Amlib
Release Notes
Version 5.3

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## Summary of New Features in Release 5.3

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<thead>
<tr>
<th>General</th>
<th>Version 5.3 – changes mainly to support new modules available:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• <em>Debt Collection</em> (needs extra license)</td>
</tr>
<tr>
<td></td>
<td>• <em>VDX Integration</em></td>
</tr>
<tr>
<td>Amlib Backup</td>
<td>Changes to Backup Manager interface to reduce the size of the Form and allow it to fit on to screens with smaller resolutions.</td>
</tr>
<tr>
<td>Manager</td>
<td>• Used in relation to <em>SQL Express</em> editions of <em>SQL Server</em></td>
</tr>
<tr>
<td>Authority</td>
<td>• No changes to this module</td>
</tr>
<tr>
<td>Borrower</td>
<td>• Substantial changes to <em>Borrower Financials</em></td>
</tr>
<tr>
<td></td>
<td>• All new Financials added using a <em>New Charge</em> button</td>
</tr>
<tr>
<td></td>
<td>• WAIVE button available in Single as well as Double-Entry Accounting</td>
</tr>
<tr>
<td>Catalogue</td>
<td>• Allow Non-Authority subfield data (only in mixed tags) when creating catalogue records through worksheet</td>
</tr>
<tr>
<td></td>
<td>• Fixed an issue that caused <strong>008</strong> tags to be updated incorrectly when editing them via the <strong>008</strong> screen</td>
</tr>
<tr>
<td></td>
<td>• When inserting a new non-authority tag into a catalogue record, a blank space is no longer inserted into the subfield editing table</td>
</tr>
<tr>
<td>Circulation</td>
<td>• Calculate fines correctly in relation to closed days and grace periods</td>
</tr>
<tr>
<td>Debt Collection</td>
<td>New module available to use with Double-Entry accounting. Separate licensing necessary. Contact <em>Amlib</em> Sales for a quote.</td>
</tr>
<tr>
<td>Module</td>
<td><em>Separate notes are available in the Amlib/Help folder for Installation and User Guide</em></td>
</tr>
<tr>
<td>Finance and Orders</td>
<td>Circ Finance:</td>
</tr>
<tr>
<td></td>
<td>• <em>Insert, Save</em> and <em>Delete</em> buttons removed for Single and Double-Entry Accounting</td>
</tr>
<tr>
<td></td>
<td>• System-generated Financial Types incorporated that cannot be deleted</td>
</tr>
</tbody>
</table>
### Amlib Release Notes - Version 5.3

#### NetOpacs
- Financial Changes
- Improvements to subject interest selection
- Changes to renewal of items

#### Periodicals
- No change

#### Reports
- Small changes to Financial Reports made for use in the Borrower Financial screen
- Fixed an issue that occurred when using the email attachment facility (for example: for SMS reports) which then caused any subsequent print to file reports to be sent as attachments.

#### Stockitem
- Reserve Allocate will now sort reservations based on Date
- Reserve Shuffle returns in Stockitem Item menu
- Stock Keyword facility (\texttt{Ctrl-K}) applies the On Loan, On Order and On Reserve filters correctly

#### Supervisor
- New installation parameters
- Usernames – New button security for Debt Collection Manager

#### VDX Integration
Allows VDX to communicate with Amlib via the NCIP protocol. Messages include:
- Request items – Amlib then determines whether the requested reservation is allowed and creates the reservation if allowed
- Cancel Request – Amlib deletes the reservation
- Issuing items – Amlib issues an item
- Renewal of items – Amlib determines whether the requested renewal is allowed and then renews the item if allowed. A new due date will be returned
- Return of items - Amlib returns the item

*Separate notes are available in the Amlib/Help folder for Installation and User Guide*
General
Release Version 5.3.0.0 – changes to incorporate the ability to use new modules

- Debt Collection module (extra license needs to be purchased)
- VDX integration

Authority

- No changes

Amlib Backup Manager Utility

- I1102940: Changes to backup manager interface to reduce the size of the form and allow it to fit on screens with smaller resolutions

- The Amlib Backup Manager application and Amlib Backup Manager service allow sites to configure and run automatic backups for SQL Server Express Edition.

- Higher editions of SQL Server already come with tools for performing these tasks. As a result, sites running editions greater than Express Edition do not need to install these programs.

- The following article defines how to determine which version of SQL Server is installed
  http://support.microsoft.com/kb/321185.

- This will require access to the server running SQL Server.

To summarise:

- Open Management Studio
- Click New Query
- Enter the following in the query window:
  - SELECT SERVERPROPERTY('productversion') as [Version], SERVERPROPERTY('productlevel') as [Service Pack], SERVERPROPERTY('edition') as Edition
- Highlight the text and click the F5 Query button
- The result query will return one row with three columns. The edition column contains the edition. If this value contains Express Edition, then the backup manager and service will need to be installed.

Apply for the Installation Guide from Customer Support for further information
Borrower

New Field: Exclude from Debt Collection

- When Y, the borrower is NOT included in any Submission for Debt Collection. Also Added to Mass Change options and Where Search Column

New Field: Status Date

- Updates whenever the Status is changed

Debt Collection Status

- With this status assigned and entered in Supervisor Installation, a Borrower cannot be allocated or removed from this status unless Submitted or Updated by the Debt Collection automated process. Not for Manual process.

Debt Collection History

- If Borrowers are Submitted to Debt Collection, a History Report is written with a Report Type of DCOLLSUB with the date and time of Submission and a comment of “Debt Collection Submission at XXX (Location code). If updated within Debt Collection the Report Type will be DCOLLUPD, with a comment of Debt Collection Update at XXX (Location code)

Borrower Financial

- New Format: Choose F1 New Charge button to enter a new Financial Transaction
- New Columns:
  - Date Modified – displays the date a change was made to the Borrower Financial Transaction. This ensures the Invoice Date and Transaction Date remain unchanged
  - Amount Outstanding - the outstanding balance for the borrower is now visible in the last Column of the Financial Table – Sum of the Value & Sum of the Paid From Financial Transactions for the specific Borrower
- Waive button now available in single line and double line accounting (Permissions need to be set for the Button permissions in Supervisor > Usernames > Viewing Menu – Borrower Financial – change the red Waive button to green). Log out of Amlib and back into Borrower Financials. Waive buttons should now be available to waive transactions if required
- In Single-Entry and Double-Entry Financials, editing is not allowed on rows, except on Comments in Single Entry. Payments are made via Allocation or able to Waived or Deleted (Single-Entry)
- Manual creation of Financial Transaction will no longer be allowed from the grid
- User can pick the Financial Types from a drop down of CR or DB transaction types. CR Financial Types available in Payment sections, Debit Financial Types available in Charge sections
• On creating a New Charge, the Charge and Payment can be made on the same window. This is useful for simple transactions where the Borrower is charged and pays at the desk. For example: Transactions for a New Card
• User can select an Item from a search launched from the form
• Charges and Payments are now linked with an ID (this is not obvious to the User but linked through the system). New index created to prevent the creation of unique IDs
• See also changes in Circulation Finance in Finance section

New Columns in Where Searches:

• Exclude from Debt Collection: Ignore unless using Debt Collection module

Service Requests

• I10032024: Ensure Lock Corporate Borrower Data installation parameter is obtained from Login location

Please Note: This was made available in Version 5.2.3.

Catalogue

• I10091667

Allow Non-Authority subfield data to display separately as valid Catalogue data when there are mixed Authority and Non Authority Subfields included in the Marc Tag. This may occur in the Catalogue Worksheet when there is no need for accompanying Authority Subfield data (was only an issue in mixed tags when creating Catalogue records through Catalogue Worksheet). For example, where 260 c Date is to be entered without the Publisher and Place of Publication and when the Date was a Non Authority and the other Tags were Authority).

Please Note: This was made available in Version 5.2.3.

Circulation

Service Requests

• I1011185: Fixed Credit issue when switching from Single to double line accounting
• I1101969: Ensure correct closed day calculations when applying an Overdue Fine
Debt Collection Module

The Debt Collection interface is a new module, specifically designed as an interface to the Unique Management Services. It is a separate program and will require separate licensing to Amlib.

- Only to be setup and used by those who have purchased it
- Only needs to be set up for those who will need to run (could perhaps be a person outside the Library)

The interface is responsible for:

Submission

- Identifying Borrower’s whose financial transactions meet the library’s criteria for submission to the Debt Collection process
- Submitting the details to Unique Management in the required format
- View option available which will allow Institution to check results prior to running in Update mode – has Test button and Run button

Update

- Identifying updated details for the Borrowers previously submitted
- Delivering the updated details to Unique Management
- View option available which will allow Institution to check results prior to running in Update mode – has Test button and Run button

Synchronization

- Collating details of all Borrowers who are currently in submission for synchronization of the systems
- Delivering the synchronization data to Unique Management in the required format
- View option available which will allow Institution to check results prior to running in Update mode – has Test button and Run button
DIY Module

- Financial Changes
- Changes to suit 3M C Series chute returns
- Return updates as per Envisionware specs
- I11011610: Added login switch to amlib.ini
- I11011162: Check-in – ensure floating item’s permanent location is set to current location so no alert is sent in the check-in response
- I11021010: Update Quantity column in financial table with correct number of days when returning that incur an overdue fine

Finance and Orders

Circulation Finance

- Improve the design of the data structure to facilitate simpler and more reliable linking of financial transactions for Double-Entry accounting - A new database table will link credits and debits for double entry financial transactions
- Improve performance when accessing financial transactions for a borrower for Double-Entry accounting
- Define and enforce rules for the use of Financial Type codes both by the system and manually by the user
- Ensure that the Debt Collection interface can extract the correct data in a reliable manner

Financial Types window now has CR or DB Columns showing whether it is valid for Credit or Debit – for use with applying Financial to Borrower records

<table>
<thead>
<tr>
<th>CIRCULATION TRANSACTION TYPE (STANDARD)</th>
<th>DESCRIPTION</th>
<th>CREDIT/DEBIT</th>
<th>SYSTEM USE ONLY</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCOUNT</td>
<td>Account</td>
<td>DB - Debit</td>
<td>v</td>
</tr>
<tr>
<td>CNH</td>
<td>Claims Never Had</td>
<td>CR - Credit</td>
<td></td>
</tr>
<tr>
<td>CR</td>
<td>Claims Returned</td>
<td>CR - Credit</td>
<td></td>
</tr>
<tr>
<td>DAM</td>
<td>Damaged Item</td>
<td>DB - Debit</td>
<td></td>
</tr>
<tr>
<td>DCFEE</td>
<td>Debt Collection Fee</td>
<td>DB - Debit</td>
<td>v</td>
</tr>
</tbody>
</table>

There are now a Standard set which must be defined and cannot be edited or deleted. A subset of these Financial Types are System Financial Types and are reserved for System use and cannot be used for Manual Circulation Financial Transactions

The System only ones are shown below in Bold.
<table>
<thead>
<tr>
<th>FEES</th>
<th>Description</th>
<th>Type</th>
<th>Optional?</th>
</tr>
</thead>
<tbody>
<tr>
<td>ISSUE</td>
<td>Issue Charge</td>
<td>DB - Debit</td>
<td></td>
</tr>
<tr>
<td>LATEFINE</td>
<td>Fine</td>
<td>DB - Debit</td>
<td></td>
</tr>
<tr>
<td>LEGAL</td>
<td>Legal Charge</td>
<td>DB - Debit</td>
<td></td>
</tr>
<tr>
<td>LOST</td>
<td>Lost Item</td>
<td>DB - Debit</td>
<td></td>
</tr>
<tr>
<td>OVERDUE</td>
<td>Overdue Item</td>
<td>DB - Debit</td>
<td>✓</td>
</tr>
<tr>
<td>PAYDAM</td>
<td>Payment for Damaged Item</td>
<td>CR - Credit</td>
<td></td>
</tr>
<tr>
<td>PAYFINE</td>
<td>Payment for Fine</td>
<td>CR - Credit</td>
<td></td>
</tr>
<tr>
<td>PAYLEGAL</td>
<td>Payment for Legal Charge</td>
<td>CR - Credit</td>
<td></td>
</tr>
<tr>
<td>PAYLOST</td>
<td>Payment for Lost Item</td>
<td>CR - Credit</td>
<td></td>
</tr>
<tr>
<td>RESADV</td>
<td>Reservation Advice Charge (through Reports)</td>
<td>DB – Debit</td>
<td>✓</td>
</tr>
<tr>
<td>RESCANC</td>
<td>Reservation Cancellation Charge</td>
<td>DB - Debit</td>
<td>✓</td>
</tr>
<tr>
<td>RESERVE</td>
<td>Reservation Charge (within Circulation)</td>
<td>DB - Debit</td>
<td>✓</td>
</tr>
<tr>
<td>RESFEE</td>
<td>Reservation Charge – Fee (through Reports)</td>
<td>DB - Debit</td>
<td>✓</td>
</tr>
<tr>
<td>RENEW</td>
<td>Renewal Charge</td>
<td>DB - Debit</td>
<td>✓</td>
</tr>
<tr>
<td>RETURN</td>
<td>Returned Item</td>
<td>CR - Credit</td>
<td>✓</td>
</tr>
<tr>
<td>WAIVE</td>
<td>Waive a Fine, Fee or Charge</td>
<td>CR - Credit</td>
<td>✓</td>
</tr>
<tr>
<td>WRITEOFF</td>
<td>Write Off a Debt</td>
<td>CR - Credit</td>
<td></td>
</tr>
</tbody>
</table>

**Circulation Finance Window**

- Mandatory definition of Financial Types will assist searching on this screen
- Disallow editing of credit and debit charges in this Window
- Disallow deletion from Table view OR the Main screen
- Remove New Transaction from Transactions Menu
NetOpacs (Opac via Web Browser)

- Financial Changes – creation of waive transaction type controlled by an amlib.ini switch - RefundReserve
- Ensure items marked as on loan and issued to current borrower when performing renewals
- I1009120: Modifications to subject interest processing to improve performance and prevent crashing
- I1012192: Ensure correct Borrower details are retrieved when using viewing subject interests and returning to borrower details screen
- I10121253: Use issue location to obtain circulation parameters when renewing items
- I1103323: Prevent Renew URL from being used to access other patron records

Offlines

- No Changes

Periodicals

- No Changes

Reports

- Changes to Borrower Financial Receipts and Table Reports to allow printing of Dates and Outstanding charges
- I11011677: Fixed problem with SMS reports where they were causing other reports to send E-mail attachments

Stockitem

- I1101922: Fixed Stock Keyword Facility: For Loan, On Order and Reserved Search Filters work correctly
- I10071122: Reserve Allocate will now sort reservations based on the date the reservation was created. Added Reserve Shuffle menu item back to Stockitem table menu (this was removed for 5.2)

Supervisor

Installation Parameters

Borrower

- Validation applied to Default Borrow Status in Borrower Installation parameters
Circulation

- **Debt Collection Borrower Status** in the DEFAULT set of parameters. This is ONLY to be used in conjunction with running the Debt Collection module.

System

- Change of parameter wording from **Disallow editing of Financial Transactions once saved** to **Double Entry Accounting (Y/N)**

<table>
<thead>
<tr>
<th>SETTING</th>
<th>DESCRIPTION</th>
<th>EXPLANATION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Y</td>
<td>Unable to delete Financial Transactions. Able to Waive</td>
<td>Changes made to make Financial Transactions more secure</td>
</tr>
<tr>
<td>N</td>
<td>Able to delete Financial Transactions. Able to undo within Allocate Window</td>
<td>Changes made to make Financial Transactions more secure</td>
</tr>
</tbody>
</table>

- **Please Note:** Sites switching to Double-Entry accounting cannot undo this setting. Once set the site **MUST** remain in Double-Entry accounting. There is **no** switch BACK to Single-Entry accounting.

- **Please Note:** Sites must switch to Double-Entry accounting if they intend to use the Debt Collection module. There is an Update path that can be followed, to implement this and ensure that Borrower Financial Transactions are still valid and correct.

Other

- **Default Financial transaction type for credits** – enter the **Transaction Type** that will be the Default (for example: one that is in use the most) for payments

- **Default Financial transaction type for debits** – enter the **Transaction Type** that will be the Default (for example: one that is in use the most) for charges

- **POP3 Alert email level** – None (N), Error (E), Success (S), Both – Error and Success (B) – for use with VDX integration via structured email. Should be entered for each Location Installation required

- **POP 3 CC Email address for alerts** – Enter Email Address to which VDX alerts will be sent. For use with VDX integration via structured email. Should be entered for each Location Installation required

- **POP 3 server address** – enter the IP address or Server name of the Server to be used for VDX Email. Should be entered for each Location Installation required

- **POP 3 server login** – enter the Username for login to the Server. For use with VDX integration via structured email. Should be entered for each Location Installation required

- **POP3 server password** – enter the Password to login to the Server. For use with VDX integration via structured email. Should be entered for each Location Installation required
User Permissions

- Debt Collection Manager – needs to be a Manager to access the Debt Collection Program (if purchased)

VDX

VDX email interface (application)

*Amplib 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 *Amplib* client, as well as creating a reservation for the borrower as entered into VDX. This user guide covers how to configure and run the *Amplib VDX ILL Email* solution.

The *Amplib VDX ILL Email* is available to all *Amplib* 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 *Amplib VDX ILL Email client* will:

1. Allow the automatic creation of a temporary Stockitem record on a requesting *Amplib* 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 *Amplib*
3. Allow the automatic creation of a corresponding ILLs record in *Amplib* applications

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

1. Require a schedule to be set and activated using the *Amplib 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 *Amplib* 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 *Amplib*
5. Allow the automatic creation of a corresponding ILLs record in *Amplib* Applications