

Amlib Release Notes

Version 6.1

Last Updated: 4 February 2015

Amlib Release Notes - Version 6.1

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CONTENTS

SUMMARY OF NEW FEATURES IN VERSION RELEASE 6.1	5
Release V6.1 – Also provides enhancements and fixes in the following Amlib components:.....	5
* Amlib client.....	5
* Amlib SIP2 manager	5
* Amlib OpenOPAC.....	5
FIXES PROVIDED FOR THE FOLLOWING ISSUES.....	6
AMLIB CLIENT:	6
Supervisor.....	6
Authorities.....	6
Catalogue.....	7
Stockitem.....	7
Circulation	8
Borrower	8
Reservations	8
Reports	9
Finance	9
SIP2 SERVICE & MANAGER.....	10
OPENOPAC	10

SUMMARY OF NEW FEATURES IN VERSION RELEASE 6.1

Many added features have been developed for this version release, covering many modules of Amlib as can be seen by the table of Contents. Many are enhancement requests that have been requested over the years or bug fixes found by other librarians. These have now been included in this new version. Enhancements have either improved operations in Amlib, with better access to menus & functions or have made some actions less ambiguous. We have also made Amlib more user friendly by adding extra buttons on some screens for ease of access to specific regular actions. For example a button now exists for selecting a query option when searching in the catalogue module. Also the number of catalogues attached to an authority, can now easily be seen on the main authority screen.

Release V6.1 - Also provides enhancements and fixes in the following Amlib components:

- * Amlib client
Apply: Amlib6.1Upgrade.exe

- * Amlib SIP2 manager
Apply: re-install the SIP2Manager and SIP2 Service (new version)

- * Amlib OpenOPAC
Apply: new OpenOPAC Installers 6.1

IMPORTANT: If you currently have a previous version of OpenOPAC installed, you are advised to use this new installer and it will detect that OpenOPAC is currently installed so will not overwrite your settings or themes you have in place. If you have never installed OpenOPAC this installer, will do the full install for you too. Available here <https://www.oclc.org/support/services/amlib/downloads-software-updates/version6-1/setup-programs.en.html>

FIXES AND ENHANCEMENTS PROVIDED FOR IN THE FOLLOWING:

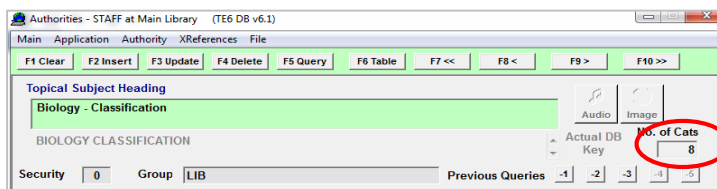
AMLIB CLIENT:

Supervisor

- **[AMB-712]** – The **Notepad** window usually shown on windows taskbar, it can now be turned off so it never gives you as pop-up, or only pops up if new messages are available at set intervals, that you set this in the supervisor module. You can choose to hide it once it is on screen. You can also open Notepad at any time by accessing it through **Base > Notepad**.
- **[AMB-748]** - When updating member details via Opac Suggests, only one memo is created in this process now when previously it was creating 2 memos.

Authorities

- **[AMB-171]** - Marc Import - Open & Update option was creating duplicate records when you had selected **catalogue and stockitem data**. No longer are duplicate catalogue records being created when you Import a marc file using **Open and Update** and when you have selected the option to add stockitem data. It was not a problem if you didn't use this Open and Update function though.
- **[AMB-680]** – When you do an authority search you can now see the number of catalogues attached to that authority on the result screen as before BUT now you can also see it on the selected authority screen, which makes it clearer to see and helpful when merging Authorities and in general Authority maintenance.



- **[AMB-686]** – Previously you can set default tags not to import when you are importing subsequent marc records and matching on marc records, but that setting **Supervisor > Installation > "MarcImport Replace: don't import these tags from the incoming cat"** only works when a catalogue matches. It is now possible to exclude specific marc tags [user specified] from an import file, whether it matches or not to another in your database. Now you can force a tag not to be imported in a record by adding this specific marc tag to the new setting in the **Supervisor > Installation > Catalogue > MarcImport : never import these tags from the incoming catalogue record**.
- **[AMB-713]** – A change has been made to the **Marc Item Defs** for export when using a stockitem file, so that the date received/accessioned is in the export as well. The heading has been changed to be clearer of what will be exported too. As it used to be **Transaction Year** but now it says **Accession Date** instead. Before you begin an export requiring this, you will need to set up your **Marc Item Defs > Export Items** table and set it up with a tag for the Accession date to be exported to. Under the **Export Items** tab and the length of this tag you

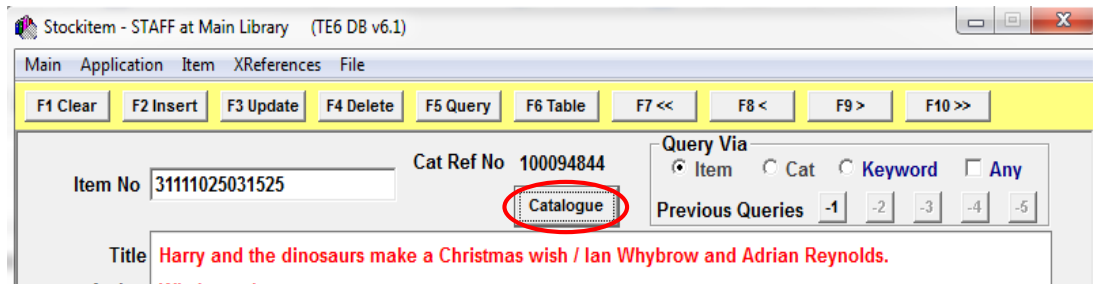
want to export needs to be set also [for example: **10** gives you 10/06/2014; **8** gives you 10/06/14] depending on the date format you want in your exported records. If you leave it blank you will get a very long date string, so we advised you to set the length when doing this task.

Catalogue

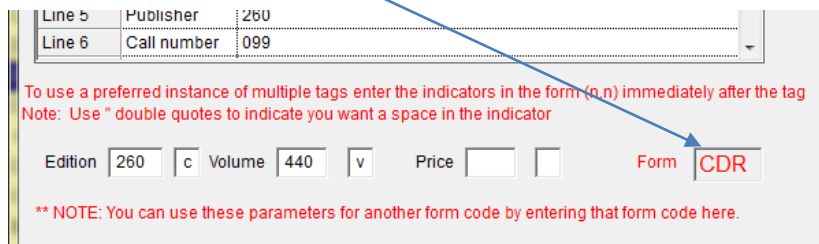
- **[AMB-664]** – It is now easier and clearer to change the type of query you wish to conduct while in the catalogue screen. You no longer have to go through several menus to get the option, to change the type of search. It now appears on the right of the search field in plain view as a button. You simply select this and you are given the table of search options immediately.



Stockitem



- **[AMB-743]** - A Catalogue link button is now available on the Stockitem screen, allowing you direct and quick access to the corresponding catalogue record instead of using the menu option of **XReference > Catalogue** - in the same way as we have a Holdings button in Catalogue module already.
- **[AMB-672]** The entry field for a Form Code to be matched with for another display of a Form Code is now larger. If your code is 3 letters it will now display correctly, in the Stock Display Tag window.
Main > Stockitems > StockitemForms > F9Display



Circulation

- **[AMB-661]** - Request to change the options when attempting to issue an item that is already on loan to another borrower, has been improved. Now when a borrower attempts to loan an item that is still on loan, a clearer pop-up message is given now. You are given the choice if you want to abandon the issue so you can follow it up OR return item and continue with new issue – not as ambiguous as it was.
- **[AMB-676]** – You can now access the Borrower history directly from the issue module when issuing an item. The access to this is controlled by username permissions, if you have no permissions to the borrower module then these options will be greyed out [for privacy]. **Issue > Borrowers** drop-down menu. The security is managed through username permissions - by taking away Borrower Permissions - the history and details are greyed out when the drop-down menu is displayed. [When in **Supervisor > Usernames > ActualMainMenu > Borrower > Borrower > TAKE** has been selected for this user]. This makes it simple to access this information when required. Instead of all the steps that were required previously, if you wanted to quickly check a borrower’s history or details – it now appears all in the one screen.
- **[AMB-700]** - In issues the option to go to **Borrower > Reserves > F9** to check on reserves the patron has, now leads you directly to the Stockitem screen and the Stockitems on reserve by that borrower, rather than just the stockitem reservation screen. Which only showed you the position in queue for that item on reserve – which is far more useful when in issues.

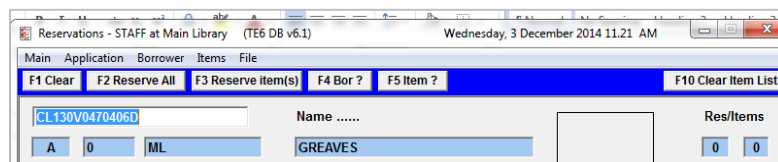
Borrower

- **[AMB-655]** – When a patron is paying a fee or fine in the Borrower Financial screen, and the **F7Alloc'tn** button is used - the default selection has been corrected. So that if you have highlighted an item, it now defaults to “Allocate against marked items” if no items are highlighted then the default message shown is “Allocate against all items”. Which is more intuitive with what the user would expect to see, when allocating payments.
- **[AMB-699]** – The drop down box size for **F1 New Charge** screen in **BorFinancial** has been increased so instead of only 3 options showing you can now see 7 for easy access to common charges used, you can still scroll down to others if need be.
- **[AMB-816]** – The number of characters in the comment field when **F10Waive** is selected in the **Borrower > Financial** screen has been increased allowing up to 100 characters.

Reservations

- **[AMB-658]** - The reservation pickup location now defaults back to the login location even after a different location has been selected for a previous reservation. It is possible to choose different pick-up locations from the drop down **Borrower** menu and it no longer holds the last location chosen, when a new reservation is being made – it defaults back to the log in location each time a reservation has been completed, which is more intuitive.
- **[AMB-667]** -The additional blank columns in the Reservation screen have now been remove.

- **[AMB-685]** - There are now matching menu/function buttons added to the top of the reservations module window, to make it clearer and easier to use when creating new reserves for patrons. It now also matches the other screens found in Amlib by having these menu buttons – so you don't need to use drop down menus to create the reserves any more, it's all on the one screen for you.



Reports

- **[AMB-648]** - There have been 3 new borrower export templates created with different details being exported, some with emails and phone numbers, and others with no email or phone.
 - **&XBORFUL.QRP** - Barcode, Full name, Phone, Full Address, Group, Class, Email
 - **&XBORN.PRP** - No phone, No Email - Barcode, Full name, Address
 - **&XBORCSV1.QRP** - No barcode, No email, Full name, Full address, Group, Type
 - **&XBOREM.QRP** - Barcode, Surname, Given & Email only
- **[AMB-678]** – Reservation reminders are now able to print a date when the reservation should be picked up. You can now set when a reservation will expire in the supervisor module '*Keep a reservation for a maximum number of ### days*'– This setting will now take into account closed days and holiday days and skip these. This setting will affect any report types in **RepReservation** module except for the **Expired Reservation Clear** Report Types. You may need to adjust some of your templates you use and may want to put in the text **Expires:** next to the date formulae, so it's clear what the date is in reference to, some currently just have the formulae for (Current date +7days) and nothing next to this, but you may like to add TEXT next to this now saying **Expiry date**.

Finance

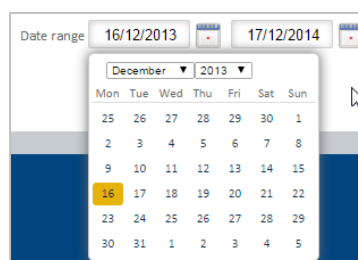
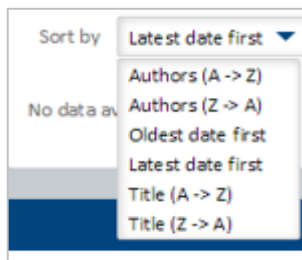
- **[AMB-665]** – Now in the finance module when the Exchange Rate Factor is updated or altered, the Date of Entry defaults now to the current day, whereas before this date did not alter.
- **[AMB-718]** - A credit value (paid) in 'Circulation Transaction' results table now displays. In **Finance > CircFinance** you are able to search for circulation transactions. The resultant table now displays the credit transactions, it displays both the Debit and credit transactions. In double entry accounting, the user is now able to view both transaction types in CircFinance.

SIP2 SERVICE & MANAGER

- **[AMB-773]** – In SIP2 Manager you can now set a ‘string’ list for a borrower status code. The code fields on borrower, items on loan, stockitem and reservations tables are now all available for selection when creating parameters.
- **[AMB-774]** – When SIP2 Server Checking for ‘Ok’ as a value – it has now been changed so values for Ok fields are now 0 or 1 (not Y or N) when set to a constant type. This is only valid for 3M settings.
- **[AMB-804]** Login request/response 93/94 message pairs have been added to all vendor defaults in vendor.xml. A new upgrade script has been created so libraries will need to install the new SIP2manager and SIP2 Service to enable them to use a 93 login message, if required by vendor. If you do not wish to upgrade to Amlib 6.1 at this time, then you can still install the new SIP2manager and SIP2 Service but you will need to request the ‘AddLoginToSIP2MasterTables.sql’ upgrade script from Support-anz@oclc.org for it to work correctly.
- **[AMB-876]** - AmlibSIP2Service.exe is no longer over utilizing system resources on the server. Code changes were made to prevent any outstanding threads from being left behind after connections are closed.
- **[AMB-956]** - Amlib SIP2 Server - loan transactions are no longer denied when a "no block" flag has been set. If you were having this issue then use the New installer: AmlibSIP2Service.msi that is now available on the OCLC website: <https://www.oclc.org/support/services/amlib/downloads-software-updates/version6.1.en.html> > under the **setup programs** tab.
- **[AMB-995]** – Fixed a problem when issuing an item with a loan type, items can now issue by using the Borrower type/item form or item stats loan parameters including loan types.

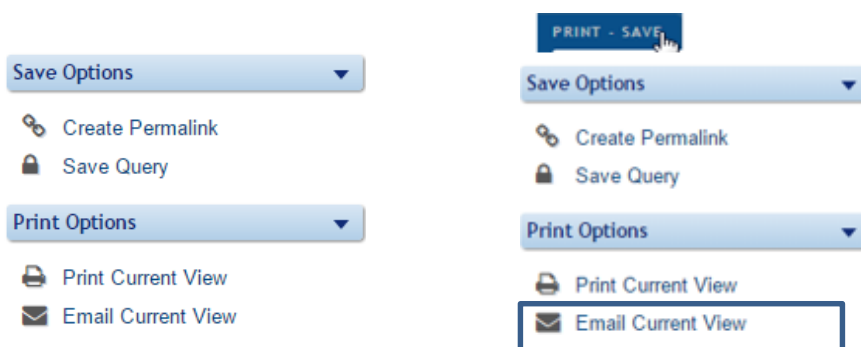
OPENOPAC

- **[AMB-263]** – Borrower history results can now be sorted by a filter as well as a date range.



OPENOPAC (CONT.)


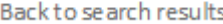
- **[AMB-267]** – The advanced search results on the mobile version are now easier to see when results are returned. As the advance search box now collapses when you select Search catalogue.
- **[AMB-275]** – When searching Borrower History in OpenOPAC, you can now re-sort your search results without having to reset the date range again - allowing for a second level search of history. For example you may have chosen '**Latest date first**', but then want to search by **Title (A-Z)** – so you can just change this filter without putting in the date range again as before.
- **[AMB-276]** –OpenOPAC- Renewal fail notice (pop-up) now displays decimal point in the currency as it is now picking up the region and language settings of your browser.
- **[AMB-278]** – If you start to save your queries, before you log in - they will be saved in the session but transferred to your account as soon as you log in, while in that session. Therefore your queries will no longer be deleted/lost [desktop version].
- **[AMB-280]** –There is now a **Delete Request** button, so that a request can be cancelled, including ILS requests from OpenOPAC in the **My Account** section under the **Requests** tab.
- **[AMB-281]** - Requests can now be deleted in OpenOPAC, in both the desktop and mobile versions. If a patron decides not to go ahead with a request made, then this is then removed from the OpacSuggest screen in the Supervisor module in the Amlib Client too.
- **[AMB-285]** – Patrons now have the ability to email their saved query results to themselves – Patrons can't email their saved query directly from their **My accounts** area, but they can open their saved queries tab and then **email current view** by using the main **Print-Save** menu on the home screen.



- **[AMB-289]** – The Link to 'JOIN ONLINE' is now visible on the front page next to where you log in but is also next to the login fields on the log in screen.

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

Amlib Release Notes - Version 6.1

- **[AMB-291]** – Search algorithm have been improved so that similar words are now returned in results ranked by relevance, so search term will be returned first followed by related terms. You can improve this by adding words you consider similar and often searched interchangeably. For example, searching for aeroplane, brings back aeroplane first, but then also plane, airplane ...maybe flight if you have added that to your **Search** tab in the configuration area.
- **[AMB-309]** - When you delete a saved query in **My Account**, you now get a confirmation message saying 'Request has been deleted'.
- **[AMB-310]** - You can now delete your old saved queries in your **My Account** area, using the delete query button.
- **[AMB-304]** – You can now **Delete Reservation** or **Modify Reservation** as buttons have been added and a Pop-up message is given when you select 'Delete Reservation' - “ Are you sure you want to delete the selected item?” Select Yes, then you get following message “Item(s) successfully deleted”. Making it clear what you are choosing to do, before it’s too late and you remove a reserve on an item, when it’s unintended.
- **[AMB-319]** –The term ‘Advanced’ has been altered to **‘Advanced Search’** – to make it clearer what it means and easier to see for patrons.
- **[AMB-323]** – The 'Label' for changing details has been changed from 'Change Data' to **Change My Details** which makes its function clearer.
- **[AMB-324]** A 'Back' button is not required as once you have selected a title and gone into the bibliographic record, you can’t get back to your results list by selecting the **‘house’** [home] button which has now been added. So it’s now possible to get back to your search result list in one click. If you want to get back to a previous list of search results, you can select the **‘RECENT ACTIVITY’** button from the top menu on the screen.


- **[AMB-325]** – Terms now match for reservations created - there is a **Reserve** button & the pop-up behind it now says “You have to login to place reserves.” And when a reserve is placed you see “Reservation successful” .So all the terms now match.
- **[AMB-328]** – When you select **Clear Fields** on **Advanced Search** screen, it now just clears your search terms and selections, so you can start a fresh advance search, without having to make any other selections.
- **[AMB-334]** - The order of the columns in the **My Account** for the **Requests** table is now more user friendly for patrons and set out in a logical order of information required/requested. The order now is : Type of request; Title; Author, ISBN/ISSN; Format; Publisher; Publication date; Additional Information; Pick up location; Date Created and Cost.
- **[AMB-336]** - Spelling of the specific words that have regional spelling differences are now controlled by both the language flag selected and can also be controlled by the regional and language settings of the browser being used. If It’s a large library with many PC’s is giving access to OpenOPAC then it can also be controlled by IIS [see appendix in the configuration and user guide] For example words like COLOR now corrected to be COLOUR or COLOURS etc... This also affects the date format displayed.

Amlib Release Notes - Version 6.1

- **[AMB-402]** – Reservation of items, making requests or changing details options can be restricted by borrower type. The trolley is removed when borrower has restricted access. If they are banned or blacklisted etc... then they will only get limited online access to their account and OpenOPAC. When they log in there is a warning **Your online access is restricted - see library staff for further information items** ‘.
- **[AMB-411]** – **My lists** in the **My Account** section has been improved – you can remove items from a list, they will remain in the cart as they are only a copy when moved to a list. So it’s possible to add the same item to several lists if desired. You can also delete an entire list or rename a list if that is more preferable. If you want to empty you cart you select the **Cart** option on the **Home screen** and delete all or just select some of the items.
- **[AMB-425]** – Once you have created a Saved list, you cannot delete individual items out of this list – you need to use the arrows to send items back to the cart. All items can be deleted in a list by selecting the orange button.
- **[AMB-436]** – Doubling up of Format types and Collections - when more than one item attached to a catalogue record. If you have several format types attached to the one record you will now only get the format mentioned once in the format line on the bibliographic record, before it use to show one format for every one attached even if it was the same format. For example you would see ...Format: DVD, BOOK, BOOK, CD But now you just see Format: DVD, BOOK, CD [once of each format attached to the record].
- **[AMB-438]** –When last stockitem is deleted and catalogue deleted, it also now deletes it from OpenOPAC. You will either have to wait for the service to run over night, for it to be removed from OpenOPAC OR if you wish to remove it instantly you will need to access the central-frontend <http://openopac:8981/CentralFrontend/Default.aspx> and upload changed catalogues. Refresh the browser and the record will have been removed.
- **[AMB-453]** –Searching for subjects has now been improved – it will now locate synonyms of subjects as well as an exact match - this works quite well now. You can use the facets down the side to pick specific subjects you are after **OR** use the advance search for specific exact subjects if it’s required. You can improve the searching further by adding common synonyms your patrons may use interchangeably, in the configuration settings under the **search** tab.
- **[AMB-489]** –Advance search screen - now minimizes when results are returned, to make it easier to see search was conducted and was successful, both on desktop and mobile versions.
- **[AMB-492]** – When an item barcode is changed in Amlib now, it doesn’t create a new duplicate item in OpenOPAC, as previously occurred. Item numbers can now be altered without duplication of the stockitems occurring.
- **[AMB-494]** – When making Purchase and Ills requests, the additional information added is now transferred to Amlib, so that the librarians can see any extra information provided by patrons when they check for request in the OpacSuggest Screen in Amlib.

- **[AMB-496]** - Statistic Codes for OPEN have been set up in **Supervisor > Stat Params**, so that statistics can be collected and run in reports. Successful and unsuccessful searches conducted in both NetOpac and OpenOPAC can now be seen in the **OpacQueries** screen also, by using these Stat codes.

600	OPEN Search	Y	N	Y	N	Y	N	N	Y	N	N	N	Y	Y
601	OPEN Saved Search	Y	N	N	N	N	N	N	Y	N	N	N	Y	Y
602	OPEN New Items Search	Y	N	N	N	N	N	N	Y	N	N	N	Y	Y
603	OPEN Borrower	Y	N	N	N	Y	Y	Y	Y	Y	N	N	Y	Y
604	OPEN Renew	Y	N	Y	Y	Y	Y	N	Y	Y	Y	N	Y	Y
605	OPEN Reserve	Y	N	Y	Y	Y	Y	N	Y	N	N	N	Y	Y
606	OPEN ILL	Y	N	Y	Y	Y	Y	N	Y	N	N	N	Y	Y
607	OPEN Join Online	Y	N	N	N	Y	Y	N	Y	N	N	N	Y	Y
608	OPEN Request	Y	N	Y	Y	Y	Y	N	Y	N	N	N	Y	Y
609	OPEN Change Details	Y	N	N	N	Y	Y	N	Y	N	N	N	Y	Y
610	OPEN Change PIN	Y	N	N	N	Y	Y	N	Y	N	N	N	Y	Y

- **[AMB-505]** – When missing mandatory fields are not filled in, on the **Join-Online** form (for example a phone number) a red text appears next to the missing mandatory field – with a warning to inform them that a field is required. When this is done, the process completes and emails are sent to the new borrower, so that they can continue to use the OpenOPAC with their Temporary barcode sent to reserve items or make requests.
- **[AMB-511]** – The background fill on the Copy information of the full detail screen is now the same colour as the fill used in the copy information shown on the results screen – which is adjustable using the **Colours** tab > in **Configuration** area > **Light colour background**.
- **[AMB-515]** - Mobile version now shows ‘Summary’ next to the items listed, rather than status as was happening previously.
- **[AMB-517]** – There is now an option for mobile devices to have a separate display to the desktop version. Where the summary can be turned off the result screen, but shown perhaps on the detailed (Bib record) screen, if desired. This prevents the display from being too long for one item when viewing results on a mobile device unless requires by mail server such as google mail
- **[AMB-551]** –Error when saving configuration settings, when logged in as Administrator has been resolved, this no longer occurs.
- **[AMB-552]** –To resolve the issue of confusion over what was being shown under the ‘similar items’ [as they are not always similar] under the **Configuration > Parameters** tab – this has now been changed to **'Show Suggestions'** - its more to do with popular items and what has been borrowed the most, most recently and is run by a service behind OpenOPAC.
- **[AMB-557]** – Issue with Join online not working correctly, has been resolved in this latest version. Must ensure you do not have SSL selected for your SMPT settings, as this will cause issues with the emailing function, unless required by mail server such as Gmail.

- **[AMB-644]** – When filling in or editing details via **Change My Details** form, one phone field is now compulsory - so that one phone field must be filled in when adjusting an existing address. There is a warning message, informing patrons, when no phone fields are filled in and it cannot be saved unless one is added now.
- **[AMB-569]** – Search strategies and relevance ranking has been improved to help more accurate results to be returned, when using the filters to drilling down.
- **[AMB-575]** –Extra text has been added to this **First steps** screen to help clarify what is required **BEFORE** you upload your catalogue records when you first install OpenOPAC here: <http://openopac:8981/CentralFrontend/Default.aspx>
- **[AMB-582]** - Hyperlinks in bib records are now taking you to the appropriate links and are functioning correctly- for example if the hyperlink is for 'formats' then other items with same format are now displayed, or authors or subjects etcdepending on what was selected from the Bib record.
- **[AMB-583]** - **New in Library** returns results if your collection has : matching date accessioned details on your Stockitems. If you are wanting to find new items using the Advance search then you need to select some fields too, at the very least an acquired date selection and possibly a collection such as **Adult Fiction**, to get useful results.
- **[AMB-584]** – Correct text now appears under the **Text** tab, in the configuration area - “You can define a custom 'Terms and Conditions' text, for your online borrowers if you wish.
- **[AMB-628]** – You can now display the 856 Tag (URL) for all your e-content on OpenOPAC, including the 'z' subfield if this is used in your catalogues. Which shows a description on the OPAC instead of the actual URL. Both Http and Https links work well. You will need to add this 856 tag to your **Marc Fields** in the configuration area, before you upload your catalogue records. OR re-load catalogue records if adding it after installing OpenOPAC. You also have to ensure you have ticked **Other Links** for your detail view and if you want it to show also in the results list, then select **Other Links** in the Search result list too.



- **[AMB-742]** – If you begin to conduct searches before logging in and log in afterwards, your search results are now retained, so you are able to continue in your searching without having to start over.
- **[AMB-786]** – You now have the ability to save created theme and settings for when system is updated or needs to be re-installed, by using the new installer available with 6.1 - as it detects there is already an installation of OpenOPAC on your system, so does not overwrite these existing files with your settings.
- **[AMB-840]** - Where an image/photograph/s are added to a catalogue records, the images now display on the bib-record of OpenOPAC. If more than 1 image is attached they sit right

next to each other and you can enlarge each by selecting it - each opens in a new browser window - close the new browser tab when done and continue using OpenOPAC.

- To alert your patrons to images being attached, maybe local history images - we suggest that you allow **Notes** to be seen on the results view. Then add 'see attached images' in your catalogue records to a 504 Marc tag or one of your 500 tags - which you have selected in the **Marc Fields** tab in configuration. Then Patron will know to open the record to view the images.
- **[AMB-861]** - 'Join online' option in the mobile version has now been removed, as the screen is often too small for filling in a form, this can be done on the desktop version at any time.
- **[AMB-919]** - The wording for the Login term has be altered to be more generic for libraries from Username to **User ID** and PIN was amended to be in uppercase.
- **[AMB-933]** – The Reservation messages have been altered for when a reserve is not allowed, to be clearer and more meaningful to the customer who sees one.

Reservation not successful:

Reserve failed for some items: You have reached your allowed reserve limit - contact library staff for further information.

Reservation not successful:

Reservation not created - Item cannot be reserved - contact library staff for further information.

- **[AMB-1007]** text has been altered for the 'other links' option on the screen of OpenOPAC, so if no description has been added [a 'z' subfield'] - an obvious & useful generic phrase is displayed for any linked resources – it displays now as: **Click to access linked resources** when before it was just '*More Info*'.

Opac32Client

- **[AMB-875]** – The correct version number now displays on OPAC 32 Client in Version 6.1 Installer, it now installs and says 6.1 on the screen.

Oracle Databases (64bit)

- **[AMB-879]** - In Financial Reports when using Oracle – the **&FINOWE.QRP** report was not running correctly, libraries were getting an error message appearing as a DB/SQL Error: "Invalid column name '_FIN_INV_NO'". The invalid column name in financial reports has been corrected and a new template & FINOWE.QRP is now required. You can also now use Bor-email as a where statement, to refine who you run the report for which is quite useful. If this affects your libraries ensure you upload and use the new 6.1 version of the **&FINOWE.QRP** template. . **This affected libraries using Oracle, so this fix is for those libraries only.**

- **[AMB-894]** Customers using Oracle [Does not occur on SQL Server], were not able to see all the overdue items with fines, against a borrower in the Issues screen when their Supervisor setting '*Include closed days in fine calculations (Y/N)*' was set to N – as should be possible. Changes have been made to the supervisor module and the circulation.exe so that now all items display with fines, rather than just one displaying as was happening before.