



Amlib VDX ILL Email: Installation Guide

Version 5.3.4

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OVERVIEW

Amlib VDX ILL Email allows for the receipt of a structured email sent from OCLC's VDX Inter-Library Loans System.

This structured email creates Stockitem and ILL records within the *Amlib* client, as well as creating a reservation for the borrower as entered into *VDX*. This user guide covers how to configure and run the *Amlib VDX ILL Email* solution.

The Amlib VDX ILL Email is available to all Amlib libraries that currently use the OCLC VDX Inter-Library Loans System, at no additional cost to the library.

The solution is available in **two** modes: automated *Service* or manual *Client*.

When manually run by an operator, the *Amlib VDX ILL Email client* will:

- 1. Allow the automatic creation of a temporary Stockitem record on a requesting *Amlib* library's database when the library has requested an item from another library via *VDX*
- 2. Allow the automatic creation of a reservation on the temporary holding record in *Amlib*
- 3. Allow the automatic creation of a corresponding ILLs record in Amlib Applications
- 4. Should be installed on the library end user's computer

The Amlib VDX ILL Email Service (run via the Amlib Configuration Manager) will:

- 1. Require a schedule to be set and activated using the Amlib Configuration Manager (see below)
- 2. Allow an overall scheduled processing time and cycle to be set
- 3. As per the schedule, allow the automatic creation of a temporary Stockitem record on a requesting *Amlib* library's database for any request placed on behalf of a patron by library staff on the OCLC *VDX ILL system*
- 4. Allow the automatic creation of a reservation on the temporary holding record in Amlib
- 5. Allow the automatic creation of a corresponding ILLs record in Amlib Applications
- 6. Should be installed on the Amlib server

Please Note: Users must first have updated their Amlib client to Amlib 5.3.

IMPORTANT: Configuration of the *Amlib VDX ILL Email* application/service requires the creation of **Location-specific POP3 email user accounts (mailboxes)** for use by the *Amlib* client – see <u>Amlib</u> <u>Supervisor Settings</u>. Once set-up, these location-specific *Amlib* mailbox addresses **MUST** be added to the *State Library of WA* (*SLWA*) *VDX* system against the specific user locations. After entering their email settings in the *Amlib* client, users should contact Sandra Jones (<u>sandra.jones@slwa.wa.gov.au</u>) at *SLWA* providing the email addresses to be added to their *VDX* configuration. *SLWA* will arrange for these configuration changes on their behalf (which will also include testing).

Please Note: It is not possible to use a standard *Exchange* mailbox with the *Amlib VDX/ILL Email* application/service.

IMPORTANT: The POP3 mailboxes created should NOT use **SSL** as this system does not support **SSL**. This VDX ILL Email program will only be within your internal network so there is no security risk.

Due to specific VDX workflow requirements, the *Amlib VDX ILL Email* application/service is currently only available for use by WA users.

OPTION 1: AUTOMATIC EMAIL PROCESSING

IMPORTANT: Please ensure that you have **full read/write** access to the **\Amlib** folder on your server (for example: **C:\Amlib**) and that you are logged in with <u>Administrative Privileges</u>.

We recommend installing the Amlib VDX ILL Email Service on the Amlib server.

- The Amlib VDX ILL Email Service 5.3.4 installer is available on the OCLC Website, under <u>Downloads and Software Updates>Utilities</u> <u>https://www.oclc.org/support/services/amlib/downloads-software-updates/utilities.en.html</u> (contact Amlib support if you require a login to this website)
- 2. Download the AmlibVDXILLEmailService534.msi and save it on your Amlib server
- 3. Double-click the **AmlibVDXILLEmailService534.msi** to launch the installation Wizard the <u>Setup</u> screen will open displaying the **Welcome** message:



4. Click the **Next** button – the <u>Destination Folder</u> screen will display:

| 🛃 Amlib VDX InterLibrary Loan Email Service Setup | |
|---|--------|
| Destination Folder Click Next to install to the default folder or click Change to choose another. | |
| Install Amlib VDX InterLibrary Loan Email Service to: | |
| C:\Program Files\OCLC\Amlib VDXILLEmail\ | |
| ⊆hange | |
| <u>B</u> ack <u>N</u> ext | Cancel |

5. Choose where the program is to be installed (generally leave as default) and select the **Next** button – the <u>Ready to Install</u> screen will display:



6. Click the **Install** button – the <u>Installing</u> window will display:

| 📸 Amitib VDX InterLibrary Loan Email Setup | - • 🛛 |
|--|--------|
| Installing Amlib VDX InterLibrary Loan Email | Ð |
| Please wait while the Setup Wizard installs Amlib VDX InterLibrary Loan Email. | |
| Status: | |
| <u>B</u> ack <u>N</u> ext | Cancel |

8. When complete, ensure the <u>Launch Configuration Manager</u> is **ticked** and click the **Finish** button



9. The Amlib Configuration Manager will then launch:

| Am | lib Configurati | ion Manager | |
|----|-------------------|---|--------|
| C | onfiguration File | C:\Program Files\OCLC\Amlib VDXILLEmail\AmlibConfig.xml | Open |
| | Amlib Systems S | RU Pusher VDX Email Debt Collection Service | |
| | Prefix | Description | New |
| | AM | Live | Edit |
| | TE | Test | Delete |
| | | | |
| | | | Test |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | Help | Exit |

Please Note: Due to the additional extra security measures on *Windows Server 2008, Windows 7* and *Vista,* you may need to edit the installation's access control list settings before being able to edit the **AmlibConfig.xml** file – see <u>Appendix 4: Edit Access Control for Amlib VDX ILL Email</u> for more details.

Set Up Database Configuration

The *Amlib Configuration Manager* controls how various *Amlib* applications or services connect to the *Amlib* SQL databases (and the *Amlib* client).

The *Amlib Configuration Manager* uses an **AmlibConfig.xml** file to as part of this configuration, eliminating the need for separate **Amlib** and **SQL.ini** files.

Each application or service utilising the *Amlib Configuration Manager* has its own **AmlibConfig.exe** file (in the same folder containing the program executable).

Please Note: This configuration automatically has the **AM** (Live) and **TE** (Test) databases defined (but not set).

1. The *Amlib Configuration Manager* is launched as part of the **AmlibVDXILLEmailSerivce.msi** installer process, or can be launched separately from the folder where it was installed

| Am | lib Configurai | ion Manager | | | |
|----|-------------------|-------------------------------|----------------------------|------|--------|
| G | onfiguration File | C:\Program Files\OCLC\Amlib V | DXILLEmail\AmlibConfig.xml | New | Open |
| | Amlib Systems | RU Pusher VDX Email Debt | Collection Service | | |
| | Prefix | Description | | | New |
| | AM | Live | | | Edit |
| | TE | Test | | | |
| | | | | | Delete |
| | | | | | Test |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | Help | Exit |

- 2. The *Amlib Configuration* Manager should already be connected to the **AmlibConfig.xml** <u>Configuration File</u> being used by the *Amlib VDX ILL Email* application
- If there is no <u>Configuration File</u> visible (only in very rare cases) open, click on the **Open** button and locate the *Amlib VDX ILL Email* **AmlibConfig.xml** for – it should be located in the same folder as your *Amlib VDX ILL Email* files (for example: C:\Program Files\OCLC (UK)\ Amlib VDXILLEmail)

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| 🗀 C:\Program Files\OCLC\Amlib | VDXILLEmail | | | |
|---|--|----------|-----------------------|---------------------|
| <u>File E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> ools | Help | | | |
| 🔇 Back 👻 🕥 - 🏂 🔎 S | Search 😥 Folders 🛄 🔹 | | | |
| Address 🛅 C:\Program Files\OCLC\Am | lib VDXILLEmail | | | 🔽 🄁 Go |
| | Name 🔺 | Size | Туре | Date Modified |
| File and Folder Tasks 🙁 | Mulib.Business.dll | 89 KB | Application Extension | 4/03/2011 4:50 PM |
| Dename this file | Multip.Circulation.dll | 37 KB | Application Extension | 23/02/2011 12:40 PM |
| | Multip. Circulation . Parameters . dll | 44 KB | Application Extension | 11/02/2011 11:59 AM |
| Move this file | Multip.Configuration.dll | 16 KB | Application Extension | 8/02/2011 3:28 PM |
| Copy this file | Amlib.Controls.dll | 19 KB | Application Extension | 18/08/2010 9:27 AM |
| Publish this file to the Web | Mulib.Data.Core.dll | 27 KB | Application Extension | 1/12/2010 10:58 AM |
| 🚖 E-mail this file | 🔊 Amlib.Data.dll | 2,780 KB | Application Extension | 22/02/2011 12:17 PM |
| 🖌 Delete this file | Multip.Encryption.dll | 7 KB | Application Extension | 24/06/2010 2:34 PM |
| ^ | 🔊 Amlib.Forms.dll | 26 KB | Application Extension | 1/03/2011 10:39 AM |
| | Mulib.InterLibraryLoans.dll | 18 KB | Application Extension | 23/02/2011 2:04 PM |
| Other Places 🏾 🛸 | 🔊 Amlib.PublicKey.dll | 4 KB | Application Extension | 24/06/2010 2:34 PM |
| | 💽 💽 Amlib.Utilities.dll | 34 KB | Application Extension | 4/03/2011 9:18 AM |
| 🔁 oarc | 🔊 Amlib, VDXILLEmail, dll | 18 KB | Application Extension | 28/02/2011 10:03 AM |
| 🕒 My Documents | Multip: XMLSerializer, dll | 7 KB | Application Extension | 22/09/2010 9:54 AM |
| 🛅 Shared Documents | AmlibConfig.xml | З КВ | XML Document | 8/12/2010 9:08 AM |
| 😡 My Computer | AmlibConfigurationManager.chm | 280 KB | Compiled HTML Help | 24/12/2010 2:39 PM |
| My Network Places | AmlibConfigurationManager.exe | 54 KB | Application | 1/03/2011 10:40 AM |
| Thy normal relates | AmlibVDXILLEmail.exe | 18 KB | Application | 8/03/2011 3:18 PM |
| 10 | 🗐 AmlibVDXILLEmail.log | 42 KB | Text Document | 8/03/2011 5:50 PM |
| Details * | MRG.Controls.UI.dll | 11 KB | Application Extension | 6/04/2010 12:56 PM |
| | 📳 VDXILLEmail.log | 3 KB | Text Document | 7/03/2011 4:30 PM |

4. Once the *Amlib Configuration Manager* is opened, the **AM** and **TE** databases will display as default:

| Amlib Configu | rration Manager | |
|--------------------|---|-------------------------------|
| Configuration F | ile AmlibConfig.xml SRU Pusher Debt Collection Servic | New Open |
| Prefix AM TE | Description Live Test | New Edit Delete Test |
| | | Help Exit |

- 5. In the <u>Amlib Systems</u> tab, highlight the **Live** or **Test** database connector and click the **Edit** button– the <u>System Editor</u> will open
 - To add a new connector, select the **New** button

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| Am | lib Configuratio | ı Manager | | |
|----|-----------------------|--|-----|-----------------|
| C | onfiguration File Arr | litsConfig.xm) J Pusher Debt Collection Service | New | Open |
| | Prefix | Description | | New |
| | TE | Test | | L dit Delete |
| | | | | Test |

6. On the <u>General</u> tab, enter the **Prefix** and a **Description** (for Live/Test this will be greyed out)

| System Editor | |
|---------------|-------|
| General Data | Jases |
| Prefix | |
| Prefix | AM |
| Description | Live |
| | |
| | |

| System Editor | |
|---------------|-------------------|
| General Datat | bases |
| Prefix | |
| Prefix | A53 |
| Description | Amlib 53 Database |
| | |
| | |

- 7. On the <u>Databases</u> tab, enter the following details:
 - Choose the details for the **RDBMS** and **OleDbProvider** from the drop-down boxes

| System E | vi 🗖 🗖 |
|----------|--|
| General | Jatabases |
| RDBM | |
| RD | IS SqlServer 🔽 OleDb Provider Sqloledb 🔽 |
| | |

• Enter the details for the Lib database

| Lib—— | | | | |
|--------|--------------|----------|------------|----------------------|
| Server | MYSERVERNAME | Instance | SQLEXPRESS | Port 0 🚭 Copy to all |
| User | SYSADM | Password | ***** | Preifx Override |

- Server enter the name of the Server running your Amlib services
- Instance enter an Instance (if required otherwise leave as Default)
- Port enter a Port number (if required otherwise leave as 0 [for unused])
- User enter the Username for the database connection
- <u>Password</u> enter the **Password** for the database connection the username and password should be the same as that the login for your other *Amlib* databases. **SYSADM/SYSADM** is the default login for most *Amlib* database setups
- Click the **Copy to all** button to copy the details to the other database fields

| RDBMS | SqlServer | Ole | Db Provider Sqloledb | |
|--------|--------------|----------|----------------------|----------------------|
| Lib | | | | |
| Server | MYSERVERNAME | Instance | SQLEXPRESS | Port 0 😭 Copy to all |
| User | SYSADM | Password | ***** | Preifx Override |
| Cat | | | | |
| Server | MYSERVERNAME | Instance | SQLEXPRESS | Port 0 😭 |
| User | SYSADM | Password | ***** | Preifx Override |
| Local | | | | |
| Server | MYSERVERNAME | Instance | SQLEXPRESS | Port 0 |
| User | SYSADM | Password | ***** | Preifx Override |
| Stats | | | | |
| Server | MYSERVERNAME | Instance | SQLEXPRESS | Port 0 😜 |
| User | SYSADM | Password | ***** | Preifx Override |

8. Click the **OK** button once complete – the <u>System Editor</u> window will close

| mlib Configurat | ion Manager | |
|--------------------|---|--------|
| Configuration File | C:\Program Files\OCLC\Amlib VDXILLEmail\AmlibConfig.xml New | Open |
| Prefix | Description | New |
| AM | Live | Edit |
| TE | Test | |
| A53 | A53 Test | Delete |
| | | Test |

Testing

Once complete, the connection can be tested:

1. Highlight the relevant database – for example: **AM** – and click the **Test** button

| Amlib Configura | tion Manager | | | |
|--------------------|--|---------|-----|--------|
| Configuration File | AmlibConfig.xml SRU Pusher Debt Collection | Service | New | Open |
| Prefix | Description | | | New |
| AM | Live | | | Edit |
| TE | Test | | | |
| | | | | Delete |
| | | | | Test |

- 2. The Test Connections window will display with the result
- 3. If errors occur, the reason will display in the Error Details column:
 - Test successful all <u>Result</u>s = OK:

| T AM | меат | | |
|--------|--------|----|--|
| | nuen | OK | |
| AM | MLIB | OK | |
| CAL AM | MLOCAL | OK | |
| ATS AM | MSTATS | OK | |

• Test **unsuccessful** – all <u>Result</u>s = **Fail** with <u>Error Details</u> shown:

| Amlib Database | Database | Result | Error Details | | | |
|----------------------|----------|--------|--|--|--|--|
| DAT | AMCAT | Fail | [DBNETLIB][ConnectionOpen (Connect]).]SQL Server does not exist or access denied. | | | |
| LIB | AMLIB | Fail | [DBNETLIB][ConnectionOpen (Connect()).]SQL Server does not exist or access denied. | | | |
| LOCAL | AMLOCAL | Fail | [DBNETLIB][ConnectionOpen (Connect()).]SQL Server does not exist or access denied. | | | |
| STATS | AMSTATS | Fail | [DBNETLIB][ConnectionOpen (Connect()).]SQL Server does not exist or access denied. | | | |
| Complete with errors | | | | | | |

- 4. Click the **Close** button to close the <u>Test Connections</u> screen
- 5. Click the Exit button once all database connections completed
- 6. Enter a valid *Amlib* username and password and check that you are able to log in to the application.

Set the Schedule

When a request is placed on *VDX*, a structured email is sent to the POP3 mailbox configured in the **Supervisor** > **Installation** setting <u>POP3 server login</u>. The *Amlib Configuration Manager* scheduler can check this mailbox according to a predefined schedule and push the request/s into *Amlib*.

- 1. Launch the Amlib Configuration Manager
- 2. Select the VDX Email tab
- 3. Using the dropdown boxes enter your preferred cycle for automatic processing. We recommend processing on a Daily basis at intervals during the day, for example: this schedule is set up to process once every hour, on the hour click the **Calculate** button to see what time the next scheduled run is due:

| Amlib Systems SRU Pusher VDX Email Debt Collection : | Service | Here | |
|---|-----------------------------|----------|---------|
| Database Prefix Amlib Test Amlib Operator | JOHN | | Service |
| Day None V Time 4:00:00 PM S Start Date 01 Mar 2011 | - Advanced Day | EveryDay | |
| Check Date and Time of next scheduled run Calculate 07 Mar 2011 03:30:00 PM | Every Repeat Interval | Hour | 43 |
| | | [| Save |

4. Ensure the <u>Enabled</u> box is **ticked**:

| Amilb Configuration Manager | |
|--|----------|
| Configuration File AmlibConfig.xml | New Open |
| Amlib Systems SRU Pusher VDX Email Debt Collection Service | |
| Database Prefix Amlib Test 🔽 Amlib Operator JOHN | Service |
| Frequency Daily | Enabled |

- 5. Click the **Service** button the <u>Service</u> prompt will display
- 6. Ensure the Service Status is Running

7. If not, click the **Restart** button and then the **Close** button

| Service | × |
|---|---|
| Service Details Service Amilb VDX ILL Email Service Service Status Running Stop Restart ﷺ | |
| Close | |

8. Click the **Save** button to save all settings and the **Exit** button to close the *Amlib Configuration Manager*. The service only needs to be scheduled once and will then process any emails that come from VDX to the configured mailboxes at this interval.

| mlib Systems SRU | Pusher VDX Email Debt Collection | on Service | |
|-------------------|----------------------------------|---------------|--|
| Database Prefix 🖌 | Amlib Test 🔽 Amlib Operator | JOHN | Service |
| Frequency | Daily | | 🗹 Enabled |
| Day | None 🐱 | | |
| Time | 3:30:25 PM 🔛 | Advanced | |
| Start Date | 01 Mar 2011 🔛 | Day Every | Day 🔽 |
| Check Date | and Time of next scheduled run | Every | 45 🛫 |
| Calculate |] | Repeat Hour | Image: A start of the start |
| | | Interval | 1 😜 |
| | | -9 - <u>9</u> | |

 As ILL requests are pushed into Amlib according to the schedule, notification emails can be sent to library staff using the email addresses set in the Supervisor > Installation screen VDX Email address for alerts and VDX CC Email address for alerts address fields (see Amlib Supervisor Settings below)

OPTION 2: MANUAL EMAIL PROCESSING

IMPORTANT: Please ensure that you have **full read/write** access to the **\Amlib** folder on your server (for example: **C:\Amlib**) and that you are logged in with <u>Administrative Privileges</u>.

We recommend installing the VDX ILL Email on the ILL officer's PC (or Amlib end-user's PC) rather than the server.

- The Amlib VDX ILL Email 5.3.4 installer is available on the OCLC Website, under <u>Downloads</u> and <u>Software Updates>Utilities</u> <u>https://www.oclc.org/support/services/amlib/downloads-software-updates/utilities.en.html</u> (contact Amlib support if you require a login to this website)
- 1. (contact Amlib support if you require a login to this website)
- 2. Download the AmlibVDXILLEmail534.msi and save it on your Amlib PC
- 3. Double-click the **AmlibVDXILLEmail534.msi** to launch the installation Wizard the <u>Setup</u> screen will open displaying the **Welcome** message:



4. Click the **Next** button – the <u>Destination Folder</u> screen will display:

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| 🛃 Amlib VDX InterLibrary Loan Email Setup | |
|--|--------|
| Destination Folder Click Next to install to the default folder or click Change to choose another. | Ð |
| Install Amlib VDX InterLibrary Loan Email to: | |
| C:\Program Files\OCLC\Amlib VDXILLEmail\ | |
| hange | |
| <u>B</u> ack <u>N</u> ext | Cancel |

5. Choose where the program is to be installed (generally leave as default) and select the **Next** button – the <u>Ready to Install</u> screen will display:

| 😸 Amlib VDX InterLibrary Loan Email Setup | |
|---|--------|
| Ready to install Amlib VDX InterLibrary Loan Email | |
| Click Install to begin the installation. Click Back to review or change any of your installation settings. Click Cancel to exit the wizard. | |
| | |
| | |
| <u>B</u> ack Install | Cancel |

6. Click the **Install** button – the <u>Installing</u> window will display:



7. When complete, ensure the <u>Launch Configuration Manager</u> option is **ticked** and click the **Finish** button:



8. The Amlib Configuration Manager will then launch:

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Please Note: Due to the additional extra security measures on *Windows Server 2008, Windows 7* and *Vista,* you may need to edit the installation's access control list settings before being able to edit the **AmlibConfig.xml** file – see <u>Appendix 4: Edit Access Control for Amlib VDX ILL Email</u> for more details.

Set Up Database Configuration

The *Amlib Configuration Manager* controls how various *Amlib* applications or services connect to the *Amlib* SQL databases (and the *Amlib* client).

The *Amlib Configuration Manager* uses an **AmlibConfig.xml** file to as part of this configuration, eliminating the need for separate **Amlib** and **SQL.ini** files.

Each application or service utilising the *Amlib Configuration Manager* has its own **AmlibConfig.exe** file (in the same folder containing the program executable).

Please Note: This configuration automatically has the **AM** (Live) and **TE** (Test) databases defined (but not set).

1. The *Amlib Configuration Manager* is launched as part of the **AmlibVDXILLEmail.msi** installer process, or can be launched separately from the folder where it was installed

| Am | lib Configura | tion Manager | | | |
|----|------------------------------------|--|---------------------------|--------------|--------|
| С | onfiguration File Amlib Systems | C:\Program Files\OCLC\ SRU Pusher VDX Email | Amlib VDXILLEmail\AmlibCo | nfig.xml New | Open |
| | Prefix | Description | | | New |
| | AM | Live | | | Edit |
| | TE | Test | | | Delete |
| | | | | | Test |
| | | | | | TESC |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | Help | Exit |

- 2. The *Amlib Configuration Manager* should already be connected to the **AmlibConfig.xml** <u>Configuration File</u> being used by the *Amlib VDX ILL Email* application
- If there is no <u>Configuration File</u> visible (only in very rare cases) open, click on the **Open** button and locate the *Amlib VDX ILL Email* **AmlibConfig.xml** for – it should be located in the same folder as your *Amlib VDX ILL Email* files (for example: C:\Program Files\OCLC (UK)\ Amlib VDXILLEmail)

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| 🗀 C:\Program Files\OCLC\Amlib | VDXILLEmail | | | |
|---|----------------------------------|----------|-----------------------|---------------------|
| <u>File E</u> dit <u>V</u> iew F <u>a</u> vorites <u>T</u> ools | Help | | | |
| 🔇 Back 👻 🕥 - 🏂 🔎 S | iearch 🦻 Folders 🛄 🔹 | | | |
| Address 🛅 C:\Program Files\OCLC\Am | ib VDXILLEmail | | | 💟 🋃 Go |
| | Name 🔺 | Size | Туре | Date Modified |
| File and Folder Tasks 🙁 | 🔊 Amlib.Business.dll | 89 KB | Application Extension | 4/03/2011 4:50 PM |
| Dename this file | Multip.Circulation.dll | 37 KB | Application Extension | 23/02/2011 12:40 PM |
| | Amlib.Circulation.Parameters.dll | 44 KB | Application Extension | 11/02/2011 11:59 AM |
| Move this file | Mulib.Configuration.dll | 16 KB | Application Extension | 8/02/2011 3:28 PM |
| Copy this file | Amlib.Controls.dll | 19 KB | Application Extension | 18/08/2010 9:27 AM |
| 👩 Publish this file to the Web | Mmlib.Data.Core.dll | 27 KB | Application Extension | 1/12/2010 10:58 AM |
| 🔄 E-mail this file | Manlib.Data.dll | 2,780 KB | Application Extension | 22/02/2011 12:17 PM |
| Velete this file | Amlib.Encryption.dll | 7 KB | Application Extension | 24/06/2010 2:34 PM |
| ^ | 🔊 Amlib.Forms.dll | 26 KB | Application Extension | 1/03/2011 10:39 AM |
| | 🔊 Amlib. InterLibraryLoans. dll | 18 KB | Application Extension | 23/02/2011 2:04 PM |
| Other Places | Amlib.PublicKey.dll | 4 KB | Application Extension | 24/06/2010 2:34 PM |
| | Amlib.Utilities.dll | 34 KB | Application Extension | 4/03/2011 9:18 AM |
| 🗁 oarc | Amlib. VDXILLEmail. dll | 18 KB | Application Extension | 28/02/2011 10:03 AM |
| 📋 My Documents | Mulib.XMLSerializer.dll | 7 KB | Application Extension | 22/09/2010 9:54 AM |
| 🛅 Shared Documents | AmlibConfig.xml | ЗКВ | XML Document | 8/12/2010 9:08 AM |
| My Computer | AmlibConfigurationManager.chm | 280 KB | Compiled HTML Help | 24/12/2010 2:39 PM |
| My Network Places | AmlibConfigurationManager.exe | 54 KB | Application | 1/03/2011 10:40 AM |
| THY INCOMENT PLACES | AmlibVDXILLEmail.exe | 18 KB | Application | 8/03/2011 3:18 PM |
| | 🗐 AmlibVDXILLEmail.log | 42 KB | Text Document | 8/03/2011 5:50 PM |
| Details | MRG.Controls.UI.dll | 11 KB | Application Extension | 6/04/2010 12:56 PM |
| | VDXILLEmail.log | 3 KB | Text Document | 7/03/2011 4:30 PM |

4. Once the *Amlib Configuration Manager* is opened, the **AM** and **TE** databases will display as default:

| Am | mlib Configuration Manager | | | | | | |
|----|-------------------------------------|-----------------------------|--|------|-------------------------------|--|--|
| C | ionfiguration File Amlib Systems | AmlibConfig.xml | | New | Open | | |
| | Prefix AM TE | Description Live Test | | | New Edit Delete Test | | |
| | | | | Help | Exit | | |

- 5. In the <u>Amlib Systems</u> tab, highlight the **Live** or **Test** database connector and click the **Edit** button– the <u>System Editor</u> will open
 - To add a new connector, select the **New** button

Amlib VDX ILL Email: Installation Guide

| Amlib Configur | ation Manager | |
|--------------------|---|----------|
| Configuration File | AmilbConfig.xml SRU Pusher Debt Collection Service | New Open |
| Prefix | Description | New |
| TE | Test | |
| | | Test |

6. On the <u>General</u> tab, enter the **Prefix** and a **Description** (for Live/Test this will be greyed out)

| System Editor | |
|---------------|-------|
| General Data | bases |
| Prefix | |
| Prefix | AM |
| Description | Live |
| | |
| | |

| System Editor | |
|---------------|-------------------|
| General Datat | bases |
| Prefix | |
| Prefix | A53 |
| Description | Amlib 53 Database |
| | |
| | |

- 7. On the <u>Databases</u> tab, enter the following details:
 - Choose the details for the **RDBMS** and **OleDbProvider** from the drop-down boxes

| System E | vi 🗖 🗖 |
|----------|--|
| General | Jatabases |
| RDBM | |
| RD | IS SqlServer 🔽 OleDb Provider Sqloledb 🔽 |
| | |

• Enter the details for the Lib database

| Lib | | | | |
|--------|--------------|----------|------------|----------------------|
| Server | MYSERVERNAME | Instance | SQLEXPRESS | Port 0 😭 Copy to all |
| User | SYSADM | Password | ***** | Preifx Override |

- Server enter the name of the Server running your Amlib services
- Instance enter an Instance (if required otherwise leave as Default)
- Port enter a Port number (if required otherwise leave as 0 [for unused])
- User enter the Username for the database connection
- <u>Password</u> enter the **Password** for the database connection the username and password should be the same as that the login for your other *Amlib* databases. **SYSADM/SYSADM** is the default login for most *Amlib* database setups
- Click the **Copy to all** button to copy the details to the other database fields

| DDDMC | | | | |
|--------|--------------|----------|----------------------|----------------------|
| RDBMS | SqlServer | Ole | Db Provider Sqloledb | |
| Lib | | | | |
| Server | MYSERVERNAME | Instance | SQLEXPRESS | Port 0 😜 Copy to all |
| User | SYSADM | Password | ***** | Preifx Override |
| Cat | | | | |
| Server | MYSERVERNAME | Instance | SQLEXPRESS | Port 0 😜 |
| User | SYSADM | Password | ***** | Preifx Override |
| Local | | | | |
| Server | MYSERVERNAME | Instance | SQLEXPRESS | Port 0 |
| User | SYSADM | Password | ****** | Preifx Override |
| Stats | | | | |
| Server | MYSERVERNAME | Instance | SQLEXPRESS | Port 0 |
| User | SYSADM | Password | ***** | Preifx Override |

8. Click the **OK** button once complete – the <u>System Editor</u> window will close

| mlib Configuration Manager | | | | | | |
|----------------------------|---|--------|--|--|--|--|
| Configuration File | C:\Program Files\OCLC\Amlib VDXILLEmail\AmlibConfig.xml New | Open | | | | |
| Prefix | Description | New | | | | |
| AM | Live | Edit | | | | |
| TE | Test | | | | | |
| A53 | A53 Test | Delete | | | | |
| | | Test | | | | |

Testing

Once complete, the connection can be tested:

- 1. Highlight the relevant database for example: **AM** and click the **Test** button
- 2. The Test Connections window will display with the result
- 3. If errors occur, the reason will display in the Error Details column:
 - Test successful all <u>Result</u>s = OK:

| Amlih Database | Database | Bacult | Error Detaile |
|----------------|----------|--------|---------------|
| CAT | AMCAT | OK | |
| LIB | AMLIB | ОК | |
| LOCAL | AMLOCAL | ОК | |
| STATS | AMSTATS | OK | |
| | | | |

• Test **unsuccessful** – all <u>Result</u>s = **Fail** with <u>Error Details</u> shown:

| Amlib Database | Database | Basult | Free Details |
|----------------|-------------|--------|--|
| CAT | AMCAT | Fail | [DBNETLIB][ConnectionOpen (Connect]]).]SQL Server does not exist or access denied. |
| LIB | AMLIB | Fail | [DBNETLIB][ConnectionOpen (Connect()).]SQL Server does not exist or access denied. |
| LOCAL | AMLOCAL | Fail | [DBNETLIB][ConnectionOpen (Connect()).]SQL Server does not exist or access denied. |
| STATS | AMSTATS | Fail | [DBNETLIB][ConnectionOpen (Connect()).]SQL Server does not exist or access denied. |
| 🂥 Complete | with errors | _ | Stop |

- 4. Click the Close button to close the Test Connections screen
- 5. If you have both options installed, it is important to ensure that the **Enabled** button is **NOT** ticked if you intend to process emails manually as this could cause duplicate requests

Amlib VDX ILL Email: Installation Guide

| Amlib Configuration | Manager | |
|-----------------------|--|----------|
| Configuration File Am | ibConfig.xml | New Open |
| Amlib Systems SRU | Pusher VDX Email Debt Collection Service | |
| Database Prefix | A53 Test 🔽 Amlib Operator FIONA | Service |
| Frequency | Daily | Enabled |
| Day | None | |

- 6. Click the Exit button once all database connections completed
- This process has also installed and configured the AmlibVDX InterLibrary Loan Email program. Access this program for your *Start* menu, or from Windows Start > All Programs > AmlibVDXILLEmail > Amlib VDX InterLibrary Loan Email
- 8. Enter a valid *Amlib* <u>Username</u> and <u>Password</u> and check that you are able to log in to the application

CREATE POP3 MAILBOXES

IMPORTANT: Configuration of the Amlib VDX ILL Email application/service requires the creation of Location-specific POP3 email user accounts (mailboxes) for use by the Amlib client. Once set-up, these location-specific Amlib mailbox addresses MUST be added into the State Library of WA (SLWA) VDX system against the specific user locations. After entering their email settings in the Amlib client, users should contact Sandra Jones (sandra.jones@slwa.wa.gov.au) at SLWA providing the email addresses to be added to their VDX configuration. SLWA will arrange for these configuration changes on their behalf (which will also include testing).

Please Note: It is not possible to use a standard *Exchange* mailbox with the *Amlib VDX/ILL Email* application/service.

IMPORTANT: The POP3 mailboxes created should NOT use **SSL** as this system does not support **SSL**. This VDX ILL Email program will only be within your internal network so there is no security risk.

AMLIB SUPERVISOR SETTINGS

IMPORTANT: Configuration of the *Amlib VDX ILL Email* application/service requires the creation of **Location-specific POP3 email user accounts (mailboxes)** for use by the *Amlib* client.

Supervisor Parameters

- 1. Launch the Amlib client
- 2. Navigate to Main > Supervisor > Installation the Installation (DEFAULT) table will display
- 3. From the menu, select **Installation** > **Choose Location** the <u>Installation</u> location selection screen will display
- Highlight your main location (libraries with multiple circulating locations should select one of these locations) and click the OK button – the <u>Installation</u> screen for the selected location will display
- 5. Select the **Other** tab

| iin LibraryN | fenu Installation | | |
|--------------|---|------------------------------|---------|
| | F3 Save F5 Query | | |
| All | Borrower Catalogue Circulation Stockiter | n Syste <u>m</u> Other | |
| | Chelsea Library | | |
| | Description | Value | |
| SMTP sei | ver login | 4 | |
| ✓ SMTP Se | ver name or IP address | libraryserver.com.au | |
| SMTP sei | ver password | | |
| SMTP sei | ver requires a login? | N | |
| Spreadsh | eet: (E)xcel | | |
| System L | anguage (ENGLISH or RUSSIAN Only) | | |
| System s | upplied Order No (Y/N) | | |
| Use cat w | orksheet for periodical cataloguing | | |
| Use Wind | ows keyboard shortcuts instead of Amlib shortcuts (Y/N) | | |
| VDX Alert | email level - None (N), Error (E), Success (S), Both - Error and Success (B |) B | |
| VDX CC E | mail address for alerts | firstname.lastname@mylib.com | |
| VDX Ema | Il address for alerts | library.manager@mylib.com | |
| VDX POP | 3 server address | myemailserver.com.au | |
| VDX POP | 3 server login | emailogin | 1 |
| VDX POP | 3 server password | emailpass | ······· |

- 6. Scroll down and enter the following *VDX* POP3-related settings:
 - a. <u>VDX Alert email level None (N), Error (E), Success (S), Both Error and Success (B)</u>¹ enter **N**, **E**, **S** or **B**
 - b. <u>VDX CC Email address for alerts</u>² for example: **firstname.lastname@mylib.com**
 - c. <u>VDX Email address for alerts</u>³ for example: **firstname.lastname@mylib.com**
 - d. <u>VDX POP3 server address</u>⁴ for example: **myemailserver.com.au**
 - e. <u>VDX POP3 server login</u>⁵ –enter the POP3 Server login
 - f. <u>VDX POP3 server password</u>⁶ enter the POP3 server password

IMPORTANT: Please refer to the detailed notes overleaf before completing these settings.

Important Information about Entering Your POP3 Settings:

- ¹When the VDX email data is processed by the Amlib VDX/ILL Email client from the nominated POP3 mailbox (see 5 and 6 below), it is possible for the Amlib client to generate a user alert email which is sent to selected library staff email addresses informing them that the incoming requests have been processed. This setting is used to determine when these user alerts are sent. The following choices are available: None (N), Error (E), Success (S), Both Error and Success (B). If you intend to send out user alerts, then you will also need to configure your SMTP settings (see step 7).
- ²The CC email address to be used for user alert emails to *library staff* (see 1 above). This is NOT the same as the POP3 account/email address that is being the used by VDX to send ILL request emails and (if used) it MUST be configured to use an entirely different email account/email address. If VDX Alert email level None (N), Error (E), Success (S), Both Error and Success (B) = N, then there is no need to enter a CC email address.
- ³The primary email address to be used for user alert emails to *library staff* (see 1 above). This is NOT the same as the POP3 account/email address that is being the used by VDX to send ILL request emails and (if used) it MUST be configured to use an entirely different email account/email address. If VDX <u>Alert email level None (N), Error (E), Success (S), Both Error and Success (B)</u> = N, then there is no need to enter a primary email address.
- ⁴The hostname or IP address of the mail server hosting the POP3 mailbox that has been set up to receive VDX emails for this location
- ⁵The user login name for the POP3 mailbox that has been set up to receive VDX emails for this location, which will then be processed by the Amlib VDX/ILL Email client
- ⁶The password for the POP3 mailbox that has been set up to receive VDX emails for this location, which will then be processed by the Amlib VDX/ILL Email client a password is required.
- 7. Scroll up and enter the following SMTP settings:

Important Information about Entering Your SMTP Settings:

- Your SMTP server settings are used to push user alert emails out of the Amlib client to library staff
- If you do not intend to setup user alert emails for library staff (VDX Alert email level None (N), Error (E), Success (S), Both - Error and Success (B) = N), then there is no need to configure your SMTP settings
- If you already have your SMTP settings defined (for email notifications to users, etc) either on the <u>DEFAULT</u> screen or on the individual location screen, then there is no need to change them
 - a. <u>SMTP server name or IP address</u> for example: **libraryserver.com.au**
 - b. <u>SMTP sender email address</u> for example: **library.staff@mylib.com**
 - c. <u>SMTP server requires a login Y/N</u> for example: Y
 - d. <u>SMTP server login</u> (only if required) for example : serverlogin
 - e. <u>SMTP server password</u> (only if required) for example : serverpassword
- 8. Click the F3 Save button when complete
- 9. Exit and restart the Amlib client for changes to take effect

Enter Email Server Details for Individual Locations

Please Note: The *VDX* <u>POP3</u> Email server settings **should not** be entered on the <u>Installation</u> (<u>DEFAULT</u>) screen as they are required to be entered against a *specific* location (even if you only have one circulating location). Libraries operating multiple circulating locations should simply repeat steps 2-9 above to enter the <u>POP3</u> server and user alert email details for each circulating location.

Please Note: When communicating details of these email addresses to *SLWA*, please ensure that you specify which locations they are to be configured against.

Setup the VDX Location

A new location of **VDX** needs to be created as this will be the <u>Permanent Location</u> used by the temporary Stockitem records created for incoming the *VDX* ILL items.

- 1. Launch the Amlib client
- 2. Go to Main > Supervisor > Locations- the Locations screen will display
- 3. Click the **F1 New** button and enter a new location as below:
 - a. Library Group Code use the same Library Group Code as your main location
 - b. Locn Code *must* be **VDX**
 - c. Location Description can be whatever you choose for example: VDX ILLS
- 4. Click the F3 Save button

| 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - | Jave 14Delete | F5 Query F6 Print F7 HetWk F8 Plans F9 Hours | |
|---|---------------|--|--|
| Library Group Code | Locn Code | Location Description | |
| ORPORATE | CORPORATE | Corporate Library | |
| IBRARY | BELMONT | Belmont Library | |
| IBRARY | CHELSEA | Chelsea Library | |
| IBRARY | DTL | DTL Location | |
| IBRARY | HASTINGS | Hastings Library | |
| IBRARY | HOME | Home Library Service | |
| IBRARY | ILL | Inter Library Loans | |
| IBRARY | LIBRARY PROCE | Library Processing | |
| IBRARY | MISSING | Missing | |
| | | | |

- 5. Go to Menu > Supervisor > Installation the Installation (DEFAULT) screen will display
- 6. From the menu, select Installation > Choose Location the Installation screen will display:

| Code | Details | Group |
|---------|-----------------------|----------|
| HOME | Home Library Service | LIBRARY |
| ILL | Inter Library Loans | LIBRARY |
| LIBRARY | Library Processing | LIBRARY |
| MISSING | Missing | LIBRARY |
| MOBILE | Mobile Library | MOBILE |
| MOBILE1 | Mobile Stop 1 (Shops) | MOBILE |
| MOBILE2 | Mobile Stop 2 (Commun | i MOBILE |
| STACK | Stack | LIBRARY |
| VDX | VDX ILLS | LIBRARY |
| WEB | Web | LIBRARY |
| | | |
| | | |

7. Highlight the VDX location and click the OK button – the Installation (VDX) table will display:

| 28 Pi | stallation - STAFF at Chelsea Library (A.53 DB v5.3) | |
|--------------|--|-------------------|
| <u>M</u> ain | LibraryMenu Installation | |
| | F3 Save F5 Query | |
| | <u>All</u> <u>Borrower</u> Ca <u>t</u> alogue <u>C</u> irculation <u>S</u> tockitem | System Other |
| | | |
| | Description | Value 🔼 |
| | Description E-mail Attachment Path | Value |
| | Description E-mail Attachment Path E-mail Maximum Attachment Size (kb) | Value |
| | Description E-mail Attachment Path E-mail Maximum Attachment Size (kb) E-mails are sent using the following method: (M)API or (I)nternal or (S)MTP | Value |
| | Description E-mail Attachment Path E-mail Maximum Attachment Size (kb) E-mails are sent using the following method: (M)API or (I)nternal or (S)MTP Location is Valid for Holdings | Value Value Y |
| | Description E-mail Attachment Path E-mail Maximum Attachment Size (kb) E-mails are sent using the following method: (M)API or (I)nternal or (S)MTP Location is Valid for Holdings Location is Valid for OPAC Enquiries | Value Value Y N |
| | Description E-mail Attachment Path E-mail Maximum Attachment Size (kb) E-mails are sent using the following method: (M)API or (I)nternal or (S)MTP Location is Valid for Holdings Location is Valid for OPAC Enquiries Location is Valid for Registrations & Circulation | Value Value Y N N |

8. Select the **Other** tab and enter the settings:

- Location is Valid For Holdings: Y
- Location is Valid for OPAC enquires: N
- Location is Valid For Registration and Circulation: N
- 9. Click the F3 Save button when complete
- 10. Exit and restart the Amlib client for the new settings to take effect

Group Permissions

Sites that are employing Group Security will need to add extra Supervisor permissions. Non Super Groups will require these permissions to be able to select a processing location:

- View permission on another Group's Parameters
- View permissions on another Group's Locations
- Insert permission on another Group's Items
- Hold permission on another Group's Items
- Hold permission on another Group's Borrowers
- 1. Launch the Amlib client
- 2. Go to Main > Supervisor > Locations the Locations screen will display:



3. Select LibraryMenu > LibraryGroupPermits – the Library Group Permits screen will display:

| <mark>ƏLibrar</mark> y Lain Librar | / Group Per ryMenu | mits - STA | FFat Chels | ea Library | (A.53 DB v5. | 3) | |
|---------------------------------------|-----------------------|------------|------------|------------|--------------|-----------------|---|
| F1 New | F2 Insert | F3 Save | F4 Delete | F5 Query | F6 Print | | |
| | Give T | o Group | | Action | Table | Give From Group | |
| COF | PORATE | 1144 | Hold | 1 | Borrowers | LIBRARY | |
| COF | RPORATE | | Viev | V | Borrowers | LIBRARY | |
| COF | RPORATE | | Hold | I | Items | LIBRARY | *************************************** |
| COF | RPORATE | | Inse | ft | Items | LIBRARY | |
| COF | RPORATE | | Viev | ۷ | Items | LIBRARY | ****** |
| COF | RPORATE | | Viev | ٧ | Location | LIBRARY | |
| COF | PORATE | | Viev | V | Parameters | LIBRARY | |

- 4. Click the **F1 New** button to enter the above settings so the operator is able to process the *VDX* emails for all other locations
- 5. Click the **F3 Save** button when complete
- 6. Exit and restart the Amlib client for the new settings to take effect

Check Digit Setup

A 14-digit ILLS-related check digit code will need to be setup.

- 1. Launch the *Amlib* client
- 2. Go to Main > Supervisor > CheckDigits the <u>Check-digit Calculations</u> screen will display:

| in Librar | ryMenu | | | | | | | |
|---------------------------|------------|------------------------------------|----------------------|---|--|--|---|------------------------------|
| 1 New | F2 Insert | F3 Save | F4 Delete | F5 Query F6 | Test | | | |
| Item | > | Borrow | er | Press F6 to test the | The leading and alphanumeric c | trailing column | s can be a le followin | combination of g symbols: |
| | | | | Barcode | # - Indicates an ? - Indicates an & - Indicates an | y alphabetic char y alphabetic ch y alphanumeric | acter aracter character | |
| (l)ter (B)or | m rr Le | Weight ft to Right separated | s comma d list | Barcode Use as Cd Depending on remainder | # - Indicates ar ? - Indicates ar & - Indicates ar Leading Chars | ry numeric char iy alphabetic ch iy alphanumeric Trailing Chars | acter aracter character Length | Mod |
| (I)ter (B)or B | m rr Le | Weight ft to Right separated | s comma 1 list | Barcode Use as Cd Depending on remainder | # - Indicates ar ? - Indicates ar & - Indicates ar Leading Chars B# | y numeric char iy alphabetic ch iy alphanumeric Trailing Chars ## | acter aracter : character Length 4 | Mod |
| (I)ter (B)or B I | n rr Le | Weight ft to Right separated | s comma 1 list | Barcode Use as Cd Depending on remainder | # - Indicates ar ? - Indicates ar & - Indicates ar Leading Chars B# | y numeric char ny alphabetic ch ny alphanumerid Trailing Chars ## ## | acter aracter character Length 4 4 | Mod 0 0 |

- 3. Click the **F1 New** button a new entry will appear in the table
- 4. Enter the following information to construct a 14-digit check barcode:
 - a. <u>(Item) (B)orr</u>: I
 - b. Leading Chars: ILLS
 - c. <u>Trailing Chars</u>: **############**

(Please Note: The above setting is composed of a string of 10 #.)

| New i | 2 Insert F3 Save F4 Delete | F5 Query F6 | Test | | | |
|------------------|--|--|---|---|--|-----------------------------------|
| • Item | C Borrower | Press F6 to test the Barcode | The leading and alphanumeric c # - Indicates an ? - Indicates an & - Indicates an | I trailing columns haracters and the ny numeric charac ny alphabetic char ny alphanumeric | can be a followin cter acter character | combination of g symbols: - |
| (I)tem (B)orr | Weights Left to Right comma separated list | Use as Cd Depending on remainder | Leading Chars | Trailing Chars | Length | Mod |
| В | | | B# | ## | 4 | 0 |
| 1 | | | I# | ## | 4 | 0 |
| 1 | | | <mark>&</mark> # | ### | 5 | 0 |
| В | | | B# | ### | 5 | 0 |
| 1 | | | CVR | ### | 6 | ⁰ 10 #'s |
| 1 | | | ### | ### | 6 | 0 10 # 3 |
| В | 1,2,1,2,1 | 0123456789 | E | | 7 | 10 |
| 1 | | | CVR | #### | 7 | 0 |
| 1 | 11,128,64,32,16,8,4,2 | 01234567890 | | | 9 | 11 |
| D | 1 2+ 1 2+ 1 2+ 1 2+ | 0123456790 | | | 0 | 10 |

Click the F3 Save button – a prompt with the following message will display:
 A new OFFLINE.INI file has been created for use with Offline Issues, Offline Returns and Offline Stocktake.



- 6. Click the **OK** button
- 7. You will then see a barcode of **14 digits** in length:

| New F2 | Insert F3 Save F4 Delete | F5 Query F6 | Test | | | |
|------------------|--|--|---|--|---|------------------------------|
| item | C Borrower | Press F6 to test the Barcode | The leading and alphanumeric of # - Indicates a ? - Indicates a & - Indicates a | d trailing columns characters and the ny numeric charac ny alphabetic char ny alphanumeric | can be a followin cter racter character | combination of g symbols: |
| (I)tem (B)orr | Weights Left to Right comma separated list | Use as Cd Depending on remainder | Leading Chars | Trailing Chars | Length | Mod |
| Ĩ | | | &#</td><td>###</td><td>5</td><td>0</td></tr><tr><td>В</td><td></td><td></td><td>B#</td><td>###</td><td>5</td><td>0</td></tr><tr><td>1</td><td></td><td></td><td>CVR</td><td>###</td><td>6</td><td>0</td></tr><tr><td>I</td><td></td><td></td><td>###</td><td>###</td><td>6</td><td>0</td></tr><tr><td>В</td><td>1,2,1,2,1</td><td>0123456789</td><td>L</td><td></td><td>7</td><td>10</td></tr><tr><td>I</td><td></td><td></td><td>CVR</td><td>####</td><td>7</td><td>0</td></tr><tr><td>I.</td><td>11,128,64,32,16,8,4,2</td><td>01234567890</td><td></td><td></td><td>9</td><td>11</td></tr><tr><td>В</td><td>1,2+,1,2+,1,2+,1,2+</td><td>0123456789</td><td></td><td></td><td>9</td><td>10</td></tr><tr><td>В</td><td></td><td></td><td>88888</td><td>&&&&&&&</td><td>12</td><td>0</td></tr><tr><td>1</td><td></td><td></td><td>88888</td><td><u>&&&&&&</u></td><td>12</td><td>0</td></tr><tr><td>В</td><td>1,2+,1,2+,1,2+,1,2+,1,2+,1,2+</td><td>6789012345</td><td>2</td><td></td><td>14</td><td>10</td></tr><tr><td> </td><td></td><td></td><td><u>&&&&&&&&</u></td><td><mark>&&&&&&&&</mark></td><td>14</td><td>0</td></tr><tr><td>I</td><td></td><td></td><td>ILLS</td><td>*******</td><td>14</td><td>0</td></tr><tr><td></td><td>1</td><td>•</td><td></td><td>1</td><td>100000</td><td></td></tr></tbody></table> | | | |

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

STOCKITEM ILL DEFAULT SETTINGS

- 1. Launch the Amlib client
- 2. Go to Main > StockItems > Stockitem the Stockitem screen will display
- 3. From the menu, select Item > ILLS the Interlibrary Loans screen will display:

| F1 Clear | F2 Insert | F3 Save | F4Browser F | 5 Refrsh F6 Upo | IDef F7 Prt1 | F8 Prt2 F | 9 Prt3 F10 U | lpper |
|-----------------|-----------|-----------|-------------|-----------------|--------------|---|-------------------------------------|-------|
| uthor: | 41 | 6 - Lis | | 1.191 | | | | |
| Title | | | | | | | Browser | 8 |
| lass: | | | | | On O | rder N | Paramet | ers |
| Ext. Ref No | 1 | Other I | ref | | | Part of the second s | User na | me |
| Publisher | 1 | eg ise | | | | | TREVIN | 0 |
| Cost | | Date/Ed | ition |); | | | Passwo | rd |
| | | | | | | | | |
| Supplying | 5 | | | | | | HTML F | le |
| Libraries | | _ | | | | | \amlib\B | ASE. |
| Requesting | CHELSEA | CHELS | SEALIBRARY | | | | and the second | |
| Collection At | | CHELS | BEALIBRARY | * Borrow | er | | ** Note: * Only these fields may | |
| ptional Item Co | ode | | | | | | be Updated | |
| Comments * | | | | | | | | |
| Status | | | Date | | | | | |
| Item * Form | Stats. | Source Lo | anType Opa | c Alert Oper | PermLocn | TempLocn | Patron Regd | |
| oreate BK | ILL | | 1 | 1 Y | I Supplier | Supplier | | |

- 4. Ensure that the following <u>Item Create Defaults</u> are set:
 - <u>Form</u>: set the default Form code to be used for **all** ILL items (including VDX) for example: Form = BK
 - <u>Stats</u>: set the default Stats code to be used for all ILL items (including VDX) for example: Stats = ILL
- 5. Click the **F6 UpdDef** button when complete

The *Amlib* client setup is now complete.

APPENDICES

Appendix 1: Antivirus Email Block

Some antivirus systems may prevent the alert email from being sent. To prevent this you must check the Access protection rules. This example covers how to do this with *McAfee*.

1. Right-click on the *McAfee* icon in the *System* tray and select **VirusScan Console...**



2. The <u>VirusScan Console</u> will display:



3. Right-click on **Access Protection** and select **Properties** – the <u>Access Protection Properties</u> screen will display:

| Use access protection rules to protect you Enable access protection | r system's access po | iints and prev | ent termination of McAfee processes, |
|---|----------------------|----------------|---|
| Categories | Block | Report | Rules |
| Anti-virus Standard Protection Anti-virus Maximum Protection Anti-virus Dutbreak Control | | | Prevent registry editor and Task Manager from being disabl Prevent user rights policies from being altered Prevent remote creation/modification of executable and co |
| Common Standard Protection Common Maximum Protection Virtual Machine Protection User-defined Rules | | 4 | Prevent remote creation of autorun files Prevent hijacking of .EXE and other executable extensions Prevent Windows Process spoofing Prevent mass mailing worms from sending mail |
| | N | 4 | Prevent IRC communication Prevent use of tftp.exe |
| | < | 4 | |
| | | | Edit |
| Prevent McAfee services from being stop | ped | | |
| 1 To York may be services from being sup | 50 <u>9</u> | | |

4. Click on the tick in the Block column against Prevent Mass mailing worms from sending mail

| Categories | Block | Report | Rules |
|---|-------|----------|--|
| Anti-virus Standard Protection Anti-virus Maximum Protection Anti-virus Outbreak Control Common Standard Protection Common Maximum Protection Virtual Machine Protection | 1 | ĩ | Prevent registry editor and Task Manager from being disab Prevent user rights policies from being altered Prevent remote creation/modification of executable and co Prevent remote creation of autorun files Prevent hijacking of .EXE and other executable extension: Prevent Windows Process spoofing |
| User-defined Hules | N | N. N. | Prevent mass mailing worms from sending mail Prevent IRL communication Prevent use of titp.exe |
| K | | 1 | Edit |

- 5. Once the tick is *removed* click the **Apply** button
- 6. Then click the **OK** button

The setting changes are complete.

Appendix 2: Enable Logging for Troubleshooting

Logging of errors and exceptions is available for the manual and automatic solutions. It is recommended that logging for the Automated Service is only enabled for troubleshooting purposes to prevent large log files from being created.

Logging of exceptions for the *Amlib VDX ILL Email* manual client occurs automatically, and is recorded in the **AmlibVDXILLEmail.log file** in the folder where the application installed.



Enabling Troubleshooting logging for the service:

1. Open the **Services** control panel



2. Right-click on the Amlib VDX ILL Email Service and select Properties



3. The Amlib VDX ILL Email Service Properties screen will display:

| ieneral Log () | n Recovery Dependencies |
|---|--|
| Service name: | AmlibVDXILLEmailService |
| Display <u>n</u> ame: | Amlib VDX ILL Email Service |
| Description: | < > |
| Pat <u>h</u> to executa | able: |
| "C:\Program Fil | les\OCLC\Amlib VDXILLEmail\AmlibVDXILLEmailService.ex |
| Startun tvne: | Automatic |
| | Automatic |
| Service status: | Stated |
| Service status: | Slatted Besume |
| Service status: Start (You can specify from here. | Stated Stop Pause Resume y the start parameters that apply when you start the service |
| Service status: Start You can specify from here. | Started Stop Pause Resume y the start parameters that apply when you start the service s: |

4. Click the **Stop** button if the service is running

5. Enter -I in the Start parameters and click the Start button



- 6. Click the **OK** button
- 7. As processing occurs, the event is recorded in **AmlibVDXILLEmailService.log** file on the server where the program is installed

Appendix 3: Switching between Automated and Manual Service

Please Note: If the library decides to go from *Automated* processing to *Manual* processing, it is very important to disable the service on the server.

- 1. Launch the Amlib Configuration Manager
- 2. Click on the VDX Email tab

| Amlib Systems SRU | Pusher VDX Email Debt C | ollection Service | | |
|-------------------|--------------------------------|-------------------|----------|--------|
| Database Prefix | A53 Test 🛛 Amlib Op | erator JOHN | Se Se | arvice |
| Frequency | Daily | | | nabled |
| Day | None 👻 | | | |
| Time | 4:50:56 PM | Advanced | | |
| Start Date | 09 Mar 2011 | Day | EveryDay | |
| Check Date | and Time of next scheduled rur | Every | | 10 |
| Calculate | | Repeat | Minute | ~ |
| | | Interval | | 5 |
| | | | | |

- 3. **Un-tick** the <u>Enabled</u> button
- 4. Click the **Service** button the <u>Service</u> prompt will display:

| Service | × |
|-----------------------------|---|
| C Service Details | _ |
| Service | |
| Amlib VDX ILL Email Service | |
| Service Status | |
| Running | |
| Stop Restart | |
| Close | |

- 5. Click the Restart button
- 6. Click the **Close** button when complete

Please Note: Correspondingly, if the library decides to go from Manual processing to an Automated Service, it is best to uninstall the *Amlib VDX ILL Email* program for the library end user's computers.

Appendix 4: Edit Access Control for Amlib VDX ILL Email

Due to the additional extra security measures on *Windows Server 2008, Windows 7* and *Vista,* you may need to edit the installation's access control list settings before being able to customise the **AmlibConfig.xml** file.

- Locate the folder containing the VDX ILL Email utility for example C:\Program Files\OCLC\Amlib VDXILLEmail
- 2. Right-click on the Amlib VDXILLEmail folder and select Properties

| | | | | | | | | × |
|---|----------------------------------|--|-------------------------------------|---------------------|------|-----------------|-----|---|
| → My Computer → OS (C:) | Program File | s > OCLC > | | | | • 4 Search OCLC | | ٩ |
| Organize 🔻 🚼 Open 🛛 Include in lib | orary 🔻 Sh | are with v Burn New | folder | | | | · · | 0 |
| Favorites | Name 🍶 Amlib FinTr | ansUpgrade | Date modified 21/06/2011 2:22 PM | Type File folder | Size | | | |
| Convoltads Convoltads Convoltads Convoltads Convoltads Convoltads Convoltads Convoltads Convoltation Convolted Conv | | Open Open in new window 7-Zip ALZip Self-Extractor (EXE) Add with ALZip Add to Amlib VDXILLEmail.zip Add to Amlib VDXILLEmail.zip Share with SVN Checkout TortoiseSVN Scan for threats Restore previous versions Include in library Send to Cut Copy Paste Create shortcut | and Email | File folder | | | | |
| - | | Delete Rename Properties | | | | | | |

- 3. The Amlib VDXILLEmail Properties screen will display
- 4. Select the <u>Security</u> tab



5. Click the Edit... button - the Permissions for Amlib VDXILLEmail screen will display

- 6. In the Group or user names: pane, click on the Users entry
- Then in the <u>Permissions for Users</u> pane, check the <u>Allow</u> checkbox for the <u>Modify</u> setting this will give Users the necessary group permission to apply modifications to files and folders in the **Amlib VDXILLEmail** folder:

| Object name: C:\Program File | es\OCLC\Amlib VDX | ILLEmail |
|--|---|---|
| Group or user names: | | |
| REATOR OWNER | | |
| SYSTEM | 24 D. C. | |
| Administrators (TARDIS)A | dministrators) | |
| Users (TARDIS\Users) | | |
| Hustedinstaller | | |
| | | |
| | A <u>d</u> d | Remove |
| Permissions for Users | Allow | Deny |
| | 100 | - |
| Full control | the second se | |
| Full control Modify | V | the second se |
| Full control Modify Read & execute | | |
| Full control Modify Read & execute List folder contents | | |
| Full control Modify Read & execute List folder contents Read | | |

8. This action will automatically **check** the <u>Allow</u> checkbox for the <u>Write</u> setting:

| Permissions for Users | Allow | Deny | | | | |
|--|----------|------|---|--|--|--|
| Read & execute | ~ | | * | | | |
| List folder contents | 1 | | | | | |
| Read | ~ | | = | | | |
| Write | v | | | | | |
| Special permissions | | | - | | | |
| Learn about access control and permissions | | | | | | |
| OK Cancel Apply | | | | | | |

9. Click on the **OK** button on the <u>Permissions for Amlib VDXILLEmail</u> and the <u>Amlib VDXILLEmail</u> <u>Properties</u> screens to complete the change of permissions