



# Amlib Release Notes

Version 6.2

Last Updated: 17 May 2016

#### Amlib Release Notes - Version 6.2

#### © 2014 OCLC (UK) Ltd

ALL RIGHTS RESERVED. Permission is granted to electronically copy and to print in hard copy portions of this document for training purposes by licensed users of the Amlib Library Management System. Any other uses – including reproduction for purposes other than those noted above, modification, distribution, republication, transmission, re-transmission, modification, or public showing – without the prior written permission of *OCLC (UK) Ltd* – is strictly prohibited.

#### **Support:**

Australia: 1300 260 795 (Local call cost in Australia)

Email:

support-anz@oclc.org
Amlib Help Desk (TOPDesk):

https://oclc.topdesk.net/tas/public/login/form

**OCLC Amlib Support Documentation:** 

https://www.oclc.org/support/services/amlib.en.html

#### Sales:

Australia: 1300 260 795 (Local call cost in Australia)

Fax: +61 (0) 3 9929 0801 Email: sales-amlib@oclc.org

www.oclc.org/en-AU

Last Updated: 17 May 2016

# Amlib Release Notes - Version 6.2

# **CONTENTS**

SUMMA	ARY OF NEW FEATURES IN Version RELEASE 6.2	6
	V6.2 – Release of the new reporting Tool OpenReports and also provides enhancing the following Amlib components:	
*	Amlib client	6
*	Amlib SIP2 manager	6
*	Amlib OpenOPAC	6
FIXES AN	ND ENHANCEMENTS PROVIDED FOR IN THE FOLLOWING:	7
Amlib C	Client: Error! Bookmark	S PROVIDED FOR IN THE FOLLOWING:
Stockiter	m	7
Circulation	ion	7
Borrowe	er	7
Reports .		8
SIP2 Sei	rvice & manager	8
OPENO	DDAC	Q_1 <i>1</i>

Last Updated: 17 May 2016 Version: 6.2

#### New REPORT solution released with Amlib 6.2

The Amlib **OpenReports** is a new web-based Reporting Tool to give Librarians an extension and choice of how they run their 'on the fly' reports.

This program will be an easier way to create those quick reports you need from time to time,

The new Web based Reporting tool connects directly to the database

It is not a replacement for Amlib reports or RepWin, but gives the Amlib User another option for presenting information from the Amlib database. There are still many reports that will still be required to be run in Amlib, such as you overdue notices and email overdue reports.



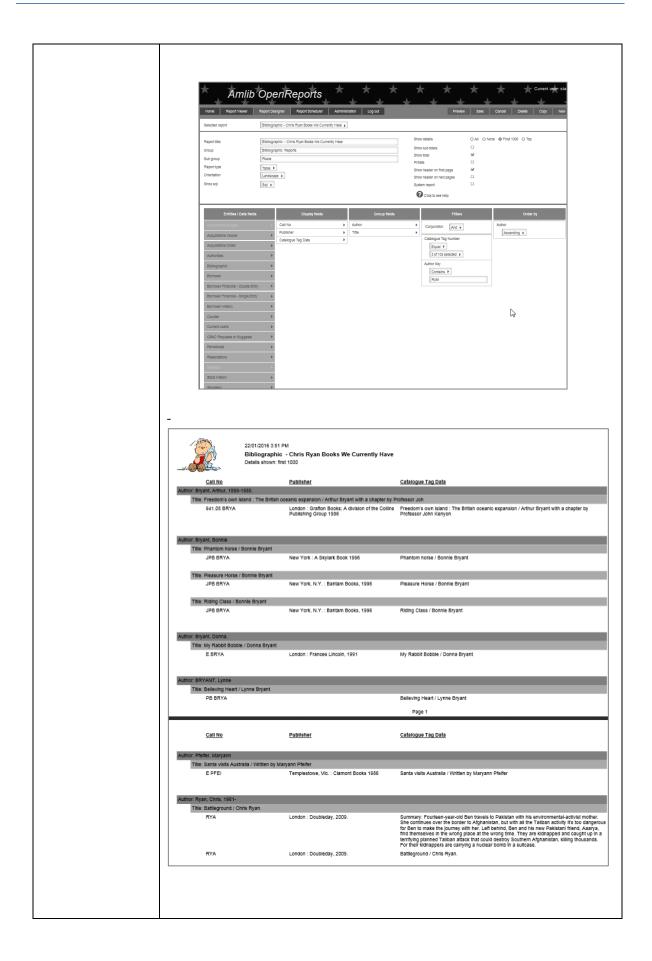
It is possible to design and run your own reports by using the Entities which are logical groupings of the Amlib tables and database areas and Data Elements which are the individual pieces of data used to create and define the reports content and display.

There is no additional licensing cost to use OpenReports. Libraries who wish to use this new product will just need to upgrade to 6.2 and then they can install & use this new program by accessing it from a browser.

#### New features for your librarians:

- It enables you to quickly create and run numerous reports with ease
- You simply begin a new report, select and drag the different information you require into your report and preview
- You can print your report or export it to a PDF, word or Excel document - giving you a lot of flexibility
- You can schedule reports and have them sent via email to one or more recipients in one of the 3 following formats: PDF, word or Excel
- You can create tables of data or charts
- Able to create and schedule reports of your new borrowers
- Create Reports for the top readers or items being borrowed

Last Updated: 17 May 2016



Last Updated: 17 May 2016

#### SUMMARY OF NEW FEATURES IN VERSION RELEASE 6.2

Many added features have been developed for this version release, covering several modules of Amlib as can be seen by the table of Contents. Many are enhancement requests that have been made by Librarians or bug fixes found by other librarians. Which have now been included in this new 6.2 version. Numerous enhancements have been added to improve operations in OpenOPAC, with many more configurable settings, call numbers displaying, 2 enrichment providers possible, SCIS book cover images displaying etc. See OpenOPAC section for all the enhancements provided in this 6.2 version.

# Release V6.2 - Release of the new reporting Tool OpenReports along with enhancements and fixes in the following Amlib components:

Amlib client

Apply: Amlib6.2Upgrade.exe

\* Amlib SIP2 manager

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

\* Amlib OpenOPAC

Apply: new OpenOPAC Installers 6.2

**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 <a href="https://www.oclc.org/support/services/amlib/downloads-software-updates/version6-2/setup-programs.en.html">https://www.oclc.org/support/services/amlib/downloads-software-updates/version6-2/setup-programs.en.html</a>

Last Updated: 17 May 2016

#### FIXES AND ENHANCEMENTS PROVIDED FOR IN THE FOLLOWING: AMLIB CLIENT

[AMB -1257] About Amlib email address updated.



#### **Stockitem**

• [AMB-1088] — When conducting a Mass Item change in Amlib Stockitem - if you were selecting changes to OPAC? Via a mass item change it was causing a Syntax SQL error, but change was still made when you logged back in [causing some confusion] This now works as expected and no SQL errors are given.

#### Circulation

- [AMB-996] A change has been made to "Include closed days in fine calculations (Y/N)" so that the system will now fine borrower for all the closed days.
- [AMB-1167] Reservations now hold the selected 'collect at' Location when a creating a reservation from **Stockitem** > **Item** > **ReserveItem** menu before it was reverting back to the default location when reserve was being finalized.

#### **Borrower**

- [AMB-740] It is now not possible to duplicate a Borrower Status code in the table which was causing errors in Supervisor module when saving new settings.
- [AMB-1209] If Update is chosen in Borrower Online changes, the address is no longer being altered to be capitalised.
- [AMB-822] On BorrowerOnlineChanges table: When a change has been made to a borrowers details via OpenOPAC, it is now highlighted in Blue. To flag to staff what has been changed & needs to be checked.
- [AMB-1214] –When a change is made to the Borrower details on OpenOPAC All changes
  are now transferred to the borrower module and database when F3Update is selected on
  Borrower Online changes table. The modified date on the borrower screen, is now also
  altered to the current day, when the F3Update is selected on the Borrower Online changes
  table.

Last Updated: 17 May 2016

- [AMB-1070] Some transactions in Borrower Financials were found that could not be waived or fixed through Circulation links, when using double line accounting. A script was required to remove these errant transactions which can be requested from support, if this is an issue you also experience
  - Please log a call on Topdesk <a href="https://oclc.topdesk.net/tas/public/login/form">https://oclc.topdesk.net/tas/public/login/form</a>

#### **Reports**

- [AMB-1207] When using the Default Report type (Title, Author, Form, Item No, and Location) the charge applied via the **F10More** button is now applied to the correct name on the Fin\_Trans Table, along with the correct barcode.
- [AMB- 1044] In RepFinancial Reports: Not all outstanding fees on printed & email notices were displaying on an individual's report this has been rectified and now ALL outstanding fees associated with total owing are displayed in the report.

#### SIP2 SERVICE & MANAGER

• [AMB-1224] – SIP2Manager - On checking out items currently on loan, the due date calculation is now based on the new borrower type, not on the previous borrower type who had the item on loan before.

#### **OPENOPAC**

• [AMB-513] – [AMB-588] – [AMB-1198] Locations were displaying any and all locations in the 'Pickup Location' dropdown, some which were not valid for circulation. Changes were made so it can now be controlled as to what location is selectable by setting up the locations correctly in the supervisor module. If you do not want a location to appear for a pickup location go to Main > Supervisor > Installation > Choose location > Other > Location is valid ....

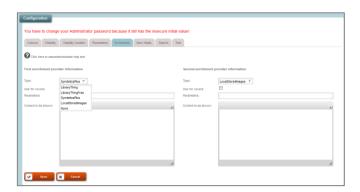
Location is Valid for Holdings	Υ
Location is Valid for OPAC Enquiries	N
Location is Valid for Registrations & Circulation	N

If you want a location to appear in your Pick-up locations, set the following ...

Е		
	Location is Valid for Holdings	Υ
	Location is Valid for OPAC Enquiries	Υ
	Location is Valid for Registrations & Circulation	Υ

Last Updated: 17 May 2016

• [AMB-532] – There are now two fields offered for Librarians to enable them to select 2 enrichment providers that they would like to use, so they can both be displayed on OpenOPAC simultaneously – they can specify a specific one, for their cover images as well.



• [AMB-595] - Join online borrower address now displays in correct logical order. To match with the database fields Address line 1, can be used for name of a property For example:

Briars Cottage OR a street number/street name such as 213 Blair Road – if no name of the property is required. Then leave Address line 4 blank, otherwise it can be used for Suburb if all other lines have already been used.



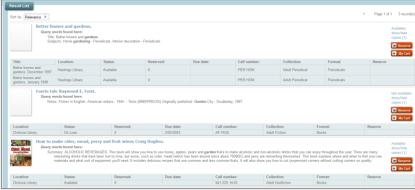
- [AMB-769] Currency symbol now displays correctly in the accounts area when it's been set under the parameters tab in the configuration area. The currency symbols shown on any messages are set by the language and regional settings of your PC/server.
- [AMB-846] When setting up your settings for the mobile version you can now turn on/off both book reviews and suggestions if you wish under the parameters tab in Configuration.

Last Updated: 17 May 2016

- [AMB-872] Both the Print Options and Email Options for a current view, now show the Call number which is essential information to users to help locate items found.
- [AMB-873] The copy information table can now be either permanently expanded so it's always viewable when you view you search results [showing you the call numbers] OR only viewable when 'show copy(s) hyperlink is chosen on the side. This choice can be set in the configuration area, when logged in as an Administrator by this setting

'Show copy information collapsed' by a tick.





- [AMB-941] The email character length has been altered to allow longer email addresses when using the Join Online option.
- [AMB-947] If library is not using PINS at all it is now possible to have the PIN field on the login page invisible. If an Administrator needs to log in, the PIN filed can't be seen until they TYPE in Administrator as the user ID, when they complete the ID the PIN field now appears below for them to fill in.
- [AMB-983] Allowing Renewals are now optional this can be set under the parameters tab in the configuration area, to control its availability.



• [AMB-989] – the Current Loans status on the My account page now shows correct summary data for number of items that are overdue (x overdue), number of requests and number of reservations

Last Updated: 17 May 2016

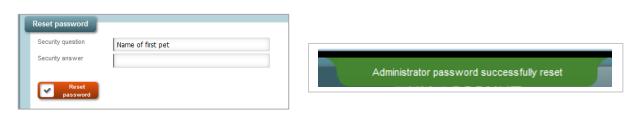


- [AMB-998] Edited borrower telephone numbers now show as updated in the AMLIB client and can be seen on the BorrowerOnlineChanges table, so they can be updated and transferred to the borrower module.
- [AMB-1023] A library can now re-set their Administration Login Password if it is forgotten. With the changes to the installer in version 6.2, there is now only 1 installer for OpenOPAC instead of 4 & the central Frontend has now been removed [ no longer required]
  - All administration tasks are now done within OpenOPAC in the configuration area Therefore resetting your password is now controlled by a link on the login page

     Reset Administrator password which appears when you type in Administrator as the username



This takes you to the security section where you will be asked your Secret Question
that you setup when OpenOPAC was installed - once the correct answer is given, you
can then select the RESET Password button ...which will set it back to the default 1234
- which can be changed again once you have logged in again as the Administrator
using the default pin.



• [AMB-1045] – You can now embed an OpenOPAC search box into a web page, by following our guide and adding some HTML to your web-page. Log a call on TOPdesk and request the Setup an OpenOPAC Search Embedded in a Webpage Guide, if you wish to have this feature.

Last Updated: 17 May 2016



- [AMB-1057] Two typo's errors on Help screens have been corrected
- [AMB-1059] An All option has been added to all the drop-down menu in the Advanced searches which now will search across all Title, Subjects, Series, Notes, Summary, Authors, Contributors, ISBN and Publisher.
- [AMB-1064] In the My Account Borrower Details area, Librarians can now choose whether to display or hide the Change my details / Change Pincode button option by selecting/deselecting this setting in the configuration > parameters tab area.



• [AMB-1065] – In My Account area - Borrower Details area, Librarians can now choose whether to suppress all Requests [none]. Or they can choose to suppress only some options such as 'Purchase Requests' and so only select 'Inter Library Loans' - as this will suits some libraries too. As they may not want to offer both types of request's.



- [AMB-1103] OpenOPAC Problem with all Borrower memos displaying in OpenOPAC when set to Y or O. This has now been corrected so that only memos set to O will be displayed in OpenOPAC If a memo has:
  - Y = It now only shows in the Amlib client as a Pop-up BUT not display in OpenOPAC
  - N = No Pop-up appears, but is visible in memo list for borrower in the Amlib Client
  - **O** = Pop-up in Library AND Appears in OpenOPAC
- [AMB-1104] When changing the default sort order in the configuration area it now carries the change over to the search result screen. This can still be changed by the patron when conducting their own individual searches, if they want a different sort order than the set default one.
- [AMB-1108] Advance Search Screen Formats and Collections now match all Amlib Formats & Stat codes/descriptions.
- [AMB- 1220] Gender on 'Change my Details' form now defaults to correct gender of the borrower from the borrower Module

Last Updated: 17 May 2016

- [AMB-1122] [AMB-1245] Relevancy filtering has been improved & exact searches now rank higher in relevancy, than other matching search terms found. For example one word Titles will now appear before other titles that have the search term and other words included in their titles.
- [AMB-1123] Mobile Version now is in sync with the libraries desktop version so it updates Available/Not Available Status instantly, when items goes out on loan or are reserved.
- [AMB-1129] A Colon (:) can now be entered in a Search term (Invalid character) without it creating an error if used in the search term.
- [AMB-1132] & [AMB-1198] When there is only 1 Stockitem attached to a catalogue record and it's changed to Opac? To N OR Deleted. The copy instantly is no longer visible and shows that it's not available for viewing or reservation.

No copies available for online reservation/viewing

no results found, try another term or word for your search

Then sometime after, around 10 minutes the search will not find any results at all, as the catalogue record will now be hidden from view too [or deleted if a deletion was actioned], if there was Result List only one copy attached to it before.

• [AMB-1156] – [AMB-1189] It is now possible to display individual periodical volumes/editions in OpenOPAC results/copies table, so a specific copy can be reserved

Title	Location:	Status:
Australian Geographic : No. 88 Sep-Nov 2010.	Chelsea Library	Available
Australian Geographic : VOL. 85 No. 1 Jan- Mar 2013.	Chelsea Library	Available
Australian Geographic : VOL. 85 No. 1 Jan- Mar 2013.	Chelsea Library	Available
Australian Geographic : VOL 85 No. 2 Apr- Jun 2013.	Chelsea Library	Available

- [AMB-1183] Local PDF files will now display on OpenOPAC when added via Picture/Sound Function in the catalogue module under the bibliographic record.
- [AMB- 1191] When creating a request either ILLS request to a purchase request, you can now pinpoint the format you require if you select OTHER
- [AMB-1193] OpenOPAC requests now correctly writes the correct form into the OPACUSERCOMMENTS database table.

Last Updated: 17 May 2016

- [AMB-1202] Advanced search now adheres to the filter being selected for the results being returned if you search for a specific format, collection or location only items that match will be returned. [Note if other items are attached to the same catalogue record –they will also display in results given]
- [AMB-1204] & [AMB- 947] Changes have been made to allow for serval PIN situations to suit all libraries as best as possible.
  - If the library does not wish to use PINs and no one has a PIN then they can select this setting in the Supervisor Module > Installation settings > Other > OPEN Borrower PIN required (YN) to N when this is now selected only one field appears for the Borrower ID, no Pin field is displayed or required.
  - If the library does not wish to use PINs, but some borrowers have a PIN, these libraries can now still select in the Supervisor Module > Installation settings > Other > OPEN Borrower PIN required (YN) to N and the Borrowers with PINs will still be able to login, they just won't need to enter the PIN they have.
  - If the library wishes to use PINs, these libraries can now select in the Supervisor Module > Installation settings > Other > OPEN - Borrower PIN required (YN) to Y and then a second field will appear for them to enter their PIN when they Log in.

[Note: As the Administrator area always needs a PIN to be accessed – if OPEN - Borrower PIN required is set to Y then two fields are always displayed. If this is setting is set to N then as soon as you TYPE the word Administrator, a new box appears below for you to enter your Administrator PIN into – However you can never select the word Administrator from the drop-down that appears, as then the required Pin field box will not display]

- [AMB-1212] When using an Advance search using one or two of the filters search results are returned. A search term is always required before any filter can be selected. It's not designed to search on two filters alone.
- [AMB-1213] [AMB-1205] Whenever 2 tags have been selected to display and there is data in both of these tags in the one record; there is now always a space between the combining Tag Fields. For example, if you have both a 245 and a 246 tag in you catalogue record, both pieces of data will now display with a space in between them.
- [1214] —Borrower online changes fully linking now, so when F3Update is selected all changes made are updated in the borrower module including the modified date.
- [AMB-1219]- [1201] Some changes have been made to the Advanced Search Screen help text, explaining what will be searched, when the new All filter is selected.
- [AMB-1220]- The gender field on Change my Details form now defaults to the correct gender of the patron who is logged in.

Last Updated: 17 May 2016

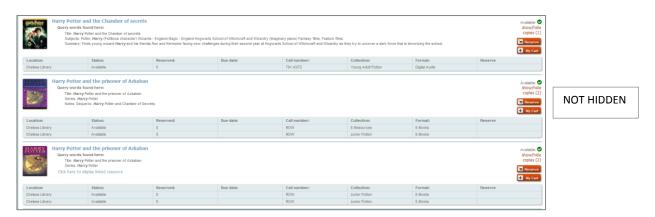
- [AMB-1222] If the 856 tag has no z sub-field descriptor tag in the catalogue then the generic message now displays Click here for linked resources. If the 856 tag has a Z sub-field descriptor such as select to Download E-Book or Click here for ClickView Download these will display instead.
- [AMB-1229] The Advanced Boolean NOT search now works correctly, so that a specific term can be limited from returned results. For example Easter NOT Island this will now just return items about Easter and not return items on Easter Island [even though the word Easter is in these records too] making the search results more accurate and helpful to patrons.
- [AMB-1230] [AMB-1191] When an Request is created and the Other Option is selected a
  new field now appears below with the Hint for type of format are they requesting required to
  be entered



[AMB-1232] – Wording has been changed for one of the parameter settings to make it more user friendly. This setting: Show copy information collapsed has now been altered to Hide copy information on initial search results – meaning you can now choose whether you Not see the copy information returned with the initial results, but can choose to expand the copy table for only the results you are interested in

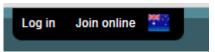


**OR** You can have the copy table already expanded, as soon as the results are returned, by ensuring this setting is not ticked.



Last Updated: 17 May 2016

- [AMB-1245] If the Search term EXACTLY matches a Title then the relevancy has been boosted so these will now be returned at the top of the result lists. One word titles will now also appear before other results, making it easier to locate an exact item title.
- [AMB-1249]- All changes made to the borrower details on OpenOPAC are now transferred to the BorrowerOnlineChanges Table in the Borrower Module
- [AMB-1250] If using join online Option you MUST have the Default Borrower type and default status set in the OpenOPAC setting in the Main > Supervisor > Installation > Other Tab, for the Join online option to display on the screen for your patrons.



- [AMB-1261], [AMB-1262] & [AMB-1282] Author searching has now been improved in the relevancy ranking, so that items by theses authors will now appear at the top of the returned results. Also if the patron types in first name, last name of an Author it will also pick up the correct author in the databases and return matching results. Author phases have now been inbuilt into OpenOPAC to make returned results more accurate, when conducting an author search from the basic search screen.
- [AMB-1266] Series advanced search has been improved by boosting results for exact matches
- [AMB-1267] Under the Marc Field tab in the configuration area, there is now separate field to be used for an alternative title instead of sharing the title field
- [AMB-1274] When printing entire current view, it currently only works in IE and Chrome. Firefox has an issue & will only partially print the current view at present, it's a bug to do with the browser Firefox. We are unable to correct this until Firefox has repaired this issue themselves.
- [AMB-1279] Filters are now returning results as expected when one or more filters have been selected
- [AMB-1285] You can now display your SCIS book cover images as book covers on the result lists & Bib record when you have set up you enrichment tab to access local stored images as your content provider AND have ticked use for covers option.
- [AMB-1289] Many mobile display issues have now been corrected, so the screen is more user friendly and accessible, regardless of the size mobile device you are using.

Last Updated: 17 May 2016