

System Management - Tasks

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System Management - TASKS

This course is designed for those sites that have been using Amlib for some time but would like to know more about managing and maintaining the system.

This course includes:

System Maintenance which includes backup and deletes unnecessary logs etc.

System Management which includes tasks that are included in the day to day operations as the site deems necessary.

Data Management which includes database deletions and changes again as the site deems necessary.

Written policies and procedure manuals are useful tools when implementing system management.

Policy

Relatively brief and available to outline the “bigger picture”. Useful when issues arise as certain decisions have been made and documented, rather than making quick decisions at the time.

Procedures Manual

Step by step detail for tasks performed internally. It becomes very important if staff rotate jobs or new staff need to be trained. Enhances consistency and accuracy. Maintenance plans and Disaster Recovery plans and trials should be considered.

Note: Screen dumps are useful for including in such documents. Use **[F12]** to dump a screen or use ALT PRINT SCREEN keys from the keyboard to send an image to the clipboard. This image can then be pasted into a Word Processing package e.g. Ctrl V into a Word document.

SUMMARY OF SYSTEM ADMINISTRATION TASKS**SUMMARY OF SYSTEM MAINTENANCE TASKS**

DAILY	Checking Backup Logs – Amlib Backup Log and Tape verification
	Backing up the system
	Delete unwanted Files
	Delete unwanted Print jobs in Report Scheduler
	If Issues Audit on, delete logs
	Copy Image Files to CD
WEBSITE updates	Check the OCLC Website for updates www.amlib.net.au
Incidents	Assistance, faults and enhancements – needs User Name and Password to log in
e.g. every 6 weeks	Check Server Disk Space
	Delete Netopac Logs
	Delete Amdberror.log in Amlib folder
After Release	Check the Amlib/Previous folder for Previous folder and check for old programs that can be deleted
	Ensure Release notes are accessible to view changes e.g. copy to My Documents or print them out

SUMMARY OF SYSTEM MANAGEMENT FUNCTIONS

Offline Application	Emergency offline for when server is down
User Names	User Permissions
Depreciation & Average Pricing	Optional
Creating Periods within Stockitem History	Autolink facility. Optional
Cat Definitions for STATE LIBRARY OF WESTERN AUSTRALIA exchange	Stockitem Application/Form & Stats codes
Setting Calendar	For setting dates closed
Circulation Overdue Notices	Finance Update (Y/N)

SUMMARY OF DATA MANAGEMENT TASKS

Many of these tasks will depend on the individual library as if these tasks are performed, how often and when appropriate

Deletions	Catalogue purge
	Stockitems without Catalogue
	Unreferenced Authorities
	Mass Delete of items/borrower
	Borrower History
	Stockitem History
Changes	Mass change of files
	Stockwand change – can save the process
	Borrower change – from Junior to Young Adult or Junior
Catalogue and Authority Maintenance	Global Updates to Authority or Catalogues
Stockitem Autolink	Global Updates to Stockitem
History deletions	Available in Borrower Reports, Stockitem Autolink
Reservation Expiry	Run through reports or cancel manually

MANAGEMENT REPORTS

System Activity	Supervisor/Library Menu
Statistics	Reports/Repstatistics
Audit Reports	Reports/RepStockitem, RepAuthority, RepBorrower
Value of Collection	Reports/RepStockitem/CountbyForm,Stats
Counts	Reports from RepBorrower or RepStockitem
Where Searches	Stockitem/Borrower for a huge variety of useful reports e.g. items never borrowed, ILLs late coming from Supplying library, Reserves of more than 5, items with cost over \$500, borrowers inactive for 2 years, Juniors who should be YA, Young Adults who should now be Adult members, AOL orders not received after 6 months etc. etc.

SYSTEM MAINTENANCE

Database Set-Up

The RDBMS (Database) can be:

- Microsoft SQL Server
- Oracle

The Data is spread over 4 separate Databases:

- **AMCAT:** Authority, Catalogue
- **AMLIB:** Borrowers, Circulation, Stockitem, History, Reports
- **AMSTATS:** Statistics
- **AMLOCAL:** Every Parameter, Defaults
- **AMWEB:** Some sites have this for Netopacs

Maintenance

Most of the maintenance of the system is incorporated into the Backup (e.g. Indexing, clearing logs).

Backing Up Your Database

All **SQL Server** installations should have a *Database Maintenance Plan*:

The plan should:

- Optimise the indexes
- Back-up the databases (CAT, LIB, LOCAL and STATS) at least once every day.
- Backup the logs - You can specify how long the backup files are kept - make sure that it is long enough for the backup to tape to pick them up. For example if a Daily backup is done it may be decided to keep the Backup files for 3 days.

It is important to check the logs created by backup to ensure that the Backup was successful. It should be possible to have this log accessed away from the Server For example - by Library Staff

If the site is running **SQL Server Express** Version there is a special Backup that can be run. See Appendix for instructions.

Backup to External Device

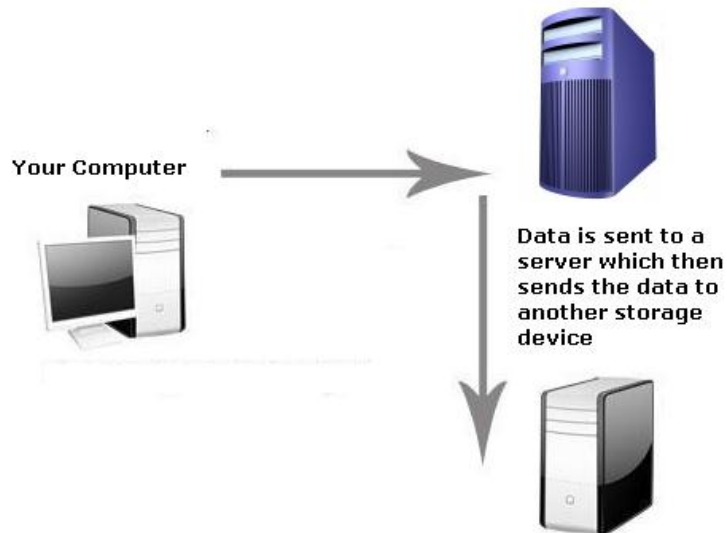
We rely on you to implement a backup maintenance plan in order to reconstruct lost or altered Customer files, data or programs. We also need you to implement a database maintenance plan to ensure that the Relational Data Base Management System (RDBMS) is operating at optimal levels.

If there are problems with either the date or error messages in Backups or any questions about creating backups please contact Support for further advice as soon as possible.

- Ensure the Databases are backed up to an external device – for example: Tape
- Ensure the Logs of the Tape Backup are checked to ensure it was successful

System Management - TASKS

- Consider the restore capabilities from that Backup device – can the Tape be read by other Tape Drives to enable a restore of the data?
- Consider backup onto an alternative Backup device – for example: a CD-R regularly as double insurance
- If you have any queries about backup do not hesitate to contact *Amlib Support*



Ensure the Images folder is backup to an external device (e.g. CD, Flashram) if there are images on either borrower or catalogue records

Tasks To Be Performed Daily

- Checking Backup Logs
- Backing up the system

Ensuring that you have sound backups of your system is your insurance that your data can be recovered if the need ever arises.

Backing up should be done regularly. We recommend a daily backup.

SCHEDULED REPORTS

1. Launch the *Amlib* client
2. Go to **Main > Reports > RepPrintProgress** – the Print Progress screen will display

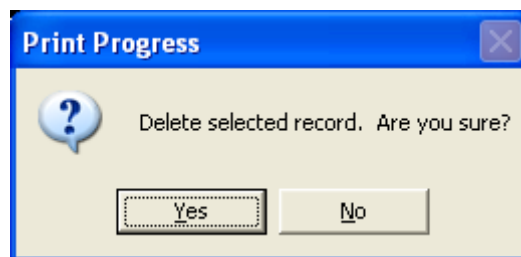
This window will display any Reports which are listed when the **F6 Print** button is chosen in Reports. Examples of Reports sent through the Report Scheduler are scheduled to update accounts, send emails, update history etc. There are 3 windows to check:

- Waiting
- Running
- Printed

Ensure that the queue does not have unwanted print jobs blocking the queue. It is also worthwhile to delete the Printed jobs occasionally.

To delete the Print Jobs

1. Click the Printed Radio button
2. Highlight the jobs to be deleted and press **F4 Delete**
3. A message will display



4. Answer **Yes** to confirm deletion
5. This will mark them for deletion with a **X** in Column 1
6. Press **F3 Save** to save the deletions

Files – Delete Unwanted Files

It is recommended to delete all unwanted Files e.g. Import files regularly. Files can be checked in Borrower, Authority, Catalogue and Stockitem. Below is the procedure to delete unwanted Stockitem Files

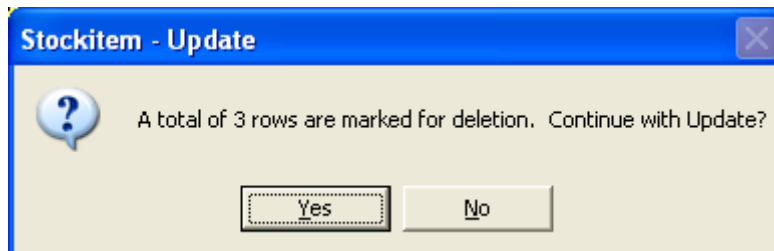
1. Launch the *Amlib* client
2. Go to **Main > Stockitem > Stockitem** – the Stockitem screen will display
3. Go to **File > Display File**
4. Highlight the Files to be deleted and press **F4 Delete**
5. This will mark them for deletion with a **X** in Column 1

System Management - TASKS

Details	Qty	Owner	Last Updated	File No
X diacritics	44	STAFF	27/04/2012 3:45:10 PM	3290
X Barcode test	6	STAFF	12/04/2012 1:40:35 PM	3289
X STAR WARS SCIS 11/4	12	STAFF	11/04/2012 11:51:49 AM	3264
Overdue one month	20	STAFF	14/03/2012 3:29:16 PM	3263
gk	22	STAFF	08/03/2012 3:13:34 PM	3238
vid	99	STAFF	07/03/2012 4:38:17 PM	3237
urx	66	STAFF	07/03/2012 4:36:58 PM	3236
45	1	STAFF	07/09/2010 9:35:30 AM	3211
fri	7	STAFF	24/11/2009 11:26:00 AM	3161
DUSTY ITEMS 2 NOV	0	STAFF	10/11/2009 1:33:00 PM	3160
Items to Delete	4	STAFF	02/11/2009 10:18:00 AM	3158
Missing Videos	226	STAFF	02/11/2009 10:11:00 AM	3157
bb	54	STAFF	27/10/2009 3:52:00 PM	3132
Deletions	24	STAFF	26/10/2009 9:44:00 AM	3124

Note: It is possible to cancel the deletion at this stage by highlighting the Files NOT TO BE DELETED and pressing the **F4 Delete** button (again). This will remove the X from the highlighted Files and then will not be included in the deletion

6. Press **F3 Save** to save the deletions
7. A confirmation message will display



8. Answer Yes to delete or No to cancel.

Note: The same procedure can be used for the Files in the Authority, Catalogue and Borrower Modules

Issues Audit

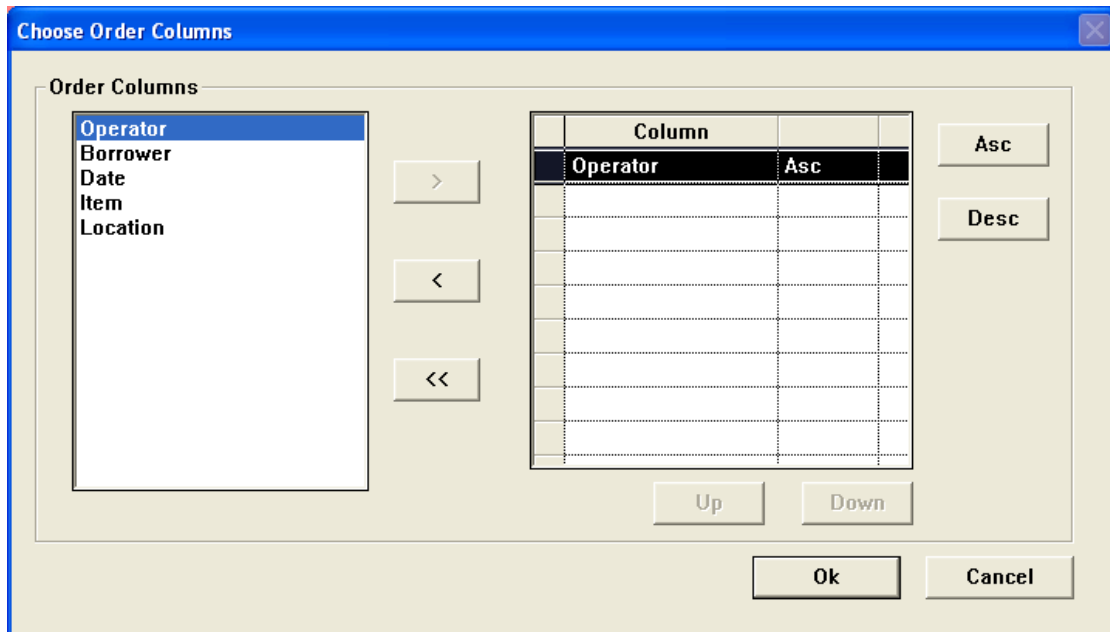
This Audit is set in Supervisor > Installation > Other > "Create an audit for all Issues prompted with messages (Y/N)

Warning: If activated, delete logs regularly, as each transaction in Issues *that invokes a message* is recorded. Therefore this log builds up very quickly.

To check or delete the logs

1. Launch the *Amlib* client
2. Go to **Supervisor > Library Menu > Issues Audit**

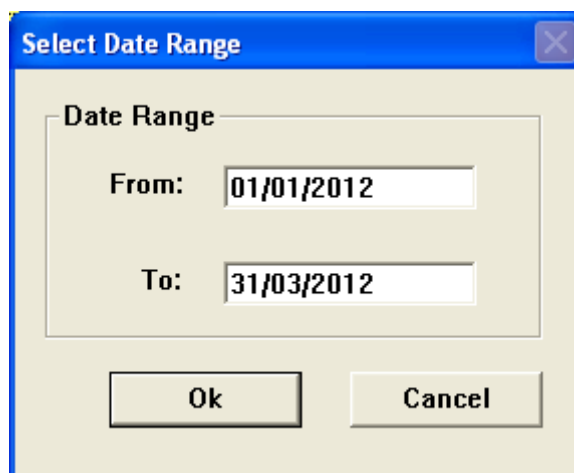
3. The Issues Audit window will display
4. To Order the Issues Audit go to **Issues Audit Menu > Order**
5. The Choose Order Columns Window will display



6. Highlight the required Order and arrow across to the right hand Column. Select Asc (Ascending) or Desc (Descending) as required
7. Click OK when the Order has been selected

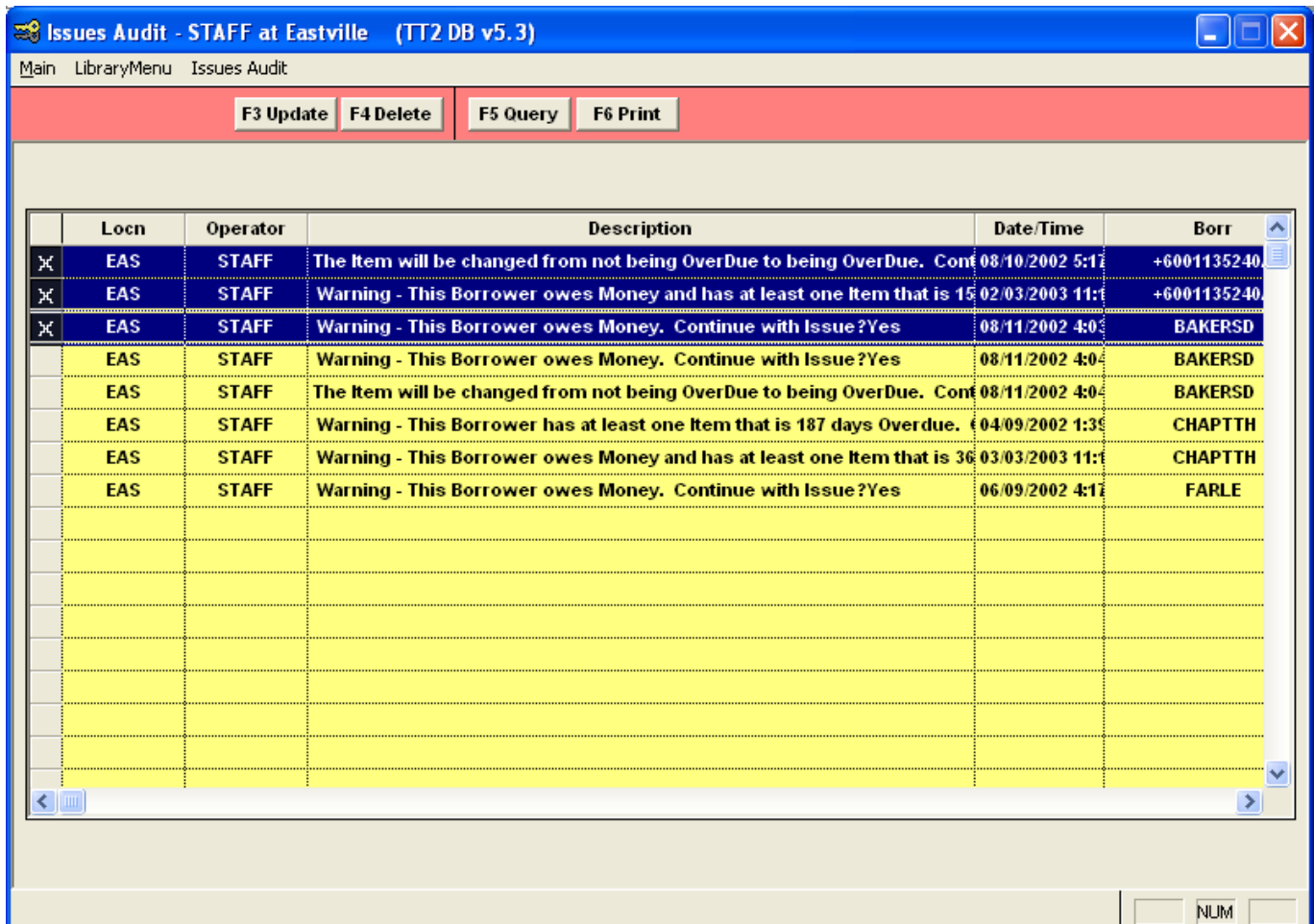
To Filter the Display by Date

1. To filter the display by date go to **Issues Audit Menu > Filter by Date**
2. The Choose Select Date Range will display
3. Enter the required Date range for the beginning (From) and for the end (To:) in the format dd/mm/yyyy and click OK.



To Delete logs from the Issues Audit Table

1. Launch the *Amlib* client
2. Go to **Main > Supervisor > Supervisor** – the Locations screen will display
3. Go to **Library Menu > Issues Audit**
4. Highlight the Issue Audit logs to be deleted and press **F4 Delete**
5. This will mark them for deletion with a **X** in Column 1

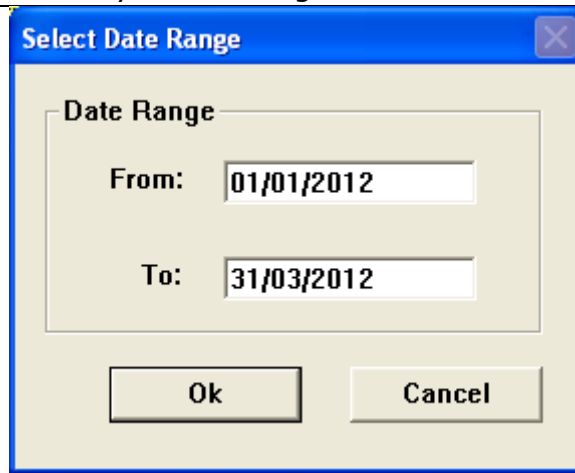


Note: It is possible to cancel the deletion at this stage by highlighting the Logs NOT TO BE DELETED and pressing the **F4 Delete** button (again). This will remove the X from the highlighted Logs and then will not be included in the deletion

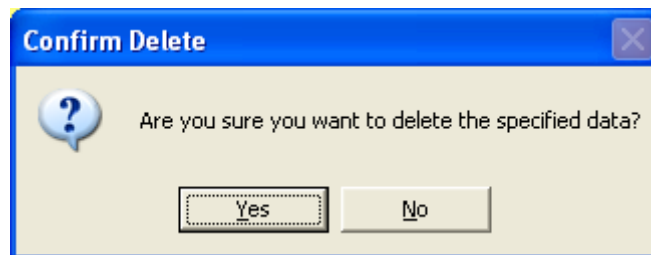
6. Press **F3 Save** to save the deletions
7. No confirmation message will display. The Logs will be deleted

Delete Issue Audit Logs by Date Range

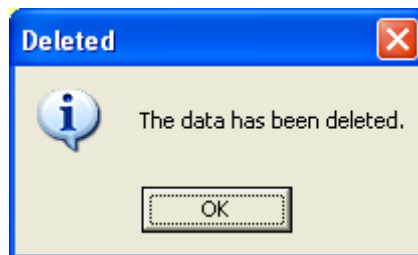
1. To Delete by date go to **Issues Audit Menu > Delete by Date**
2. The Choose Select Date Range will display
3. Enter the required Date range for the beginning (From) and for the end (To:) in the format dd/mm/yyyy and click OK.



4. A Confirm Delete message will display



5. Answer Yes to delete or No to Cancel
6. If Yes is selected a message will display. Select OK to continue



Issues Audit - STAFF at Eastville (TT2 DB v5.3)

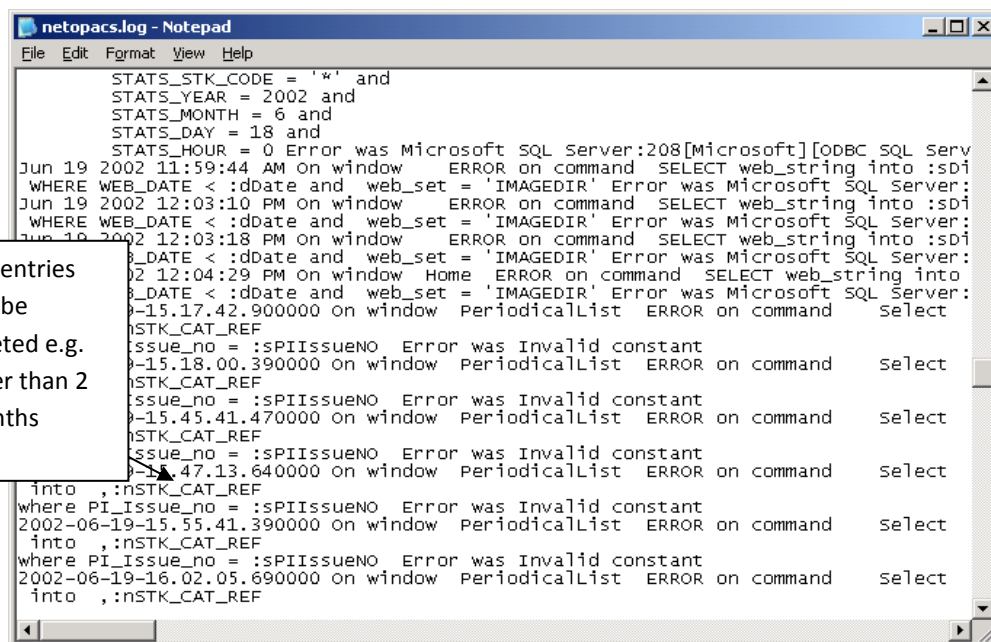
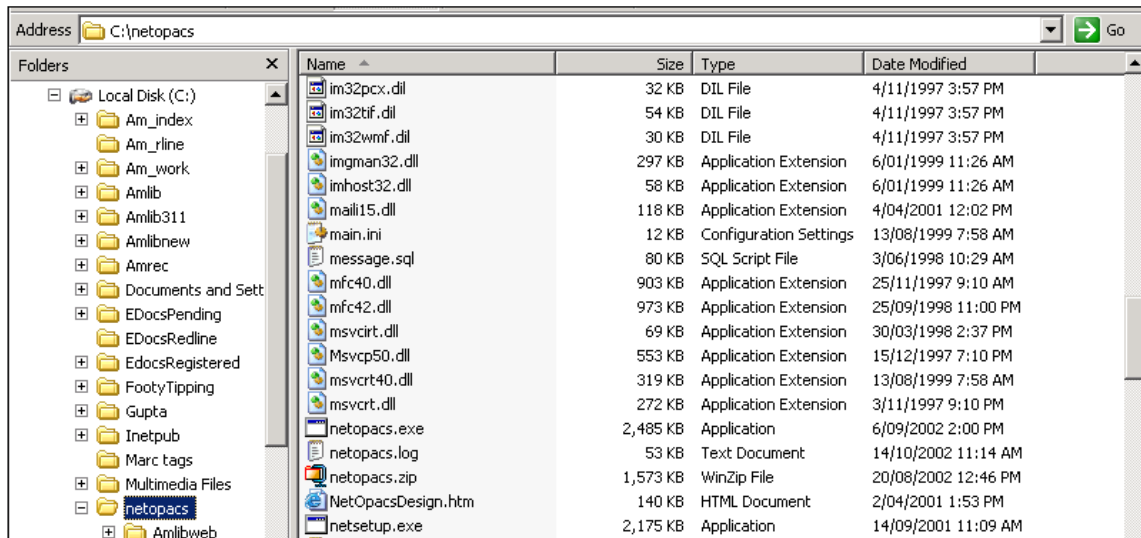
Main LibraryMenu Issues Audit

F3 Update F4 Delete F5 Query F6 Print

Locn	Operator	Description	Date/Time	Borr
EAS	STAFF	Warning - This Borrower owes Money and has at least one Item that is 36	03/03/2003 11:	CHAPTTH
EAS	STAFF	Warning - This Borrower owes Money and has at least one Item that is 15	02/03/2003 11:	+6001135240
EAS	STAFF	Warning - This Borrower owes Money. Continue with Issue?Yes	08/11/2002 4:0	BAKERSD
EAS	STAFF	The Item will be changed from not being OverDue to being OverDue. Cont	08/11/2002 4:0	BAKERSD
EAS	STAFF	Warning - This Borrower owes Money. Continue with Issue?Yes	08/11/2002 4:0	BAKERSD
EAS	STAFF	The Item will be changed from not being OverDue to being OverDue. Cont	08/10/2002 5:1	+6001135240
EAS	STAFF	Warning - This Borrower owes Money. Continue with Issue?Yes	06/09/2002 4:1	FARLE
EAS	STAFF	Warning - This Borrower has at least one Item that is 187 days Overdue. €	04/09/2002 1:3	CHAPTTH

Netopacs Logs

A log record is automatically created whenever an error occurs on the database when using Netopacs. The Netopac.log will be located on the Web Server in the **NetOpacs Folder**. The Netopac.log can be deleted occasionally.



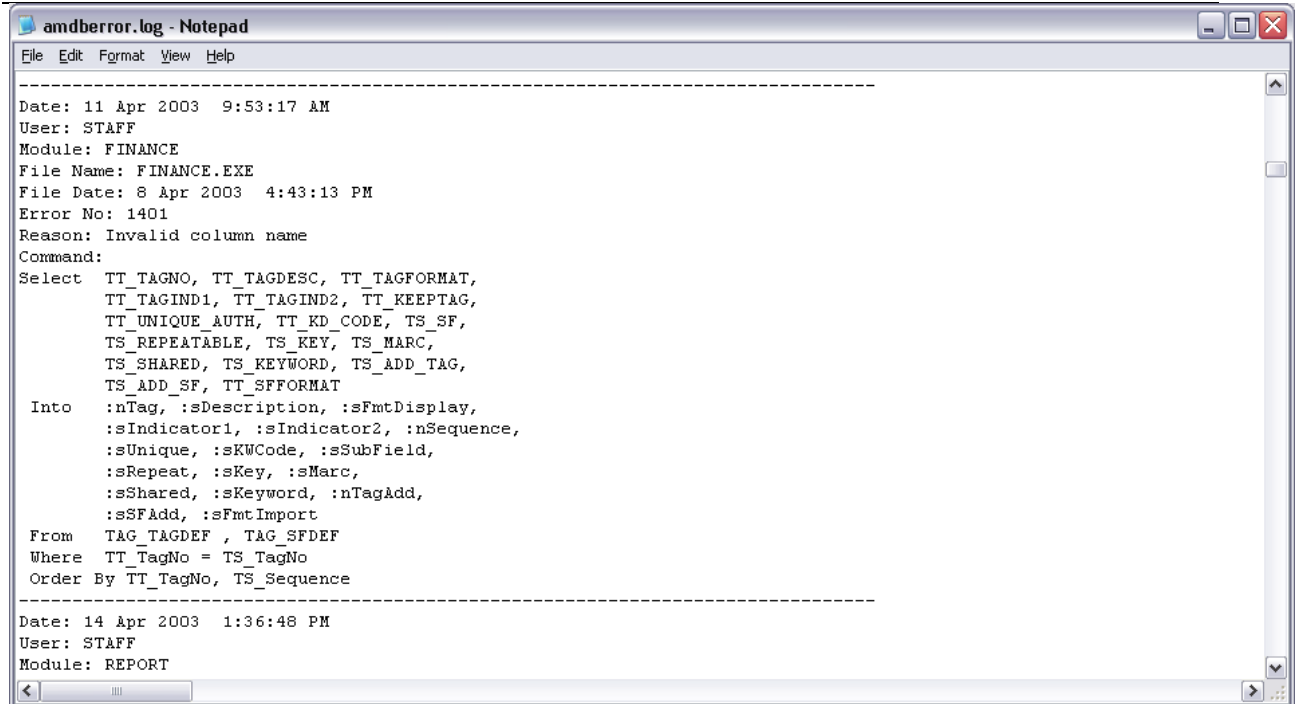
Amberror.Log

Any SQL errors are written to a log. In case of SQL errors encountered, this log can be emailed to OCLC support for verification. This error log can be accessed from the **Amlib Folder**.

The report is in ascending date order and therefore the *latest errors* are at the end of the document.

The Text file can be cleared by highlighting and deleting the text e.g. every 6 months.

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```
amdberror.log - Notepad
File Edit Format View Help
-----
Date: 11 Apr 2003  9:53:17 AM
User: STAFF
Module: FINANCE
File Name: FINANCE.EXE
File Date: 8 Apr 2003  4:43:13 PM
Error No: 1401
Reason: Invalid column name
Command:
Select  TT_TAGNO, TT_TAGDESC, TT_TAGFORMAT,
        TT_TAGIND1, TT_TAGIND2, TT_KEEPTAG,
        TT_UNIQUE_AUTH, TT_KD_CODE, TS_SF,
        TS_REPEATABLE, TS_KEY, TS_MARC,
        TS_SHARED, TS_KEYWORD, TS_ADD_TAG,
        TS_ADD_SF, TT_SFFORMAT
Into    :nTag, :sDescription, :sFmtDisplay,
        :sIndicator1, :sIndicator2, :nSequence,
        :sUnique, :sKWCode, :sSubField,
        :sRepeat, :sKey, :sMarc,
        :sShared, :sKeyword, :nTagAdd,
        :sSFAdd, :sFmtImport
From    TAG_TAGDEF , TAG_SFDEF
Where   TT_TagNo = TS_TagNo
Order  By TT_TagNo, TS_Sequence
-----
Date: 14 Apr 2003  1:36:48 PM
User: STAFF
Module: REPORT
```

Check Server Disk Space

Ensure that the free space on the server running SQLBase or Oracle. Generally there should be at least 500 Mb free space. If the free space falls below 100 MB immediate action will be required to prevent a system crash.

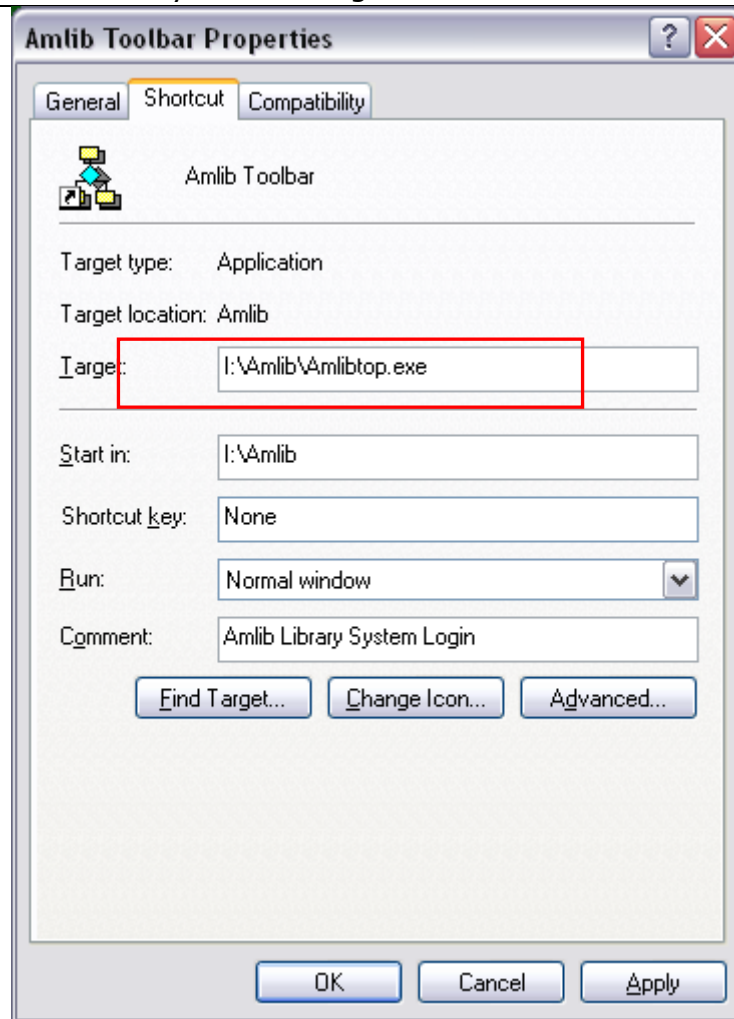
Icon Setup On New Pcs

When installing a new Amlib Client machine, a decision needs to be made as to where to access the Amlib programs according to the following options:

- Access to Amlib Programs from the Server **or**
- Install the programs locally and access from the new PC

If you are not sure where you currently access the Amlib program from you can find out by:

1. Right-click on the Amlib Icon of a different Amlib Client and select **Properties**
2. On the shortcut tab, locate the **Target** field and note the file path
 - If the Target point to a different drive – for example a library drive or I:/ drive etc then you are most likely accessing Amlib from a server: follow **Option 1**
 - If the file path points to C:/Amlib/Amlibtop.exe then you are most likely accessing the program from a locally install on the PC- follow **Option 2**



Option 1- Access the Programs from the Server

In the *Amlib* folder on the server, navigate to Amlib > Utilities > Icons > Iconsetup.exe

Copy the Iconsetup.exe file to the new PC and run the file on the PC as below, browsing to the Amlib folder on the server – see notes below

Option 2- Install the Amlib programs

Copy the Amlib folder from an existing PC that is running Amlib (or from the Server). This will ensure that the Programs are the Version suitable for the Database.

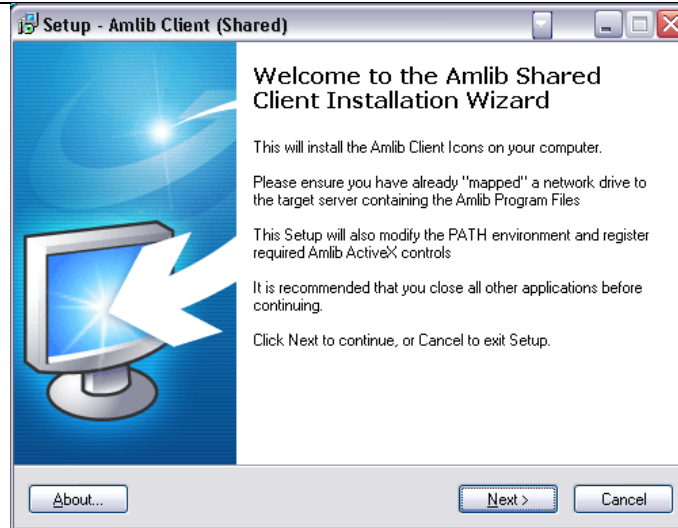
Run the Amlib > Utilities > Icons > Iconsetup.exe file on the PC and browse to the Amlib folder on the local PC where you have just saved it

Running the IconSetup Facility

This is used to set up PC Icons, set the Database Login, and for installing Active X.

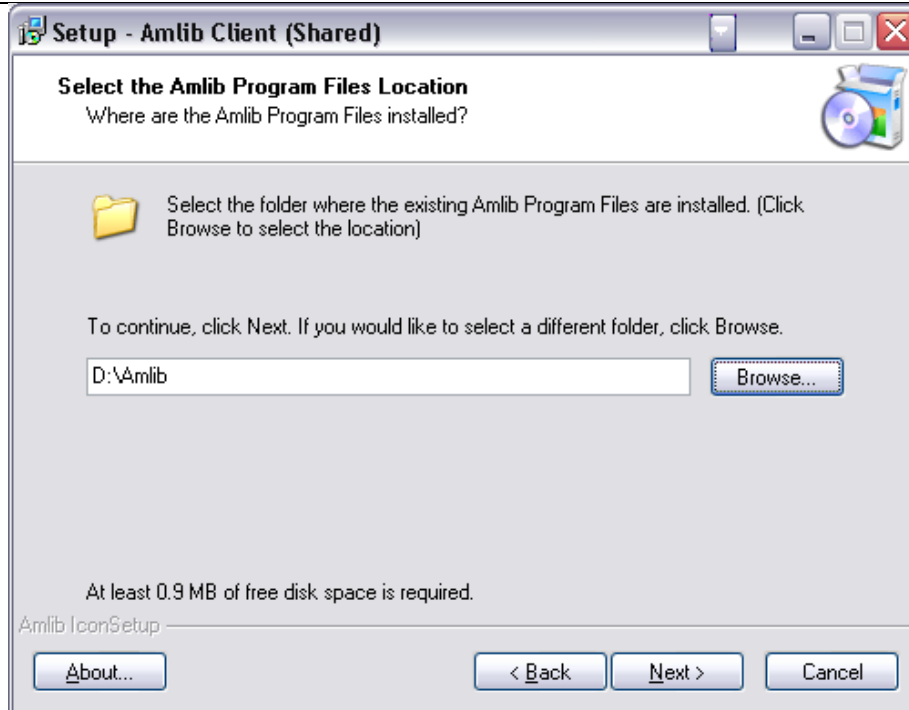
1. Access the Icon Setup facility from Amlib > Utility > Icons > IconSetup.exe. Double clicking on it will bring up a Wizard

System Management - TASKS

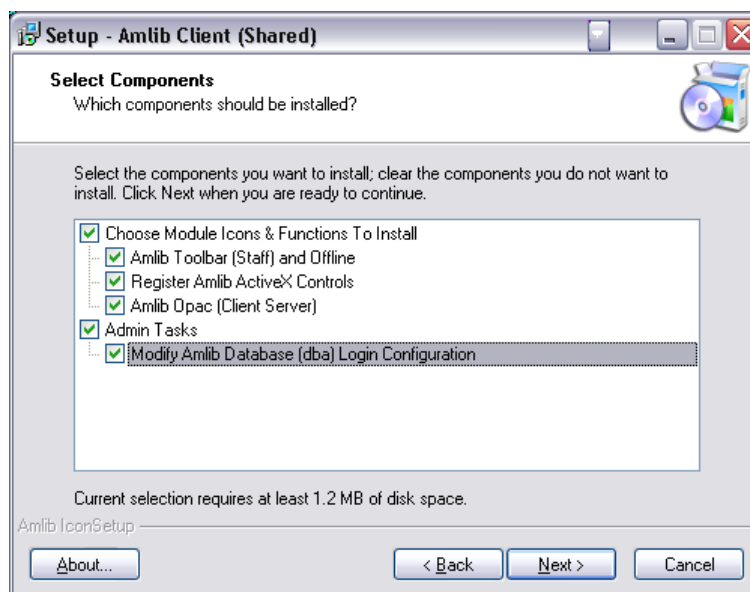


2. Browse for the path of the Amlib program files. Find the folder where this PC will access Amlib from (as per Option 1: the Server, or Option 2: Local PC). Once selected click **Next**

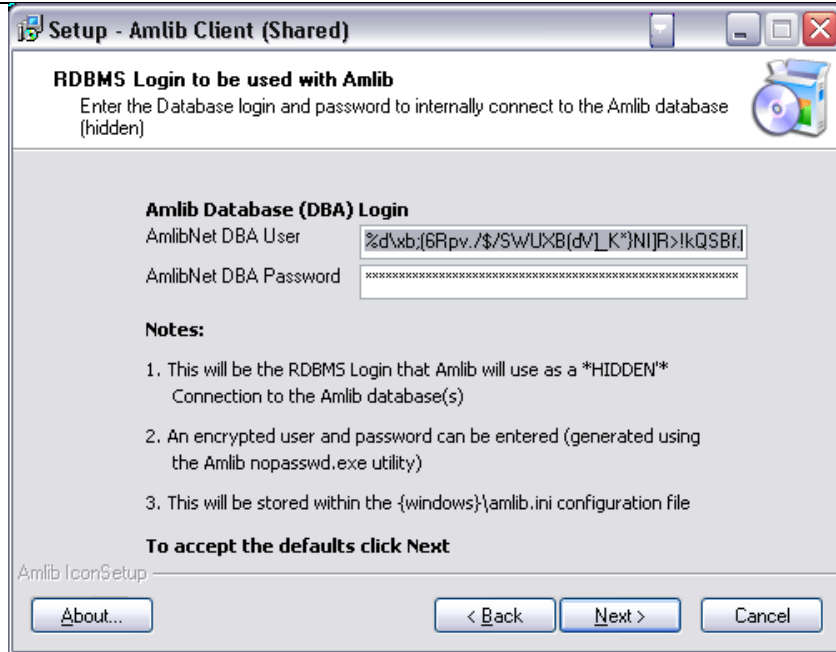




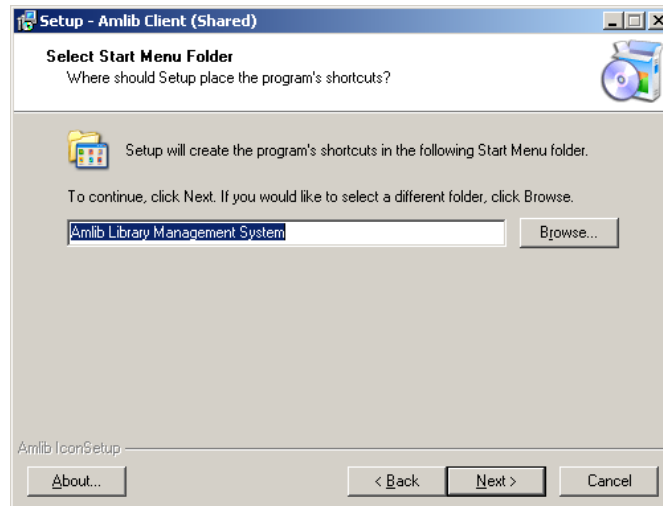
3. In the “Select Components” dialog, “Choose Modules To Install” and also generally select the boxes for “Admin Tasks” (to ensure the Database connection is correct in the Amlib configuration file). Click **Next**



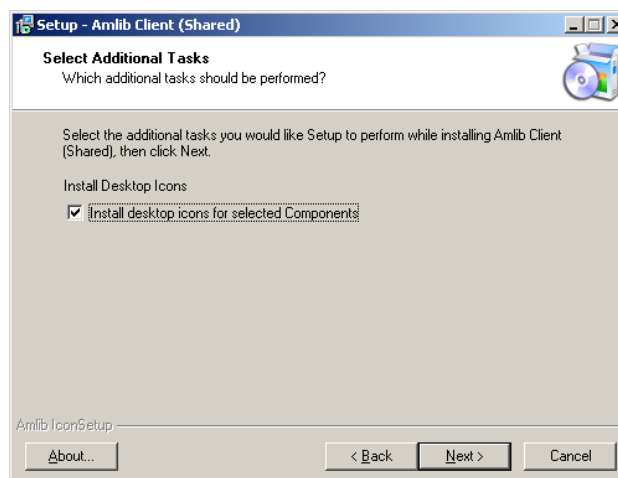
4. Enter the Database login and Password. Enter the correct Username and Password (usually SYSADM for both). For security reasons, this will be encrypted when stored in the configuration file. Click **Next**



5. Choose the Destination for the Shortcut. Usually the default is fine. Click **Next**

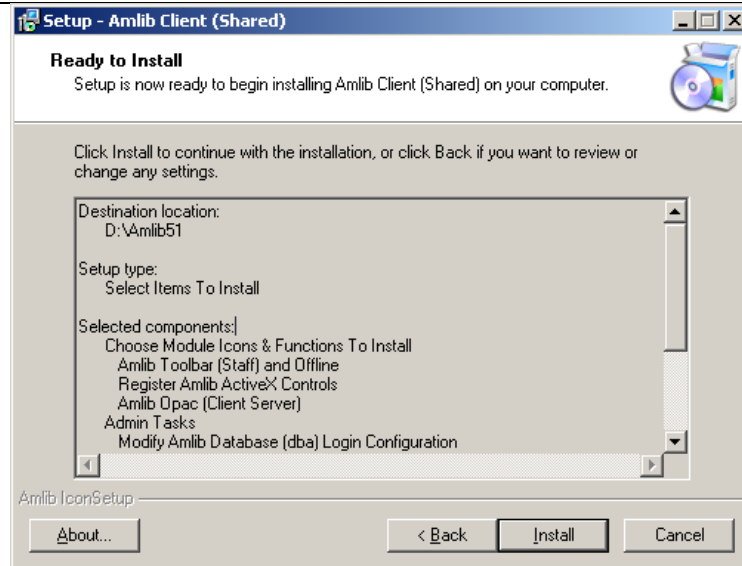


Select Additional Task. Generally Install desktop icons for selected Components. Click **Next**.



6. Ready to Install. Review and Confirm and select **Install**

System Management - TASKS



7. Select **Finish** to exit the IconSetup Utility



Note: If the Amlib path is already pointing to the correct file and you wish only to set the Database Login, take off the ticks in Select Components Window - **Choose Module Icons and Functions to Install** at Step 3. Click **Next**.

SYSTEM MANAGEMENT FUNCTIONS

Emergency Planning

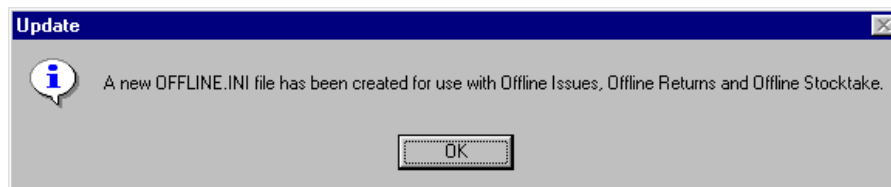
In the event of emergencies, the most important precaution is to have sound backups. If the Server hard disk fails or for some reason becomes unusable, it may be necessary to restore your data from tape. Check the backup information supplied with this manual.

Offline Circulation

Setting Up Offline On A Pc

Amlib Offline is a facility which enables barcodes to be read while the Amlib Programs are unavailable from the Server. It can also be used on a computer disconnected from the network e.g. A laptop used for a Mobile library. When the Server is available again and the Issues screen is in operation, the files from Offline can be downloaded using the Borrower/Offline Issues menu from the Issues Window.

Check the Supervisor/Check Digits screen to ensure that there is a table of Barcode validations set up. If this is blank, it will be necessary to enter the validations of the Barcodes that are used (see below). Every time this table is updated, a message will display. The new offline.ini that is created will need to be copied to the offline folder on each PC.



A Folder needs to be created on the local disk (e.g. C:\ drive) of Circulation PCs in a separate directory, especially where Amlib is loaded from a network drive. This will enable the Offline module to be used even if the network or server is down. This folder needs to contain:

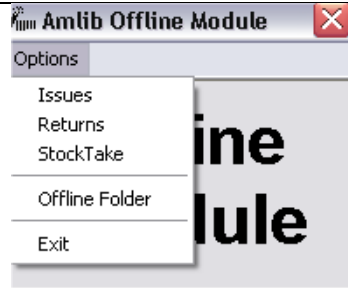
Offline Ini (offline parameter file). This is created each time the Supervisor, Check Digits table is saved. If the Check Digits table is altered, the updated offline.ini should be recopied to the PCs running Offline from their C Drives.

Offline.exe (offline application)

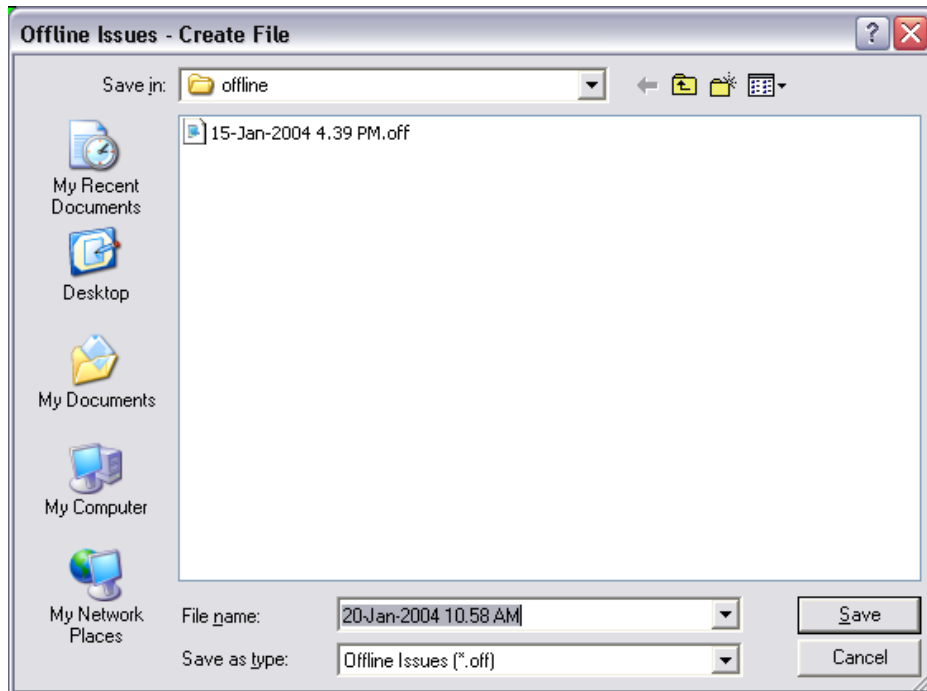
Deploy (contains many of the dll files needed to run the program). Copy all files from the Deploy folder to the Offline folder. As well as the Deploy contents, one extra dll (Amshell.dll is needed - This found in the Amlib/Programs directory.

Offline Operation

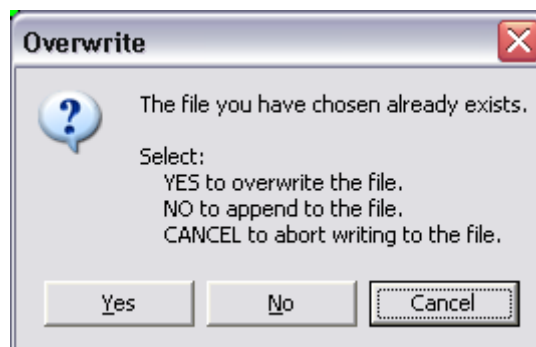
A Windows Shortcut can be set up on the Desktop. When loaded, select the relevant application from the Options menu.

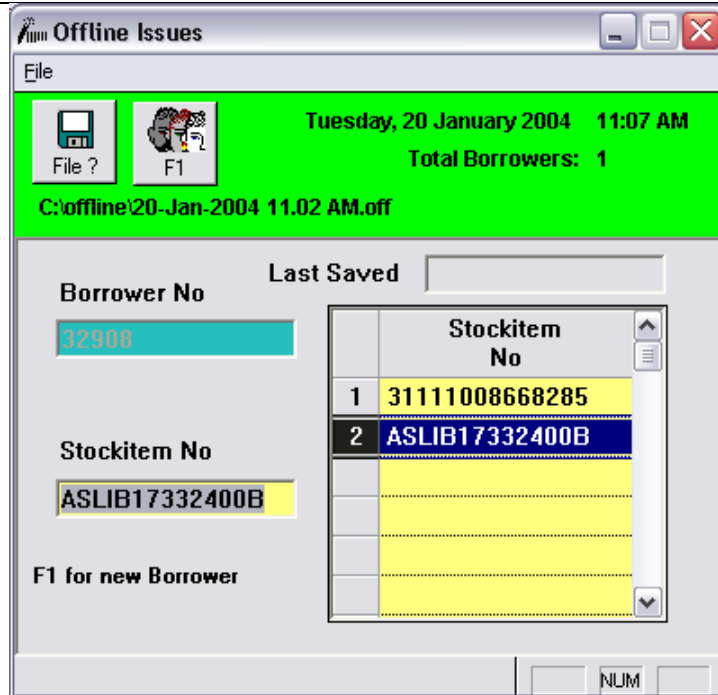


When an option is chosen, a File is created automatically with the date and time as a File Name. Ensure the path is correct.



If an existing File is chosen, it is possible to overwrite the existing file or append to it. This is useful for Mobile libraries where there are several steps.





As Borrower and Item barcodes are entered, the system will write records to the file. To change to a new borrower select **[F1]**. The table is cleared whenever a new Borrower barcode is wanded. If a Barcode does not comply to the Offline.ini file a message will display:



If many offline transactions are being entered, e.g. for half a day or more, it would be a good idea to start a new file. To change to a new file just click the file ? icon.

The offline facility may also be used to capture Returns and Stocktake information. The Returns and Stocktake output file format is one item number per record.

Note: In order for the program to correctly validate check digits there must be a file of the name 'offline.ini' in the working directory of the PC. This file is recreated whenever you change the Check Digits window in the Supervisor module.

Once captured to file as above, the barcodes are able to downloaded when the Server is available once more. Download:

- Offline Issues (from Issues/Borrower menu)
- Offline Returns (from Returns/Borrower menu)

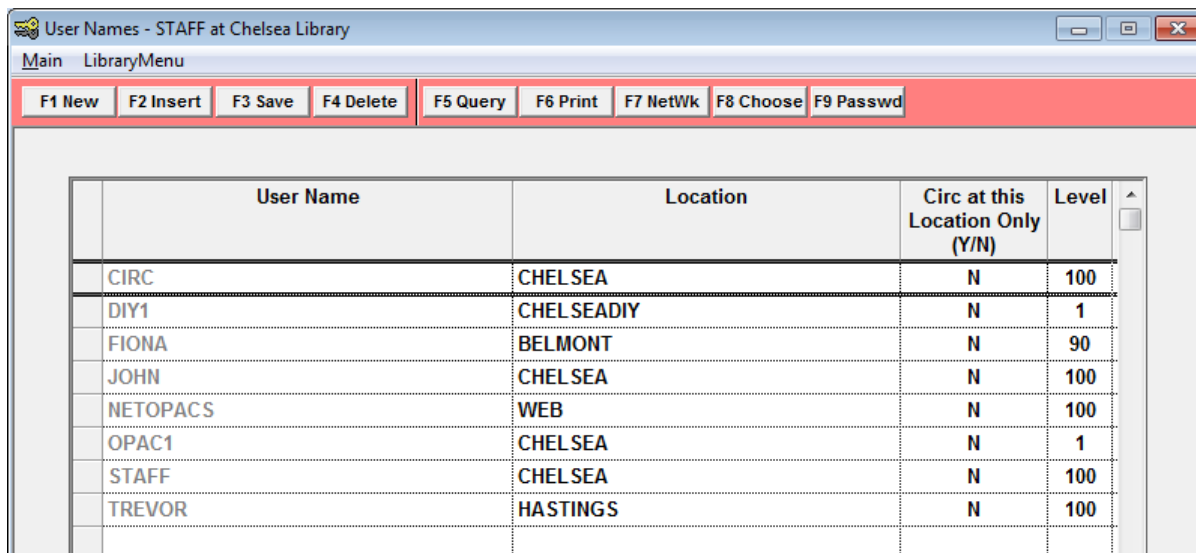
CREATING NEW USERNAMES

System Management - TASKS

It is possible to create to create user-specific logins for the *Amlib* client which can then be configured to allow access to only certain modules, screens, menu items and buttons.

View Existing Usernames

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



User Name	Location	Circ at this Location Only (Y/N)	Level
CIRC	CHELSEA	N	100
DIY1	CHELSEADIY	N	1
FIONA	BELMONT	N	90
JOHN	CHELSEA	N	100
NETOPACS	WEB	N	100
OPAC1	CHELSEA	N	1
STAFF	CHELSEA	N	100
TREVOR	HASTINGS	N	100

3. A list of existing User Names will be visible with the following settings:

FIELD	EXPLANATION	
User Name	This is the <u>User Name</u> used when logging onto the <i>Amlib</i> client	
Location	The default location that displays when the User logs into the <i>Amlib</i> client (the user may select a different location)	
Circ at this Location Only (Y/N)	Y	Can operate Circulation only at the location specified in the <u>Location</u> field
	N	Can operate Circulation at <u>all</u> Locations within the system
Level	An indication of the user's permissions levels setup. Some of the tasks on the system can also be limited using User Level (for example: Attachment security level, default Authority security level , etc), although it is rarely used.	

Enter a New User

1. Click the **F1 New** or **F2 Insert** button – a new entry will appear in the table
2. Type in the following:
 - a. User Name – use one word only (for example: **CHRIS** or **CHRISW**)
 - b. Location – the default login location of the user
 - c. Circ at this Location Only – **Y** or **N**
 - d. Level – the level against a User is used only as a guide

User Name	Location	Circ at this Location Only (Y/N)	Level
→ CHRIS	HASTINGS	N	100
CIRC	CHELSEA	N	100
DIY1	CHELSEADIY	N	1
FIONA	BELMONT	N	90
JOHN	CHELSEA	N	100
NETOPACS	WEB	N	100
OPAC1	CHELSEA	N	1
STAFF	CHELSEA	N	100
TREVOR	HASTINGS	N	100

3. Click the **F3 Save** button – the Operator Password screen will display:

Operator Password

Operator: CHRIS

Password: *****

Confirm Password: *****

OK Cancel

4. Type in a Password and Confirm Password
5. Click the **OK** button when complete
6. Close and restart the *Amlib* client to allow the new User Name to come into effect

Resetting User Passwords

1. Launch the *Amlib* client
2. Go to **Main > Supervisor > UserNames** – the User Names table will display
3. Highlight the User Name in the table
4. Click the **F9 Passwd*** button – the Operator Password screen will display:



The screenshot shows a dialog box titled "Operator Password". It contains three input fields: "Operator" (containing "CHRIS"), "Password" (containing six asterisks), and "Confirm Password" (containing six asterisks). At the bottom of the dialog are "OK" and "Cancel" buttons.

5. Type in the new Password and Confirm Password
6. Click the **OK** button when complete
7. Click the **F3 Save** button
8. Close and restart the *Amlib* client to allow the new Password to come into effect

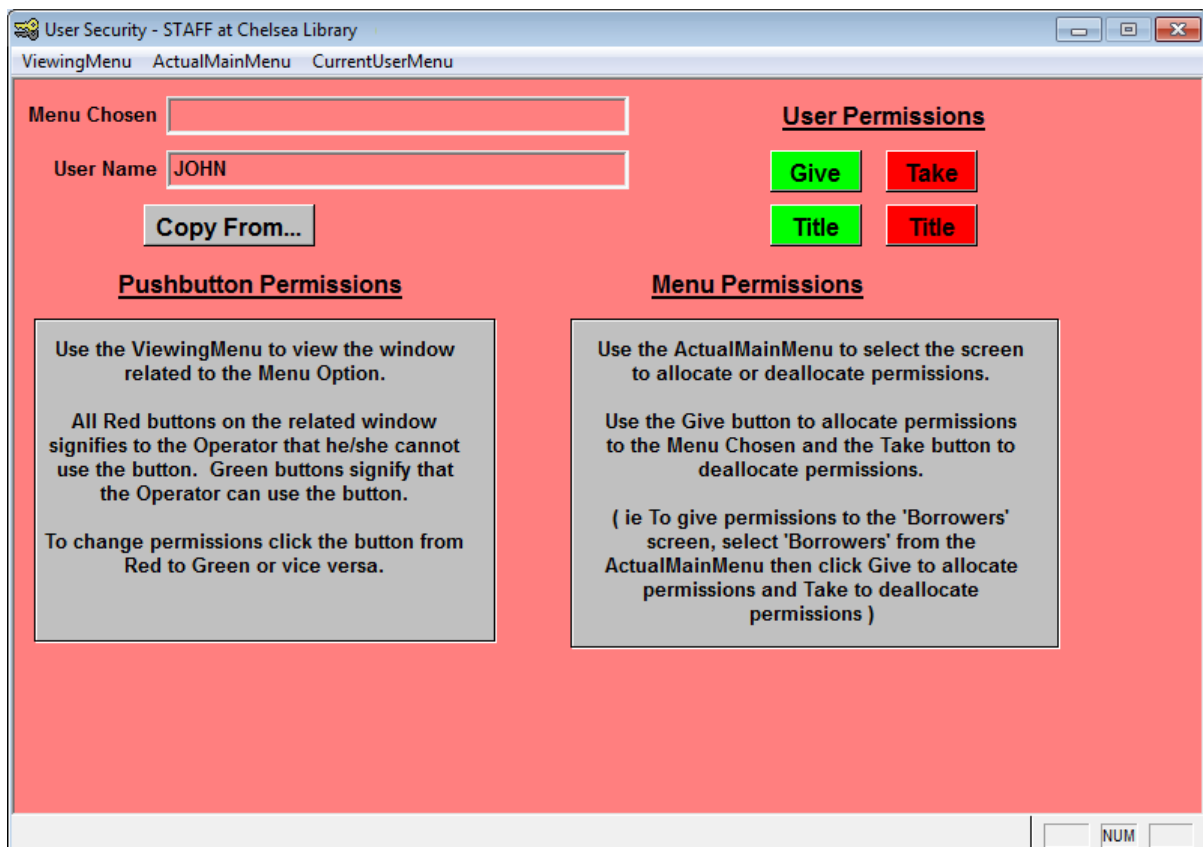
***Please Note:** If the **F9 Passwd** button is not visible – the button will have to be activated for the User who is resetting the password (see [below](#)).

USER PERMISSIONS

Amlib client User Names can be configured to allow access to only certain modules, screens, menu items and buttons. Only Users with full Supervisor permissions can edit the permissions for other Users.

View Existing User Permissions

1. Launch the *Amlib* client
2. Go to **Main > Supervisor > UserNames** – the User Names table will display
3. Highlight a **User Name** in the table – for example: **JOHN**
4. Click the **F8 Choose** button – the User Security screen will display:



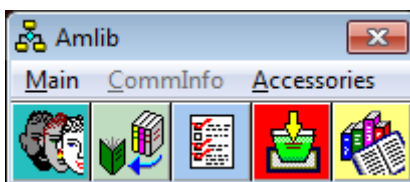
Menu Options

- **ViewingMenu:** is used to show/hide the buttons that appear on any given screen for the selected User
- **ActualMainMenu:** lists the modules/screens/options available which could *possibly* be assigned to the selected User
- **CurrentUserMenu:** lists the modules/screens/options *actually* assigned to the selected User (**bold** for active, **grey** for inactive)

System Management - TASKS

Give	When a screen/option is selected from the <u>ActualMainMenu</u> , the Give button is used to ENABLE the selection – for example: MassBorrowerChange
Take	When a screen/option is selected from the <u>ActualMainMenu</u> , the Take button is used to DISABLE the selection – for example: MassBorrowerChange
Title	When a screen/option is selected from the <u>ActualMainMenu</u> , the green Title button is used to ENABLE access to the module as a whole – for example: Borrower module
Title	When a screen/option is selected from the <u>ActualMainMenu</u> , the red Title button is used to DISABLE access to the module as a whole – for example: Borrower module

- If access to certain Titles (modules) is DISABLED, the selected User will see fewer icons on the *Top Bar* once they log in (the module names will also be *greyed out*):



Enabling a Single Username Permission

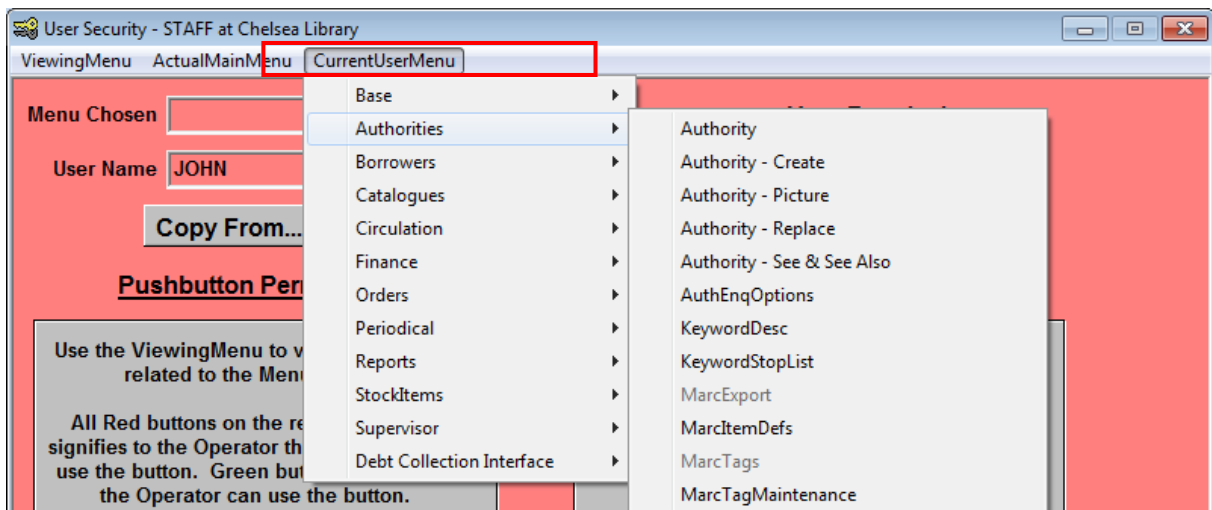
1. Go to **Main > Supervisor > UserNames** – the User Names table will display:

User Name	Location	Circ at this Location Only (Y/N)	Level
CHRIS	HASTINGS	N	100
CIRC	CHELSEA	N	100
DIY1	CHELSEADIY	N	1
FIONA	BELMONT	N	90
JOHN	CHELSEA	N	100
NETOPACS	WEB	N	100
OPAC1	CHELSEA	N	1
STAFF	CHELSEA	N	100
TREVOR	HASTINGS	N	100

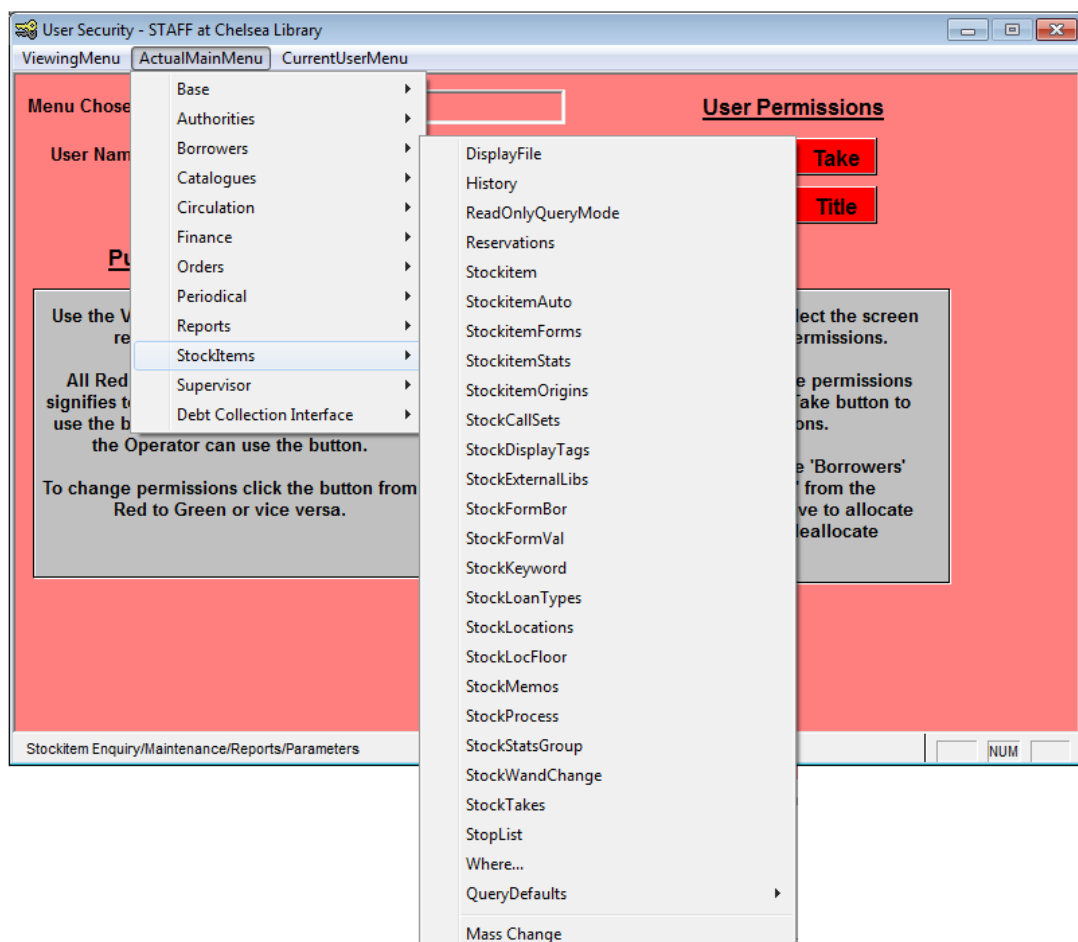
2. Highlight the **User Name** you would like to grant a permission to and click the **F8 Choose** button – the User Security screen will display

System Management - TASKS

3. Navigate to the **CurrentUserMenu** to see the permissions that the user currently has ENABLED (any options that appear in **grey** in the menu are permissions that the user does not currently have):

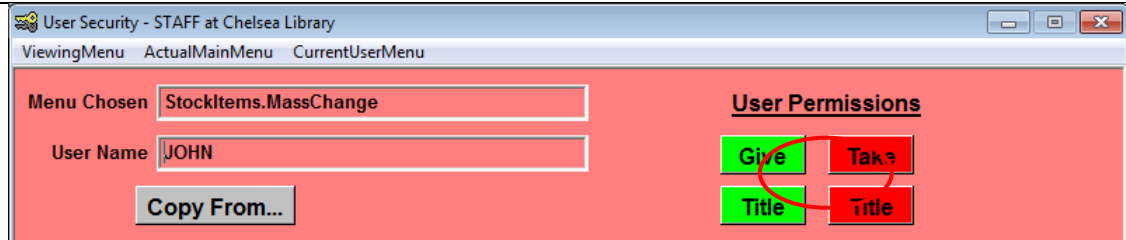


4. To enable a permission, navigate to the ActualMainMenu and then to the menu option you wish to grant- this example uses Stockitem > Mass Change



4. The chosen menu item will then display in the Menu Chosen box – for example:
Stockitems.MassChange

System Management - TASKS



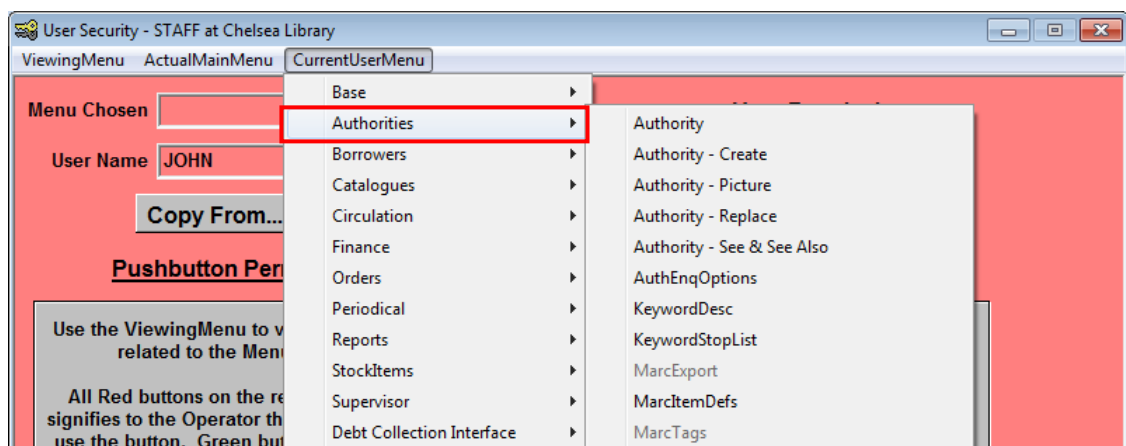
5. Click the green **Give** button
6. You can then recheck the setting in the CurrentUserMenu to see if it has been ENABLED (it will be **bolded**)
7. Then close out of the window and restart the *Amlib* client for the change to have effect

Disabling a Single Username Permission

1. Go to **Main > Supervisor > UserNames** – the User Names table will display:

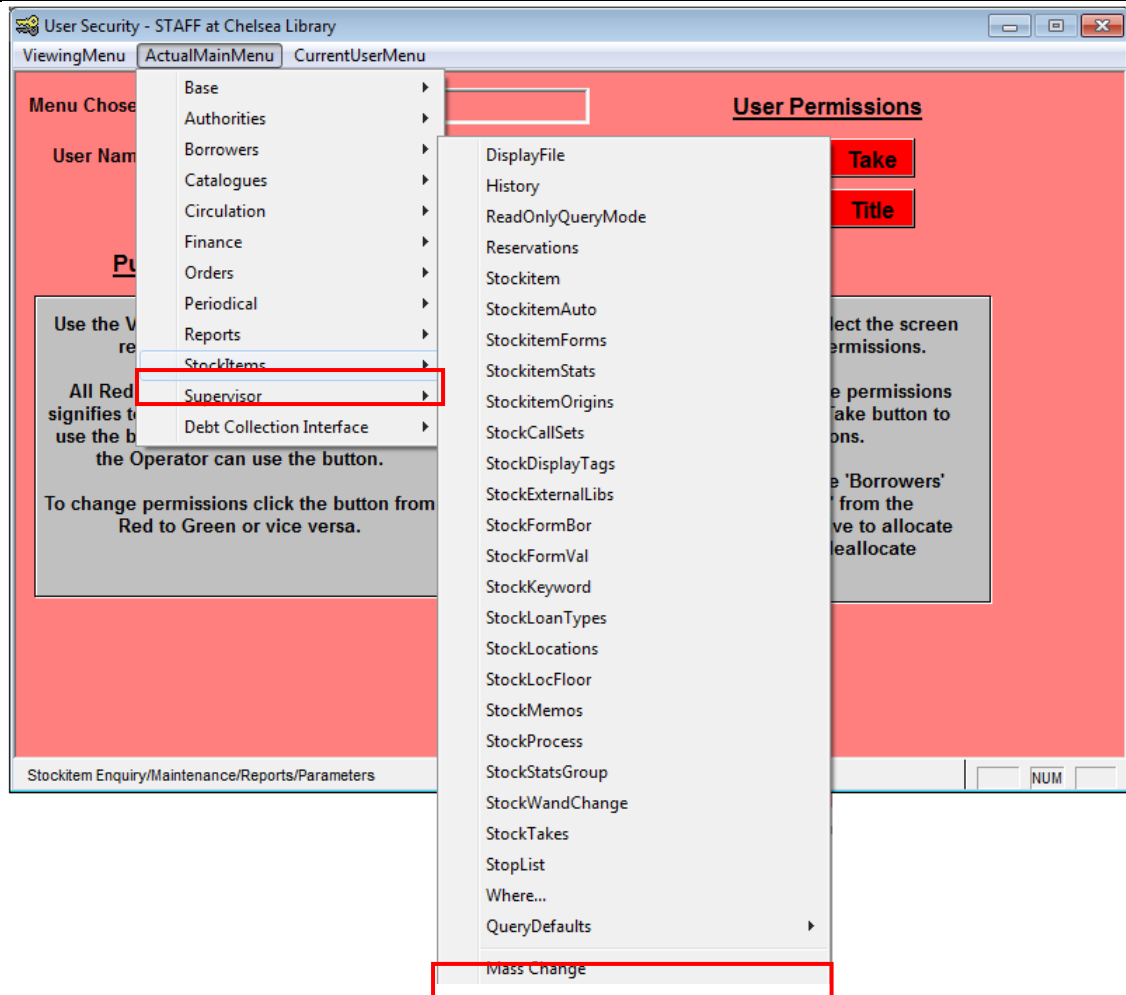
User Name	Location	Circ at this Location Only (Y/N)	Level
CHRIS	HASTINGS	N	100
CIRC	CHELSEA	N	100
DIY1	CHELSEADIY	N	1
FIONA	BELMONT	N	90
JOHN	CHELSEA	N	100
NETOPACS	WEB	N	100

2. Highlight the **User Name** you would like to grant a permission to and click the **F8 Choose** button – the User Security screen will display
3. Navigate to the **CurrentUserMenu** to see the permissions that the user currently has ENABLED (any options that appear in **bold** in the menu are permissions that are enabled):

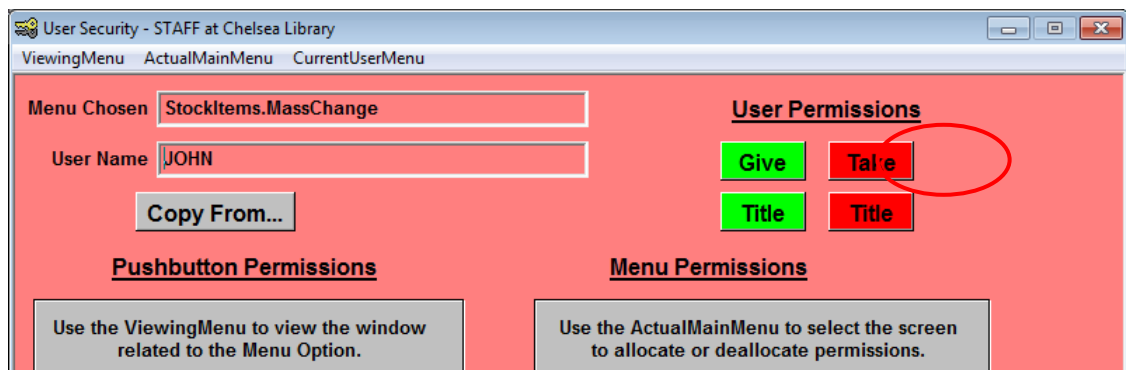


4. To disable a permission, navigate to the **ActualMainMenu** and then to the menu option you wish to grant- this example uses **Stockitem > Mass Change**

System Management - TASKS



5. The chosen menu item will then display in the Menu Chosen box – for example:
Stockitems.MassChange



6. Click the red **Take** button
7. You can then recheck the setting in the CurrentUserMenu to see if it has been DISABLED (it will be *greyed out*)
8. Then close out of the window and restart the *Amlib* client for the change to have effect

Enabling Access to an Entire Module

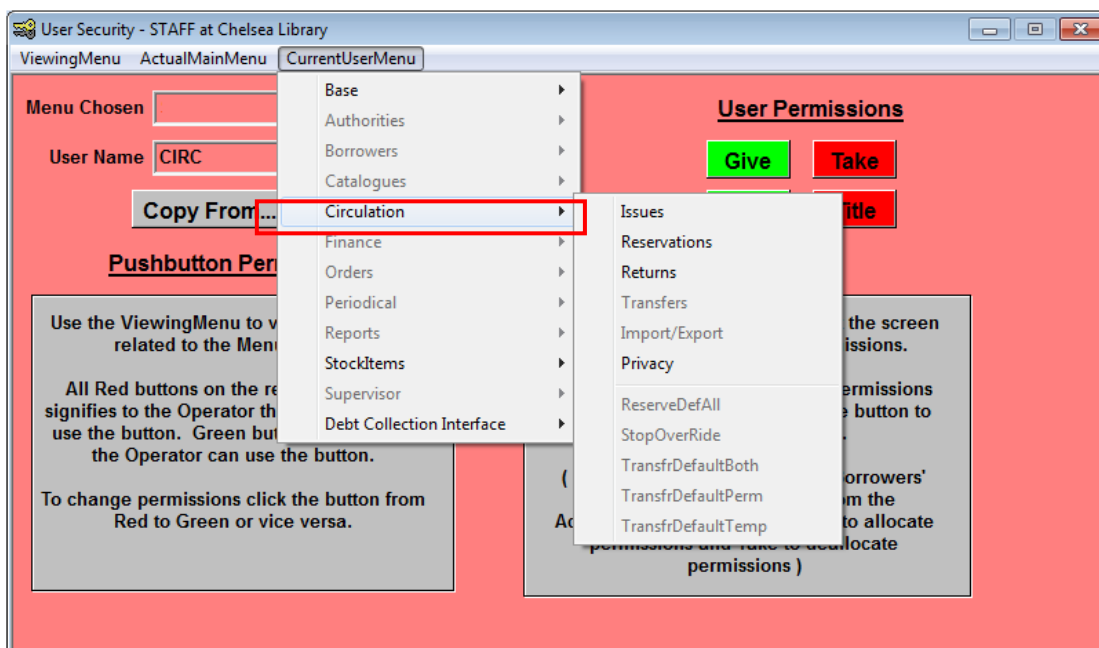
It is possible to control a user's access to entire module.

System Management - TASKS

1. Go to **Main > Supervisor > UserNames** – the User Names table will display:

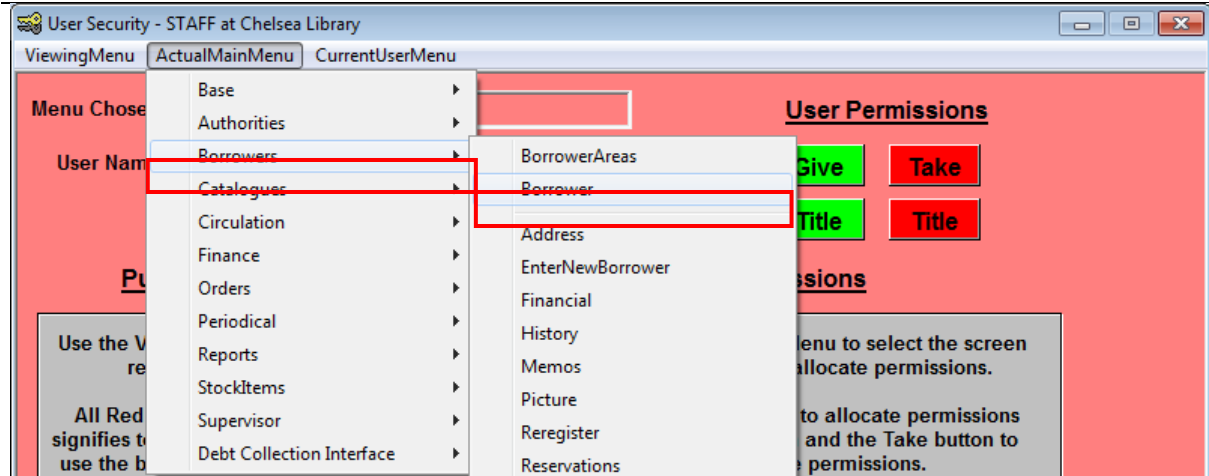
User Name	Location	Circ at this Location Only (Y/N)	Level
CHRIS	HASTINGS	N	100
CIRC	CHELSEA	N	100
DIY1	CHELSEADIY	N	1
FIONA	BELMONT	N	90
JOHN	CHELSEA	N	100
NETOPACS	WEB	N	100
OPAC1	CHELSEA	N	1
STAFF	CHELSEA	N	100
TREVOR	HASTINGS	N	100

2. Highlight the **User Name** you would like to grant a permission to and click the **F8 Choose** button – the User Security screen will display
3. Navigate to the **CurrentUserMenu** to see the permissions that the user currently has – any module names that appear in *grey* in the menu are permissions that the user does not currently have – for example: **Authorities**, **Borrowers** and **Periodicals** amongst others are not permitted for the **CIRC** Username login example below:

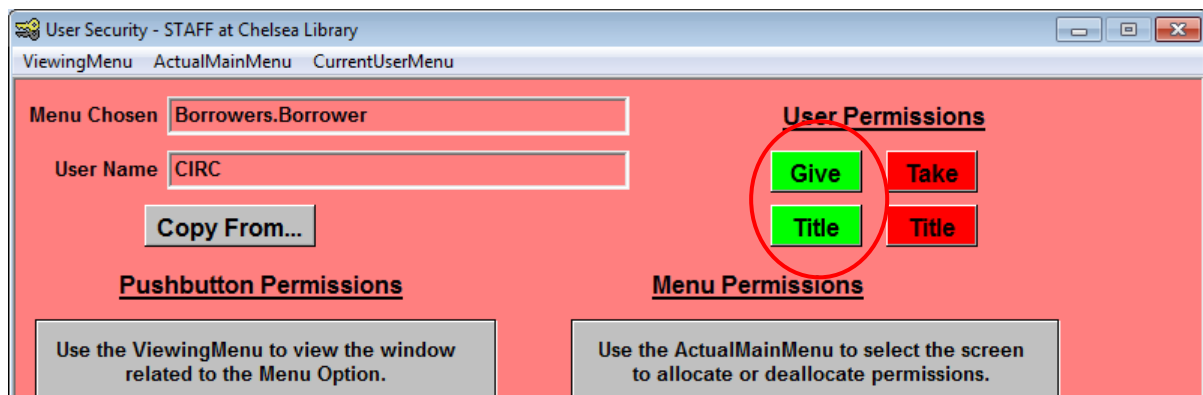


4. To enable a module, navigate to the **ActualMainMenu** and then to the menu option you wish to grant – for example: **Borrowers > Borrower**

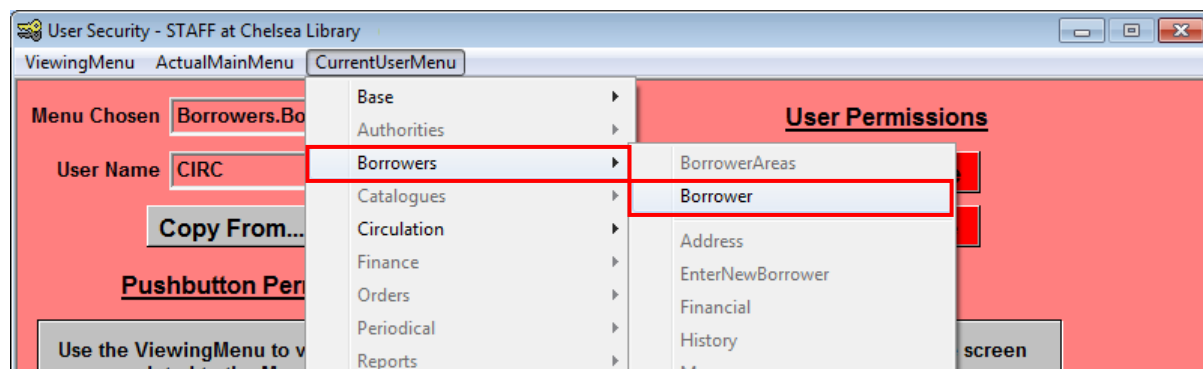
System Management - TASKS



5. The chosen menu item will then display in the Menu Chosen box – for example:
Borrowers.Borrower



6. Select the green **Give** button and then the green **Title** button
7. Selecting the **Current User Menu** at this stage will show that you have granted access to the Borrower screen only – you still need to add individual menu screen permissions – for example: **History** and **Memos** using the steps outlined above



8. Then close out of the window and restart the *Amlib* client for the change to have effect

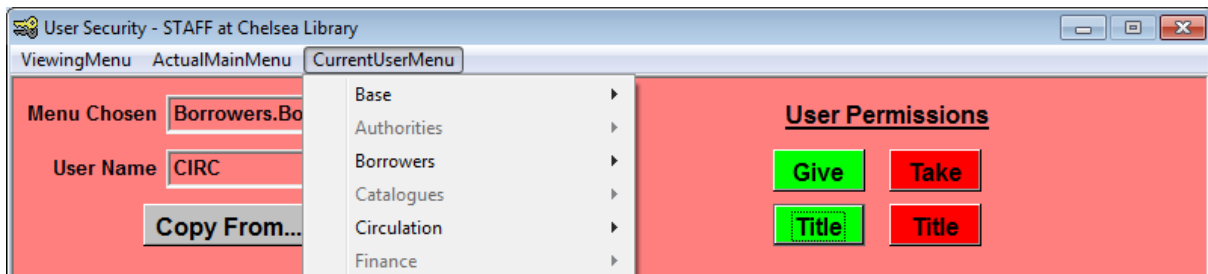
Disabling Access to an Entire Module

1. Go to **Main > Supervisor > UserNames** – the User Names table will display:

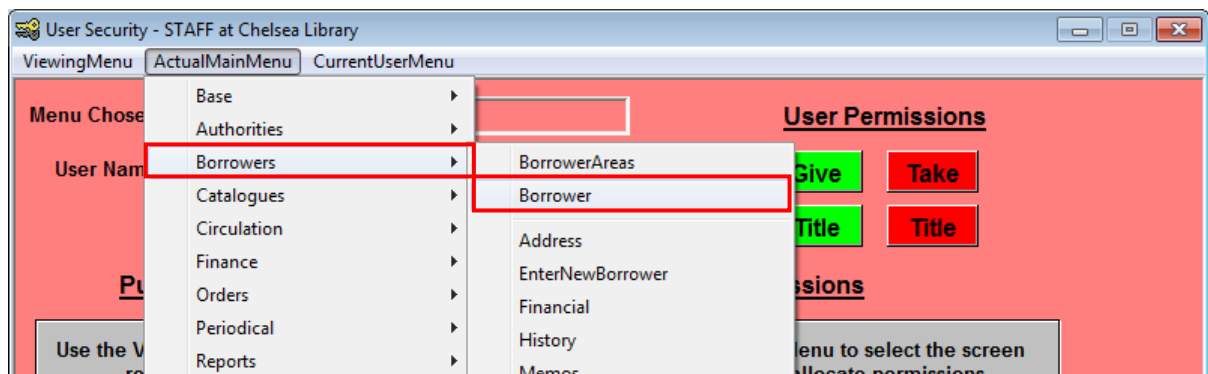
System Management - TASKS

User Name	Location	Circ at this Location Only (Y/N)	Level
CHRIS	HASTINGS	N	100
CIRC	CHELSEA	N	100
DIY1	CHELSEADIY	N	1
FIONA	BELMONT	N	90

- Highlight the **User Name** you would like to grant a permission to and click the **F8 Choose** button – the User Security screen will display
- Navigate to the **CurrentUserMenu** to see the permissions that the user currently has – any module names that appear in *grey* in the menu are permissions that the user does not currently have – for example: **Authorities**, **Borrowers** and **Finance** amongst others are not permitted for the **CIRC** Username login example below:

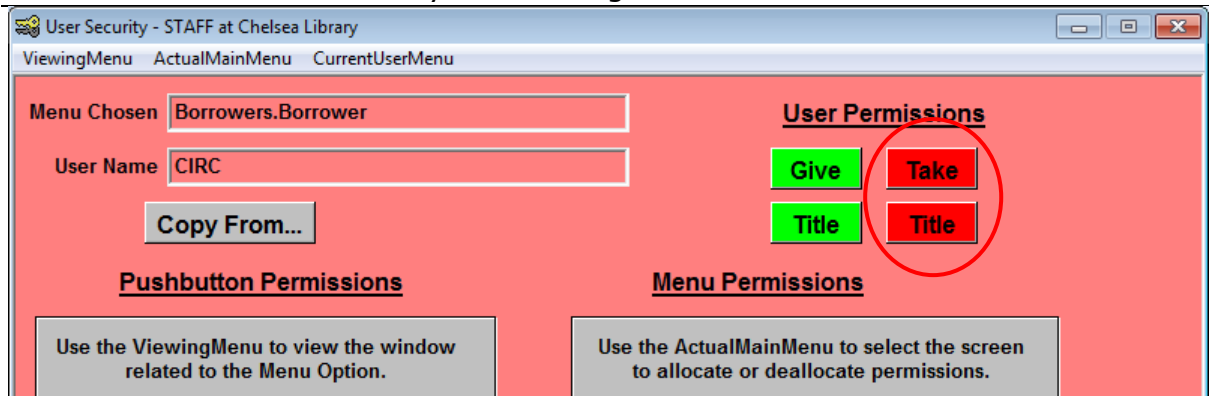


- To disable a module, navigate to the **ActualMainMenu** and then to the menu option you wish to remove – for example: **Borrowers > Borrower**

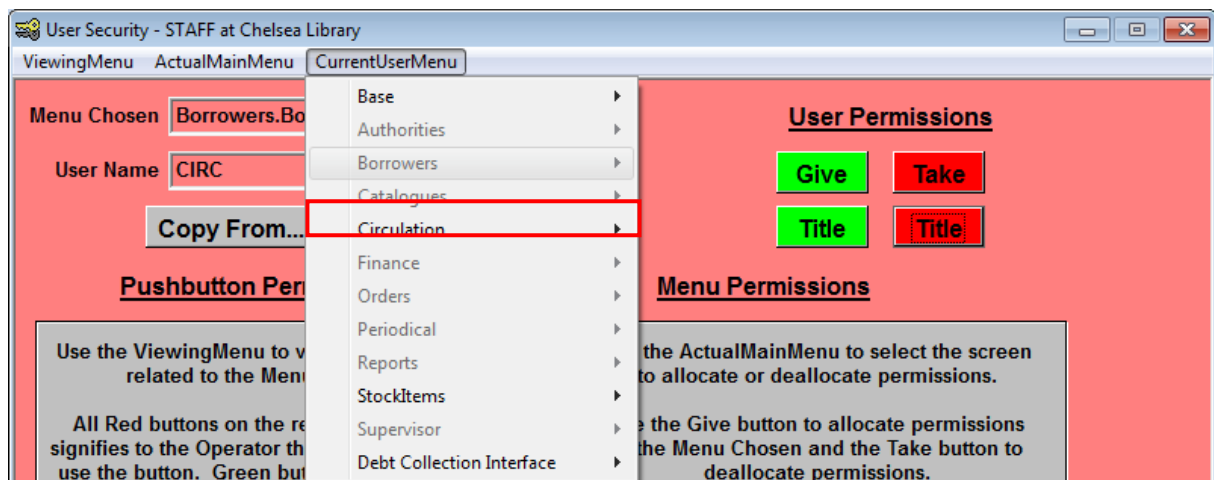


- The chosen menu item will then display in the Menu Chosen box – for example: **Borrowers.Borrower**

System Management - TASKS



6. Select the red **Take** button and then the red **Title** button
7. Selecting the **Current User Menu** at this stage will show that you have disabled access to the Borrower module



8. Then close out of the window and restart the *Amlib* client for the change to have effect

Enabling/Disabling Buttons

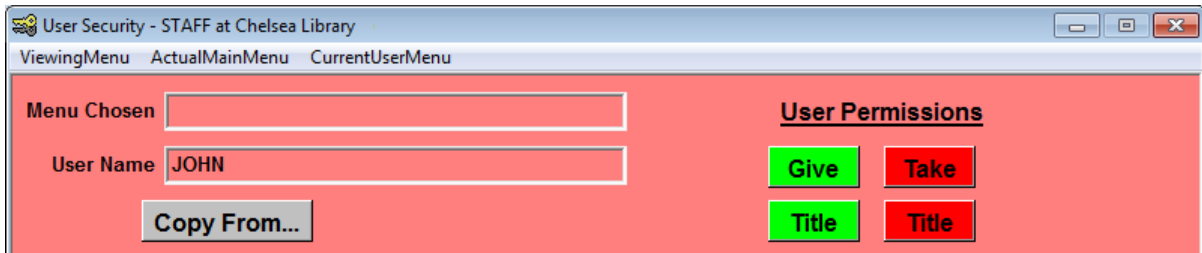
It is possible to show/hide the buttons the user sees on any given screen – this can be used to restrict the user's ability to perform certain tasks – for example: perform updates or delete records

1. Go to **Main > Supervisor > UserNames** – the User Names table will display:

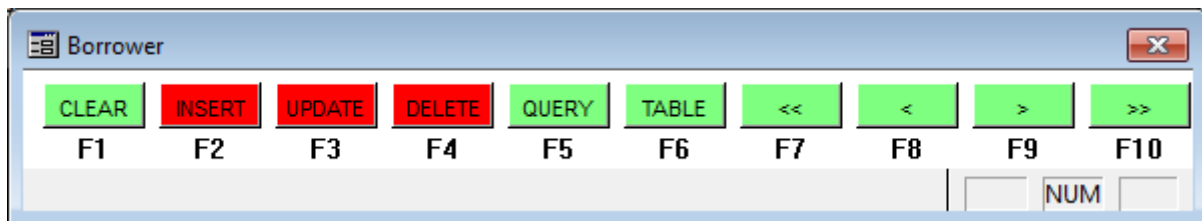
User Name	Location	Circ at this Location Only (Y/N)	Level
CHRIS	HASTINGS	N	100
CIRC	CHELSEA	N	100
DIY1	CHELSEADIY	N	1
FIONA	BELMONT	N	90
JOHN	CHELSEA	N	100
NETOPACS	WEB	N	100

System Management - TASKS

2. Highlight the **User Name** you would like to grant a permission to and click the **F8 Choose** button – the User Security screen will display:

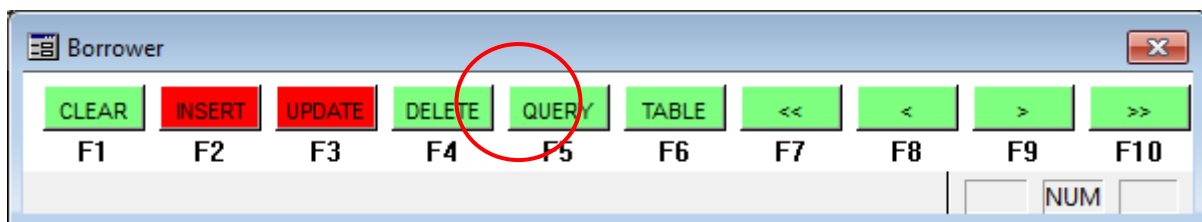


3. Navigate to the **ViewingMenu** and then to the menu option you wish to enable/disable buttons for – for example: **Borrowers > Borrower** – the Borrower buttons menu will display:



The enabled (and therefore visible) buttons will be displayed in **green**, the disabled (and therefore hidden) buttons are in **red**.

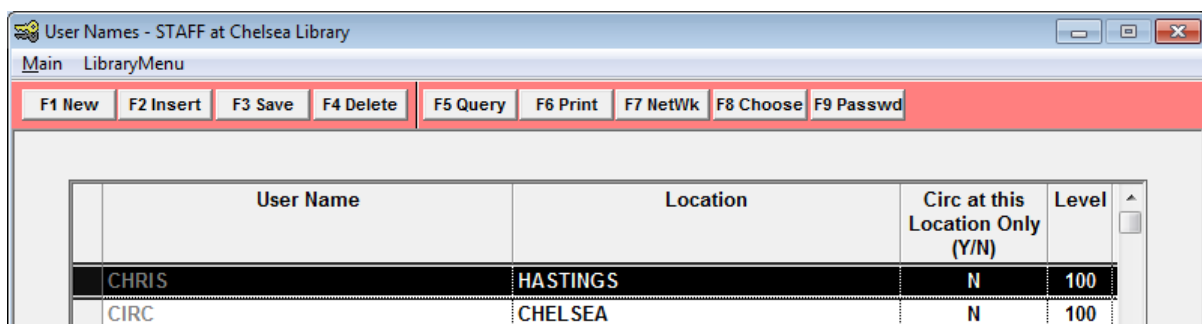
4. To enable (show) a button, simply click a **red** button with your mouse – the button will then turn **green** – in the following example, the **DELETE** button has been enabled:



5. Similarly, to disable (hide) a button, simply click a **green** button with your mouse – the button will then turn **red**
6. Then close out of the button menu, the User Security window and restart the *Amlib* client for the changes to take effect

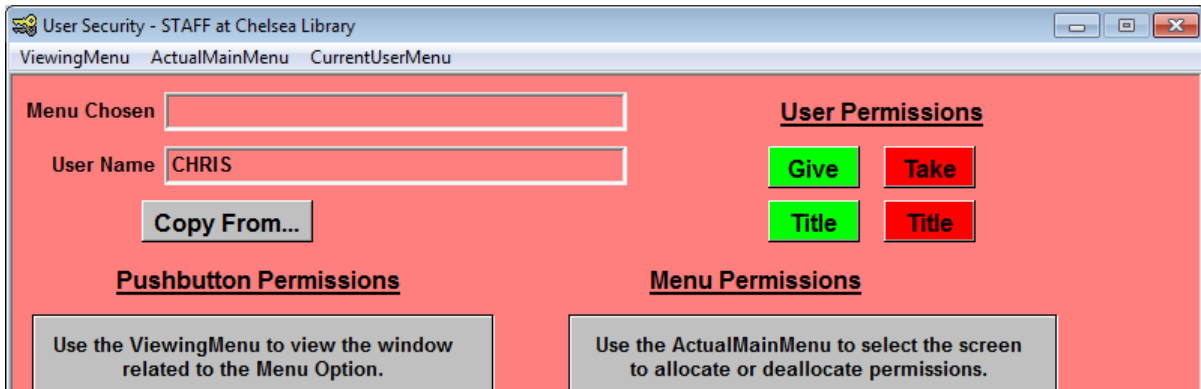
Enabling the F9 Passwd Button on the User Names Screen

1. Go to **Main > Supervisor > UserNames** – the User Names table will display:

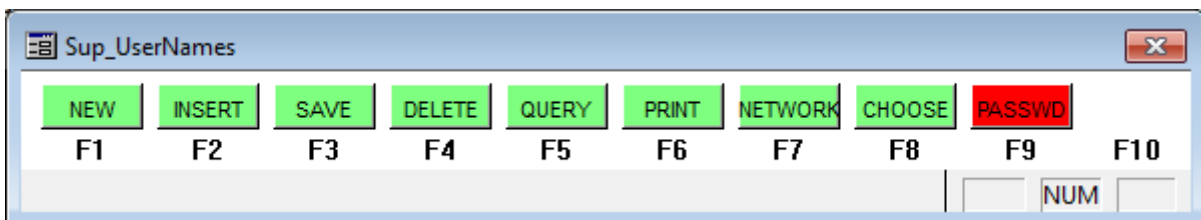


System Management - TASKS

2. Highlight the **User Name** you would like to grant a permission to (this will be the operator who is ALLOWED to reset User passwords) and click the **F8 Choose** button – the User Security screen will display:

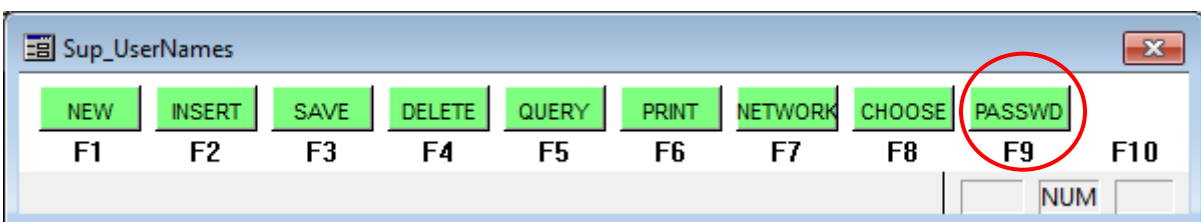


3. From the menu, select **ViewingMenu > Supervisor > UserNames** – the Sup_UserNames button menu will display:



The enabled (and therefore visible) buttons will be displayed in **green**, the disabled (and therefore hidden) buttons are in **red**.

4. Click the **red PASSWD** button with your mouse – the button will then turn **green**:



5. Then close out of the button menu, User Security window and restart the *Amlib* client for the changes to take effect
6. The button will now be visible on the User Names screen when the selected User is logged in

Copying Permissions from One User to Another

It is possible to copy the permissions from another User – for example: copy JOHN's permissions to CHRIS.

1. Go to **Main > Supervisor > UserNames** – the User Names table will display:

System Management - TASKS

User Name	Location	Circ at this Location Only (Y/N)	Level
CHRIS	HASTINGS	N	100
CIRC	CHELSEA	N	100

2. Highlight the **User Name** you would like to copy the permissions to (for example: CHRIS) and click the **F8 Choose** button – the User Security screen will display:

Menu Chosen

User Name

Copy From...

User Permissions

Give **Take**

Title **Title**

3. Click the **Copy From...** button – a Copy From list will display with all the other Users listed:

Copy From

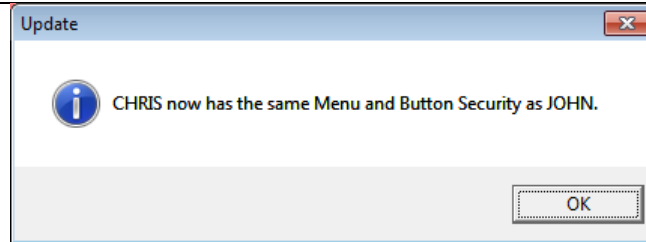
Operator

- CIRC
- DIY1
- FIONA
- JOHN**
- NETOPACS
- OPAC1
- STAFF
- TREVOR

Copy Cancel

4. Highlight the Operator whose permissions you would like to copy – for example: **JOHN**
5. Then click the **Copy** button – a prompt with the following message will display: **XXXXX now has the same Menu and Button Security as XXXXX.**

System Management - TASKS



6. You can review the permissions now enabled for this User by selecting the **CurrentUserMenu** – **bolded** selections are enabled, disabled selections are *greyed out*
7. Then close out of the window and restart the *Amlib* client for the changes to have effect



STOCKITEM CAT DEFINITIONS

By setting the Cat Definitions for Forms and Stockitem codes, the correct Stats and Form codes are given to items as they are created. The Default codes **do not** need Cat Definitions as they will automatically be inserted unless an alternative rule applies.

Form Codes: Cat Definitions

Form Cat Definitions are found in the Window Menu of the Stockitem Form code screen.

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

 AC | Audio Cassettes | Y | N | N || BK | Books | Y | N | N |
| BR | BookRoom | Y | N | N |

Form	Description	Allow Loan	Floating ?	Cat Def Defined
AC	Audio Cassettes	Y	N	N
BK	Books	Y	N	N
BR	BookRoom	Y	N	N

3. Highlight a Form code in the table – for example: **AC – Audio Cassettes**
4. From the menu, select **Window > Cat Defs** – the Form Codes for Catalogues window will display:

Form Code:

**** NOTE: You can use these parameters for another form code by entering the new form code here.**

Tag

- 247
- 250
- 260
- 300
- 310
- 362
- 440
- 490

Must Contain

Must Not

Paste Delete

Description

Tag 300 contains 'SOUND CASSETTE'

5. To set a Cat definition:
 - a. Select a Tag number – for example: **300**

System Management - TASKS

- b. Enter the data that **MUST** be present for valid items to be given this Form Code in the Must Contain field– for example: **Sound Cassette**
 - c. Enter the data that **MUST NOT** be present for valid items to be given this Form Code in the Must Not field – for example: **CD**
 - d. Click the **Paste** button
6. Click the **F3 Save** button when complete

Stats Codes: Cat Definitions

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

Stats Code	Allow Loan	Floating ?	Stats / Collection Description	Price Group Code	Cat Def Defined
E0	Y	N	Equipment	NB	N
ILL	Y	N	Inter Library Loan	FIC	N
J	Y	N	Junior Fiction	JUN	N
JCAS	Y	N	Junior Cassette	NB	N

3. Highlight a Stats Code in the table – for example: **J – Junior Fiction**
4. Click the **F8 Cat Def** button – the Stats Codes for Catalogues window will display:

Stats Code: J

** NOTE: You can use these parameters for another form code by entering the new form code here.

Tag

41
82
84
89
99
100
110
111
130
240
243
245
246
247

Numbers

Ignore
 Must Contain
 Must Not Contain

Tag

Starts With
 Contains anywhere before first space
 Contains anywhere in tag

Use a comma to specify more than

Must Start With

Must Not Start With

Description

Tag 82 contains no numbers.

Paste

Delete

5. To set a Cat definition:
 - a. Select a Tag number – for example: **82**

- b. Numbers:
 - i. Select either the **Must Contain** or **Must Not Contain** radio button (the **Ignore** button is only used when creating non-numerical definitions)
 - ii. Enter Must Start With and/or Must Not Start With data (optional)
 - iii. Click the **Paste** button
 - c. Tag:
 - i. Ensure Numbers is set to **Ignore**
 - ii. Select either the **Starts With, Contains anywhere before first space** or **Contains anywhere in tag** radio button
 - iii. Enter Must Start With and/or Must Not Start With data
 - iv. Click the **Paste** button
6. Click the **F3 Save** button when complete

A setup for Schools might be:

CODE	EXAMPLE
NF	DEFAULT as set up in Main > Supervisor > Installation – Stockitem tab or set in MARC Take up
F	Tag 82 must not contain numbers

A setup for Public Libraries might be:

CODE	EXAMPLE
ANF	DEFAULT as set up in Main > Supervisor > Installation – Stockitem tab or set in MARC Take up
AF	Tag 99 must not contain numbers. Must contain F but not contain J before the first space.
JK	Tag 99 Must contain JK before the first space
JNF	Tag 99 must contain numbers Must contain J but not contain JK before the first space.
JF	Tag 99 must not contain numbers Must contain J but not contain JK before the first space.

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

Description	Value
Check (B)orrower or (I)tem for fines and charges	B
Claims returned process code	
Days of week where ALL locations are closed (0=Sun, ..., 6=Sat)	06
Debt Collection Borrower Status	DC
Default Booking Increment	
Display a confirmation message of Credit (Y/N)	Y
Display Chute Returns on the Main Menu instead of Returns	N
Display the borrower's image in Circulation screens (Y/N)	Y
Fines for an item cannot exceed the price of the item	N
Give a Message when an Interlibrary Loan is Returned	Y
Hide the Message ITEM BELONGS AT LOCATION XX in Returns	N
If a borrower owes money go straight to collect on Issue window	N
If a Borrower owes money go straight to collect on Returns window	N
If set to Y allows an Issue return date > than the specified ILL Return date	N
If Set to Y allows renewals to be due after the ILL Return date	N

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

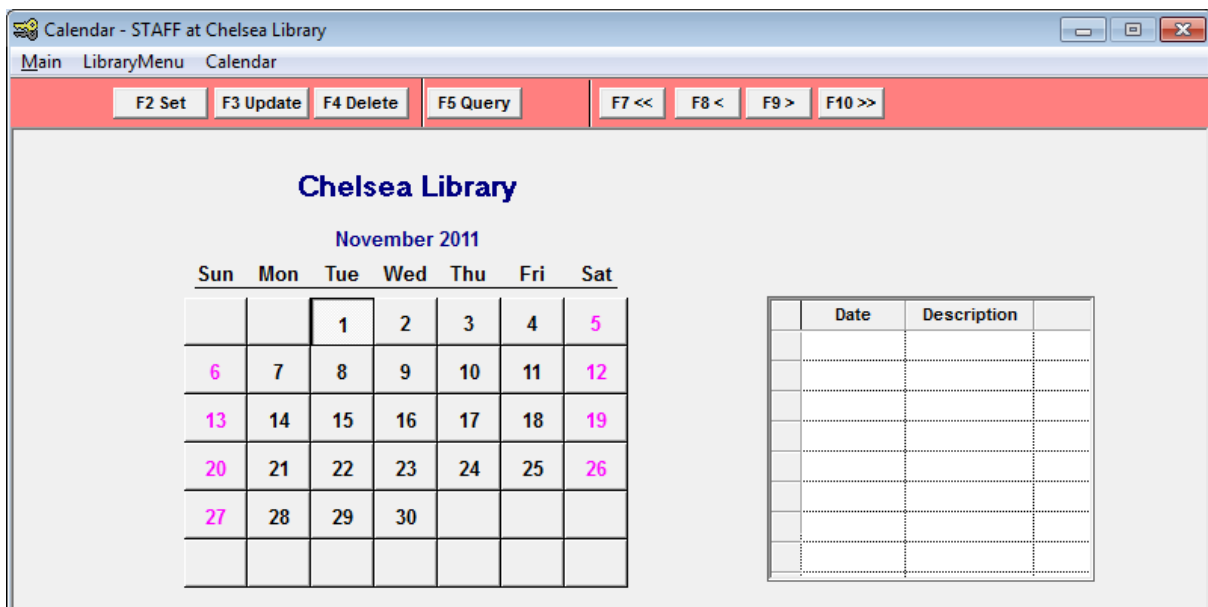
Holidays

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

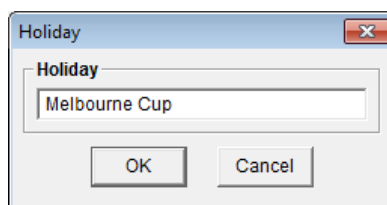
When an item is issued, the program will ensure that it the item is not due for return on closed dates. Reservations will not be due for collection on closed dates. Dates may be entered as far in advance as desired.

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:

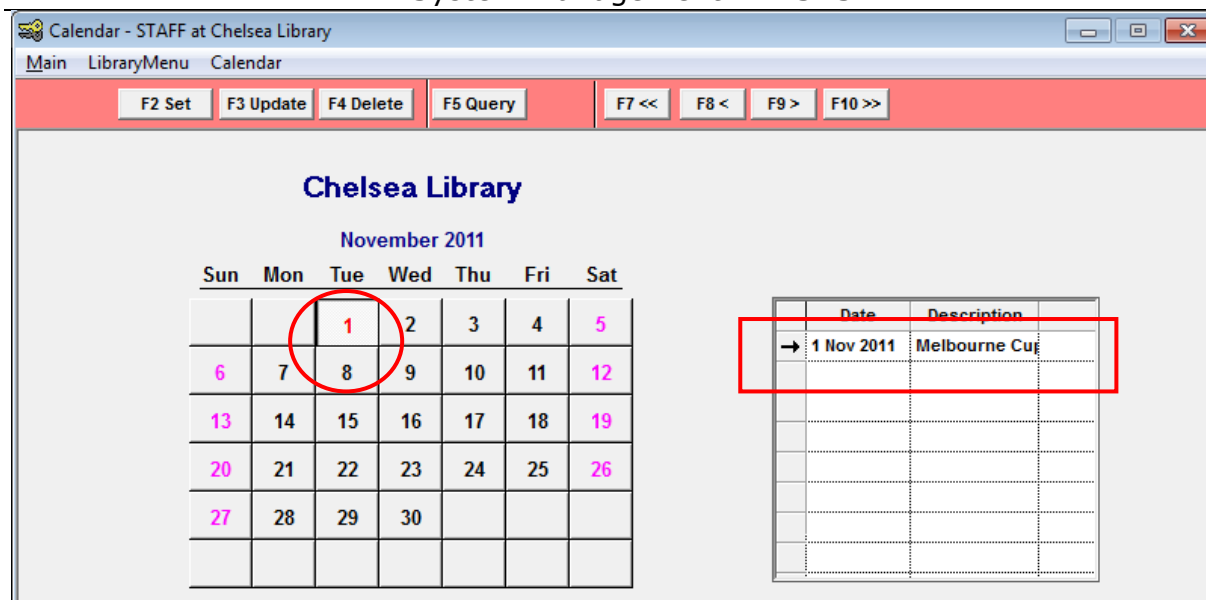


4. Select a date with your mouse – for example: **1 November 2011**
5. Click the **F2 Set** button – the Holiday prompt will display:



- 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 Date and Description will appear in the table to the right of the calendar:

System Management - TASKS



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

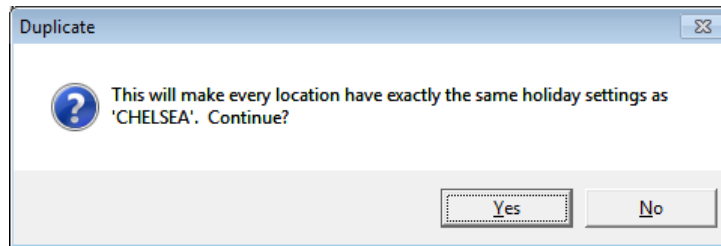
Remove a Closed Date

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

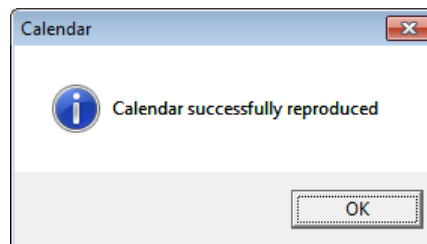
Copy a Closed Date to Other Locations

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

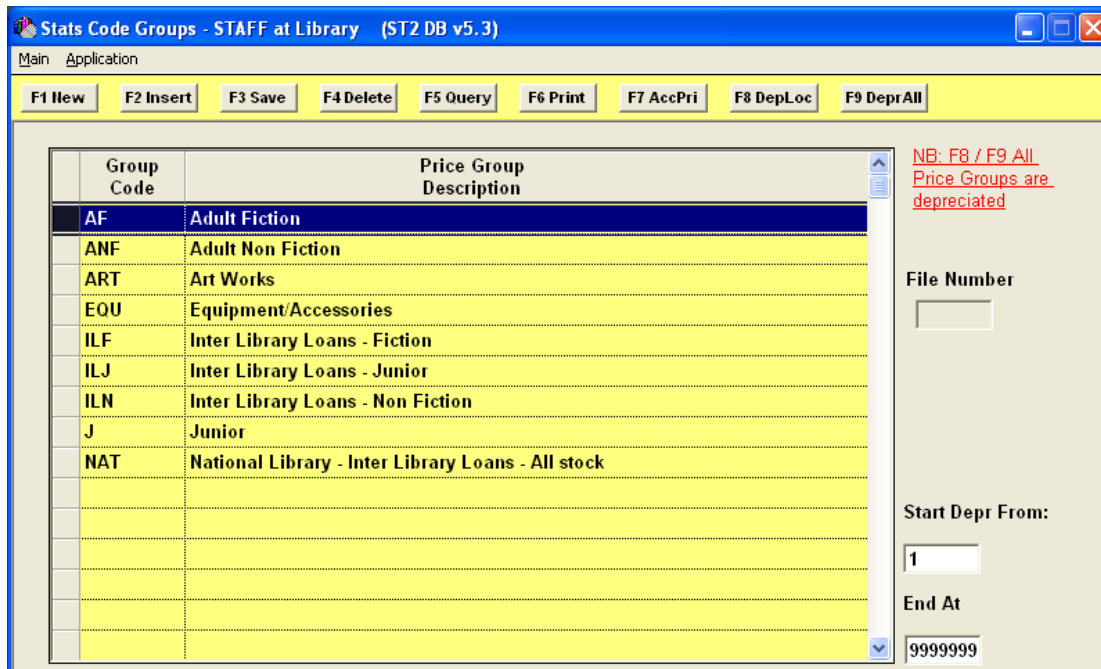
Different Closed Dates for Each Location

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

DEPRECIATION

Each Stockitem Stats code is associated with a Group. These groups are used to assign depreciation rates and cost prices to items. The actual prices used are formulated by STATE LIBRARY OF WESTERN AUSTRALIA. By Depreciating by Groups varying percentage depreciation figures can be set, and Local stock can be exempt from depreciation as required. Depreciation can be set via Location or for All Locations using **[F8]** for specific Location and **[F9]** for All Locations.



To view Price information for any of the Stats groups, highlight the line and select AccPri **[F7]**. A table will display, which allows the entry of current depreciation rates and minimum prices for each Form.



COLUMN	EXPLANATION
Form Type	Available Form Types that can be allocated average

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	prices
Year of First Average Price	First average price as defined on the Prices Table for this particular form.
Year of Last Average Price	Last average price as defined on the Prices Table for this particular form.
Always use Average Price Before Year	Before the year entered in this column, give the average price for the particular year rather than calculate according to percentage
Depreciation Rate (%)	The rate at which the prices will be depreciated in the new calculation
Minimum Depreciation Cost (\$)	A minimum amount, so that if the value of the calculation falls below this amount, enter this amount in the cost field rather than the calculated figure

To be eligible for depreciation, depreciation rates must be entered for every type of Form.

In addition, an average price for each year can be entered for Forms of items by selecting Prices **[F7]**.

The screenshot shows a window titled "Average Stock Prices" with a blue header and a yellow background. It contains three buttons: "F3 Save", "F5 Query", and "F6 Print". Below the buttons, it displays "Group Code: AF" and "Form: BK". The main area is a table with two columns: "Year" and "Cost (\$)". The table lists years from 2014 down to 2003, with corresponding cost values.

Year	Cost (\$)
2014	
2013	
2012	
2011	29.70
2010	27.50
2009	24.20
2008	22.00
2007	19.80
2006	17.60
2005	16.50
2004	14.30
2003	13.20

Running Depreciation

Depreciation can be set to be depreciated on a Straight Line basis or on a Reducing Balance basis.

The method is selected in Supervisor, Library Menu, Installation, Stockitem – Deprec. Items on straight line basis. An option as to whether 10% GST is removed prior to depreciation and then reapplied can be selected from Supervisor, Library Menu, Installation, System – If price includes GST

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this removed before depr and recalculated after. Regardless of the Depreciation method, the same Depreciation Tables are used within Amlib. The essential difference is in the calculation and which cost price is used for the calculation.

The Depreciation can be performed on one item or as a Mass Depreciation from Stockitem, StatsGroups.

The date Depreciation uses is the Accession Date of the Stockitem. If there is no Accession Date, it uses the Received Date of the Stockitem.

As the item is depreciated, the system considers:

Method of Depreciation e.g. Straight Line or Reduced Balance

The Stats Group code which has the Percentage Rate, Minimum price restrictions

Last Depreciation date (items Depreciated in the last 12 months will not be included or new items accessioned in the current year will not be subject to Depreciation)

Rounding formulas as set in Stockitem, Application, StockOrigins for the particular Source

Straight Line Depreciation

A Straight Line Depreciation uses the Original Cost Price which is stored in Stockitem/Item/History.

Stockitem Circulation History
✖

F5 Query
F6 Print

Times Issued : 19 Prev. 0 StockTake : 15/02/2011 Original Cost Price

Times Reserved 2 Period 0 Last depr: 01/01/2011 \$40.35

Times Renewed : 8 Last Act: 15/02/2011 12:12:06 PM

31111025711829 Circulation Activity ChangeCost

Action	Date	Who	Comments	Value
RES.HIST	14 May 2008 10:3	CI125b5599032d Miss Misty Anne Franc	Cancelled within Circ on 2008-05-14-10.33 by A-	
RETURN	15 Feb 2011 12:1	CI125b6358675d Mrs Joy L Curran	Returned at OSB by A-O on 15/02/2011 12:12 PM	
PRICE	21 Jan 2011 10:1		BATCH DEPR (USED LAST DEPR DATE 2010-0	\$20.90
ISSUE	6 Jan 2011 5:42	CI125b6358675d Mrs Joy L Curran	Circ issue at OSB by A-O to CURRAN, JOY Due:	
RETURN	6 May 2010 4:14	CI125b0841137d Wosb Osborne Transi	Returned at OSB by A-O on 06/05/2010 4:14 PM	
ISSUE	4 May 2010 4:11	CI125b0841137d Wosb Osborne Transi	Circ issue at MIR by A-M to OSBORNE TRANSIT,	
RETURN	4 May 2010 3:51	CI125b5599032d Miss Misty Anne Franc	Returned at MIR by A-M on 04/05/2010 3:51 PM	
ISSUE	27 Apr 2010 3:54	CI125b5599032d Miss Misty Anne Franc	DIY issue at MDIY3 by MIRDY3 to FRANCIS, MIS	
RETURN	20 Apr 2010 1:37	CI125b0841153d Wmir Mirrabooka Tran	Returned at MIR by A-M on 20/04/2010 1:37 PM	

Reports

Date	Report Type	Details
25 Aug 2006 12:0	READING	ALEXANDER THOMSON
6 Oct 2006 12:00	READING	ALEXANDER THOMSON
23 Aug 2007 12:0	READING	LESLEY CAREY
18 Feb 2008 10:3	READING	HEATHER WILKINSON

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Note: The Original Cost field is assigned the same value as the cost field when a new item is manually inserted *Example or Straight Line Depreciation*

An item worth \$27.00 was purchased in 1995, and therefore 6 years old at 2001.

Within the tables, the depreciation rate is set at 10%

It simply calculates 60% (6 years x 10% = 60%) of the Original Cost e.g. of \$27.00

This will be \$16.20

So the Depreciated pricing will be \$27-\$16.20= \$10.80, rounded off will be \$11.00

Note: Rounding parameters are set in Stockitem, Application, StockitemOrigins

Reducing Balance

A Reducing Balance the current cost (i.e. the value visible on the Stockitem Window) is used.

Example or Reducing Balance Depreciation

An item worth \$27.00 was purchased in 1995, and therefore 6 years old at 2001.

Within the tables, the depreciation rate is set at 10%

- 1st year it depreciates to \$24.30
- 2nd year it depreciates to \$21.87 (\$24.30 – 2.43)
- 3rd year it depreciates to \$19.69 (\$21.87 – 2.18)
- 4th year it depreciates to \$17.73 (\$19.69 – 1.96)
- 5th year it depreciates to \$15.96 (\$17.73 - 1.77)
- 6th year it depreciates to \$14.37 (\$15.96 – 1.59)

Rounded off that will be \$14.00

Depreciation Process

The Depreciation process can take a large amount of system resources to implement, and should not be done when the library is busy as all other applications will be slow

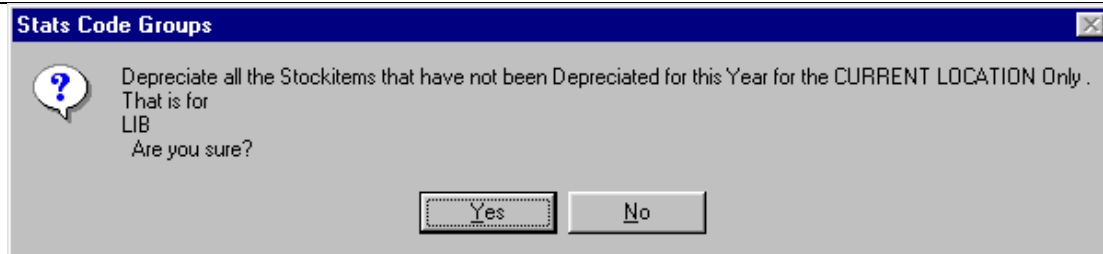
Items can be depreciated on a yearly basis. Depreciate all items at the Login Location via the Stats Group Table by selecting DepLoc **[F8]**. To depreciate all items use DepAll **[F9]**.

Start Depr From, End At

The value in this field is the unique Stockitem number and depending upon your installation could be in the range 1 to 999999 depending upon how many items are in the database.

A message will display:

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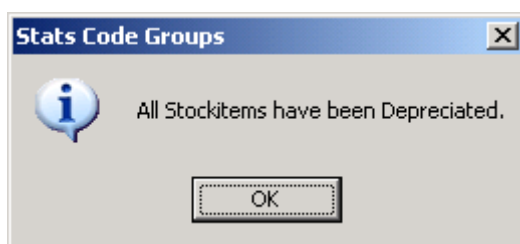


For every item on the database at the Current Location this will

Assign an average price if the price is 0.00 and a parameter entry can be found

Depreciate the current price by the respective % if the price has not be depreciated within the last 12 months (a field in the Stockitem History records the last depreciation date).

At the end of the process, a message will display.



The Accession date of an item is used in these calculations.

Note: New items accessioned within the last 12 months will not be depreciated

The Stockitem history will keep a note of the Depreciation change and enters the Last Depreciation Date.

F5 Query F6 Print
 Times Issued : 6 Prev. 0 StockTake : 01/09/2010 Original Cost Price
 Times Reserved 0 Period 0 Last depr: 01/01/2011 \$27.40
 Times Renewed : 0 Last Act: 01/09/2010 2:48:56 PM
 AL12505073227B Circulation Activity

Action	Date	Who	Comments	Value
PRICE	22 Jan 2011 2:47		BATCH DEPR (USED LAST DEPR DATE 2010-0	\$20.90
RETURN	1 Sep 2010 2:48	C1125b5588960d Mr Emir Tupkovic	Returned at MIR by A-M on 01/09/2010 2:48 PM	
ISSUE	7 Aug 2010 10:56	C1125b5588960d Mr Emir Tupkovic	DIY issue at MDIY2 by MIRDIY2 to TUPKOVIC, EN	
RETURN	24 May 2010 10:4	C1125b6196500d Mrs Sanela Tupkovic	Returned at MIR by A-M on 24/05/2010 10:59 AM	
ISSUE	10 May 2010 1:52	C1125b6196500d Mrs Sanela Tupkovic	DIY issue at MDIY1 by MIRDIY1 to TUPKOVIC, SA	
RETURN	4 May 2010 3:50	C1125b5599032d Miss Misty Anne Franc	Returned at MIR by A-M on 04/05/2010 3:50 PM	
ISSUE	17 Apr 2010 10:5	C1125b5599032d Miss Misty Anne Franc	DIY issue at MDIY2 by MIRDIY2 to FRANCIS, MIS	
PRICE	6 Feb 2010 6:31		BATCH DEPR (USED LAST DEPR DATE 2009-0	\$23.10
PRICE	7 Feb 2009 9:45		BATCH DEPR (USED LAST DEPR DATE 2008-0	\$25.30
RETURN	1 May 2008 1:51	C1125b5599032d Miss Misty Anne Franc	Returned at MIR by A-M on 01/05/2008 1:51 PM	

Reports

Date	Report Type	Details
18 Jan 2008 1:03	READING	BIANCA PEETERS
15 Feb 2008 9:18	READING	MISTY FRANCIS
1 May 2008 1:51	F READING	MISTY FRANCIS
4 May 2010 3:50	F READING	MISTY FRANCIS

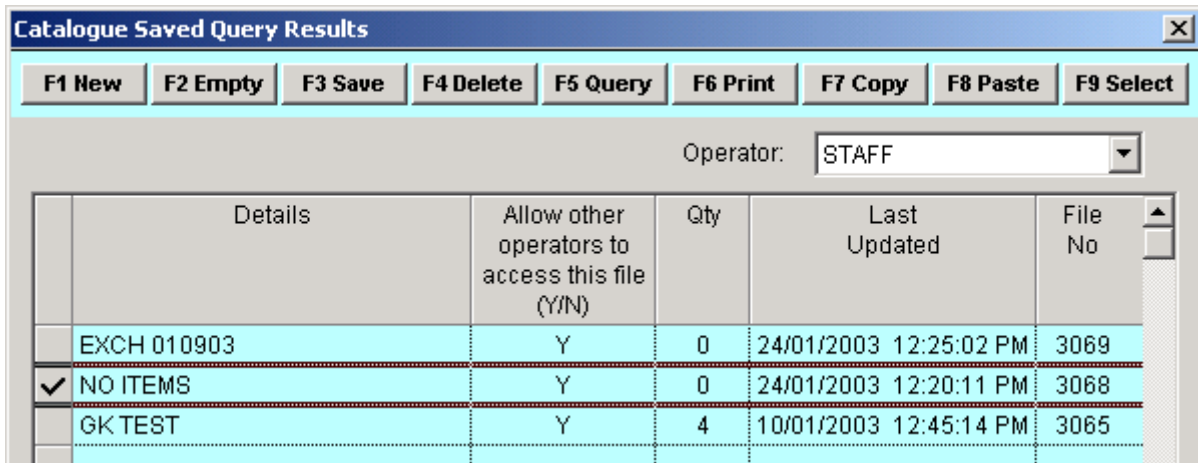
Individual items can also be depreciated from Stockitem, Item, Depreciate item.

DATA MANAGEMENT

Catalogue Maintenance

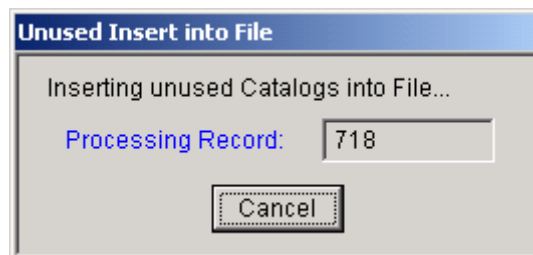
Insert all Unused Catalogues Records into a Saved File

1. In *Amlib* go to **Main > Catalogue > CatMaintenance**
2. Choose the Maintenance Task from Field 1 – **Insert all unused Catalogues into a Saved File**
3. Enter an appropriate date in the “Only consider catalogue records before” parameter
4. Click the **Options** button to select or *create a file* for the Unused Catalogs

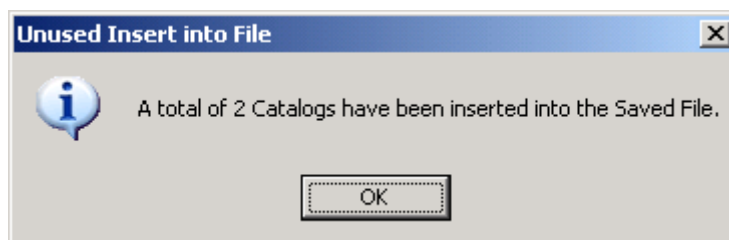


Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
EXCH 010903	Y	0	24/01/2003 12:25:02 PM	3069
✓ NO ITEMS	Y	0	24/01/2003 12:20:11 PM	3068
GK TEST	Y	4	10/01/2003 12:45:14 PM	3065

5. Press Start [**F3**] to begin the task.



6. A message will display at the end of the task, giving a summary of the changes made.



The items can then be viewed by displaying the Catalogue File.

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The screenshot shows a window titled "Catalogue Saved Query Results" with a menu bar containing: F1 New, F2 Empty, F3 Save, F4 Delete, F5 Query, F6 Print, F7 Copy, F8 Paste, F9 Select. Below the menu bar is an "Operator:" dropdown menu set to "STAFF". The main area contains a table with the following data:

Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
NO ITEMS	Y	2	24/01/2003 3:19:53 PM	3068
EXCH 010903	Y	0	24/01/2003 12:25:02 PM	3069
GK TEST	Y	4	10/01/2003 12:45:14 PM	3065

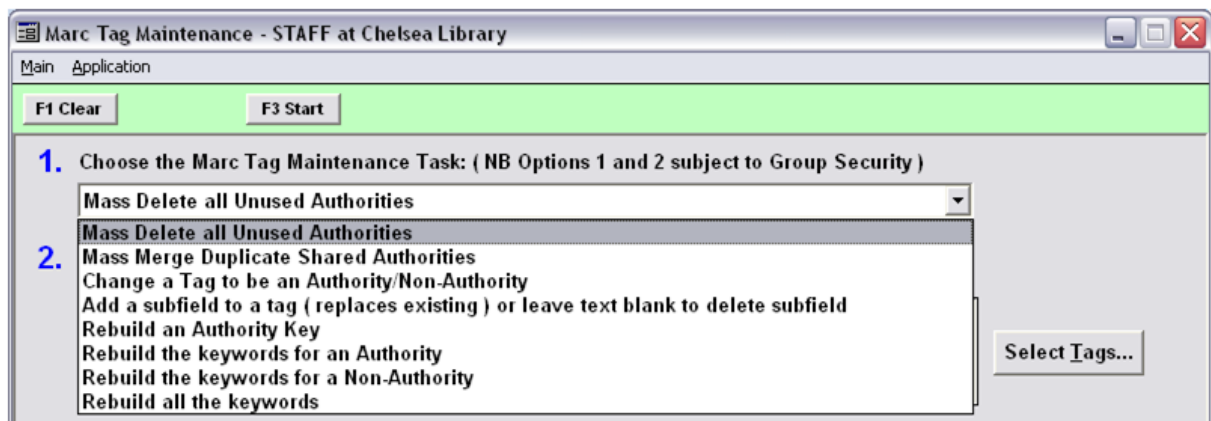
7. The records can be investigated.
8. If the catalogue records are to be deleted, the task can be run "Delete all Unused Catalogues that are in a Saved File" in the same way as shown above

Authority Maintenance

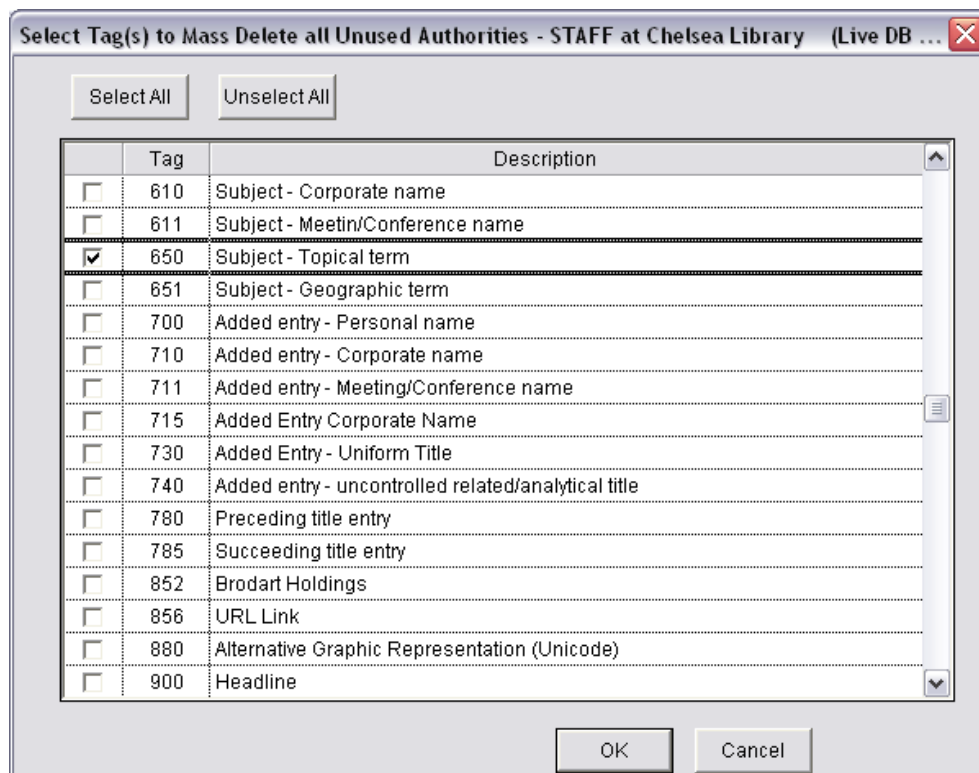
Mass Delete Unused Authorities

To mass delete Authorities that are not being reference by catalogue records select this option. Schools that import the SCIS Authority File should not perform this task, as they will want to keep the unused headings for future use.

10. In *Amlib* go to **Main > Authorities > MarcTagMaintenance**
11. Choose the Marc Tag Maintenance Task from Field 1 – **Mass Delete All Unused Authorities**



12. Under field 2, use the **Select Tags...** button select the tag the maintenance task is to apply the deletion to. Some tasks allow multi selection of tags, whilst some will allow only one tag. Tick the tags you want to delete the unused authorities from and select **OK**



13. Under field 3 select the **Options...** button to choose the deletion level from Level 1, Level 2 or Level 3 then select **OK** (these are explained further below)

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Delete Options

Level 1: Delete only Authorities that have not been used by the system. This will retain any Authority used, either for a Catalogue or used for a cross reference with any other Authority.

Level 2: Delete all Authorities that are not referenced to any Catalogue, directly or through a cross reference. This will retain any Authority used, either for a Catalogue or used as a cross reference with other Authorities, where the other Authority is used for a Catalogue.

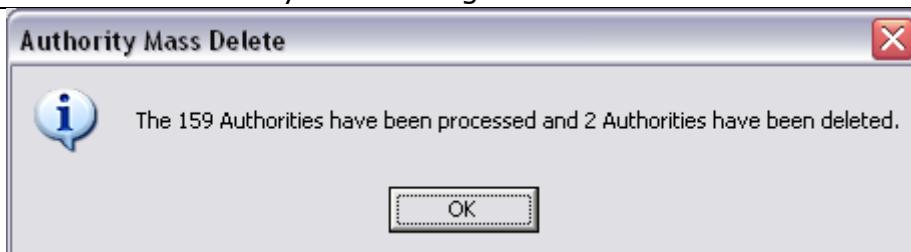
Level 3: Delete all Authorities and related cross reference links that are not directly linked to a Catalogue. This will retain any Authority used for a Catalogue.

OPTION	EXPLANATION	EXAMPLE
Mass Delete Unused Authorities – See options in more detail below	<p>3 options that can be chosen. Level 1 will delete the least data, Level 3 the most data:</p> <p>Level 1: <i>Only Authorities that have never been used on your database will be deleted. Therefore subject headings that have been used as a See, See also, RT, NT etc. will not be deleted</i></p> <p>Level 2: <i>Will delete Authorities that are not attached to a Catalogue record but will retain Authorities where one of the references (NT, BT etc.) is attached to a Catalogue record</i></p> <p>Level 3: <i>Will delete any Authority that is not directly attached to a Catalogue record</i></p>	<p>See below in Table format “Mass Delete Unused Authorities”</p> <p>NB: As schools import SCIS Authority headings, they may not wish to delete the Unused headings</p>

14. Press **F3 Start** to begin the task

15. A confirmation message will be seen, select **OK**

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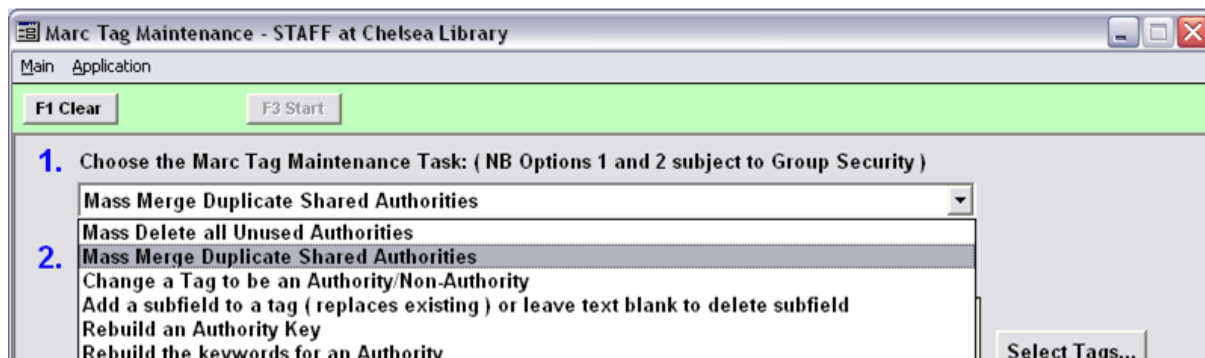


EXAMPLE – WILL THE TERM BE DELETED??				
Term	Usage	Level 1	Level 2	Level 3
		<i>Only Authorities that have never been used on your database will be deleted. Therefore subject headings that have been used as a See, See also, RT, NT etc. will not be deleted</i>	<i>Will delete Authorities that are not attached to a Catalogue record but will retain Authorities where one of the references (NT, BT etc.) is attached to a Catalogue record</i>	<i>Will delete any Authority that is not directly attached to a Catalogue record</i>
Cats	0	Y	Y	Y
Cats NT Kittens	0 0	N - (the heading is used by the system by having a cross reference)	Y	Y
Cats NT Kittens	0 1			
Cats NT Kittens	1 0	N	N - Neither term will be deleted (the Cats heading is being referenced by a catalogue record through the cross reference)	Y - The Term Cats will be deleted. The Term Kittens will remain (the heading is being directly referenced by a catalogue record)
Cats NT Kittens	1 0			
Cats NT Kittens	1 1	N	N	N - (both headings are being directly referenced by a catalogue record)
Cats	1			
Cats	1	N	N	N

Mass Merge Duplicate Shared Authorities

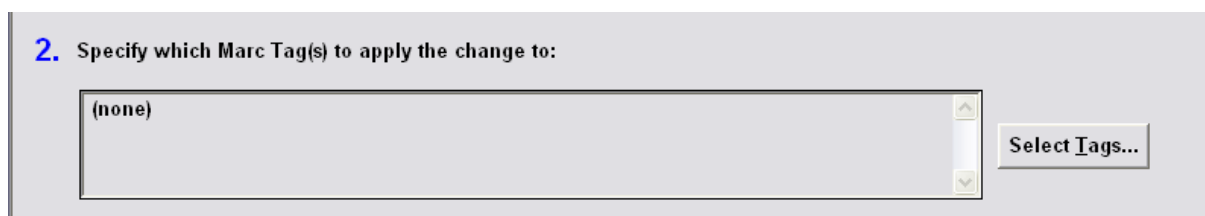
This is a Mass merge process and the system automatically merges any duplicate shared Authority - for example Subject headings or Authors, without allowing the User to first view any duplicates. It will keep the fuller authority and merge the shorter version to the larger version.

1. In *Amlib* go to **Main > Authorities > MarcTagMaintenance**
2. Choose the **Mass Merge Duplicate Shared Authorities** Task from Field 1

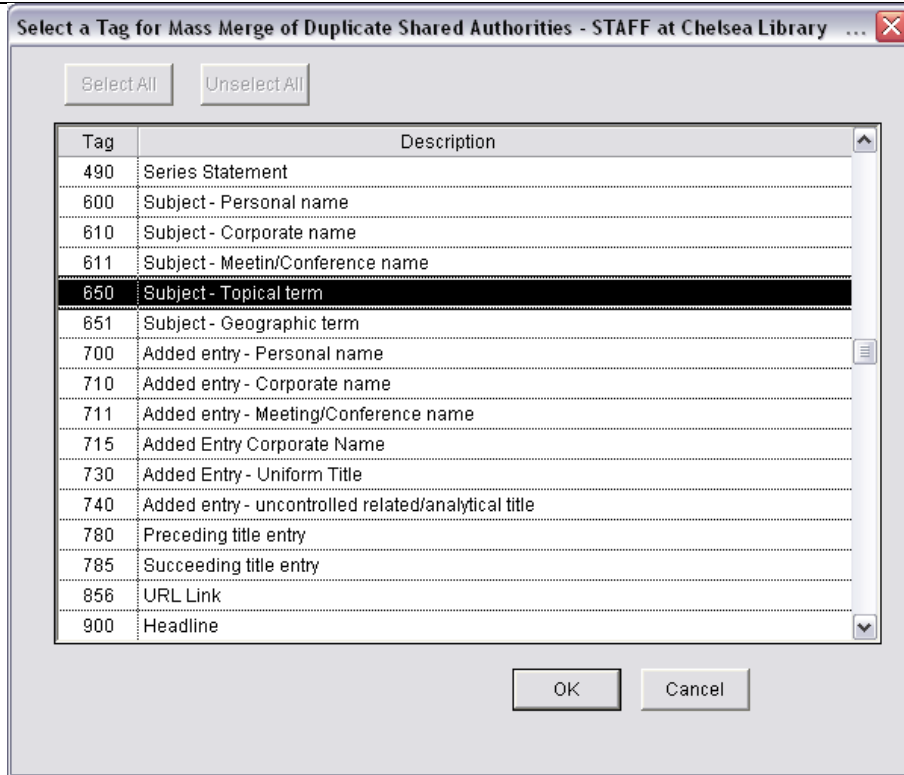


OPTION	EXPLANATION	EXAMPLE
Mass Merge Duplicate Shared Authorities	This merges authorities that have identical Search keys and merges them to one Authority without User Intervention Please Note: This option should be used with caution as some Authors may have the same name but in fact are different Authors	John Smith (1866-1924) and John Smith (1948 -) are different authors but they have the same Search string – these would be merged if this option is run

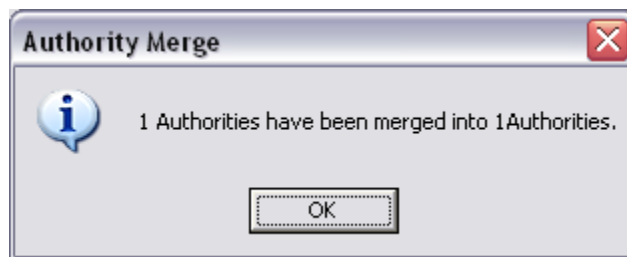
3. Under Box 2 highlight the Marc Tag to which to apply the task then select **OK**. If merging Subject Headings, tick the Tag for the 650. You will need to redo the other tags if they are required e.g. 651



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4. Ignore Fields 3 and 4 as these are not required for this task
5. Press **F3 Start**
6. You will receive a notification, select OK

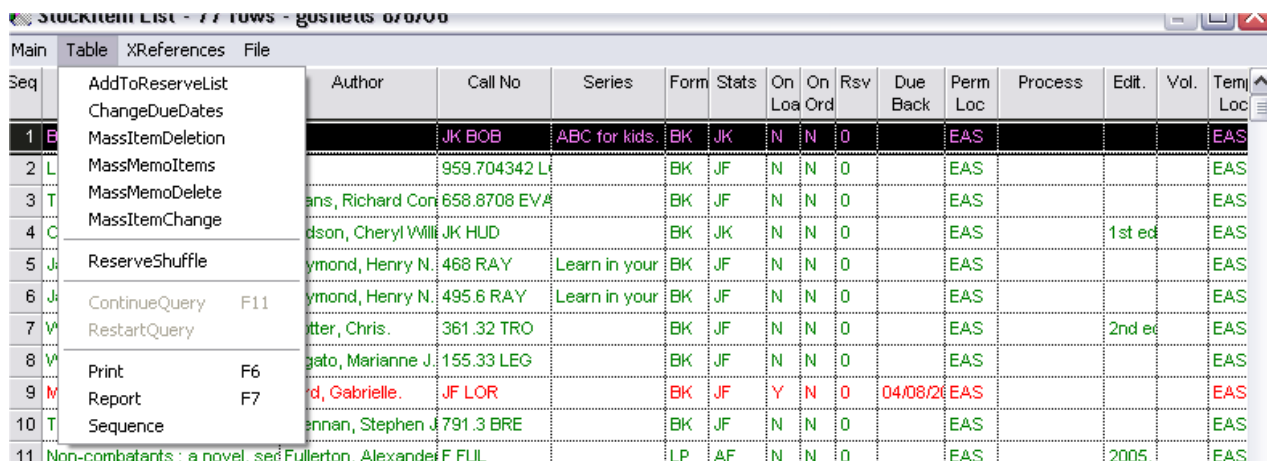


Stockitem Maintenance

Item Table Menu

Contains maintenance tasks for Stockitems.


<p>NOTE:</p> 	<p>Change Due Dates & Mass Item Change need a File for Processing. If a File is not chosen first, the Menu options will remain grey</p>
---	---



Seq	Author	Call No	Series	Form	Stats	On Loa	On Ord	Rsv	Due Back	Perm Loc	Process	Edit	Vol	Term Loc
1	JK BOB	ABC for kids	BK	JK	N	N	0		EAS					EAS
2	959.704342 L		BK	JF	N	N	0		EAS					EAS
3	ans, Richard Con	658.8708 EVA		BK	JF	N	N	0	EAS					EAS
4	dson, Cheryl Willi	JK HUD		BK	JK	N	N	0	EAS			1st ed		EAS
5	ymond, Henry N.	468 RAY	Learn in your	BK	JF	N	N	0	EAS					EAS
6	ymond, Henry N.	495.6 RAY	Learn in your	BK	JF	N	N	0	EAS					EAS
7	tter, Chris.	361.32 TRO		BK	JF	N	N	0	EAS			2nd ed		EAS
8	gato, Marianne J.	155.33 LEG		BK	JF	N	N	0	EAS					EAS
9	d, Gabrielle.	JF LOR		BK	JF	Y	N	0	04/08/20	EAS				EAS
10	ennan, Stephen J	791.3 BRE		BK	JF	N	N	0	EAS					EAS
11	Non-combatants : a novel. sed Fullerton. Alexander F FUL			LP	AF	N	N	0		EAS			2005	EAS

Stockitem Mass Item Deletion

Stockitem Mass Change is useful for maintenance of Stockitem Records.

<p>NOTE:</p> 	<p><i>MassItemDeletion will only become available after displaying a Saved File as the File references are used to determine which Stockitems on the Database will be deleted.</i></p>
---	--

The procedure is to firstly create a Saved file within Stockitem Module

Secondly we then mass delete the items within the file.

Creating the Saved File with stockitems for deletion

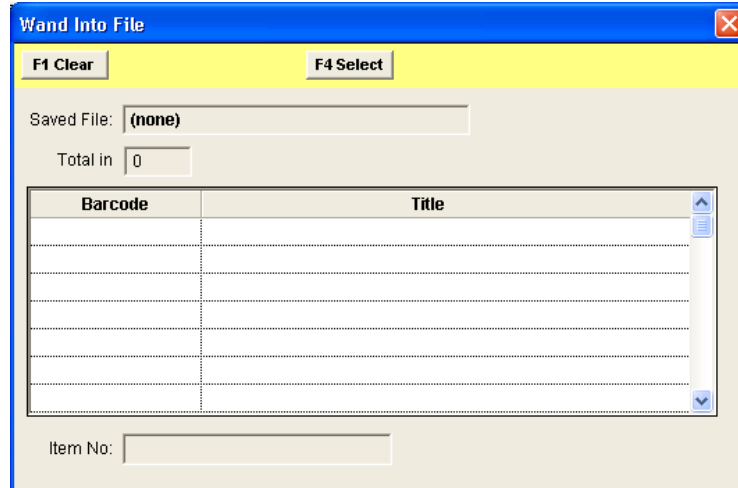
There are three different ways to conduct the query within Amlib to collate the stockitems necessary to save to the Stockitem File. Simply choose from either of the following three suggested methods depending on your needs.

To create a File in Stockitem, either:

- Wand into File
- Conduct a Query in Stockitem
- Perform a Where Search or

File creation alternative 1 - Wand into File

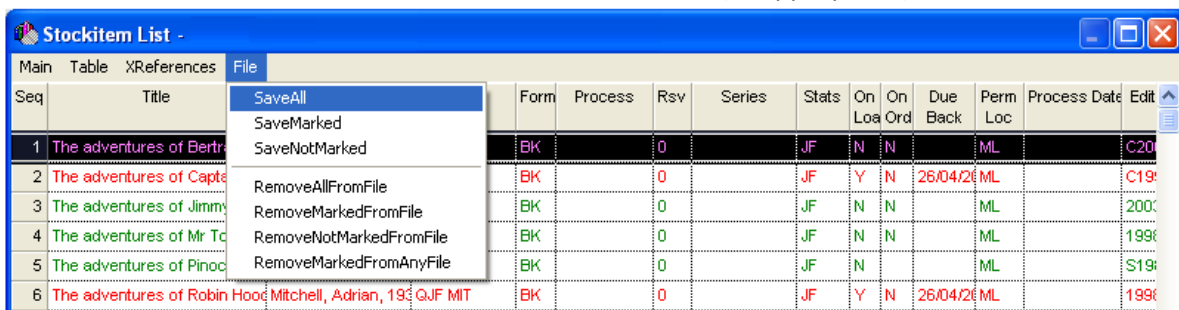
1. From the **Stockitem > Application** screen, select File. Select the menu option **WandIntoFile**.



2. **F4Select** to choose a File. If a suitable File does not exist, select **[F1]**, type a description (eg. Mass Deletions) and Select **Save** using **[F3]**.
If a suitable File does exist, but items are already in the File which need to be excluded, highlight the File and select Empty **[F2]**.
3. Select the File by highlighting the File and pressing **[F9]** Select.
4. Wand the barcodes of the items to be included in the File. As you wand the items you will notice the number of items increase for the File on the taskbar of the Stockitem screen. Once you have wanded all the items, select **File**. You will see a tick next to the **WandIntoFile** menu item. To de-activate this click the **WandIntoFile** option again. The tick will disappear.

File creation alternative 2 -Conduct a Query in Stockitem

1. Perform a query to select the Stockitems to change, save the results into a File by selecting **File >> Save All** or **Save Marked** or **SaveNotMarked** (as appropriate).



2. If a suitable File does not exist, select **[F1]**, type a description and Select **SaveF3**.

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If a suitable File does exist, but items are already in the File, which need to be excluded, highlight the File and select Empty [F2].

- Once the File has been created or emptied, select the File by highlighting the File and pressing [F9] Select.
- The items can then be mass changed as shown under the heading **Making the Changes**.

File creation alternative 3 - Where Search

- Where Searches can be used for creating Files in Stockitem. Set the parameters as required. For example, those items not counted in a Stocktake that are DVDs.

Column	Operator	Where
Form	=	VI
Stock Take Date	IS	NULL
Last Active	\leq	Current Date - 1 Year

- Choose **Query into File** [F7].

If a suitable File does not exist, select [F1], type a description and Select Save using [F3].

If a suitable File does exist, but items are already in the File, which need to be excluded, highlight the File and select Empty [F2].

- Select the File by highlighting the File and pressing [F9] Select.

Deleting the Items

Mass Item Deletion

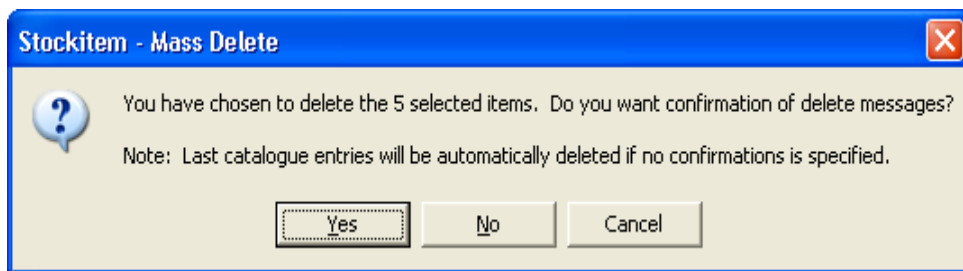
- After saving the File, close the Table and go back to the Stockitem Details screen. Select **File** > **DisplayFile**. Highlight the appropriate File and select [F9].
- When the items display, highlight all the items in the table and choose **MassItemDeletion** from the **Table** menu.

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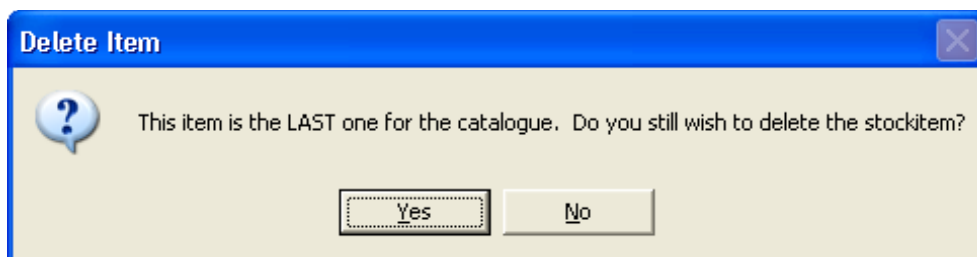
Stockitem List - 5 rows - Mass Deletion											
Seq	Table	XReferences	File	Title	Stockitem	Series	Form	Stats	Perm Loc	On Loa	BorrowerN
1	9	MassItemDeletion		Olive oil quality improvement /	980485289	978-84-505-9	BK	ANF	CHEL	N	
2	7	MassMemoItems		Learn to paint with watercolor	980362473	978-0-00-411	BK	ANF	CHEL	N	
3	6	MassMemoDelete		Cricket : the men and the game	980113901	978-0-7254-0	BK	ANF	CHEL	N	
4	F	ReserveShuffle		Harry Potter and the Goblet of	16904		BK	J	CHEL	N	
5	F	MassItemChange		Harry Potter and the Order of	ORDER0000593	978-0-439-35	BK	J	CHEL	N	

The following message will appear asking if you want confirmation of delete messages. In most cases, you would press **No**, and this automatically deletes the **stockitem**, and the **catalogue** record if it is the last stockitem for the catalogue record.

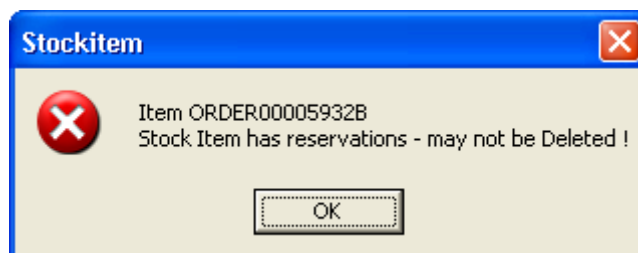
If however, you want to be warned before the **catalogue** record is deleted when the last **stockitem** is deleted, you should press Yes.



Pressing Yes (and when an item in the table is the last stockitem for the catalogue) will result in the message below, allowing you to choose to keep the catalogue record if needed.



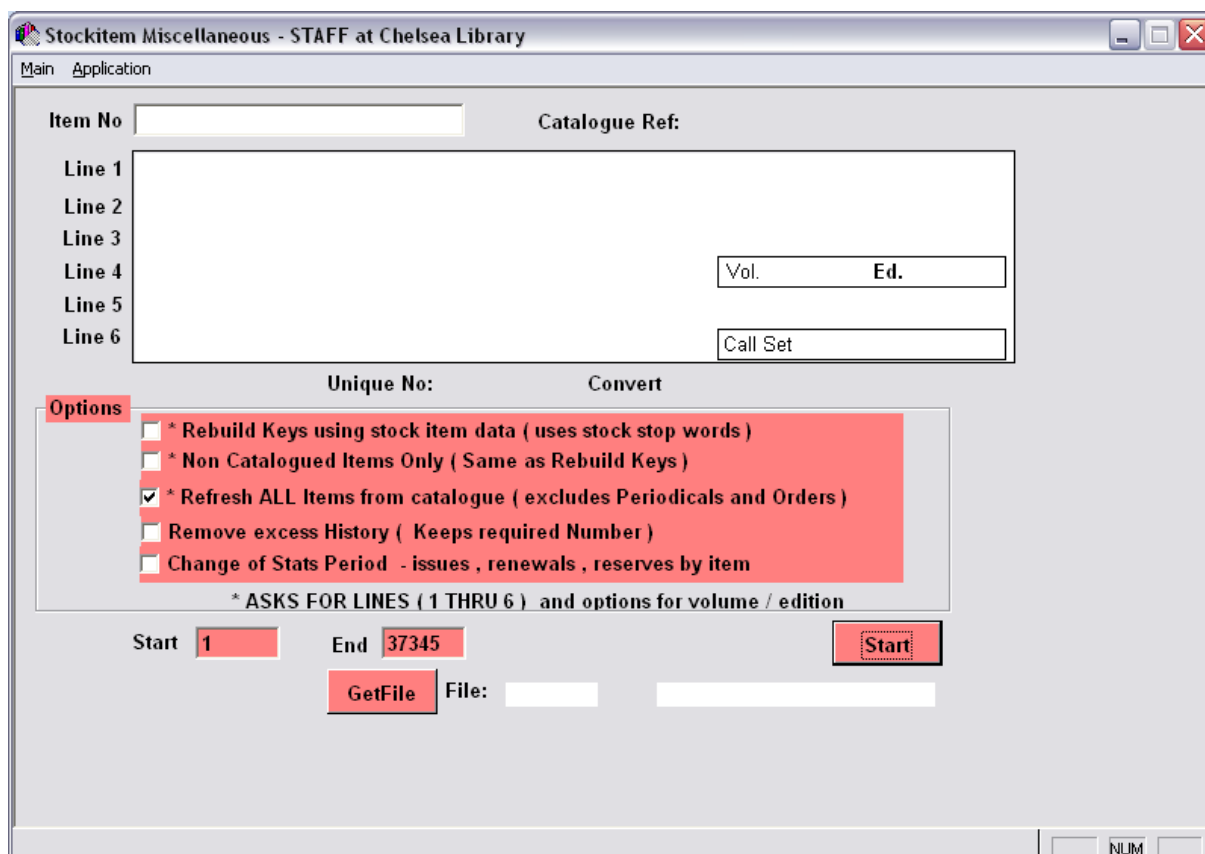
If an item has been reserved it cannot be deleted and will remain in the file. Once the reserve is removed the item can then be deleted.



Stockitem Autolink

This facility allows a Global refresh of Stockitems according to the option chosen. The option is selected from the table. This can be done on selected items from a saved file or against the database by entering a Start and End of Unique numbers (e.g. 1 to 99999) entered.

Please Note: Ensure that you have recent Amlib backups prior to running Autolink. Many of these facilities, though useful, are powerful and make global changes. They should be run in consultation from Amlib Support and as directed. **During the following step all users should NOT be using the Stockitem Module for anything BUT searching.**



OPTION	EXPLANATION
<p>*Rebuild keys using Stockitem data (uses Stock Stopwords)</p>	<p>This would only be used if the Stopword listing had been changed in Authority, Application, KeywordStopList. Enter a range of Unique numbers to Rebuild (e.g. 1 to 100000). You will then be asked to enter the Line Number (e.g. Line 1, Title, Line 4 Series) to Rebuild. Once this is selected, the Rebuild will commence. A message will display indicating the number of items Rebuilt.</p>
<p>*Non Catalogued items Only (Same as Rebuild Keys)</p>	<p>This would only be used for Stockitems with no Catalogue data, if the Stopword listing had been changed in Authority, Application, KeywordStopList. Enter a range of Unique numbers to Rebuild (e.g. 1 to 100000). You will then be asked to enter the Line Number (e.g. Line 1, Title, Line 4 Series) to Rebuild. Once this is selected, the Rebuild will</p>

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	commence. A message will display indicating the number of items Rebuilt.
*Refresh ALL items from catalogue using (excludes Periodicals and Orders)	<p>Refreshes all Stockitems that are different to the Catalogue data. This needs to be used with caution, as there may be a reason behind making the Stockitems different (e.g. Primary Campus having different Call Nos. to Senior Campus but sharing the same Catalogue Number). Enter a range of Unique numbers to Rebuild (e.g. 1 to 100000). A message will display indicating the number of items refreshed.</p> <p>Note: Single items can be Refreshed from Catalogue from the Stockitem, Item menu</p>
Remove Excess History	<p>Can be set to delete history entries from Stockitem records based on Installation parameters.</p> <p>For large libraries from time to time it may be necessary to delete history records from the Borrower and Stockitem modules. The history records contained within the stockitem history are directly linked to the borrower history. Deleting the Stockitem 'RETURN' history also deletes the corresponding 'RETURN' entry in the borrower history. Borrower Types that have the 'Keep History' parameter set to 'Y' do not have their READING history deleted in this process. The Stockitem History Deletion Autolink function will only delete history records as determined in Supervisor > Installation > Circulation > Keep the last ### History records</p>
Change of Stats Period – Issues, renewals, reserves by item	<p>Creates a new Statistics Period so that the new statistics can be compared to the previous period. This history can be viewed in the Stockitem /Item/ History menu. <i>This needs to be used with Caution as when run several times, the History can only be viewed for 2 periods - Current Period and Previous Period. The possibility of checking what has never been borrowed since System inception will be lost. Use only under guidance of Amlib Support.</i></p>
Get File	<p>Enables the refresh to be restricted to a Saved File. When this is selected, a list of Stockitem Files display where the relevant File can be selected</p>

Please Note: Facilities marked with an asterisk (*) will prompt for lines to be refreshed from Catalogue

Run the Stockitem Autolink

1. In *Amlib* navigate to **Main > Stockitems > Stockitem**
2. Select **Application > StockitemAutolink**


3. In the **Options** section tick the task to be completed

4. To perform the task against the entire database enter **1** next to **Start** and **99999** next to **End** **OR** to perform the task only on a saved file select the **GetFile** button

5. Select the **Start** button (note the and the **End** count will then refresh to the number of records to be affected)

6. Tick the lines that are to be refreshed. These are the 6 lines of the Stockitem screen and/or Volume, Edition and Call Set fields. Only tick those Stockitem lines that are to be rebuilt from Catalogue (note that the **Remove Excess History** option does not display this screen, all others do)

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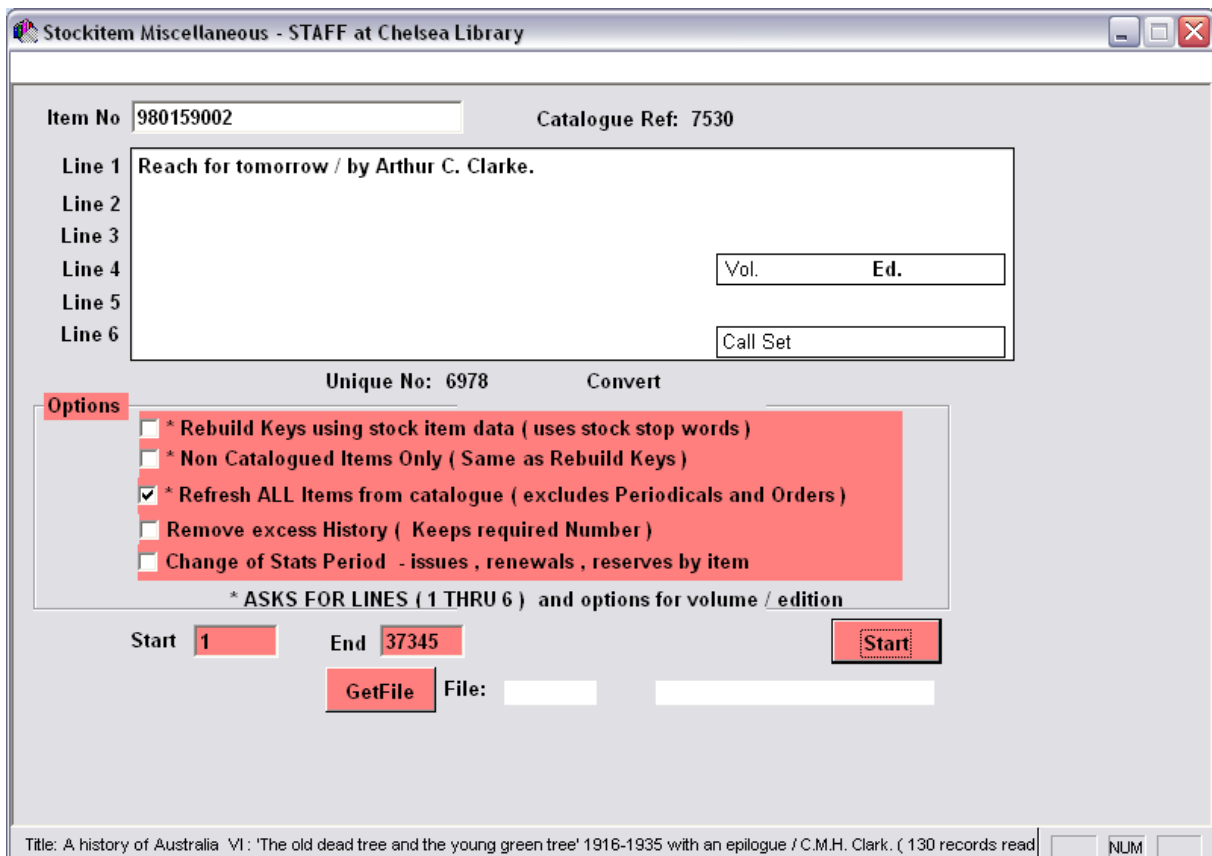


A dialog box titled "Refresh" with a close button (X) in the top right corner. The text inside says "Please select the lines to be refreshed." Below this is a list of checkboxes:

- Title
- Author
- Publisher
- ISBN/ Series
- Subject
- Call Number
- Volume
- Edition
- Call Set

At the bottom are two buttons: "OK" and "Cancel".

- The process will then run, displaying the updates as it runs. This is a system intensive process so avoid making any other demands on the system until it is complete



A screenshot of a software window titled "Stockitem Miscellaneous - STAFF at Chelsea Library". The window contains the following information:

- Item No: 980159002
- Catalogue Ref: 7530
- Line 1: Reach for tomorrow / by Arthur C. Clarke.
- Line 2: (empty)
- Line 3: (empty)
- Line 4: (empty)
- Line 5: (empty)
- Line 6: (empty)
- Vol. (empty)
- Ed. (empty)
- Call Set (empty)
- Unique No: 6978
- Convert (empty)
- Options (highlighted in red):
 - * Rebuild Keys using stock item data (uses stock stop words)
 - * Non Catalogued Items Only (Same as Rebuild Keys)
 - * Refresh ALL Items from catalogue (excludes Periodicals and Orders)
 - Remove excess History (Keeps required Number)
 - Change of Stats Period - issues , renewals , reserves by item
- * ASKS FOR LINES (1 THRU 6) and options for volume / edition
- Start: 1
- End: 37345
- Start (button)
- GetFile (button)
- File: (empty)

At the bottom of the window, there is a status bar: "Title: A history of Australia VI: 'The old dead tree and the young green tree' 1916-1935 with an epilogue / C.M.H. Clark. (130 records read NUM

- At the end of the process a message will display, indicating the number of items processed, select **OK**



Mass changes to Stockitem

There are 2 options for Mass Change of items:

- Stockwand Change
- File – Mass Change from the File e.g. After wandling into File

Stockwand Change

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

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

Stockwand Change - setting Values to change

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

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

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1 Choose Column to Change

2 Type the New Value and Press Paste
OR Press Special

Update Description:

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

Item No: Last Changed By:

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

Using the Special Button

Useful for selecting the Current Date and perhaps minus (or Add) a number of days of Months.

7. Click the red **Special** button – the Update prompt will display:

 Days' and '+ - Months'. There are 'Paste' and 'Cancel' buttons at the bottom right."/>

Update

Process Date = Wednesday, 19 Oct 2011

Current Date
Start of Week
Start of Month
Date Received
Date Accession
Process Date
Last Stock Take

+ - Days
+ - Months

Paste Cancel

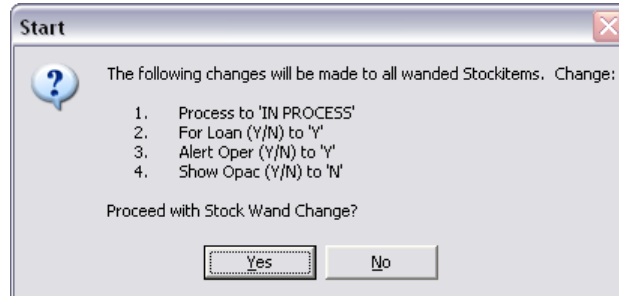
8. Select/enter your date parameters
9. Click the **Paste** button

Executing the Changes

The Changes can be applied in one of 3 methods:

1. Individually from the Barcode:

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



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

2. From a Saved File:

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



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

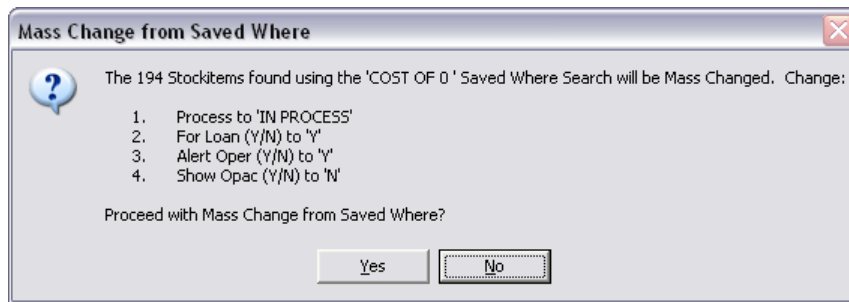


3. From a Saved Where Search:

- a) Select the **F8 FrWhere** button – the Saved Queries screen will display

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



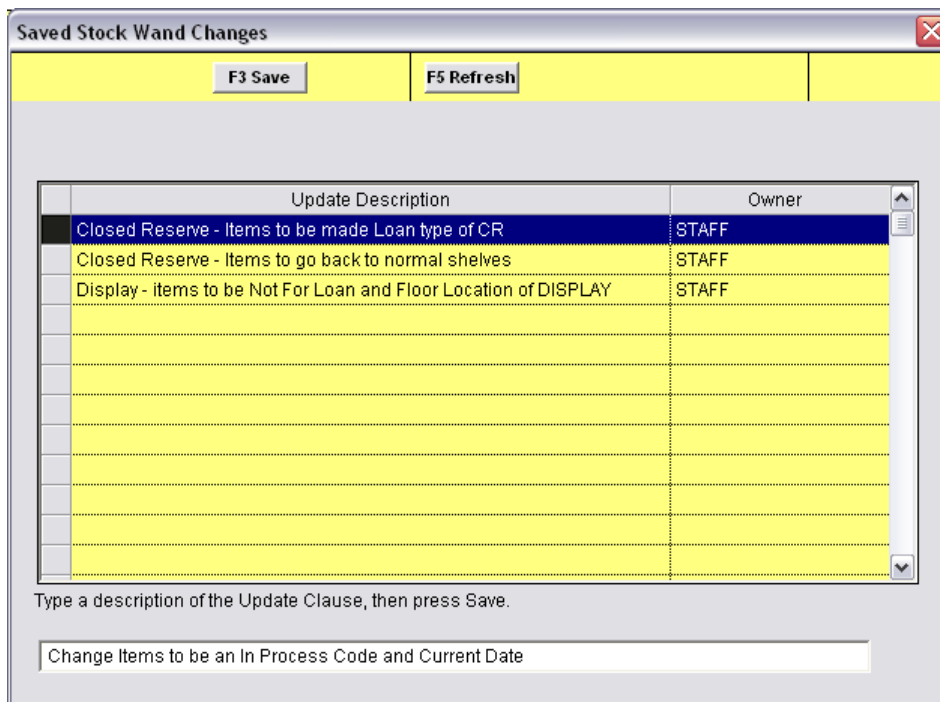
- c) Review the message and if the information is correct click the **Yes** button to proceed
- d) A prompt with the following message will display when complete:
The XX Stockitems have been Updated.



Saving a StockWandChange

A Stockwand Change can be saved for future use:

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

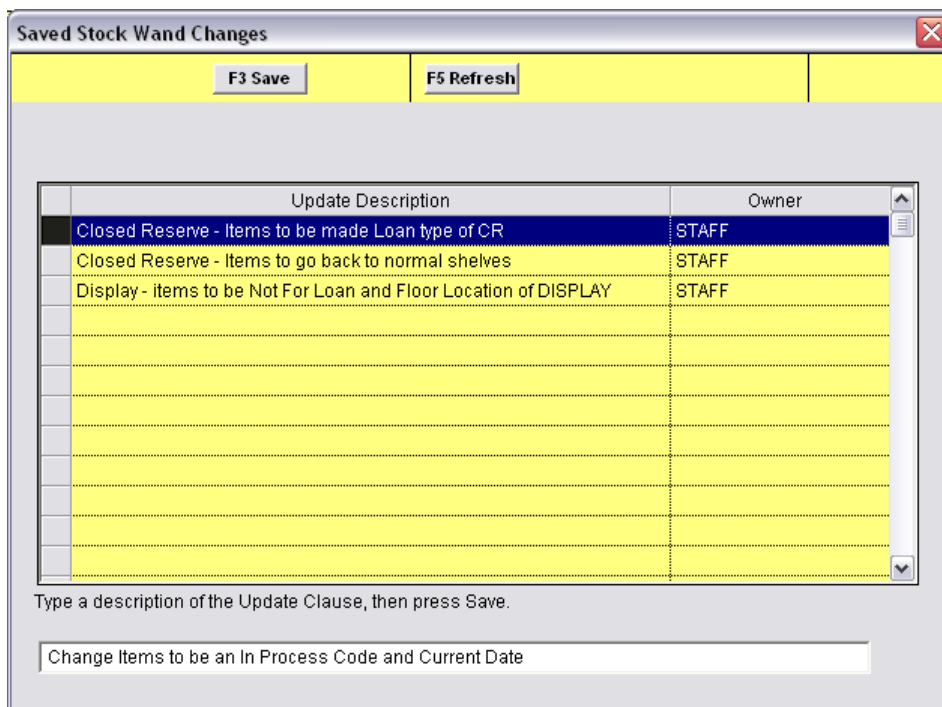


2. Type a Description in the field at the bottom of the screen

3. Click the **F3 Save** button

Reusing a StockWandChange set of Parameters

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




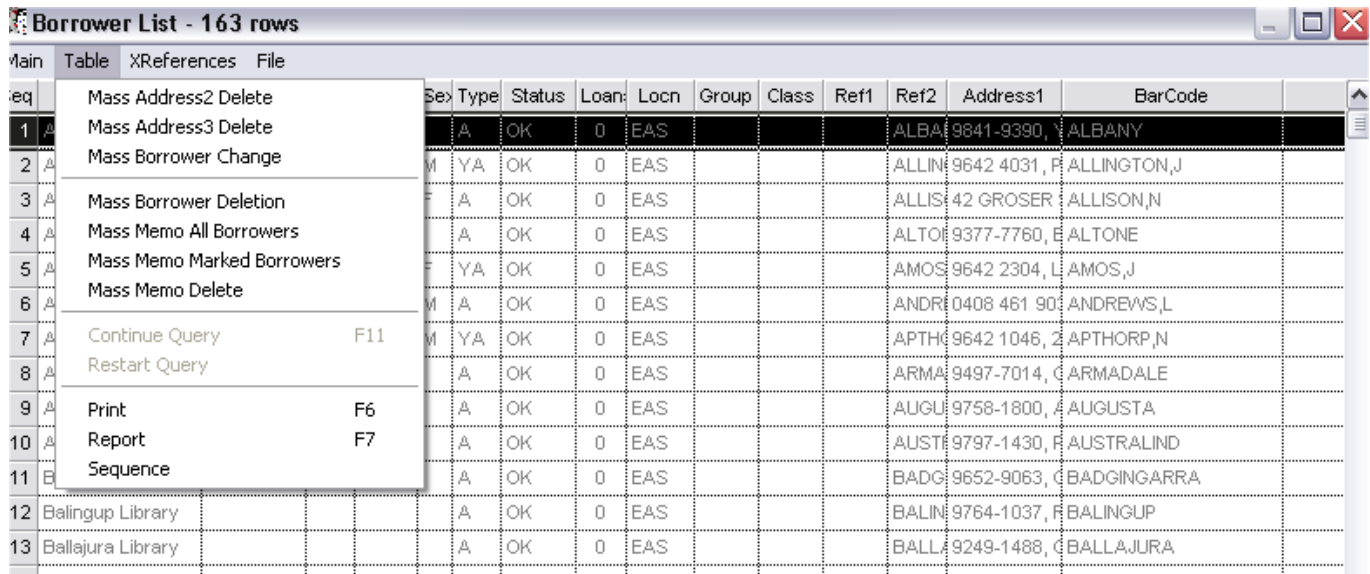
6. Type a Description in the field at the bottom of the screen
7. Click the **F3 Save** button

Borrower Maintenance

Borrower Table Menu

Contains maintenance tasks for Borrowers.

<p>NOTE:</p> 	<p>Mass Borrower Change, Mass Address2 Delete & Mass Address 3 Delete need a File for Processing. If a File is not chosen first, these Menu options will remain grey</p>
---	--



Borrower List - 163 rows

Seq	Table	XReferences	File	Sex	Type	Status	Loans	Locn	Group	Class	Ref1	Ref2	Address1	BarCode
1	A	Mass Address2 Delete		A	OK	0	EAS						ALBA 9641-9390,	ALBANY
2	A	Mass Address3 Delete		M	YA	OK	0	EAS					ALLIN 9642 4031,	ALLINGTON,J
3	A	Mass Borrower Change		F	A	OK	0	EAS					ALLIS 42 GROSER	ALLISON,N
4	A	Mass Borrower Deletion		F	YA	OK	0	EAS					ALTO 9377-7760,	ALSTONE
5	A	Mass Memo All Borrowers		F	YA	OK	0	EAS					AMOS 9642 2304,	AMOS,J
6	A	Mass Memo Marked Borrowers		M	A	OK	0	EAS					ANDR 0408 461 90	ANDREWS,L
7	A	Mass Memo Delete		M	YA	OK	0	EAS					APTH 9642 1046,	APTHORP,N
8	A	Continue Query	F11	A	OK	0	EAS						ARMA 9497-7014,	ARMADALE
9	A	Restart Query		A	OK	0	EAS						AUGL 9758-1800,	AUGUSTA
10	A	Print	F6	A	OK	0	EAS						AUST 9797-1430,	AUSTRALIND
11	A	Report	F7	A	OK	0	EAS						BADG 9652-9063,	BADGINGARRA
12	B	Sequence		A	OK	0	EAS						BALIN 9764-1037,	BALINGUP
13	B	Balingup Library		A	OK	0	EAS						BALL 9249-1488,	BALLAJURA

Deletions

Single deletions of Borrowers can be done from the Borrower Details screen.

Mass deletions of Borrowers can be done from the **Borrower Table** menu. The Borrowers in the table need to be highlighted to make the deletions.

Borrowers with loans, reservations or Memos will **NOT** be deleted.

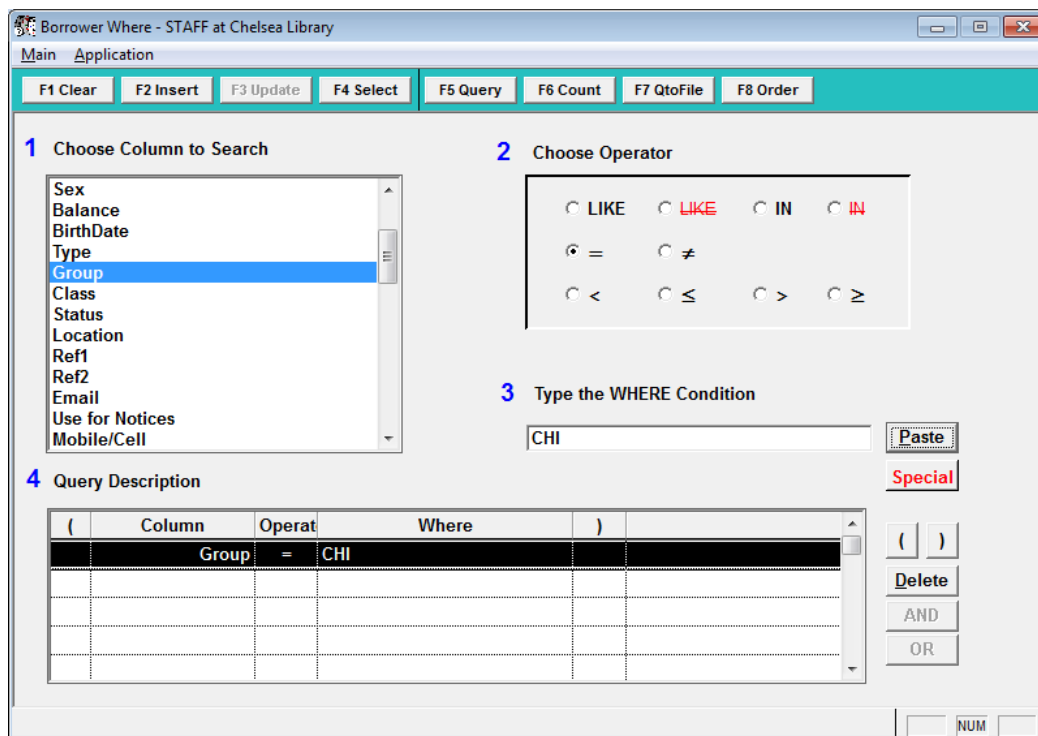
Mass Borrower Change

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

1. Launch the *Amlib* client
2. Go to **Main > Borrowers > BorrowerWhere** – the Borrower Where screen will display
3. Create a Where clause – for example: Group = **CHI** (this will search for all Borrowers who are in that particular group)
 - a. Highlight the field to search on: **Group**
 - b. Choose Operator: =

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- c. Enter the Where condition, or the exact data you want to find – for example: **CHI**
- d. Click the **Paste** button to insert the clause into the table



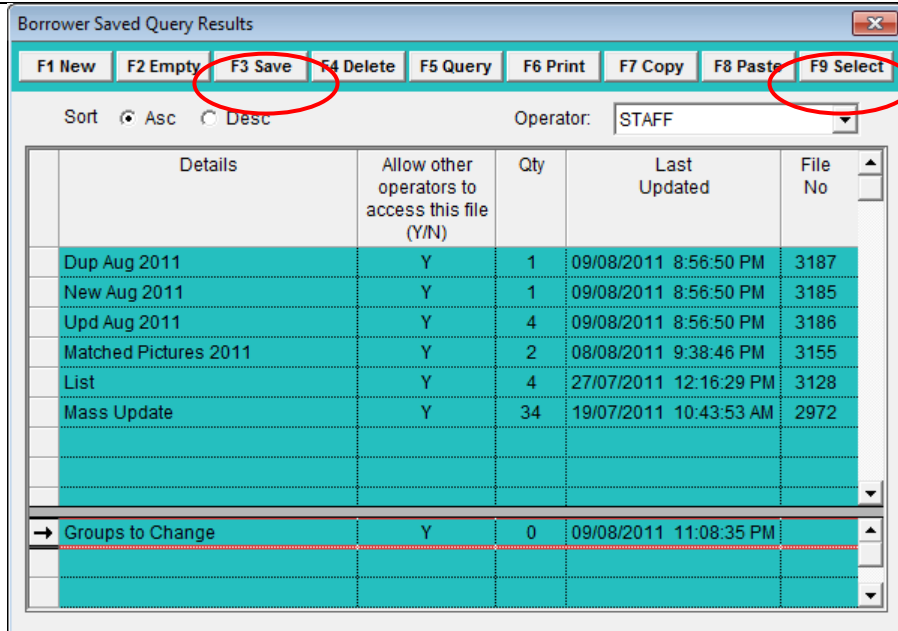
4. Click on the **F7 QtoFile** button – the Borrower Saved Query Results screen will now display:

The screenshot shows the 'Borrower Saved Query Results' application. The interface includes a menu bar with options like 'F1 New', 'F2 Empty', 'F3 Save', 'F4 Delete', 'F5 Query', 'F6 Print', 'F7 Copy', 'F8 Paste', and 'F9 Select'. Below the menu bar, there are 'Sort' options (Asc, Desc) and an 'Operator' dropdown set to 'STAFF'. The main area contains a table with the following data:

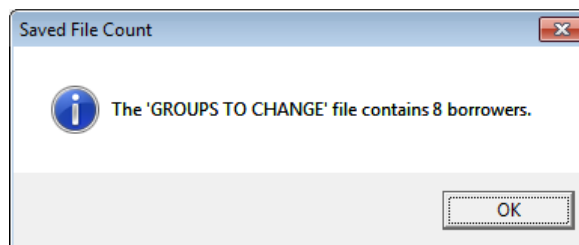
Details	Allow other operators to access this file (Y/N)	Qty	Last Updated	File No
Dup Aug 2011	Y	1	09/08/2011 8:56:50 PM	3187
New Aug 2011	Y	1	09/08/2011 8:56:50 PM	3185
Upd Aug 2011	Y	4	09/08/2011 8:56:50 PM	3186
Matched Pictures 2011	Y	2	08/08/2011 9:38:46 PM	3155

5. Click on the **F1 New** button to create a new Saved File
6. Type in a name for the file in the Details 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

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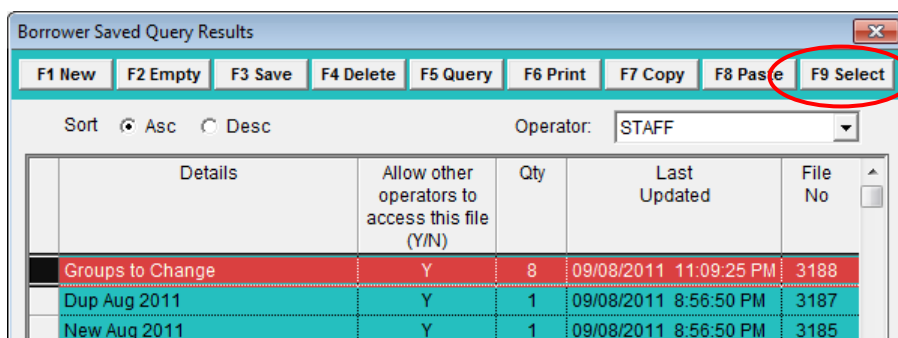
9. A prompt will display noting the number of borrowers contained in the file



10. Click the **OK** button

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

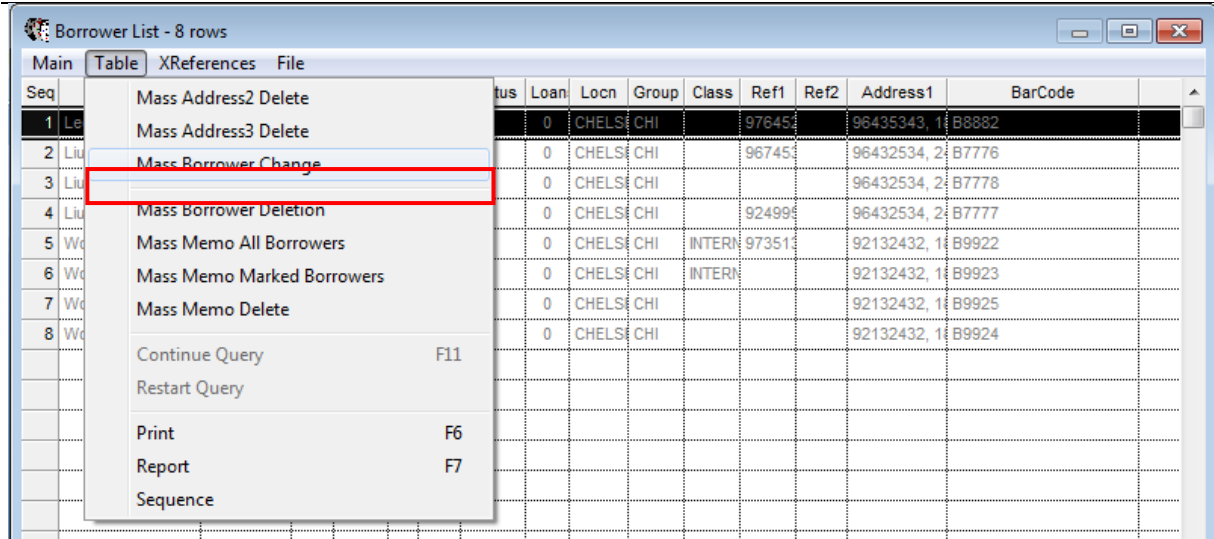
12. Select **File > DisplayFile** – the Borrower Saved Query Results file screen will display



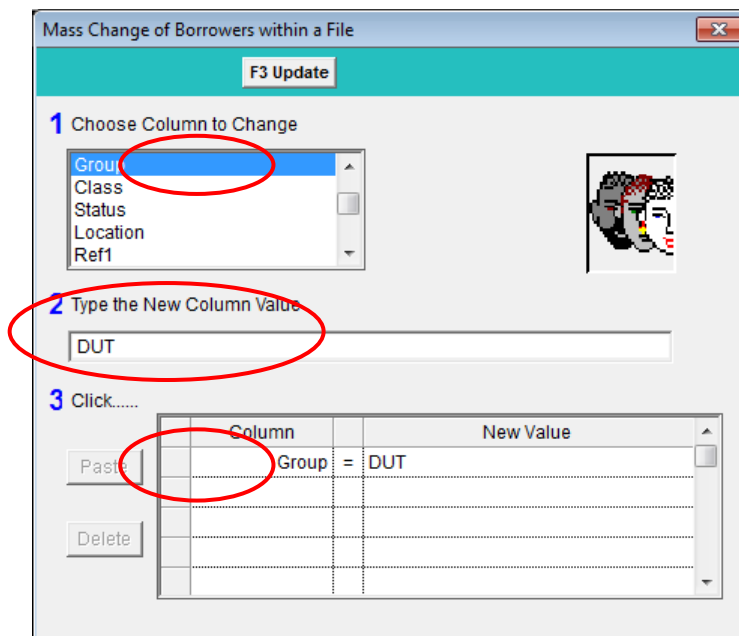
13. Highlight the required Saved File and click on the **F9 Select** button to display the file

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

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



7. Enter the following settings:

- Select the field you wish to change for all stockitems in the file example - **Group**
- Type in the new value example, which is what you are changing all stockitems to be – for example: **DUT**
- Click on the **Paste** button to insert the new criteria into the bottom table
- 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

Mass Memo Borrowers

It is possible to attach memos to Borrowers “en masse” by applying a Memo to a table of borrowers. Firstly, decide whether Memo Types will be included in the Memo, and if so ensure that the Memo Type to be selected is defined

Check Memo Types

1. In Amlib navigate to **Main > Supervisor > Supervisor** screen
2. Select **Library Menu > Memo Types**
3. To add a new Memo Type select **F1 New**

Memo Type	Description	Valid for Holdings	Valid for Members	Show As Default	Expires n days time
BARCODE	Borrower's old barcode	N	Y	N	
BORCHGDETS	A borrowers change of details has been acknowledged	N	Y	N	28
CLAIMRET	Claim Return	Y	Y	Y	
CNH	Claims Never Had	Y	Y	Y	
COMMINFO	Note:	Y	N	N	9999
FILEISSUE	Item issued from Saved File	Y	N	Y	
HOMEREAD	Home Reading Preference	N	Y	N	999
LOSTCARD	Borrower Lost Card	N	Y	Y	
MERGED	Merged borrower details	N	Y	N	
MULTIPLE	Item Has Multiple Items Attached	Y	N	Y	
PAYARR	Special Payment Arrangement	N	Y	Y	999
RESGET	Reservation Get Item Off Shelf Memo (Auto)	Y	Y	Y	
RESREQUEST	An item has been requested via Netopacs	Y	N	N	10
RESRET	Item Has Been Returned That Is Reserved (Auto)	Y	Y	Y	
SBARCODE	Svstem memo for change of Stockitem Barcode	Y	N	N	.1

4. Type in a **Memo Type** code, and **Description**
5. Enter whether the memo is **Valid for Holdings** (to be applied to Stockitems), **Valid for Members** (to be applied to Patrons), **Show as Default** (to pop up in Circulation Y/N)
6. If you wish the memo to expire enter an **Expire in n days time** number, otherwise leave this column blank
7. Select **F3 Save** and log out of Amlib and back in

Mass Memo the Borrowers

1. Find the Borrowers to whom the Memo will be applied from a Where search or a Query. If they are Borrowers that cannot be queried at the same time, find the assorted Borrowers and save them to a File so that they can be displayed together in a borrower table. This example uses searching for borrowers for a particular class using a Where Statement
2. Go to **Main > Borrowers > Borrower Where**

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- Enter an appropriate **Where Statement** to find your borrowers- for example **Class = 7A** and **Paste**

- Select the **F5 Query** button
- A Table will display. If only some of the Borrowers from the Table are to be sent Memos, highlight those Borrowers – use Ctrl + Click to select multiples, or Shift + Click to select a range.
- Select Mass Memo All Borrowers or Mass Memo Marked Borrower as appropriate.

Seq	Surname	Name	Title	Middle	Sex	Type	Status	Loan	Locn	Group	Class	Ref1	Ref2	Address1	BarCode
1	A.H. Bracks Librar	Andrew	Mr	Mark	M	A	0	0	BID	B	NR	3999 H		9555 17438	CL130V0465291D
2	Aamodt	Deeqa	Miss	Halima	F	A	0	5	BID	B	R	5017 S		9555 18660	CL130V0478067D
3	Aamodt	Hilary	Ms	C	F	A	0	0	BID	B	R	5017 S		9555 18661	CL130V0478075D
4	Aanensen	Christine	Miss	May	F	YA	0	2	BID	B	R	5017 S		9555 18662	CL130V0478083D
5	Aarian	Allan	Mr	John	M	A	0	7	BID	B	NR	5019 S		9555 18663	CL130V0478105D
6	Aaron	Gareth	Mr		M	A	0	2	BID	B	R	5019 S		9555 18665	CL130V0478121D
7	Aaron	Vinayak	Mr	Athara	M	A	0	0	BID	B	R	5020 S		9555 18664	CL130V0478113D
8	Aarons	Allan	Mr	David	M	A	0	2	BID	B	R	5019 M		9555 18666	CL130V0256889D
9	Abay	Kyla	Ms	Jane	F	A	0	3	BID	B	R	5020 M		9555 18667	CL130V0093416D
10	Abbatista	Aidan	Mast	Daniel	M	J	0	0	BID	B	R	5020 M		9555 18668	CL130V047813XD
11	Abberton	Emanuel	Mr		M	YA	0	1	BID	B	R	5020 C		9555 18669	CL130V0478148D
12	Abbey	David	Mr	Sigame	M	A	0	3	BID	B	NR	5020 C		9555 18671	CL130V0478164D
13	Abbey	Samantha	Miss	Teresa	F	YA	0	4	BID	B	R	5020 C		9555 18670	CL130V0478156D
14	Abbey	Shone	Mast		M	J	0	0	BID	B	R	5020 C		9555 18673	CL130V0478199D
15	Abbey	Smitha	Mrs		F	A	0	6	BID	B	R	5020 C		9555 18672	CL130V0478180D
16	Abbott	Geraldine	Miss		F	YA	0	3	BID	B	R	5021 R		9555 18677	CL130V0478210D
17	Abbott	Laura	Mrs	Kim Lei	F	A	0	3	BID	B	R	5021 R		9555 18676	CL130V0478202D
18	Abbott	Noor Syahr	Miss		F	J	0	2	BID	B	R	5020 T		9555 18675	CL114C1443887D
19	Abbott	Pei Kin	Ms		F	A	0	4	BID	B	NR	5020 R		9555 18674	CL114C1389378D

Step 3: The Mass Memo Data screen will display

Enter the details as required:

1. Select Memo Type if appropriate – this will automatically insert the Show Default, the Date Defaults and the Memo Message. To view the Memo Types available, type . <TAB> (full stop and press the TAB key)

Code	Description
BARCODE	Borrower's old barcode
BORCHGDETS	A borrowers change of details has been a
CLAIMRET	Claim Return
CLIB	Customer contacted Library to advise that
CREDIPAC	Credipac collection efforts unsuccessful
EMR	Email bounced, verify email, change Notic
F	Check Finance
ID USED	Member used ID. They have been advised
ILLREQBY	Inter-Library Loan required by (date)
INT ONLY	Internet use only
INTERNET	NEW INTERNET PERMISSION
LKTEST	Int Perm Letter Test LK

2. If no Memo Type is to be used, enter the Show, Start and End Dates and Message details.


Show: Y/N/O

Y	The operator is alerted every time the Borrower's identity is entered in circulation
N	The memo can be viewed from the Borrower memo option
O	The memo can be viewed from Opac

- **Date:** The date (in the format of dd/mm/yyyy) to begin showing the memo. This is defaulted to today's date but may be altered
- **End Date:** The date (in the format of dd/mm/yyyy) to finish showing the memo. This is defaulted to the date as calculated in Supervisor, Installation, Borrower, "Delete memo after xx days". This may be altered
- **Type:** Optional. A type of memo can be entered to assist with deletions, reporting, queries etc.
- **Message Details:** Text of up to 250 characters can be entered.

3. Select Save [F3].

Step 4: Memos will be automatically placed against the Borrowers. When the Borrower is displayed in Circulation the memo will display if the Show is set to Y.

<p>NOTE:</p> 	<p><i>Whether the Memo appears in the Borrower Module depends on the Supervisor, Installation parameter for the relevant Location (from Installation Menu). Check the Borrower button – Parameter is "Show Memos in Borrower automatically"</i></p>
--	---

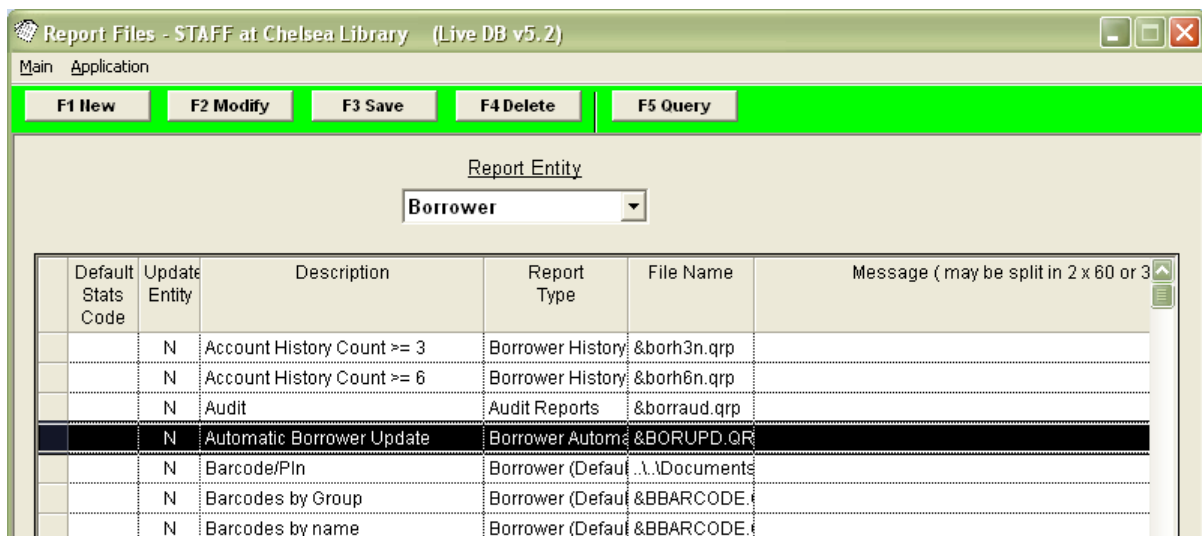
Borrower Update Reports

Borrower update reports can now be run to change borrower **status**, add **memos** and delete the **address 3** field (for those borrowers that are changing to adult status).

In the following example, we are changing the Borrower Type of Young Adult members to an **Adult** Type and deleting the Guardian Address.

Template

1. Launch the *Amlib* client
2. Go to **Main > Reports > RepAddNew** – the Report Files screen will display:



3. Locate and highlight the &BORUPD.QRP template
4. Click the **F2 Modify** button – the Borrower – Modify Report File screen will display:

System Management - TASKS

5. Check the following settings:
 - a. **Choose Type = Borrower Automatic Update**
 - b. **Update Entity (Y/N) = Y**
6. Click the **F3 Update** when complete

Create the Report

1. Go to **Main > Reports > RepBorrower** – the Borrower Reports screen will display
2. Click the **F1 New** button – the Select Report Format list will display:

Description	Default Stats Code	Update Entity	File Name
Account History Count >= 3		N	&borh3n.qrp
Account History Count >= 6		N	&borh6n.qrp
Audit		N	&borraud.qrp
Automatic Borrower Update		N	&BORUPD.QRP
Barcode/Pln		N	..\Documents
Barcodes by Group		N	&BBARCODE.Q
Barcodes by name		N	&BBARCODE.Q
Bor List with Barcodes		N	&barcode.qrp
Borrower Address Labels		N	#AddLabl.qrp
Borrower Card		N	&borcard.qrp
Borrower Card with picture		N	&BORCRDP.QF
Borrower Circulation Automatic Update		Y	&BORCUPD.QF
Borrower count by Location, Type & Gender		N	&bctg.qrp
Borrower count by Location, Type & Suburb		N	&hctgm

3. Highlight the **&BORUPD.QRP** template and click the **Select** button
4. A new report will be added to the list of reports
5. Type in a Description – for example: **Update Borrower Address 3**

System Management - TASKS

6. The Update Entity (Y/N) column setting must be set to **Y**
7. Click the **F3 Save** button when complete

Report Stats Code	Update Entity (Y/N)	Report Description	Report Type	Template
	N	Borrowers Inactive 1 Year	Line by Line	&borrsht.qrp
	N	Count Sex and Type	Counts Sex and Ty	&bcst.qrp
	N	Delete History > 2 Years Old	List of History Recd	&borhict.qrp
	Y	Update Borrower Address 3	Automatic Borrower	&BORUPD.QRF
	N	Usage Count > 6 Issues	History Count >= 6	&borh6.qrp

Set Where Parameters

Your where parameters can be set according to the changes you need to make to your database, and which group(s) of people these changes apply to.

The Where statement here selects those borrowers with a **YA** borrower type who are now over **18**.

If you are unsure of how to set your where parameters for the update you wish to carry out, please contact Amlib support.

1. Highlight the Report
2. Click the **F7 Where** button – the Borrower Reports – Where screen will display:

Column	Oper	Where	
BorType	=	YA	AND
BirthDate	\leq	Current Date - 18 Years	AND

3. Enter the following details:

- a. **BorType** – for example: **BorType = YA**
 - b. **BirthDate** – for example: **BirthDate <= Current Date – 18 Years** (use the **Special** button to insert Current Date – **216** months)
4. Click the **F3 Save** button when complete (the Where screen will close)

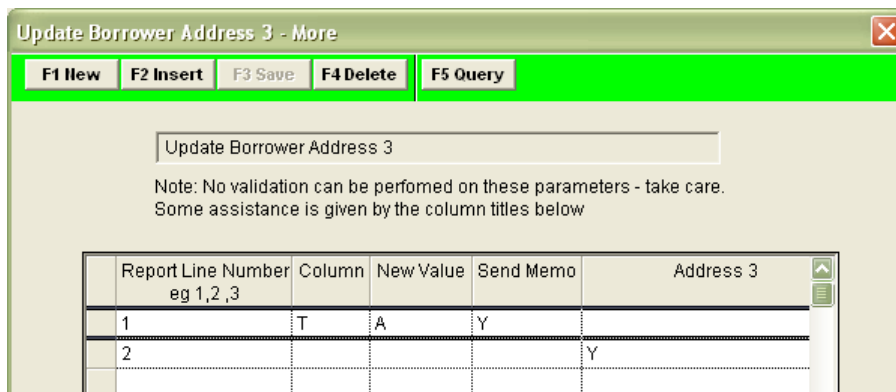
Update Parameters (F10 More)

The **F10 More** button is used to set up the new values and whether a Memo is to be sent.

A report employing **F10 More** parameters must be run via the *Scheduler*.

	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5
HEADING	Report Line Number	Column	New Value	Send Memo	Address 3
EXAMPLE	1	T	A	Y	<leave blank>
	2	<leave blank>	<leave blank>	<leave blank>	Y
COMMENT	Line 1 is used for updates Line 2 is used to delete Borrower Address 3	Borrower field – can be Borrower Types (T), Classes (C) Groups (G) or Status (S)	The new value – must be a valid code for the selected column	If Y , create the memo in Text for Letter , found at the top of the Borrower Reports screen	If Y , can be used to delete Address 3 (Guardian Address) from Borrower record

1. Highlight the report
2. Click the **F10 More** button – the More screen will display
3. Click the **F1 New** or **F2 Insert** button
4. Enter the following Line 1 parameters (see Notes below):
 - a. Report Line Number = **1**
 - b. Column = **T**
 - c. New Value = **A** (for **Adult**)
 - d. Send Memo = **Y** (optional)
5. Click the **F3 Save** button when complete
6. Enter the following Line 2 parameters (see Notes below):
 - a. Address 3 = **Y** (this will delete the Borrower’s Guardian Address)
7. Click the **F3 Save** button when complete



Notes

Updates: The new value is the new Borrower Type (or Borrower Status, Borrower Class or Borrower Group) that you wish to change the Borrowers to.

In the example given above, the Borrower Type would be changed to **Adult**, or **A**. The value entered in this column will depend on your Borrower Type settings. If you unsure, check your settings before proceeding: Go to **Main > Borrower > BorrowerTypes**:

Type	Description	Keep House Bound Borr History (Y/N)	Include In Stats (Y/N)	Max Items On Loan	Max No. Of Reserves	Return By Date	Age >=	Age <=	Exp Days	Exp Date
A	Adult	Y	Y	20	5		18	999	0	
B	Branch	Y	Y	100	999					
H	Housebound	Y	Y	24	999		0	0	0	
I	Interlibrary loan	Y	Y	100	999					

Memo: If you wish to add a memo to each borrower record that is changed, type a **Y** in the Send Memo column. Otherwise, type **N** in the Send Memo column.

Delete Guardian Address: Type a Y in the Address 3 column if you wish to have the guardian address deleted (for example in the case where YA members are changed to A members, for these records you may prefer to have the guardian address deleted as this is no longer required).

Memos

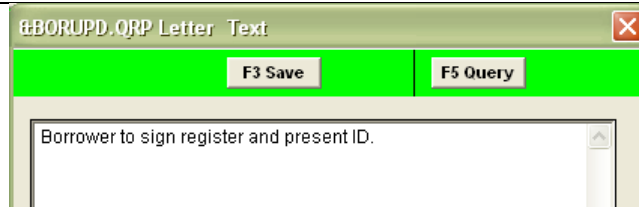
If you have placed a **Y** in the Send Memo column, then the Memo text must then be set up.

1. Highlight the report

Report Stats Code	Update Entity (Y/N)	Report Description	Report Type	Template
	N	Borrowers Inactive 1 Year	Line by Line	&borrsht.qrp
	N	Count Sex and Type	Counts Sex and Ty	&bcst.qrp
	N	Delete History > 2 Years Old	List of History Recd	&borhict.qrp
	Y	Update Borrower Address 3	Automatic Borrowe	&BORUPD.QRF
	N	Usage Count > 6 Issues	History Count >= 6	&borh6.qrp

2. Click the **Text for Letter** button – the Letter Text screen will display:

System Management - TASKS

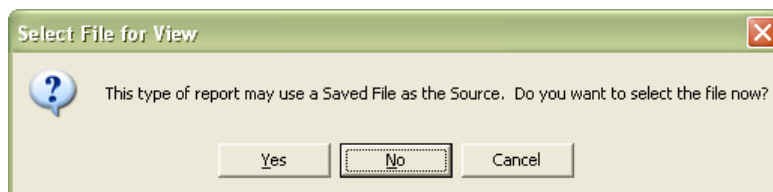


3. Type in the text that you would like to see in the Borrower Memo – for example: **Borrower to sign register and present ID**
4. Click the **F3 Save** button when complete

View Report

Once the report is set up, you can then preview the report as follows:

1. Highlight the report and click the **F8 View** button
2. The Select File for View pop-up will appear:



3. Click the **No** button to run this report against all borrowers
4. The report will open in the Report – View window:

Bar Code:	Name:	Field:	New Value:	Memo:
B270	NORMAN, Peter D	T	A	Y
B201	MATTHEWS, John A	T	A	Y
B202	LOWE, Andrew J	T	A	Y
B203	RENSHAW, Kim L	T	A	Y
B204	GILES, Michael J	T	A	Y
B205	JENNINGS, Paul J	T	A	Y

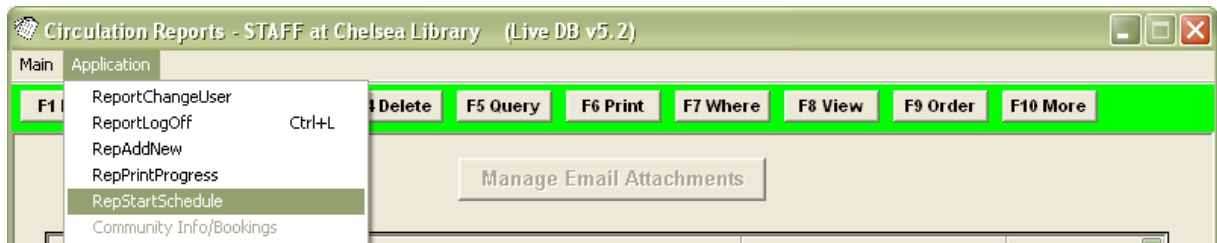
5. If you wish to print a hardcopy, click on the **print** icon

Print Report (via Scheduler)

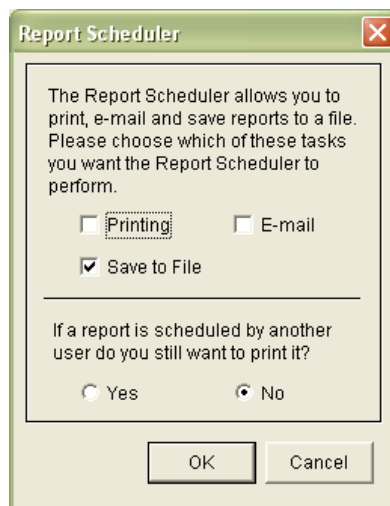
Borrower Update reports MUST be run via the Scheduler.

Start the Scheduler

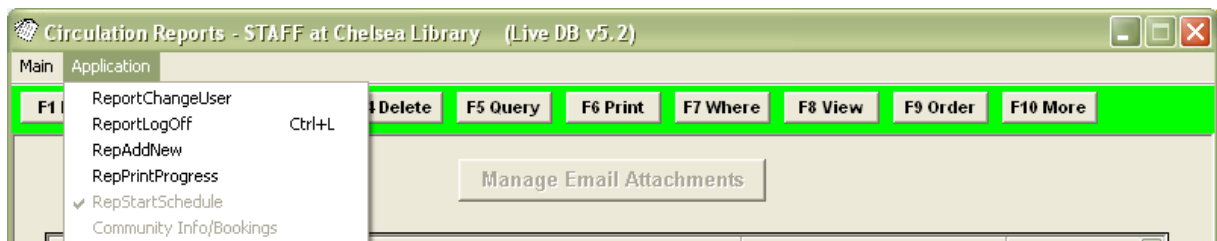
1. From the Reports screen, select **Application > RepStartSchedule**



2. The Report Scheduler screen will then open
3. Select your printing options: Ensure **Save to File** is ticked (you can tick all three if you intend on printing up multiple reports using multiple formats during a session)

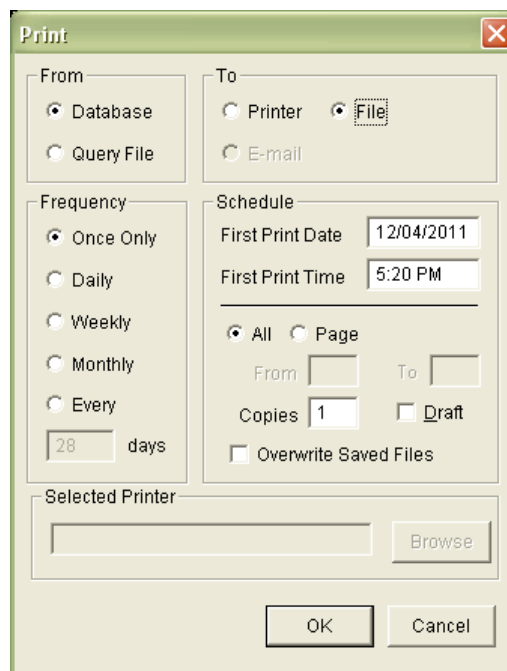


4. Then click the **OK** button
5. After clicking **OK**, if you go back into the **Application** menu you will see that *RepStartSchedule* is now greyed out with a tick next to it – this indicates that the *Scheduler* is now running

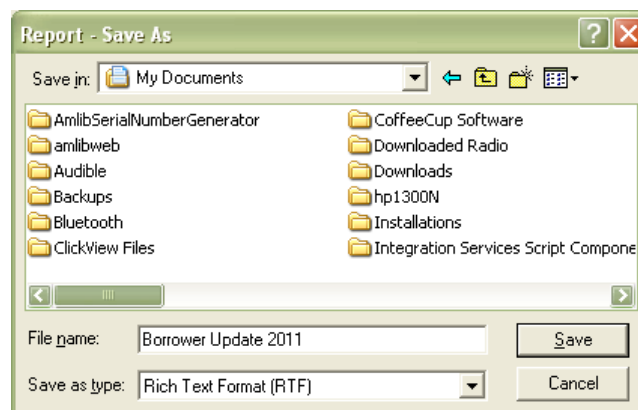


Scheduling the Report

1. With your report highlighted, select the **F6 Print** button – the Print dialogue box will open
2. Select from the following options:
 - a. From:
 - **Database** (to search the entire database)
 - b. To:
 - **File** (to save a report as a file)
 - c. Frequency:
 - **Once Only**



3. Once you have selected all of your settings, click the **OK** button – the Report – Save As screen will display:



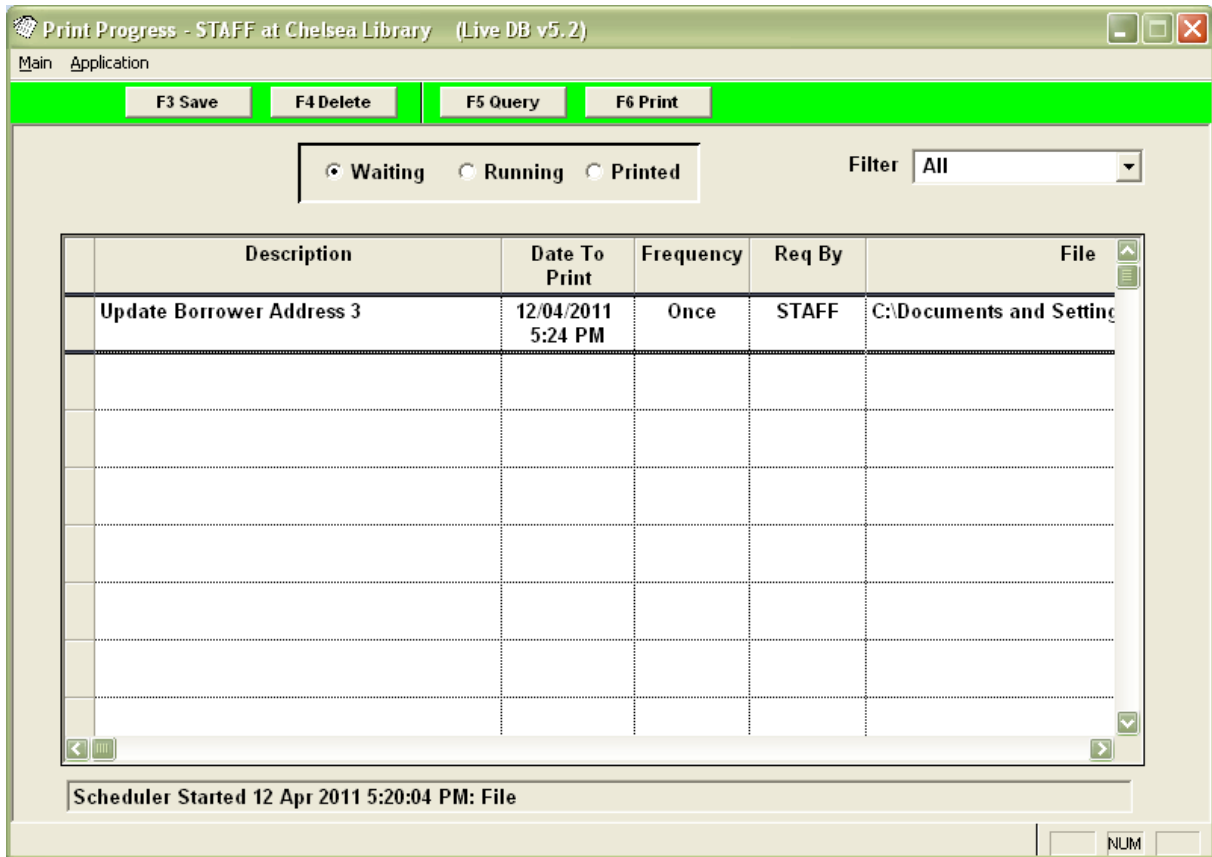
4. Select a Save in: location and type in a File name:

System Management - TASKS

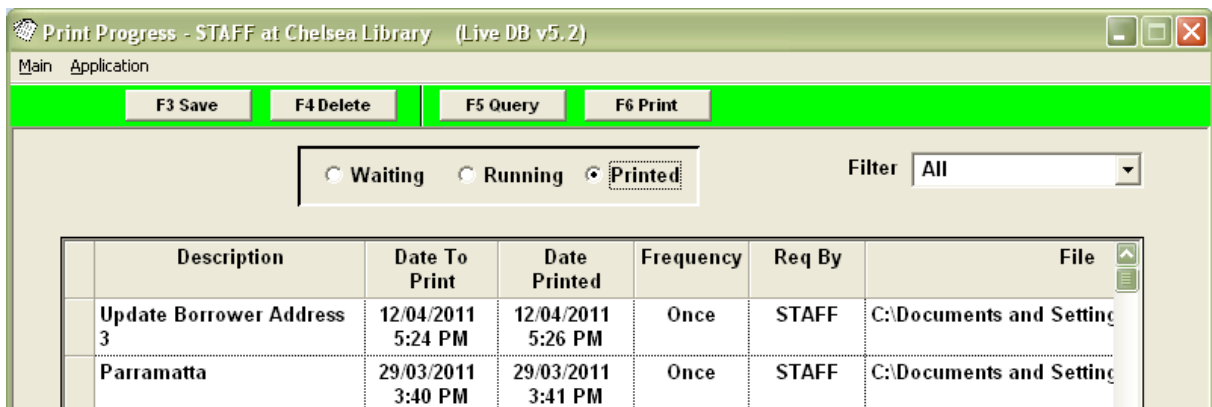
5. Click the **Save** button when complete

Check Print Progress

1. You can check the progress of your reports at any time by going into **Main > Reports > RepPrintProgress**



2. You can also click through the three tab options at the top to see the ones that are **Waiting**, **Running**, or have already been **Printed**
3. Your report will show up in **Printed** when it is complete



The matching Borrower details should then be updated.

Updated Borrower Record:

System Management - TASKS

Borrower Details - STAFF at Chelsea Library (Live DB v5.2)

Main Application Borrower XReferences File

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

BarCode: B270 Pin: Previous Queries: -1 -2 -3 -4 -5

Scope: 'EXTERNAL','ITS','LIBRARY' Given Name: Peter Middle Name: D

Surname: Norman

Title: Mr Sex: M Balance: \$0.00 Picture:

BirthDate: 20/03/1953 Potential Charges? AlwaysShow:

Type: A Group: Class:

Status: OK Location: CHELSEA
9999-1111, 12 Smith Road, Berwick, 3806
12 Smith Road, Berwick, 3806

Business Phone: ID:

Ref1: R Ref2: Loan Count: 0 Memo Count: 1

Email: Use for Notices: N

Mobile/Cell: Use Mobile/Cell for Notices: N Lib. Group: LIBRARY

Enquiry Security Level (00-99): 00

Joined: 01/12/1997 At: CHELSEA Modified: 12/04/2011 5:26:00 PM Seq: 1 Set: 1 ?Size: 200

Reg Exp: 15/04/2016 Last Active: 17/04/1997 by: STAFF

Enter SURNAME: NUM

Memo that appears in Circulation:

Memos for this Borrower

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

Barcode: B270 Name: Norman, Peter Number of Memos: 1

Show	Date	End Date	Type	Memo Details	stk Item no if applic
Y	12/04/2011	11/04/2012	AUTOUPD	Borrower to sign register and present ID.	

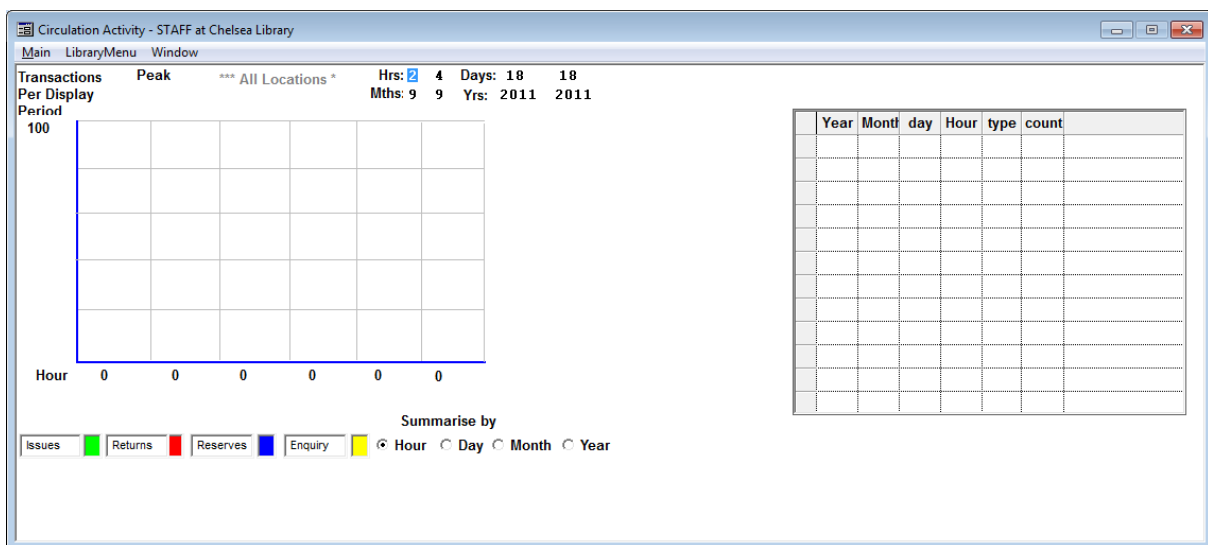
System Activity Trends

The system activity window gives a brief overview of the system for the following activities. The colours used in the graph are different for each activity.

- Issues (**Green**)
- Returns (**Red**)
- Reserves (**Blue**)
- Enquiry (**Yellow**)

This window may also be used to initiate spreadsheet data transfer.

1. Launch the *Amlib* client
2. Go to **Main > Supervisor > System Activity** – the Circulation Activity screen will display:

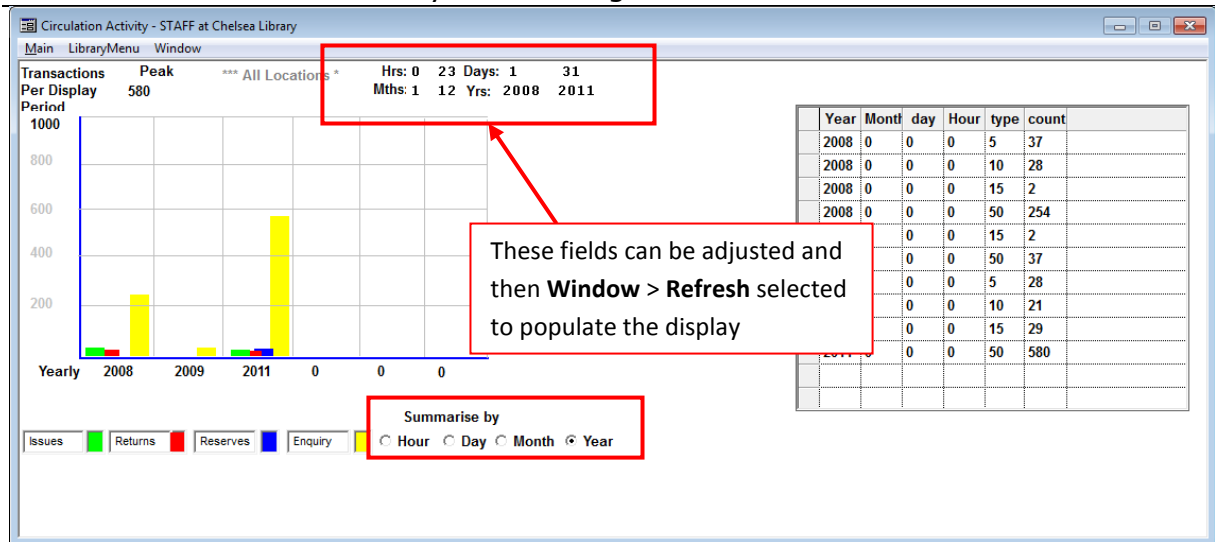


3. This window is actually using the collected statistics and may be used to view any period by changing the **from** and **to** values for Hrs, Days, Mths and Yrs fields from the top of the window (highlight the field with your mouse and overwrite it) and then selecting **Window > Refresh** from the menu – the following ranges apply:
 - a. Hrs: **0 – 23** – for example: 8 – 18 (for stats between 8am and 6 pm)
 - b. Days: **1 – 31** – for example: 1 – 12 (for the first 12 days of the month)
 - c. Mths: **1 – 12** – for example: 1 – 3 (for the first quarter)
 - d. Yrs: **2XXX – 2XXXX** – for example: 2009 – 2010 (for the 2009 and 210 stats)

Please Note: By default, the Hrs, Days, Mth and Yrs fields will default to the current date and time.

Please Note: When viewing statistics on the system activity window you may only view down to the level at which stats are being collected – for example: if you are not collecting by hour enter **0 - 23** in the hours fields.

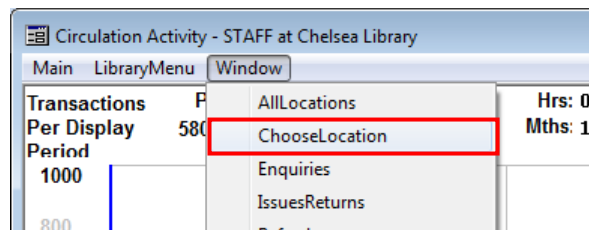
System Management - TASKS



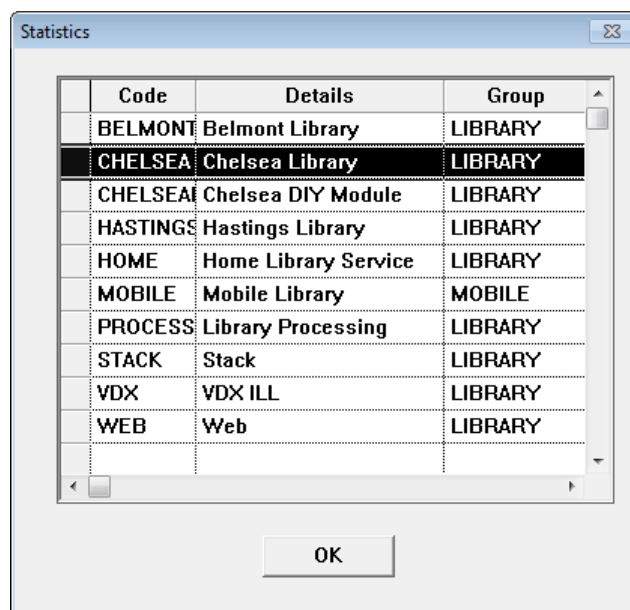
4. The display can be changed to be **Hour, Day, Month** or **Year** using the Summarised by radio button selections at the bottom of the screen

5. The default display is: **All Locations** – to view a particular location in isolation:

e. Select **Window > ChooseLocation** from the menu



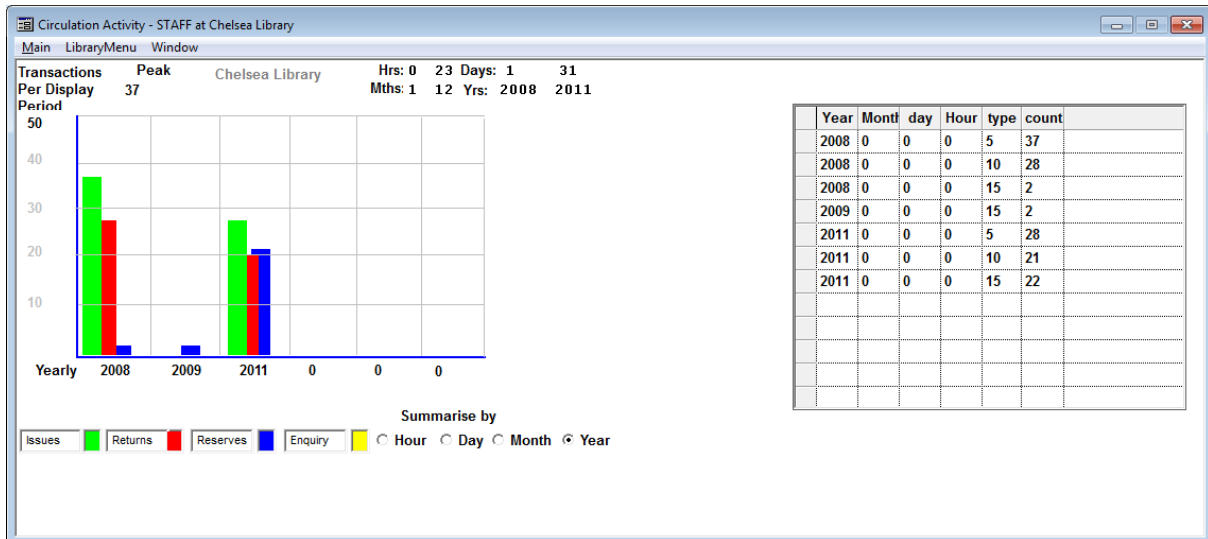
f. The following prompt will display:



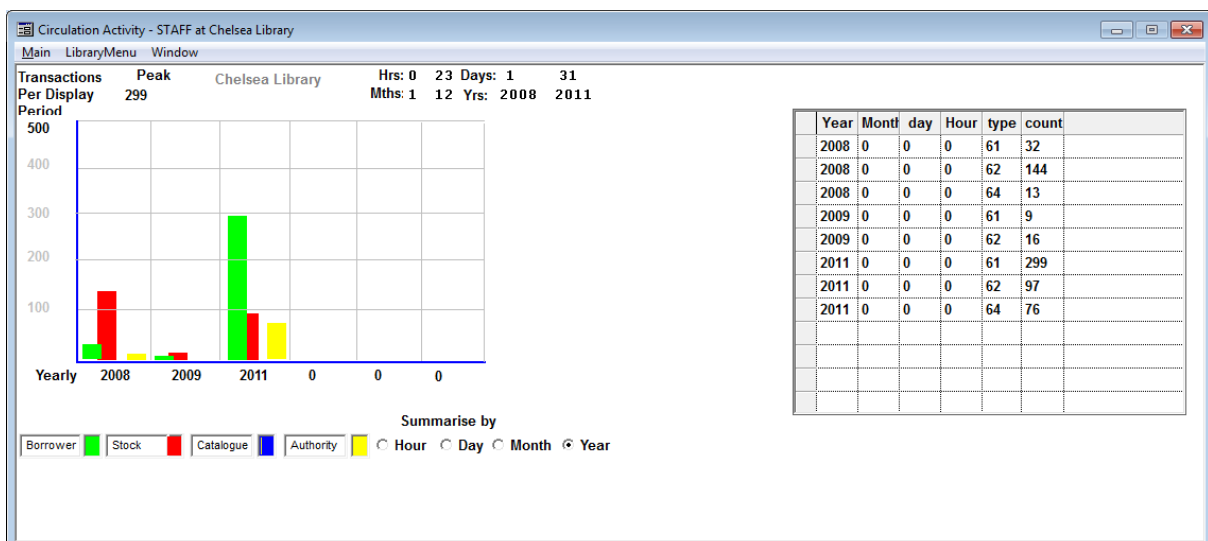
g. **Highlight** the desired location and click the **OK** button – the Location at the top of the screen will change to match the selected Location

System Management - TASKS

h. **Select Window > Refresh** to refresh the statistics displayed



6. The default display is to show **Issues>Returns** – the system activity can be changed to be viewed by Borrower (**Green**), Stockitem (**Red**), Catalogue (**Blue**) and Authority (**Yellow**) by selecting **Window > Enquiries** and then **Window > Refresh**



As the population of statistics grows the data collection queries may take some time so this should not be activated when the system is busy.

Please Note: Use **Window > Refresh** whenever you have changed any of the selection fields.

Printing

If you have a colour printer, you can print the image. There is no Print button in the *Amlib* client but you can capture a screenshot by holding the **Alt** button while clicking the **PrtScn** button on your keyboard. You can then paste (**Ctrl + V**) the image into Word or WordPad for printing.

**APPENDIX 1: BACKUP AMLIB SQL SERVER & CREATE TEST DATABASES:
SQL SERVER MANAGEMENT STUDIO**

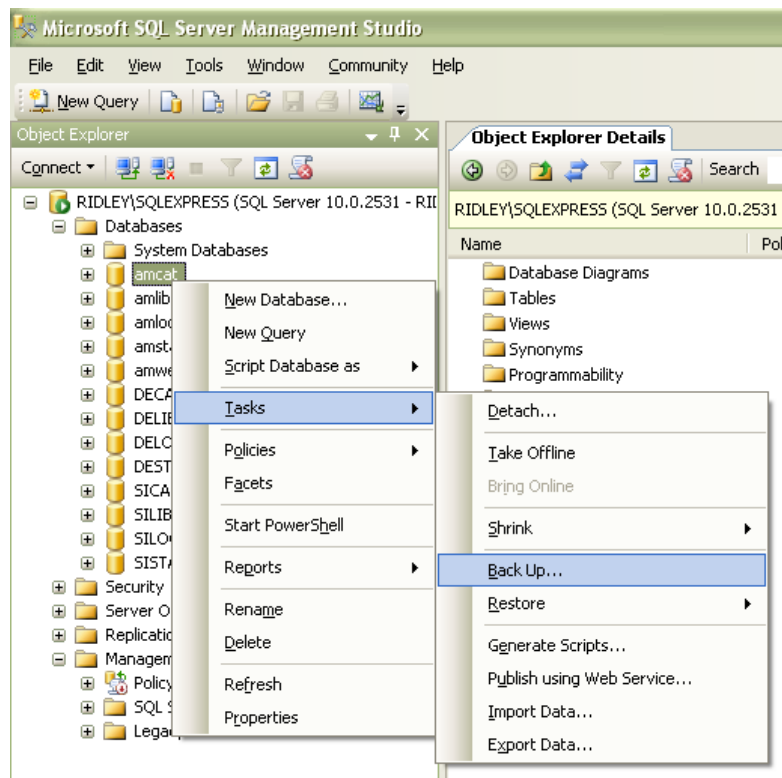
If you have any queries about backup do not hesitate to contact our OCLC Support office.

The following databases must be backed up:

- **AMCAT**
- **AMLIB**
- **AMLOCAL**
- **AMSTATS**
- **AMWEB**

Backup

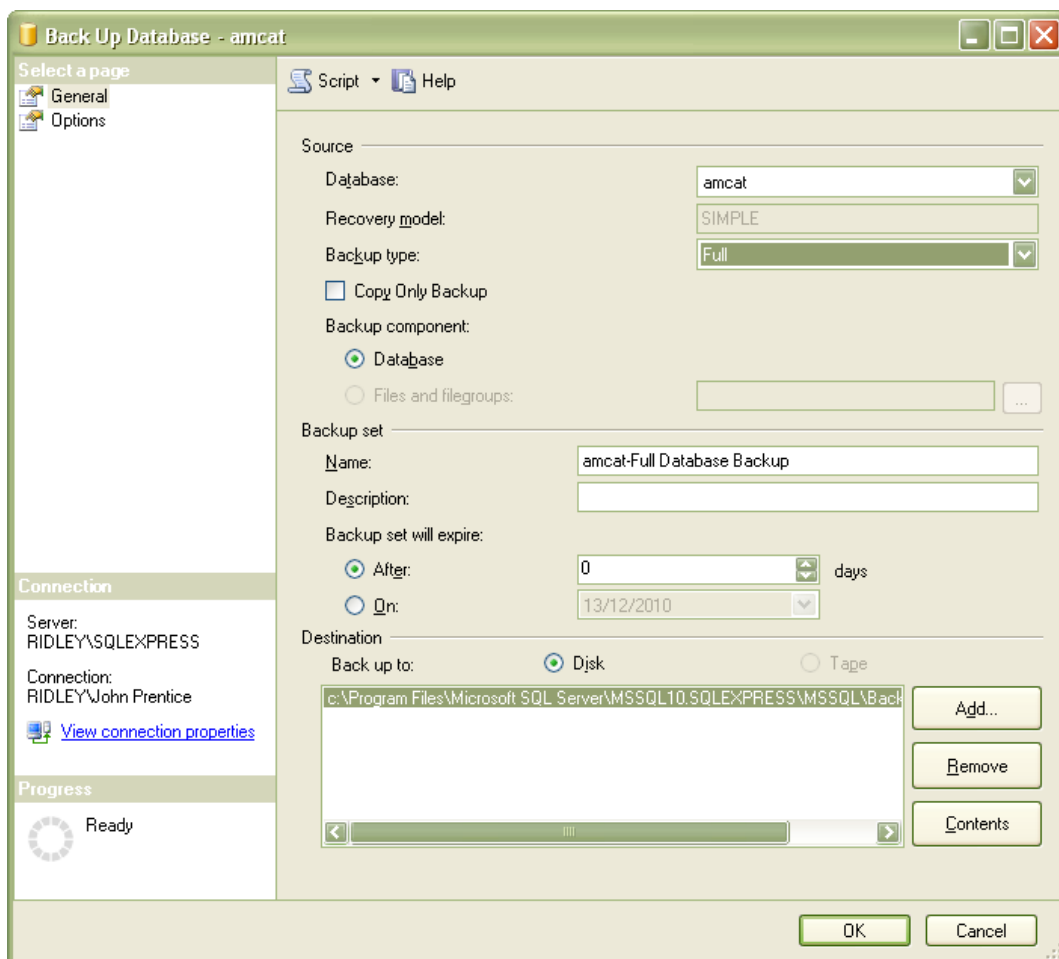
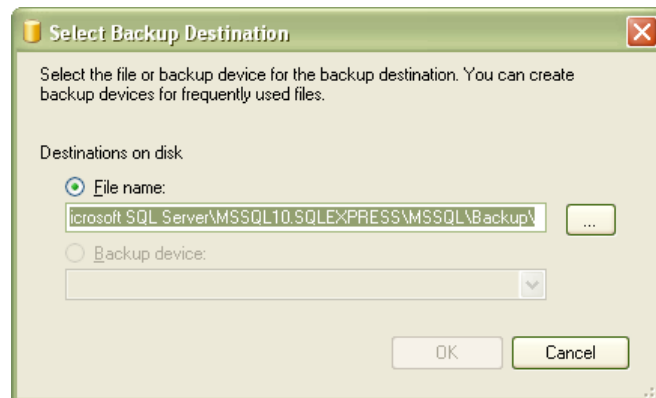
1. Launch *Microsoft SQL Server Management Studio*
2. Expand the Databases selection tree [+]
3. Right-click on the **AMCAT** database and select **Tasks > Back Up...**



4. The Back Up Database window will open
5. Select the General page
6. Choose the following options:
 - Source
 - Database: **AMCAT**
 - Backup type: **Full**

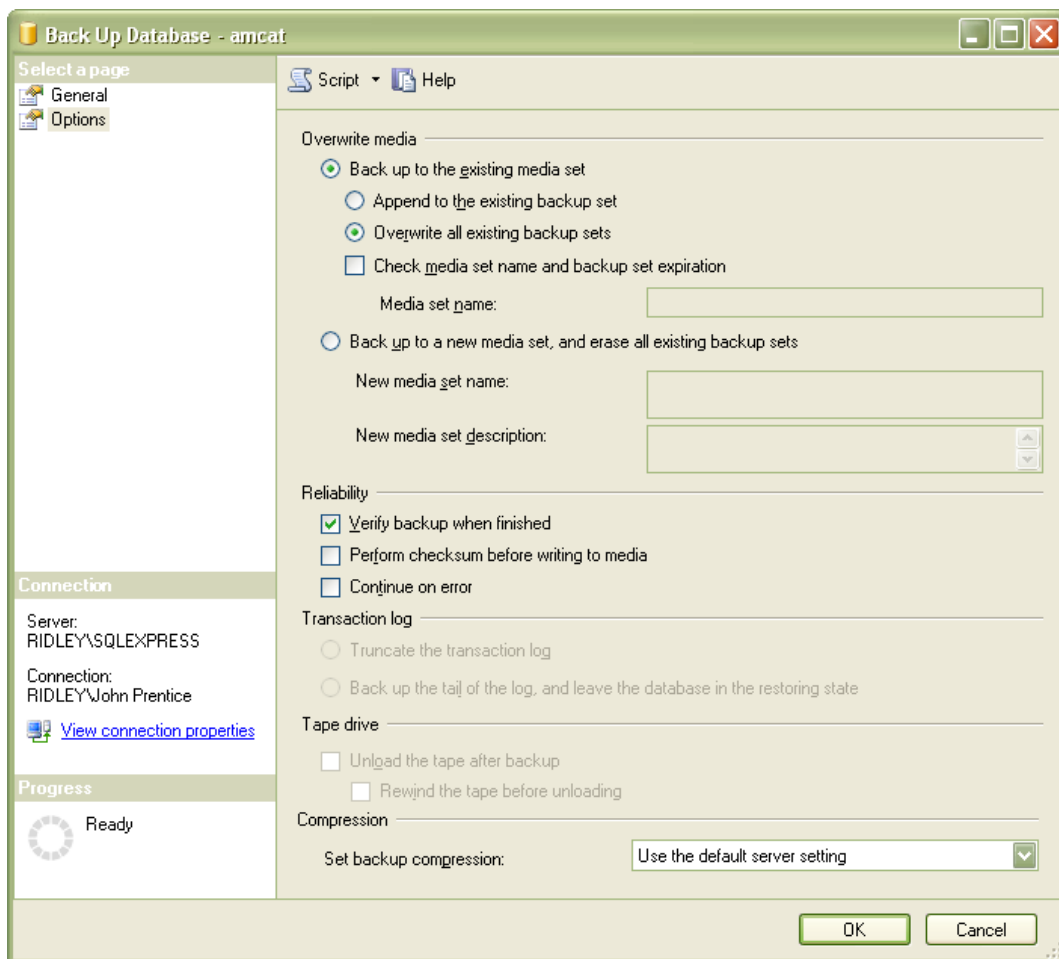
System Management - TASKS

- Destination (can leave as default)
 - Click on the **Add** button to open the Select Backup Destination window
 - Click on the ... button to browse to and select a destination
 - Click on the **OK** button

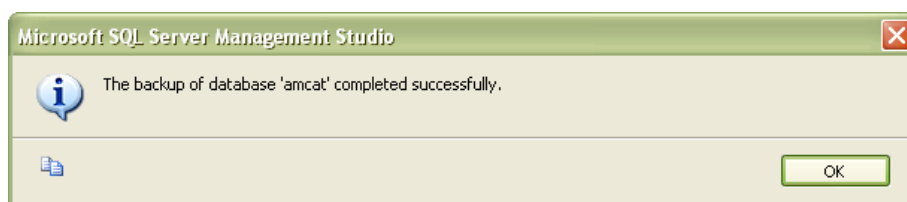


7. Select the Options page
8. Choose the following options:
 - Overwrite media
 - **Overwrite all existing backup sets**

- Reliability
 - **Verify backup when finished**



9. Click the **OK** button
10. When complete the following message will appear: **The backup of database 'AMCAT' completed successfully.**



11. Repeat steps 3 – 10 for the **AMLIB, AMLOCAL, AMSTATS** and **AMWEB** databases

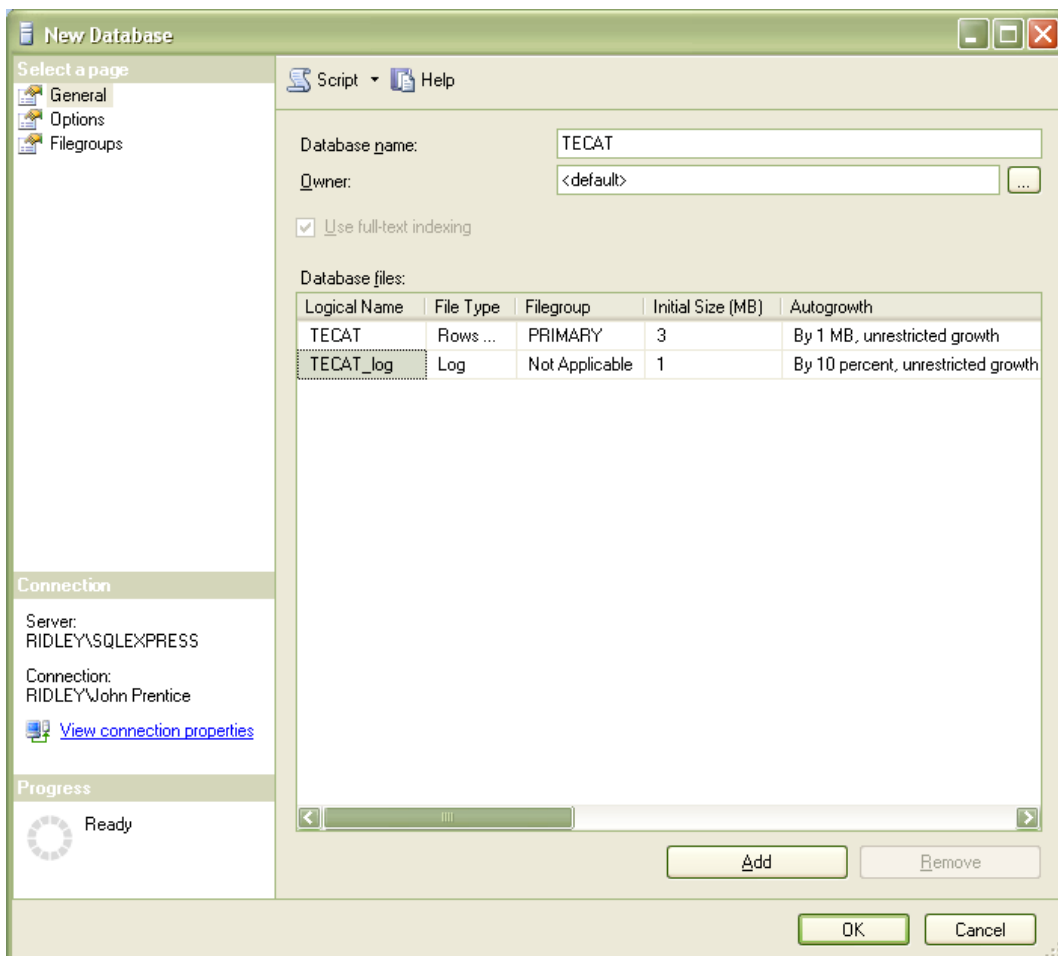
Create a Test Database

The following databases will be created:

- **TECAT**
- **TELIB**
- **TELOCAL**
- **TESTATS**
- **TEWEB**

Create Databases

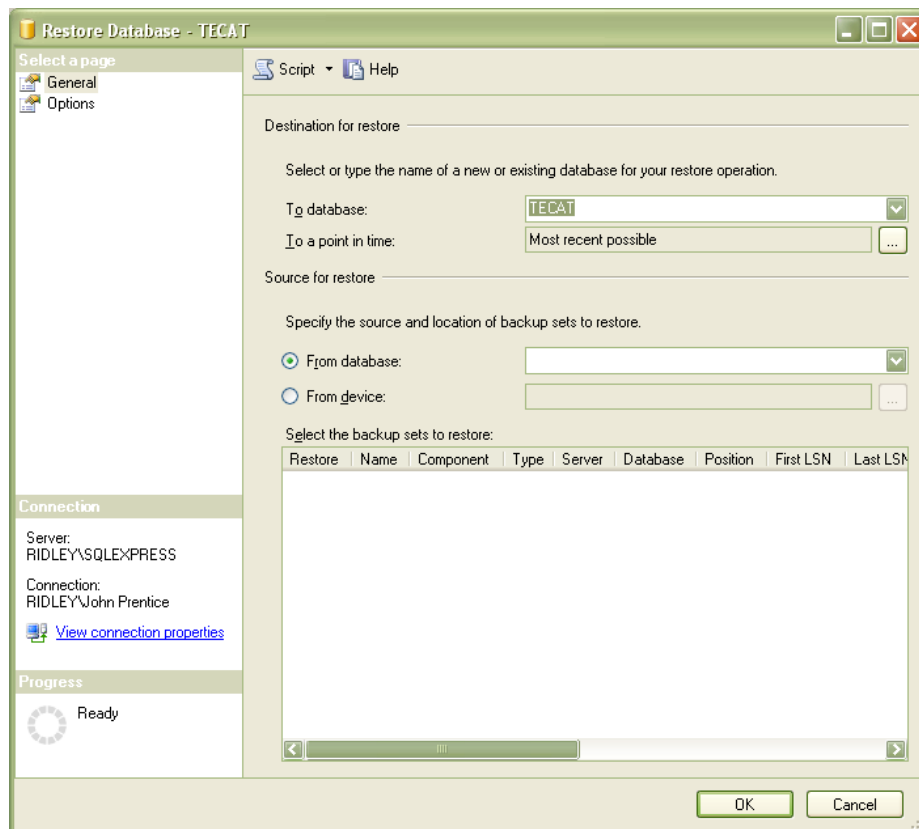
1. Launch *Microsoft SQL Server Management Studio*
2. Right-click on Databases and select **New Database...** – the New Database window will open



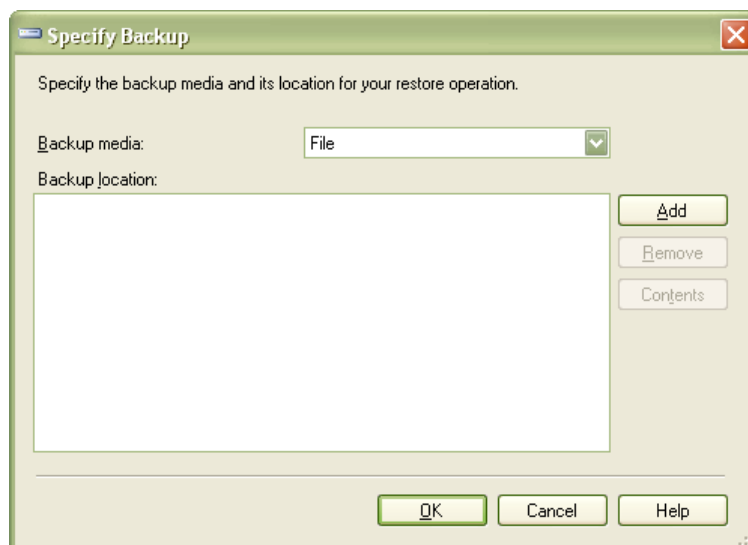
3. Database Name = **TECAT**
4. Click the **OK** button to create the database
5. Repeat steps 2-4 to create the **TELIB**, **TELOCAL**, **TESTATS** and **TEWEB** databases

Restore Backed Up Databases to New Test Databases

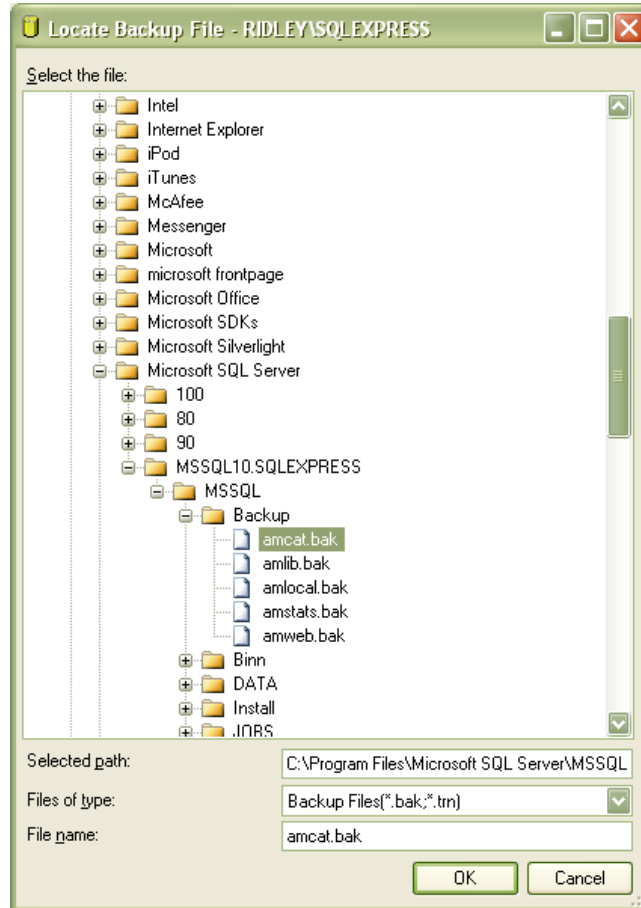
1. Expand the Databases selection tree [+]
2. Right-click on the **TECAT** database and select **Tasks > Restore > Database...** – the Restore Database window will open



3. Select the From device: radio button
4. Click the ... (Select Devices) button – the Specify Backup screen will open

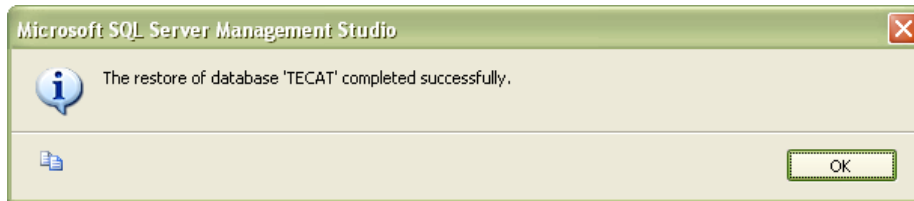


- Click the **Add** button – the Locate Backup File window will open



- Select the corresponding **AMCAT.BAK** file
- Click the **OK** button to return to the Specify Backup window
- Click the **OK** button to return to the Restore database window
- Tick** the Restore box for the selected database
- Select the Options page
- Restore options – select **Overwrite the existing database (WITH REPLACE)**
- Edit the paths of the Data and Log files in the Restore Database files as: table so that they reflect the path of the test database file name – for example: **TECAT.mdf** and **TECAT_log.ldf**
- Click the **OK** button – the database will be restored

14. The following message will appear when complete: **The restore of the database XXXX completed successfully.**

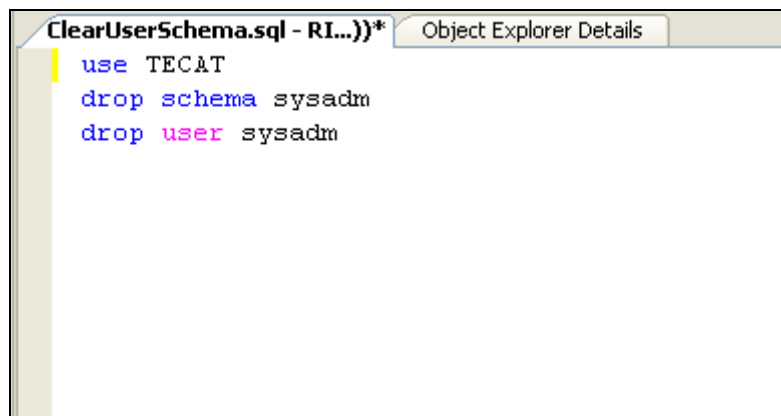


15. Repeat steps 2-14 for all the **TE** databases

Map User Schema

It may be necessary to clear the old user schema first.

1. Click the **New Query** button – this will open up the SQL Query screen
2. Type in the following:
 - **use TECAT**
 - **drop schema sysadm**
 - **drop user sysadm**

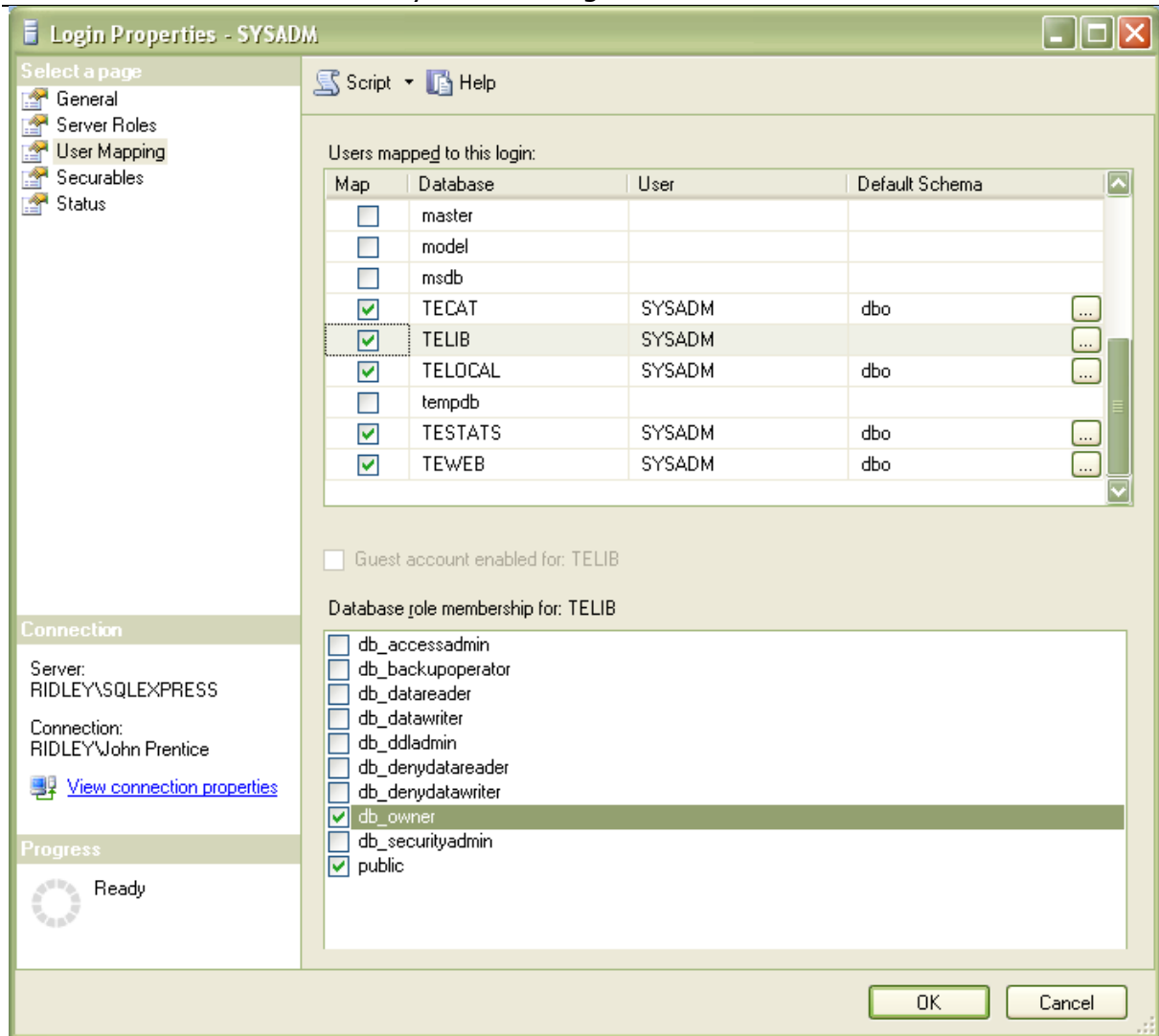


3. Click the **! Execute** button
4. Repeat for all **TE** databases

Map User Schema

1. Expand the Security selection tree [+]
2. Expand the Login selection tree [+]
3. Right-click on the **SYSADM** and select **Properties** – the Login Properties window will open
4. Select a page = **User Mapping**
5. Users mapped to this login: ensure there are ticks against ALL the **TE** databases
6. Database role membership for: ensure that **db_owner** is **ticked**
7. Click the **OK** button when complete

System Management - TASKS



Link the Amlib Client to the Test Database

1. In the Amlib folder on the Amlib server, locate the **SQL.ini** file
2. Open the **SQL.ini** file in *Notepad*
3. Scroll down to the server paths section – you should see the existing server paths for the default (Live) SQL databases:

; This is the server paths used for the default SQL server

```
REMOTEDBNAME=AMCAT,DRIVER=SQL SERVER;SERVER=MYSERVERNAME\SQLEXPRESS;DATABASE=AMCAT
REMOTEDBNAME=AMLIB,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=AMLIB
REMOTEDBNAME=AMLOCAL,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=AMLOCAL
REMOTEDBNAME=AMSTATS,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=AMSTATS
REMOTEDBNAME=AMWEB,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=AMWEB
```

4. Copy the existing set and then paste underneath, then edit the new set to create the link to the **TE**

; This is the server paths used for the test SQL server

```
REMOTEDBNAME=TECAT,DRIVER=SQL SERVER;SERVER=MYSERVERNAME\SQLEXPRESS;DATABASE=TECAT  
REMOTEDBNAME=TELIB,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=TELIB  
REMOTEDBNAME=TELOCAL,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=TELOCAL  
REMOTEDBNAME=TESTATS,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=TESTATS  
REMOTEDBNAME=TEWEB,DRIVER=SQL SERVER;SERVER= MYSERVERNAME \SQLEXPRESS;DATABASE=TEWEB
```

5. Save the changes

The test database is now linked to Amlib.

APPENDIX 2: Amlib SQL Server 2008 Maintenance Plans

This document applies to any purchased version of SQL Server 2008 or 2008R2. This does not apply to the Express version.

Your library has invested considerable time and effort in the creation of the library data, so it is vital to protect this investment and ensure that loan transactions and financial records are safe. The most important tool in this process is the Maintenance Plan.

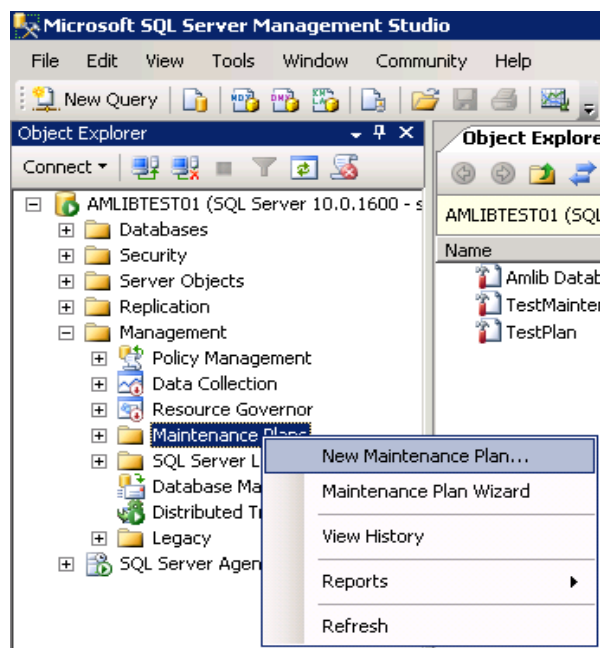
A properly configured Maintenance Plan does more than just backup the databases. It also runs a number of important tweaking tasks which help to keep the system healthy and running as fast as possible.

Third party backup utilities are NOT a substitute for running an SQL Server Maintenance Plan, despite any claims made by their manufacturers.

Make sure that you check to see if any other Maintenance plans are being run on the server. They may be configured in a way that will affect the Amlib databases, certainly you will have to avoid scheduling conflicts.

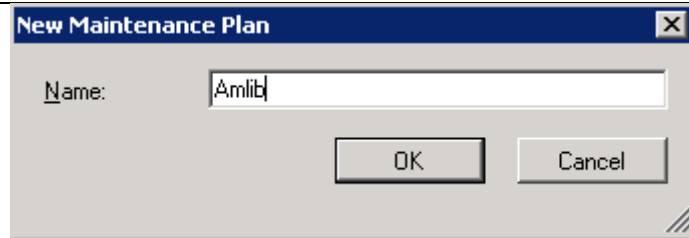
Step One:

In SQL Server Management Studio, expand “Management” and right-click on “Maintenance Plans”, then select “New Maintenance Plan...”:

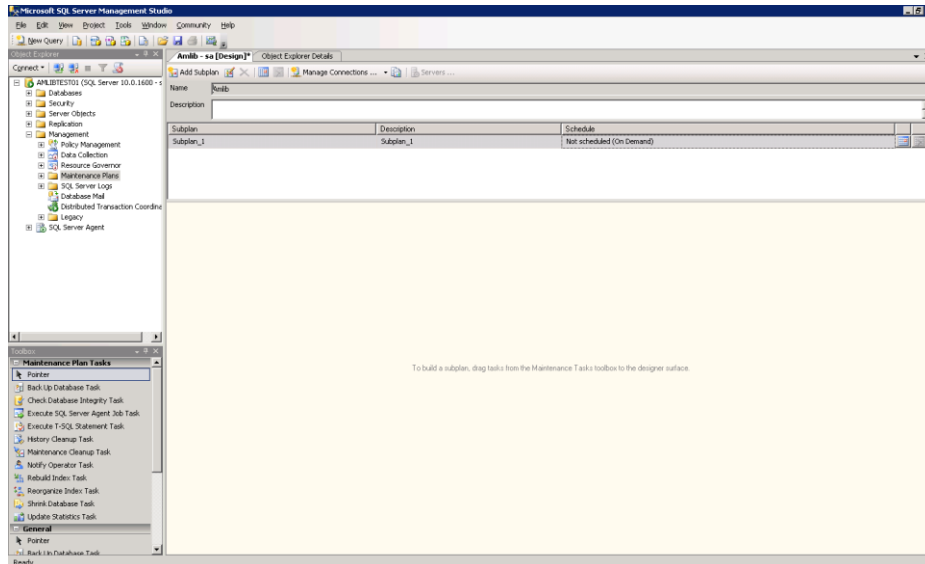


Give the new plan a suitable name:

System Management - TASKS

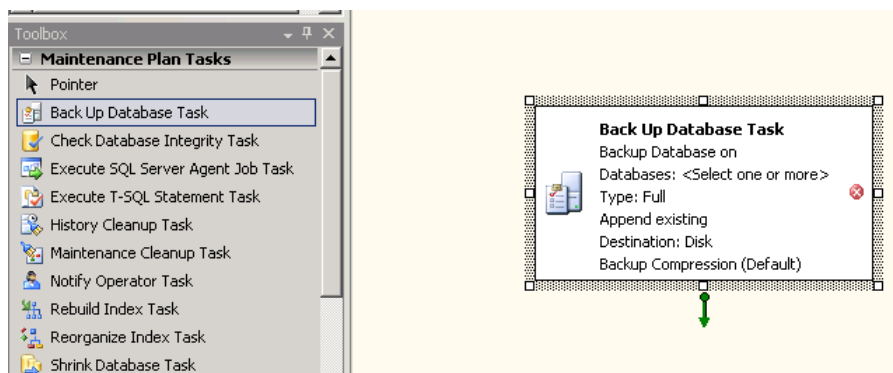


One you have clicked on “OK”, this screen will open:



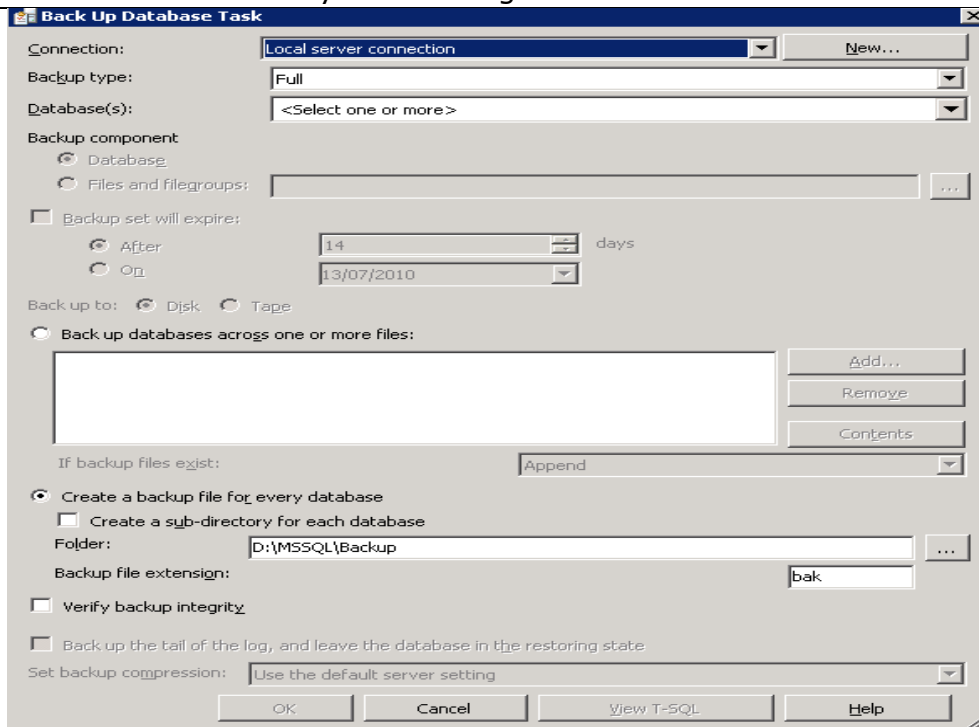
Step Two:

From the “Toolbox” on the sidebar, select the “Back Up Database Task”, then drag and drop it into the white area:

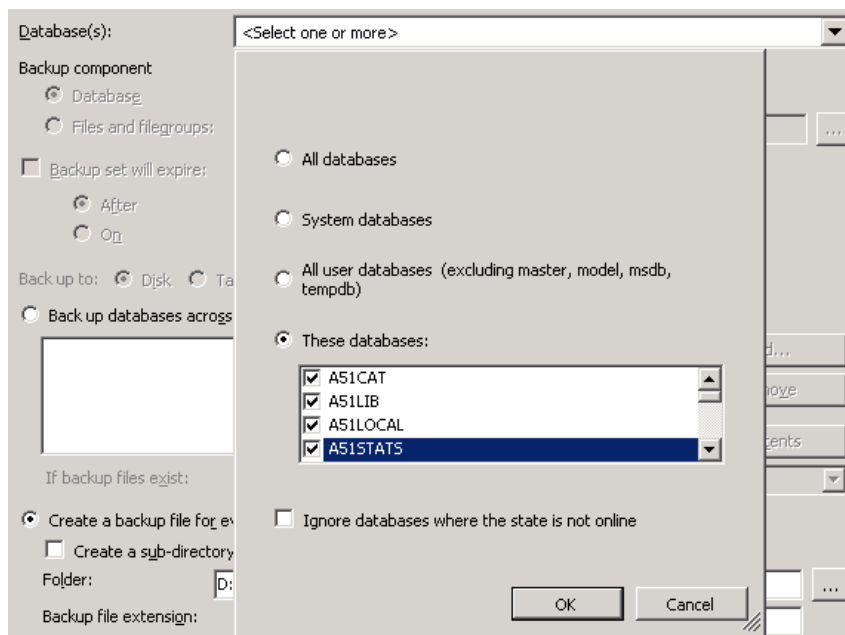


Double click on the task to open the configuration settings.

System Management - TASKS



Click on the downward facing arrow on the dropdown box next to “Database(s)” and select the databases to be backed up (all Amlib databases, i.e. AMCAT, AMLIB, AMLOCAL, AMSTATS and AMWEB – yours may have prefixes other than “AM”).



Tick the box next to “Backup set will expire” and set the expiration period based on your IT’s backup policies. If your IT has no policy on how long the backups should be kept, you can leave it at the default 14 days:

System Management - TASKS

Backup set will expire:

After days

On

Ensure that your Database Backup Task contains the same settings as the screenshot below, then select "OK":

Back Up Database Task

Connection: Local server connection

Backup type: Full

Database(s): Specific databases

Backup component

Database

Files and filegroups:

Backup set will expire:

After days

On

Back up to: Disk Tape

Back up databases across one or more files:

If backup files exist:

Create a backup file for every database

Create a sub-directory for each database

Folder:

Backup file extension:

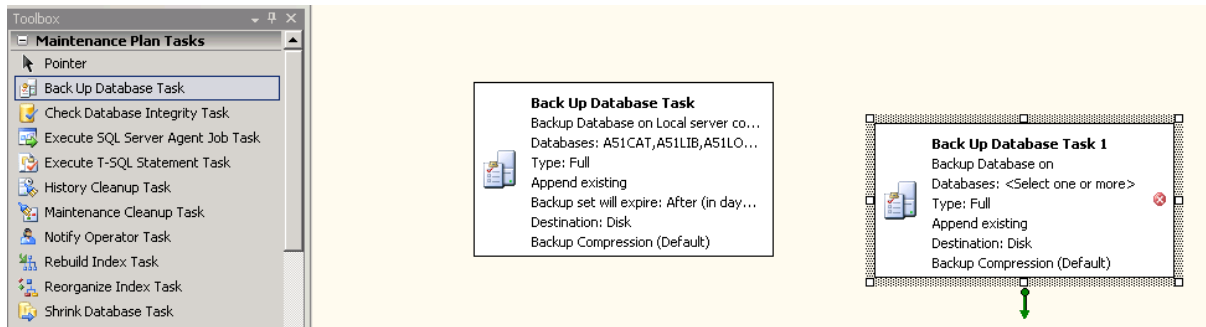
Verify backup integrity

Back up the tail of the log, and leave the database in the restoring state

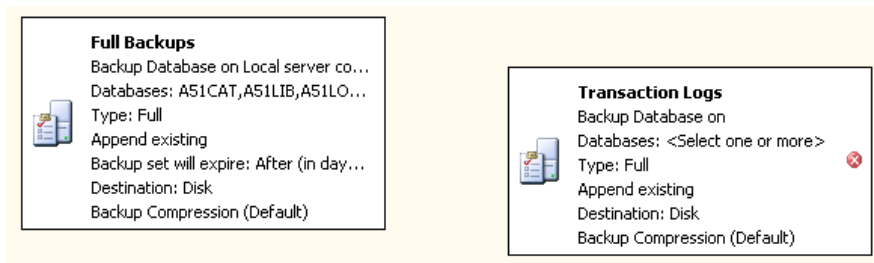
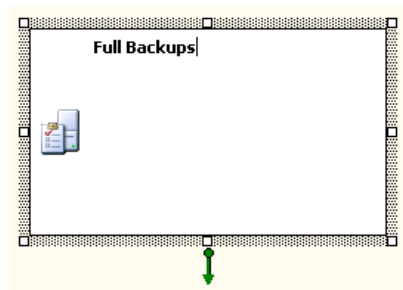
Set backup compression:

Step Three:

In addition to backing up the entire databases, we will also want to make a backup of the transaction logs. Once again, drag and drop the “Back Up Database Task” from the Toolbox on the sidebar into the white space to create a second task.

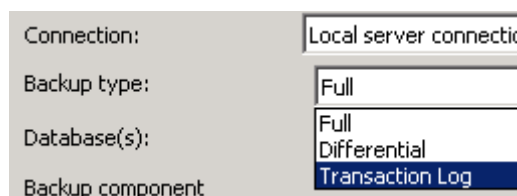


To avoid confusion, you can rename tasks by clicking once on the bolded text at the top and altering it:



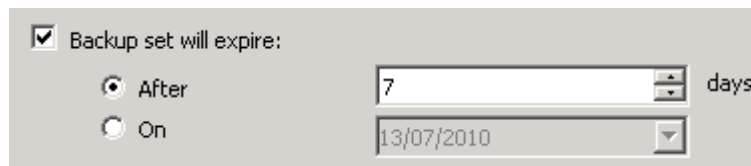
Double click on the second task to open its configuration settings.

Change the “Backup Type” to “Transaction Log” and again select your Amlib databases from the “Database(s)” drop down:



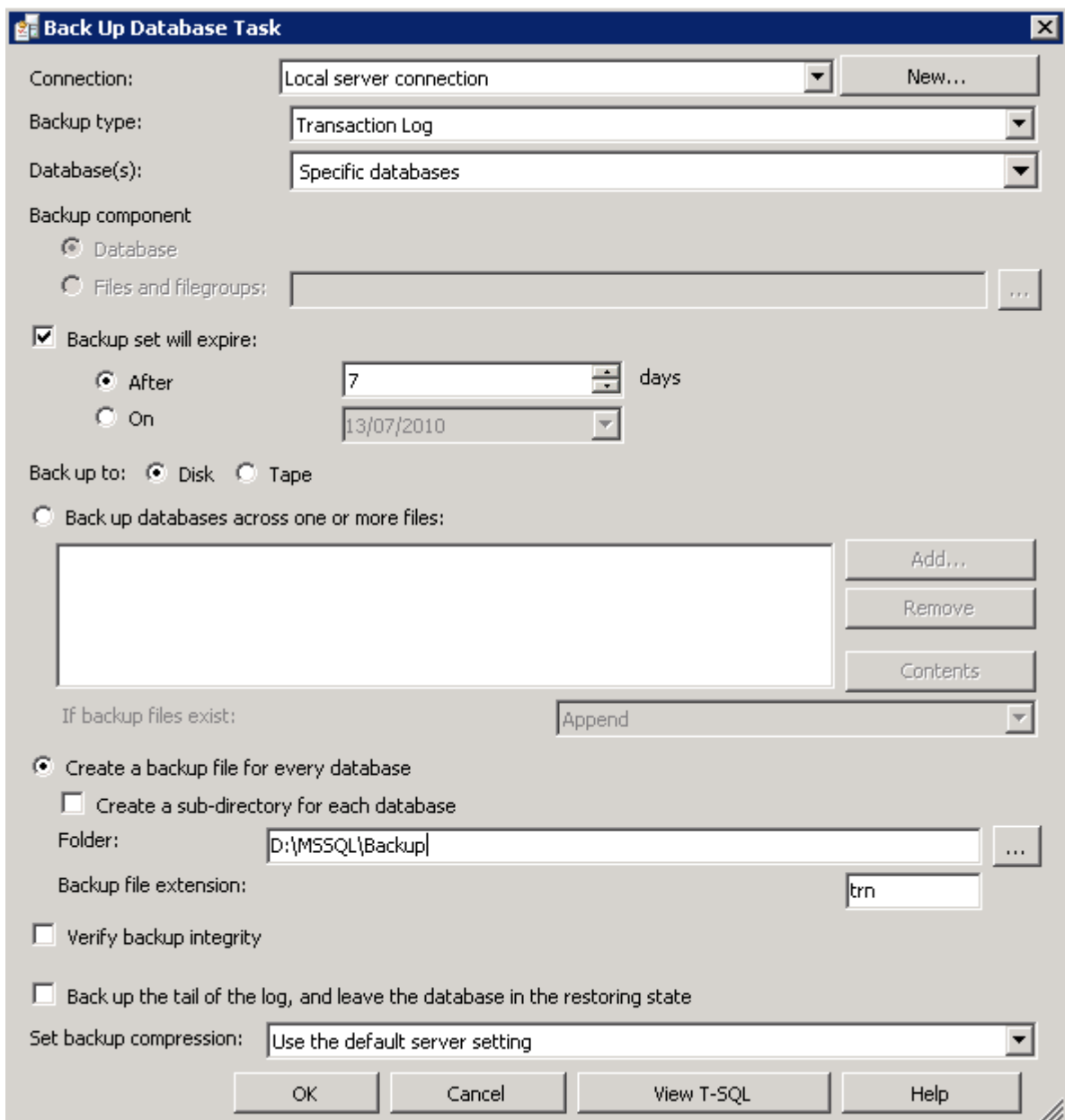
System Management - TASKS

Like with the full backups, tick the box next to "Backup set will expire" and set the expiration period. Transaction logs can take up quite a lot of room, so OCLC recommend change this to expire every 7 days, but this is dependent on the size of your hard drive.



A screenshot of a configuration window showing the 'Backup set will expire' section. The checkbox is checked. The 'After' radio button is selected, with a spinner box set to '7' and the unit 'days'. The 'On' radio button is unselected, with a date box set to '13/07/2010'.

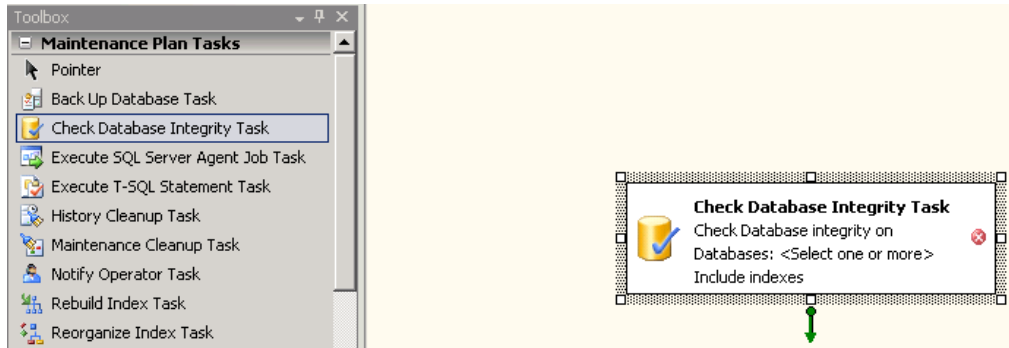
Ensure that all of your settings as the same as the screenshot below, then click on "OK":



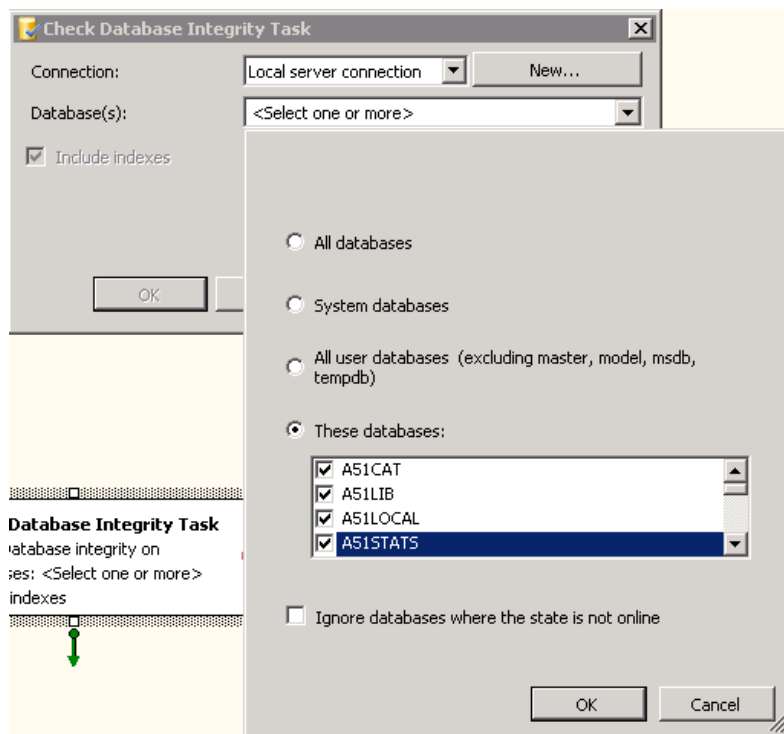
A screenshot of the 'Back Up Database Task' dialog box. The 'Connection' is 'Local server connection'. The 'Backup type' is 'Transaction Log'. The 'Database(s)' are 'Specific databases'. The 'Backup component' is 'Database'. The 'Backup set will expire' checkbox is checked, with 'After' selected and '7' days set. The 'Back up to' is 'Disk'. The 'Back up databases across one or more files' checkbox is unselected. The 'If backup files exist' dropdown is set to 'Append'. The 'Create a backup file for every database' checkbox is checked, with 'Create a sub-directory for each database' unselected. The 'Folder' is 'D:\MSSQL\Backup' and the 'Backup file extension' is 'trn'. The 'Verify backup integrity' and 'Back up the tail of the log, and leave the database in the restoring state' checkboxes are unselected. The 'Set backup compression' dropdown is set to 'Use the default server setting'. The 'OK', 'Cancel', 'View T-SQL', and 'Help' buttons are at the bottom.

Step Four:

From the Toolbox on the Sidebar, drag and drop the “Check Database Integrity Task” into the white space.

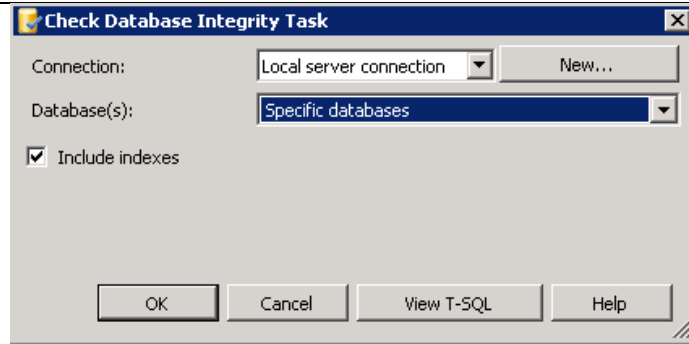


Double click on the task to open the configuration settings and select your Amlib databases.



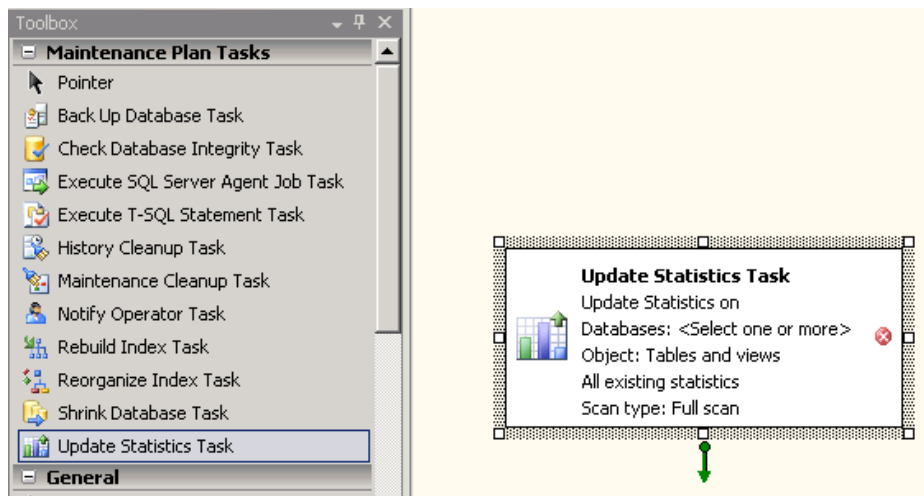
Ensure that “Include Indexes” is ticked and select “OK”.

System Management - TASKS

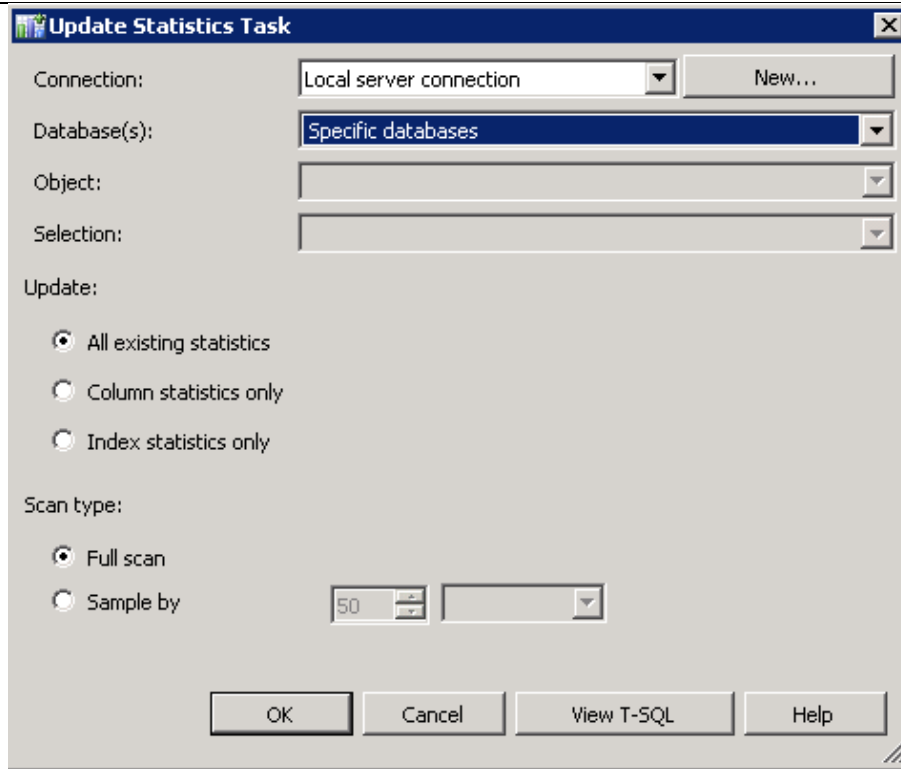


Step Five:

From the Toolbox on the Sidebar, drag and drop the "Update Statistics Task" into the white space.



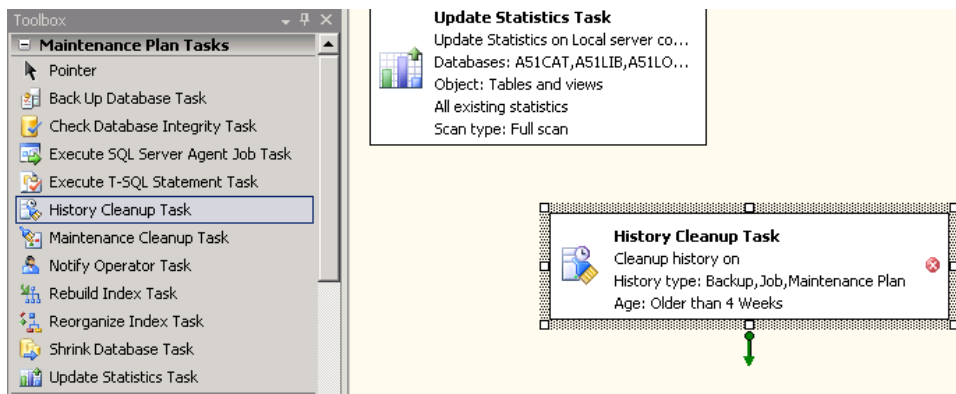
Double click on the task to open the configuration settings. Select your Amlib databases from the "Databases" drop down and select "OK".



Leave the defaults: “All existing databases” and “Full scan”.

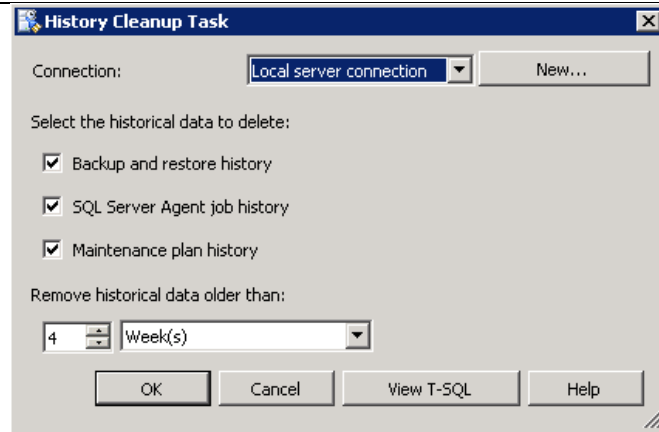
Step Six:

Drag and drop the “History Cleanup Task” from the Toolbox on the Sidebar into the white space.



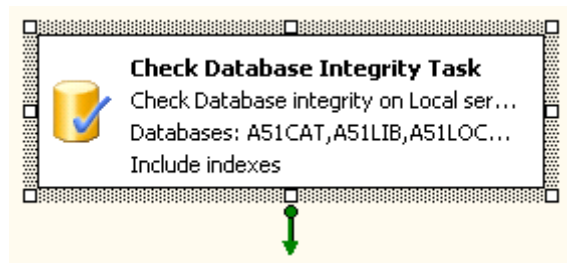
Double click on this task to view the configuration settings. Most of them should be left as the default, but you may wish to alter the expiration period.

System Management - TASKS



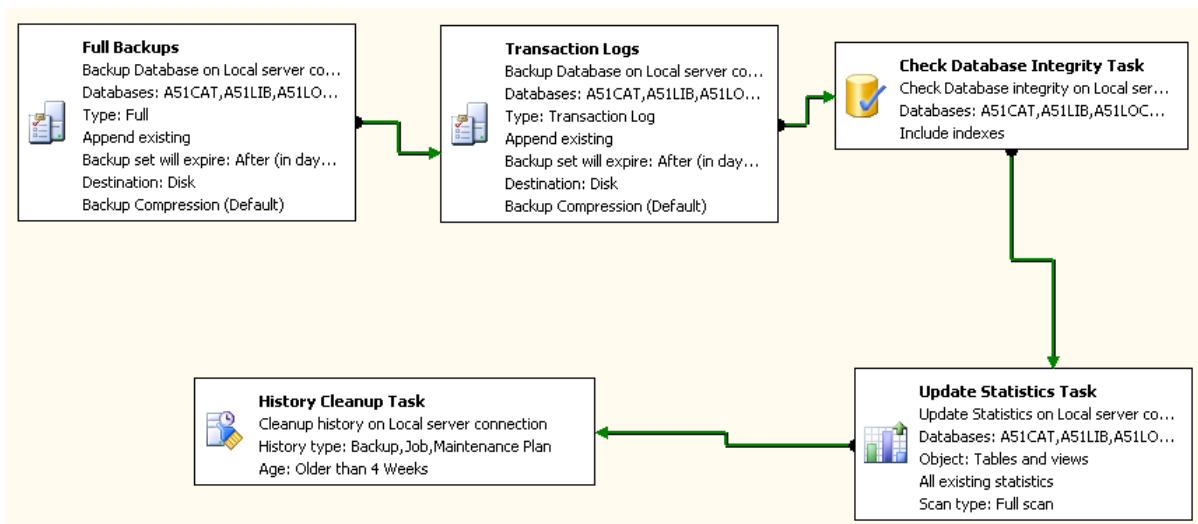
Step Seven:

Now that all of the tasks have been created, they need to be connected. When selected, each task will have a green arrow down the bottom:



Click on this green arrow and drag it out to the next task in the list. Do this to all tasks so that they are pointing towards the next one that was created.

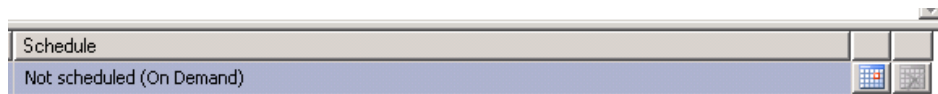
The final task will not be connected to a future task.



Step Eight:

The final step in settings up your maintenance plans is to create a schedule.

At the top of the white space, click on the calendar icon:



It is recommended that these tasks be run daily and set to occur outside of normal opening hours.

Some considerations to be made when scheduling your plan:

- Make sure any scheduled reports have occurred before your Maintenance Plan
- Allow sufficient time for scheduled reports to be completed
- Make sure other system tasks will happen after your Maintenance Plan
- Allow sufficient time for your Maintenance Plan to be completed

After your plan has been scheduled, you can save the plan and exit SQL Server Management Studio.

If you have any queries, please contact Amlib Support either via the Online Helpdesk (<https://servicedesk.oclc.org>) or via email (support-amlib@oclc.org).

APPENDIX 3: DISASTER RECOVERY PLANNING

Losing your library data is a frustrating, expensive and unnecessary experience; don't let it happen to you.

This document doesn't pretend to teach you everything that you need to know about disaster recovery, but it should get you thinking along the right lines. Many City and Shire Councils and some schools will already have disaster recovery plans; this document focuses on the elements of such a plan that relate to library management systems.

O'Toole's Commentary on Murphy's Law – “Murphy was an optimist”
--

There are a number of events that can bring your library management system to a complete halt, some are temporary, some are not.

1. Equipment failure

- Hard Disk crash
- Network failure
- Virus attack

2. Power Outage

- Anything between a momentary disk-frying surge and a couple of candle-lit days

3. Operator/Administrator error

- Accidental deletion of files or data
- Mistakes while editing configuration files (INI files)
- Removal of User permissions

4. Fire

- The most compelling reason for keeping off-site backups
- Even if the whole building and collection is lost you will want to recover the data for your insurance claim

5. Theft

These things happen to school and community libraries regularly, if you don't have a good disaster recovery plan you will lose all your data, thousands of catalogue and holdings records, all your circulation information and any value added cataloguing that you have done. You will not be happy.

System Management Tasks in Amlib

There are three phases to a disaster recovery plan:

Before:

○ **Preventative**

Are there any actions you can take that might prevent the disaster from happening?

- Replace aging hardware before it fails
- Use power line filters and/or surge protectors, at least on the server
- Keep your Operating System up-to-date by installing Service Packs
- Use up-to-date virus protection software
- Use only commonly available backup media, software and drives
- Monitor the amount of free disk space on your database server to ensure that there is enough space for the backups and database growth
- Follow the OCLC recommended procedures for backups
- Document the backup and recovery procedures
 - Make sure that each action is assigned to a person

○ **Preparedness**

Are there any actions you can take that will ensure that you are properly prepared to respond to and recover from the disaster?

- Maintain and check backup procedures
 - If the databases are backed up to disk, SQL Base always does, you also need a process to copy the backup files to some other location and or media for off-site backup
 - Copy the following folders onto the backup media as well as the database backups:
 - Folder containing Images linked to Catalogues
 - Folder containing Images linked to Borrowers
 - Folder containing NetOpac html files
 - Folders containing AmlibNet html files
 - Label backup media clearly
 - Rotate backup media so that you are not over-writing the most recent backup
- Keep off-site backups of the backup data and recovery software
- Check the backup logs – allow access for both Library and IT staff for this purpose

System Management Tasks in Amlib

- Keep your Amlib installation CDs – they always contain everything you need to carry out a fresh installation of the client software and also the latest SQL Base Database Management System
- Carry out a test recovery onto a set of test databases at regular intervals
- Install and test Offline on more than one PC etc.

During

○ **Response**

What action should be taken when a disaster occurs?

- Use Offline for circulation during power outages and network or server failures.
- Power down machines running on UPS devices before the battery fails.

After

○ **Recovery**

What action must be taken to restore library services to normal or at least make data available for the insurance claim?

- Borrow, rent or buy a replacement server as soon as possible
- Install the required Operating System, Database Management Software and backup utilities.
- Restore the Amlib databases from the most recent backup
- Install the Amlib Client software from the Amlib Installation CD
- Make sure that the new system is working

Allocate Responsibility

Decide who is responsible for each action that is specified in the plan and make sure that the person acknowledges the responsibility.

Practice

At regular intervals, practice recovering you library's databases from the most recent backups. This is one good reason for having a set of test databases, you can practice restoring from a backup on them with no risk to your live data.

Put these regular practices into you plan.

Review

Over time software systems change, new utilities get installed, web pages are updated, new people move into important roles; this means that your plan may become out-of-date. To avoid this review you plan at regular intervals.

Staff changes are a big cause of problems in Backup and Recovery procedures. Review the whole process with each new person so that there is a clear understanding of what is being done, why it is being done and by whom.

References

System Management Tasks in Amlib

National Library of Australia - Disaster Planning for Libraries and Archives: Understanding the Essential Issues Retrieved August 31, 2005, from: <http://www.nla.gov.au/nla/staffpaper/lyall1.html>