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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_.

Last Updated: 24 February 2014
Version: 5.3.4
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 Amlib Supervisor Settings. 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 (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.

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 **Administrative Privileges**.

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

1. The *Amlib VDX ILL Email Service 5.3.4* installer is available on the OCLC Website, under Downloads and Software Updates>Utilities [https://www.oclc.org/support/services/amlib/downloads-software-updates/utilities.en.html](https://www.oclc.org/support/services/amlib/downloads-software-updates/utilities.en.html) (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 **Setup** screen will open displaying the **Welcome** message:

![Welcome screen](image)

4. Click the **Next** button – the **Destination Folder** screen will display:

![Destination Folder screen](image)
5. Choose where the program is to be installed (generally leave as default) and select the **Next** button – the **Ready to Install** screen will display:

6. Click the **Install** button – the **Installing** window will display:
8. When complete, ensure the **Launch Configuration Manager** is **ticked** and click the **Finish** button.

9. The **Amlib Configuration Manager** will then launch:

**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 **Appendix 4: Edit Access Control for Amlib VDX ILL Email** 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

2. The Amlib Configuration Manager should already be connected to the AmlibConfig.xml Configuration File being used by the Amlib VDX ILL Email application

3. If there is no Configuration File 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)
4. Once the Amlib Configuration Manager is opened, the AM and TE databases will display as default:

![Amlib Configuration Manager](image)

5. In the Amlib Systems tab, highlight the Live or Test database connector and click the Edit button—the System Editor will open

- To add a new connector, select the New button
6. On the General tab, enter the **Prefix** and a **Description** (for Live/Test this will be greyed out)

7. On the **Databases** tab, enter the following details:

   - Choose the details for the **RDBMS** and **OleDbProvider** from the drop-down boxes
   - Enter the details for the **Lib** database
• **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

• **Password** – 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

8. Click the OK button once complete – the System Editor window will close
Testing

Once complete, the connection can be tested:

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

![Test Connections window](image)

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 **Results = OK**:

   ![Test successful](image)

   • **Test unsuccessful** – all **Results = Fail** with **Error Details** shown:

   ![Test unsuccessful](image)

4. Click the **Close** button to close the **Test Connections** 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 POP3 server login. 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:

4. Ensure the Enabled box is ticked:

5. Click the Service button – the Service prompt will display
6. Ensure the Service Status is Running
7. If not, click the Restart button and then the Close button

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.

9. 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 Administrative Privileges.

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

1. The Amlib VDX ILL Email 5.3.4 installer is available on the OCLC Website, under Downloads and Software Updates>Utilities
   (contact Amlib support if you require a login to this website)

1. Download the AmlibVDXILLEmail534.msi and save it on your Amlib PC

2. Double-click the AmlibVDXILLEmail534.msi to launch the installation Wizard – the Setup screen will open displaying the Welcome message:

   ![Welcome screen](image)

4. Click the Next button – the Destination Folder screen will display:
5. Choose where the program is to be installed (generally leave as default) and select the **Next** button – the Ready to Install screen will display:

6. Click the **Install** button – the **Installing** window will display:
7. When complete, ensure the Launch Configuration Manager option is **ticked** and click the **Finish** button:

8. The *Amlib Configuration Manager* will then launch:
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 Appendix 4: Edit Access Control for Amlib VDX ILL Email 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

![Amlib Configuration Manager](image)

2. The *Amlib Configuration Manager* should already be connected to the *AmlibConfig.xml* Configuration File being used by the *Amlib VDX ILL Email* application

3. If there is no Configuration File 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`)
4. Once the Amlib Configuration Manager is opened, the AM and TE databases will display as default:

5. In the Amlib Systems tab, highlight the Live or Test database connector and click the Edit button– the System Editor will open
   
   - To add a new connector, select the New button
6. On the **General** tab, enter the **Prefix** and a **Description** (for **Live/Test** this will be *greyed* out)

![System Editor](image1)

![System Editor](image2)

7. On the **Databases** tab, enter the following details:

   - Choose the details for the **RDBMS** and **OleDbProvider** from the drop-down boxes

![System Editor](image3)

   - Enter the details for the **Lib** database

![System Editor](image4)
• **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

• **Password** – 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

8. Click the **OK** button once complete – the **System Editor** window will close
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 Results = OK:
     - Test unsuccessful – all Results = Fail with Error Details shown:
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
6. Click the **Exit** button once all database connections completed

7. 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 Username** and **Password** 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 Installation location selection screen will display
4. Highlight your main location (libraries with multiple circulating locations should select one of these locations) and click the OK button – the Installation screen for the selected location will display
5. Select the Other tab

6. Scroll down and enter the following VDX POP3-related settings:
   a. VDX Alert email level - None (N), Error (E), Success (S), Both - Error and Success (B) – enter N, E, S or B
   b. VDX CC Email address for alerts – for example: firstname.lastname@mylib.com
   c. VDX Email address for alerts – for example: firstname.lastname@mylib.com
   d. VDX POP3 server address – for example: myemailserver.com.au
   e. VDX POP3 server login – enter the POP3 Server login
   f. VDX POP3 server password – enter the POP3 server password
IMPORTANT: Please refer to the detailed notes overleaf before completing these settings.

Important Information about Entering Your POP3 Settings:

- When 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).

- The 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 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.

- The 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 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 primary email address.

- The hostname or IP address of the mail server hosting the POP3 mailbox that has been set up to receive VDX emails for this location

- The 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

- The 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 DEFAULT screen or on the individual location screen, then there is no need to change them

  a. SMTP server name or IP address – for example: libraryserver.com.au
  b. SMTP sender email address – for example: library.staff@mylib.com
  c. SMTP server requires a login Y/N – for example: Y
  d. SMTP server login (only if required) – for example : serverlogin
  e. SMTP server password (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 POP3 Email server settings should not be entered on the Installation (DEFAULT) 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 POP3 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 Permanent Location 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

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

8. Select the Other tab and enter the settings:
   - Location is Valid For Holdings: \textit{Y}
   - Location is Valid for OPAC enquiries: \textit{N}
   - Location is Valid For Registration and Circulation: \textit{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:

![Locations Screen](image1)

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

![LibraryGroupPermits Screen](image2)

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 Check-digit Calculations screen will display:

   ![Check-digit Calculations Screen]

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. (Item) (B)orr: I
   
   b. Leading Chars: ILLS
   
   c. Trailing Chars: ############

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

   ![Check-digit Calculations Table]

   ![10 #’s in Red]
5. 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:

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:

4. Ensure that the following Item Create Defaults are set:
   - **Form**: set the default Form code to be used for all ILL items (including VDX) – for example: Form = BK
   - **Stats**: 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 VirusScan Console will display:

3. Right-click on Access Protection and select Properties – the Access Protection Properties screen will display:
4. Click on the **tick** in the **Block** column against *Prevent Mass mailing worms from sending mail*

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 AmlibVDXILEmail.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**

![Amlib VDX ILL Email Service Properties window](image1)

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

![Amlib VDX ILL Email Service Properties window](image2)

4. Click the **Stop** button if the service is running
5. Enter `-l` in the Start parameters and click the Start button

![Service properties window](image)

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 Configuration Manager]

3. Un-tick the Enabled button
4. Click the Service button – the Service prompt will display:

![Service]

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.

1. 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

3. The Amlib VDXILLEmail Properties screen will display

4. Select the Security 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.

7. Then in the **Permissions for Users** pane, **check** the **Allow** checkbox for the **Modify** setting – this will give Users the necessary group permission to apply modifications to files and folders in the **Amlib VDXILLEmail** folder:

![Permissions for Amlib VDXILLEmail](image)

8. This action will automatically **check** the **Allow** checkbox for the **Write** setting:

![Permissions for Amlib VDXILLEmail](image)

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