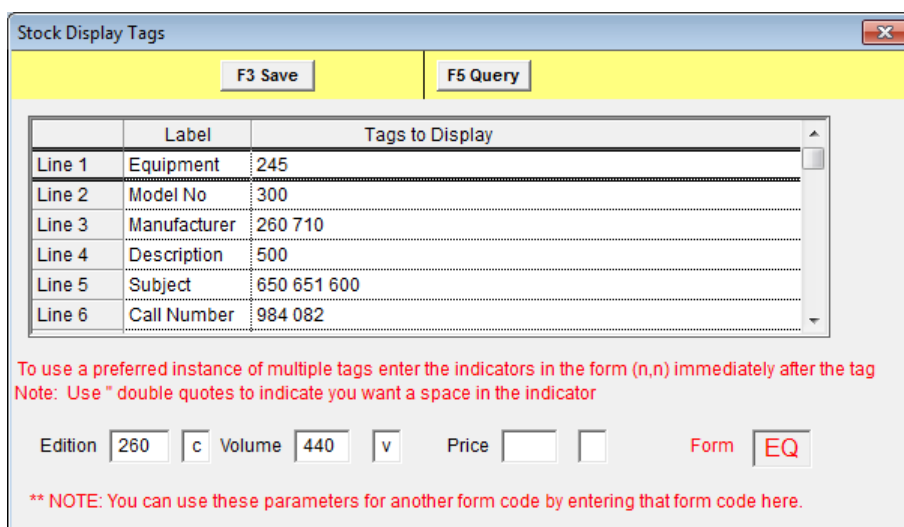
5. Click on the **F3 Save** button when complete

6. To refresh the data displayed for a particular stockitem, select **Item** > **RefreshFromCat**

7. Click the **F3 Update** button to save changes

APPENDICES

Appendix1: Setting Up the Option for Export from Stockitem File

In order to have the option to export records from a stockitem file, the export item definitions should be filled in. Log out of the Authority module and then back in and you should have the export from stockitem option available in box one of the export screen.
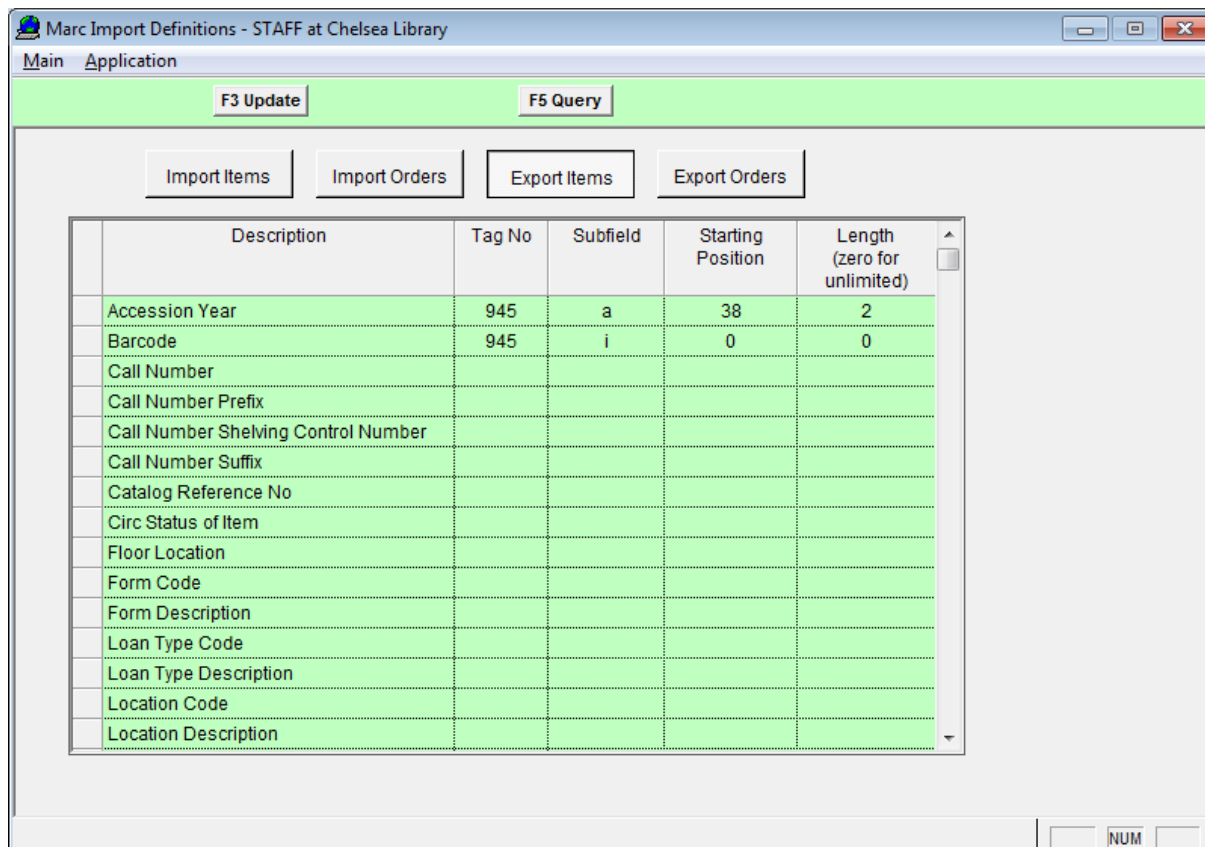
Appendix 2: Check Digits

If you change your barcodes at any time or introduce a new type of barcode, you will need to add a line to your check digits, so the system recognises the new barcode as being valid.

1. Launch the *Amlib* client

2. Go to **Main** > **Installation** > **Supervisor**

3. From the menu, select LibraryMenu > **CheckDigits** – the <u>Check-digit Calculations</u> screen will display:

(I)tem (B)orr	Weights Left to Right comma separated list	Use as Cd Depending on remainder	Leading Chars	Trailing Chars	Length	Mod
B			B#	##	4	0
I			I#	##	4	0
I			&#	###	5	0
B			B#	###	5	0
I			###	###	6	0
B	1,2,1,2,1	0123456789	I		7	10
I	11,128,64,32,16,8,4,2	01234567890			9	11
B	1,2+,1,2+,1,2+,1,2+	0123456789			9	10
I			&&&&&&	&&&&&&	12	0
B			&&&&&&	&&&&&&	12	0
I			&&&&&&&	&&&&&&	14	0
B	1,2+,1,2+,1,2+,1,2+,1,2+	6789012345	2		14	10

4. Click the **F1 New** button to create a new line

Columns 2 and 3 are optional. As a minimum you must specify:

- If the barcode is for items (I) or borrowers (B) – if it is to be used for both, you will need to create two lines – one for each.

- Leading characters and trailing characters – you can use these to indicate a barcode prefix or suffix that is the same for every barcode e.g. AL102. Otherwise you can just use the & symbol (see the legend at the top right of the screen). The system adds together the leading and trailing characters to make up the total length of the barcode. At the most basic level, you can just count the number of digits in the barcode and divide roughly between the leading and trailing columns
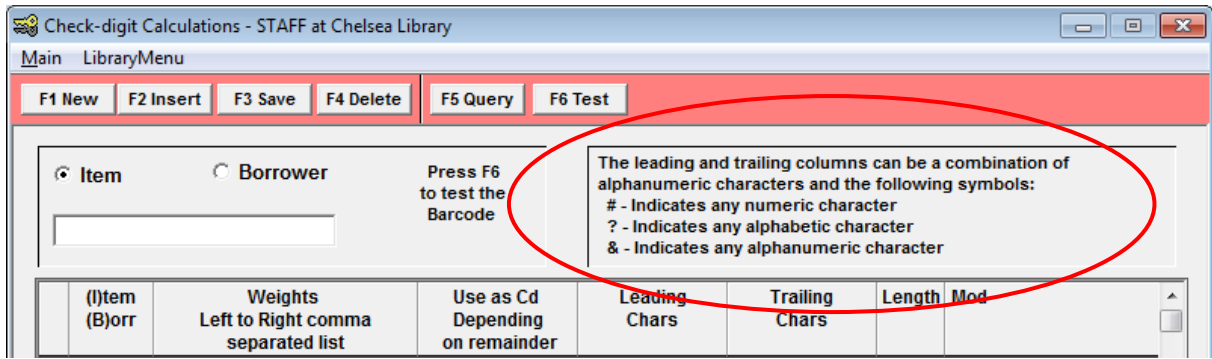
5. Click the **F3 Save** button when complete

6. To test a barcode, use the test box in the top left corner, select either **Item** or **Borrower**, then scan the barcode into the box and click the **F6 Test** button
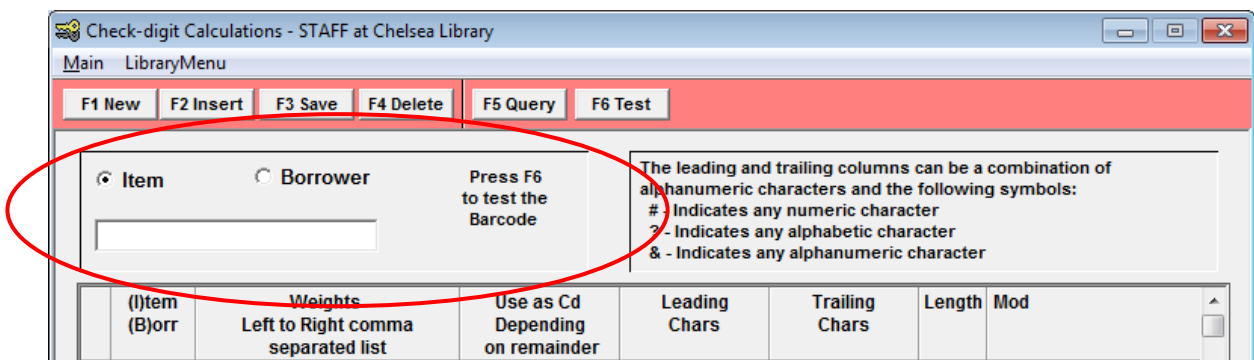
For more information, press **Ctrl-H** from your check digits window.