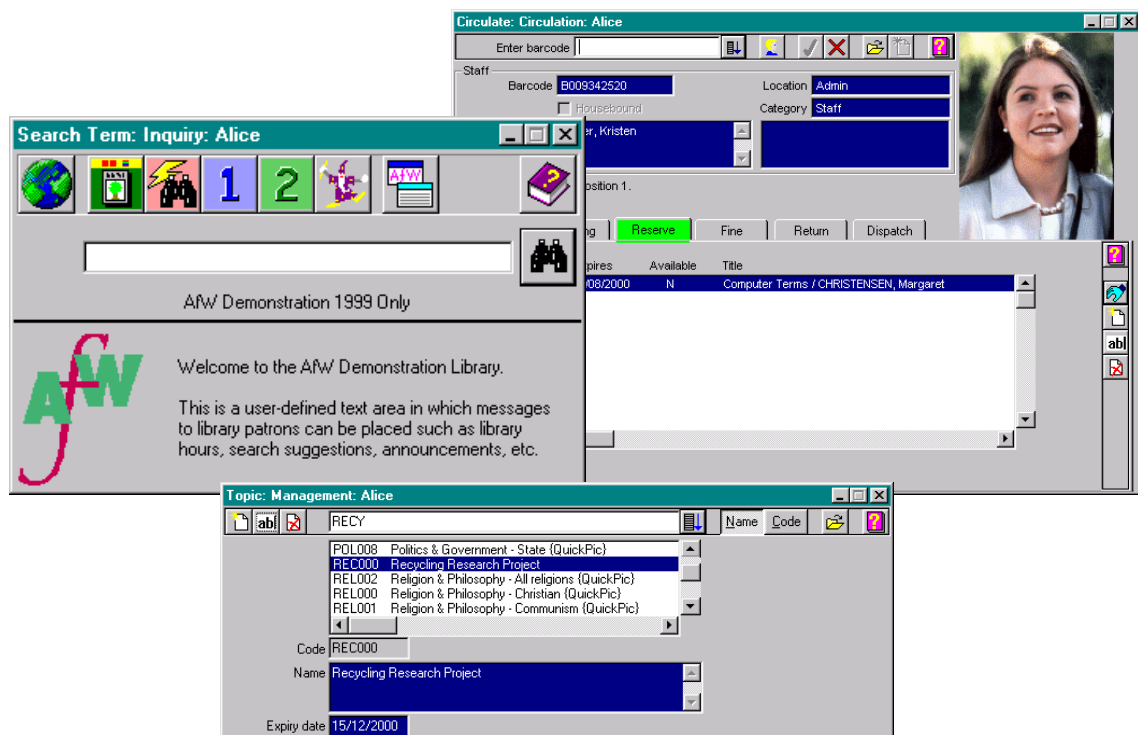




# User Manual



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# Company Profile

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**Company Name:** Softlink Australia Pty Ltd  
(A.C.N. 010 822 143)



**Established:** August 1983
















**Company Directors:** John A. Dunne Executive Chairman  
Bob Dunne Executive Director (Asia/Pacific)

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**Softlink software is found in:**

	All states and territories of Australia
	Britain
	U.S.A.
	Europe
	New Zealand
	Papua New Guinea
	South-east Asia
	South America
	Iceland
	Pacific Islands
	Africa
	India

**Agencies:**

	Western Australia
	South Australia
	A.C.T.
	Victoria
	Auckland
	Wellington
	Christchurch
	Singapore
	Kuala Lumpur
	Thailand
	Fiji
	Reykjavik
	India
	United Kingdom
	U.S.A.

**Awards:**

★	Gold Awarded to OASIS in 1989 Australian Technology in Government.
★	Gold Awarded to Corporate Affairs Software in 1989 Technology in Government.

# Contents

<b>Introduction</b>	<b>1</b>
<b>Part 1      Implementation Strategy</b>	
Summary	3
Implementation	4
Reassessing your goals	5
Things to think about as you set up AfW	6
System Parameters	7
How to devise Loan Categories	9
Lending Policy	10
<b>Part 2      Guided Tour to AfW</b>	
Getting Started	11
System	17
Management	35
Circulation	39
Reports	47
<b>Part 3      System Administrator Functions</b>	
Shutdown Parameters	48
System Administrator Functions	50
<b>Part 4      Cataloguing</b>	
Introduction	53
Cataloguing	54
Authority Files	61
Lookup Files	69
Utilities	72
Reports	74
Authority Lists	75
Catalogues	75
Cataloguing Examples	76
<b>Part 5      Circulation</b>	
Introduction	84
Plan your Circulation Setup	84
Loans	85
The Circulation Control Card	89
Circulate Folder	90
Circulation Warning Messages	92
File Folder	94
Fine Schedule	101
Global Change	105
Utilities	108
Lists	109
Forms	109
Reports	110
Notices	110

<b>Part 6</b>	<b>Using Inquiry</b>	
	Introduction	111
	Quick Search By Category	112
	Quick Search - One-Word	113
	Quick Search – Two-Word	114
	Standard Search	115
	Boolean Searching	120
	Accessing computer files and web sites	124

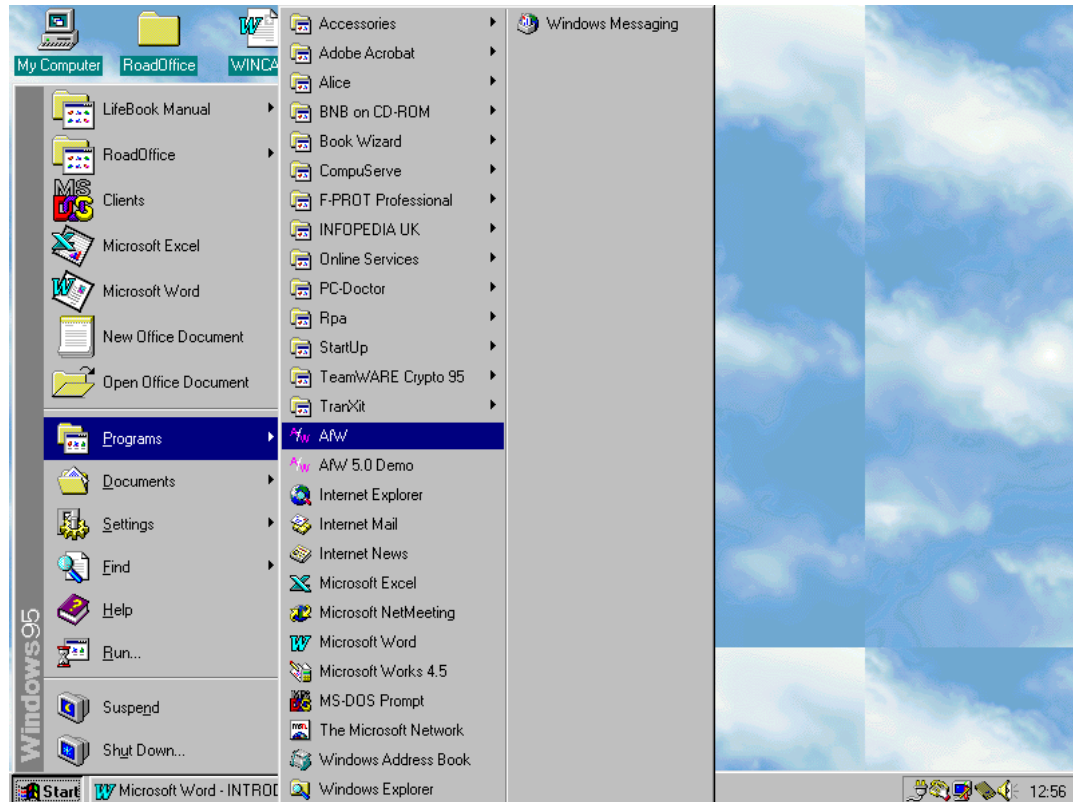
**October 1999**

# Introduction

This information has been written to assist you in getting started with using **AfW**. Any screen shots used in this manual are examples only. For further assistance in using **AfW**, you should first check the **AfW** Help module, then contact Softlink support with full details of your query.

## Overview

To open **AfW** from the Taskbar, select **Start, Programs, AfW**.



To save you time in opening **AfW**, you can set up an **AfW** Folder on your desktop.

Put the mouse cursor on Start and click the right hand mouse button. Click Open and you will see the Start Menu. Double-click on Programs. This will show you the available program groups, including **AfW**. Click on **AfW**, using the right mouse button, then choose the option Copy. Place the cursor on the desktop and again using the right mouse button, choose the option Paste, to paste the **AfW** icon onto your desktop.



## AfW Folder/Module List

<b>Folder</b>	<b>Purpose / Functions</b>
<b>Favourites</b>	Frequently used options may be inserted here
<b>Inquiry</b>	Searching for resources and their availability ; reserving resources.
<b>Management</b>	Maintenance of Authority files, including subjects, GMD, authors, keywords, stop words, locations, etc. Cataloguing and accessioning all resources. Printing of reports, authority file lists and catalogues
<b>Circulation</b>	Maintenance of borrower information, calendar, resource and borrower loan categories, fines, user group updating. Circulation of resources, including loans, returns, reservations and bookings. Printing of reports, e.g. overdue notices, borrower lists, borrower and resource usage.
<b>Acquisitions</b>	Maintenance of budget information, the Wish List, On Approvals, ordering, receipt of resources and non-book expenses. Printing of budget reports, orders and On Approval requests, resources by budget dissection and claims for late orders.
<b>Periodicals</b>	Maintenance of periodical titles, subscription information, receipt and circulation of periodicals. Printing of reports, e.g. subscriptions due, claims for missing and overdue issues and circulation lists.
<b>Stocktake</b>	Stocktaking of collection. Includes reports for missing, disposed and purged items.
<b>Reports</b>	Printing all <b>AfW</b> reports, including catalogue reports, overdue notices, loan history, borrower lists etc. The reports folder contains the collective reports that are available within each individual folder.
<b>System</b>	System Administration functions, including system parameters (including Maps), shutdown settings, rebuilds, maintenance of security, operators & passwords, data loading for borrower records and MARC records.
<b>Support</b>	Functions accessible only via the Support Password, including Run, File Compressor and Recovery.

**Note:** This list gives details of all modules available. The system you are using may not have all these modules installed.



## **1. Implementation Strategy**

# Summary of AfW Implementation

1. Install **AfW**
2. Set up System Parameters (System/Parameters)
3. Devise and set up Security for each module (System/Security/Groups and Settings), and add new operators (System/Security/Operators)
4. Set up Resource Loan Categories and Borrower Loan Categories in Circulation (Circulation/File/Resource Loan Category/Borrower Loan Category)
5. Catalogue resources in Management (Management/Cataloguing) or download from appropriate CD ROM bibliographic database, e.g. SCIS or ABN. (System/Data Loading/MARC File).
6. Enter borrower details for circulation, manually (Circulation/File/Borrower) or load from an existing database of borrowers (System/Data Loading/Borrower)
7. Commence 'Live' operation of **AfW**.



# Implementation of AfW

1. Install/upgrade hardware and network (if applicable). Make sure your hardware is working and that it is configured to run **AfW** properly (for assistance here, consult with **AfW** Support).
2. Install your **AfW** software (Softlink can assist you with installation – just let your Support Officer know in advance when you intend to install and they will be standing by if you need assistance). Follow the installation instructions with your installation kit. Performing an Archive completes installation.
3. Stop and rethink how you want **AfW** to work for you. See the attached information ‘Things to think about’ (on page 6).
4. Set your **AfW** System Parameters for your installed modules. Set up your Loan Category information in Circulation (on pages 9-10).
5. Do some sample data entry
  - Catalogue a representative cross section of your library resources in Management, manually or through loading a MARC file.
  - Add a representative cross section of Borrowers in Circulation, manually or import borrower records from an administration database (ask your Support Officer for assistance).
  - Try out Inquiry to check your cataloguing data entry. Do you need to add more information to enable your users to find resources?
  - Try out circulation to check that your parameters, loan category information is set up correctly for your needs.
  - Review your system set up and revise if necessary.
6. If you think you need help in Steps 3 to 5, there are one–day training courses that you can attend. On-site training and Telephone training are also available. Contact Softlink Australia for details.
7. Complete Data entry
  - Catalogue the remainder of your library resources.
  - Enter remaining borrower records.
  - Try out Circulation and Inquiry again.
  - Do any essential tidying up (especially in the cataloguing area).
8. On going use of **AfW**.
  - Continue to evaluate and monitor the use of your catalogue (can you improve your catalogue data in any way i.e. authority files).
  - Carry out routine housekeeping tasks to assure continued good health of **AfW** i.e. Shutdown and Archives; external backup; Rebuilds of your data base; changing Resource Loan Categories as library resources are moved and re-classified; **AfW** utilities

# Re-Assessing the Need for Automation and Your Goals and Objectives for Automation

**Q. Why are you automating with AfW?**

- A. To improve library management and reduce time spent on repetitive manual tasks that can be carried out using automation
- A. To enable your users to find what they want
- A. To keep track of where your library's resources are at all times

**Q. What do you want to achieve and what time frames have you set for achieving your goals for your library**

- A. Catalogue your major library resources
- A. To add borrower information
- A. To loan/return items through Circulation
- A. To set up networked OPACs (Online Public Access Catalogues) so your users can search for library materials
- A. To catalogue all resources in school/organisation
- A. To make OPAC available from any network terminal throughout the school/organisation
- A. To make OPAC available remotely via the Internet and Web Inquiry.

**Q. How will you measure your success?**

All of your goals and objectives should be considered BEFORE you commence the actual process of automation. Remember, a great deal of time, effort and resources will need to be put into your automation project before the full advantages are realised. **AfW** is able to help you achieve the above goals and to introduce you to a great many new possibilities for your library or resource centre.

# Things to Think About When Setting Up AfW

## Barcode Labels

- Are you going to use barcodes for your resources and borrowers?
- For your resources, where are you going to put them? There is no correct place for book barcodes, however for Returns and Stocktake, the best place is on the back of the book near the spine. Choose the best position for your needs.
- Will barcode numbers replace accession numbers? If you are automating your library for the first time, separate accession numbers are superseded, as the barcode will be the unique identification number for the resource.
- If you are converting from another library automation system, will you continue to use your current type of barcode?

## Lending Policy – How Will You Lend Resources?

- What types of borrowers do you have? Will you need to distinguish between specific groups of borrowers (e.g. younger from older students; continuing students from Final year students; students from staff; full-time teaching staff from part time staff/trainee teachers; external borrowers from borrowers internal to the organisation)?
- What types of resources do you have? Will you need to distinguish fiction from non-fiction and Reference; books from non-book items; books suitable for younger users from books suitable for older users etc?
- What types of resources can each type of borrower have out and for how long? Do you have any resources that can be borrowed for part of a day only? Do you have any final due dates by which all items are to be returned by a particular type of borrower?
- What limits have you set for the number of items borrowers can take out (e.g. 5 book items/ 2 non-book items; 2 fiction/ 3 non-fiction /1 Audio/visual item etc.)? Which resources belong to each limit group?
- Are you going to date stamp? How many date stamps will you need?
- Are borrowers going to have tickets/cards? With barcodes on? With photos?

## System Administration

- How many operators do you have? Librarian, library assistant, volunteer, master operator?
- What is each type of operator allowed to do?
- How often do you want **AfW** to create a Data Archive? The system is set to do three Data Archive sets. Ask your Softlink Support Officer for assistance if necessary.
- How will you do an external backup for **AfW**? (Zip Drive/Tape – ask your hardware vendor/Network administrator for assistance).

# System Parameters

System Parameters must be set before you commence data entry in **AfW**. These are set in System/Parameters.

## Library

### General:

- Library Name and Address.
- Library Code? (Last four digits of your **AfW** barcodes. Leave blank for Non **AfW** barcodes).

### Barcode:

- Next Barcode – Borrower? – Enter your first borrower barcode here.
- Match accession number to barcode? Accession numbers will become the first six characters of your barcode.
- Keep 7<sup>th</sup> character? For libraries converting from another automated system, the 7<sup>th</sup> character in your barcodes may not be a check digit and should not be removed.
- Incrementing character position? Which character on your barcodes is incremented. In **AfW** barcodes it is position 5.
- Any special (non **AfW**) barcodes? If so, consult your Softlink Support Officer.

## Inquiry

### General:

- Allow borrowers to make reservations in Inquiry?
- Allow Quick Search in Staff mode (if module installed).
- Show unused Subject Headings? – i.e. Subject headings that currently have no resources attached. Do you want Inquirers to see these headings?
- Record failed searches for analysis of Inquirer search strategies and to enable identification of possible gaps in collection?

### OPAC:

- Allow printing of resource lists?
- Allow Quick search?
- Show other sites? (Union Catalogue only)
- Show Financial data? Price, supplier etc.
- Time to terminate? Automatic shutdown for unsupervised OPACS and Self Circulation workstations.
- PIN to exit? Four digit number to prevent unauthorised exit from OPAC and Self Circulation workstations.

### Quick:

- For Quick Search users only. Choose the Default All button and then edit the default subjects to suit your library.

## Management

- Automatic Keywords from Title, Notes, Edition?

If required, **AfW** automatically tags significant words (except those words placed in a Stopped Word list) entered in these fields. These words will then be searchable in Inquiry.

- Automatic See References by term, by word?

If required, **AfW** can automatically generate 'See From' headings from the authorised subject headings you enter as you catalogue. e.g.

(Subject heading) Australia– Description and travel

(See from) Description and travel – Australia

(See from) Travel – Australia – Description

These See From headings allow Inquiry users to approach the same subject from a different angle. They will always be directed to the authorised subject heading.

- Default Resource Loan Categories for Fiction and Non Fiction? In general, which Resource Loan Category do you want allocated to these types of resources? If you enter the letter F for fiction items in the Classification field, **AfW** will automatically enter the Resource Loan Category you nominate here for these types of items when you add a new copy record. All other entries in the Classification (other letters, Classification numbers) are considered to be non-fiction. **These two parameters are important, as ALL resources must have a Resource Loan Category if they are to be loaned. (Please note that these defaults are entered into the Parameters AFTER they have been set up in Circulation).** See Part 1, Pages 9-10 for information on setting up Resource Loan Categories.
- Next Values? Accession Number, Resource Number – these are generated automatically.
- Allow Keywords from words with no digits, words with some digits, words with all digits? If you choose words with all digits, numbers like dates will be generated as keywords automatically.
- Automatic Suffix generation? Shelf location numbers or Dewey Decimal Classification numbers are often followed by a suffix, typically the first three letters of the author's surname. **AfW** can generate this suffix for you automatically as you enter new resources.

## Circulation

### General:

- Maximum number of loans per person to be set by count or by total monetary value?
- Print Reservation Notices when a reserved item is ready to collect?
- How many days will you hold items once Reservation Notices have been printed and dispatched?
- Default expiry date for reservations? How long, in general, will a reservation be 'live', i.e. how long will you wait for a resource currently on loan to be returned before a reservation is automatically cancelled? Please note that the expiry date may be set for each reservation if necessary.
- Loan Limit Category names?

What type of loan privileges do your borrowers have, e.g,

2 Fiction, 2 Non-fiction, 1 Audio-visual (could include videos and CD ROMS)

4 Books (fiction and non-fiction), 1 Audio-visual, 1 Reference

Different types of resources are allocated a Resource Loan Category in Circulation. These Resource Loan Categories are in turn allocated a Loan Limit Category.

- Booking Slot name? For part day loan items – how do you split your working/school day – Sessions, Lessons, Periods, Time (24hr clock). Part-day loan items may be booked for a particular date and they can be lent out for a particular period of time during the day.
- Charge fines for open days only? If you wish fines to be accrued only during days the library is open.

### Print:

- Heading to appear at header of overdue notices, under the name of the library?
- Messages for External overdue, overdue to Family (parents of school students)?
- Recall notices for items required urgently by the library, including overdue items?

**Special:**

- Do you need to enter any other information about your borrowers not contained in the main Borrower detail fields?

**Membership:**

- If you have a membership scheme, how many days do you need for an expiry warning in the main Circulation screen?
- How long will membership be renewed?
- Will you send out Membership expiry/renewal notices?

## How to Devise Loan Categories

These categories are used to group borrowers and resources into categories. Each category can then be authorised to borrow a particular combination of resources for varying lengths of time. The following steps, relating to Resource Loan Categories must be completed before cataloguing and circulation can commence. The following steps, relating to Borrower Loan Categories must be completed before circulation can commence.

**Resource Loan Categories**

Must be established in the option group Circulation/File/Resource Loan Category. Each category is represented by a single character and a corresponding description, selected to represent a loaning policy for a group of resources in the collection. Each resource must be assigned a Resource Loan Category as it is added to the database in Management/Cataloguing/Resources.

**Borrower Loan Categories**

These must be established in the option group Circulation/File/Borrower Loan Category. Each category is represented by a single character and a corresponding description, selected to represent different groups of borrowers who have access to the collection. Each borrower must be assigned a Borrower Loan Category as they are added to the database in Circulation/File/Borrower. In addition, each Borrower Loan Category must be authorised to borrow particular Resource Loan Categories.

As the following diagram illustrates, the planned use of loan categories results in a large number of combinations of borrowing rights of users: e.g. users assigned the Borrower Loan Category of 'Teacher' can borrow items from the Resource Loan Category 'General Fiction' for a term. However, 'Senior Students' are authorised to borrow these types of items for only one week. Equally, while the 'Teacher' and 'Senior Student' are authorised to borrow items from the 'Reference' Resource Loan Category overnight, 'Junior Students' are not authorised to borrow 'Reference'.

## Example Lending Policy

			BORROWER LOAN CATEGORIES			
			CODE	S	F	T
			DESCRIPTION	Student	Final Year Student	Teacher
			MASTER DUE DATE		01/071998	
	LOAN LIMIT CATEGORY	CODE	DESCRIPTION	LOAN PERIOD (number of days/fixed due date/part day)		
RESOURCE LOAN CATEGORY						
	BOOKS	F	Fiction	14	14	21
	BOOKS	N	Non Fiction	14	14	21
	AUDIO-VISUAL	C	CD ROM	Part day	Part day	Part day
	AUDIO-VISUAL	V	Video	No	No	1
	AUDIO-VISUAL	S	Sound Recording	2	2	7
	EQUIPMENT	O	Conference Room	Part day	Part day	Part day
	EQUIPMENT	T	Computer	Part day	Part day	Part day
	SPECIAL	R	Reference	No	1	1
	SPECIAL	B	Resource Box	No	No	21
	SPECIAL	P	Pamphlet/Clippings	1	1	1

Note: Loan Limit Category Description defined in Circulation parameters

Your Lending Policy can be devised here

			BORROWER LOAN CATEGORIES			
			CODE			
			DESCRIPTION			
			MASTER DUE DATE			
	LOAN LIMIT CATEGORY	CODE	DESCRIPTION	LOAN PERIOD (number of days/fixed due date/part day)		
RESOURCE LOAN CATEGORY						



## 2. Guided Tour to AfW

This section is a quick tour of **AfW**. It discusses the basic aspects of the system as well as the entering of System Parameters. This section should be read first before referring to more detailed information on the workings of Cataloguing, Circulation and Inquiry in Parts 4, 5, and 6.

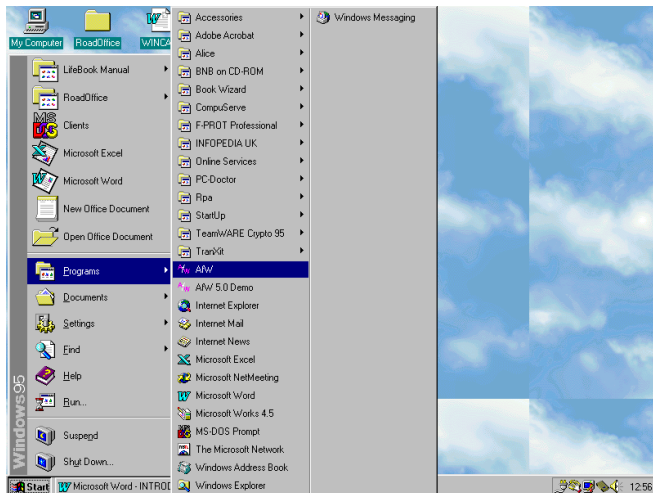


# Getting Started

## Starting

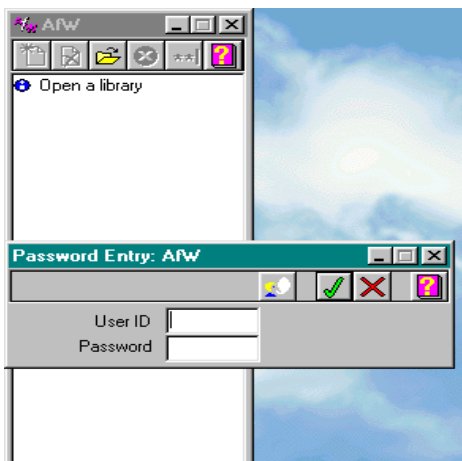
To open **AfW**, simply do the following:

1. From the Taskbar, select **Start**.
2. From the Start menu, select **Programs**.
3. From the Programs menu, select **AfW**.



To save you time in opening **AfW**, you can set up an **AfW** Icon on your desktop. See Page 1 in the Introduction for instructions on how to set up an **AfW** icon.

## Log into AfW



To “open a library” and commence using **AfW**, you must Log in first.

User ID (usually your initials)

Password

Use the<Tab> key to move between fields, or by using the mouse. Machine name must be entered the first time **AfW** is run on any machine.

## Log out of AfW

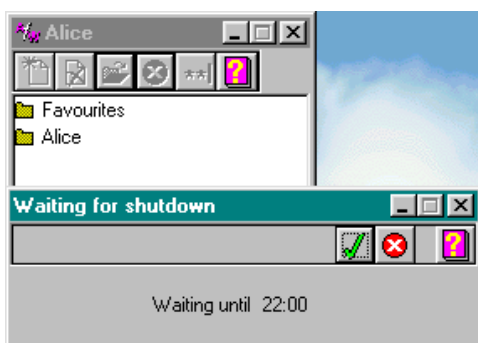


Click the [X] in the top right hand corner of the window.  
(This is the standard Windows 95/98 method for closing a window).  
Note: All other **AfW** applications must be closed before you can Log out.

To exit immediately, without performing a Shutdown, click



The Shutdown process is explained in Part 3 of this manual.

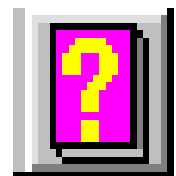


The complete Logout/Shutdown process is explained in Part 3, pages 48-52.

## Help

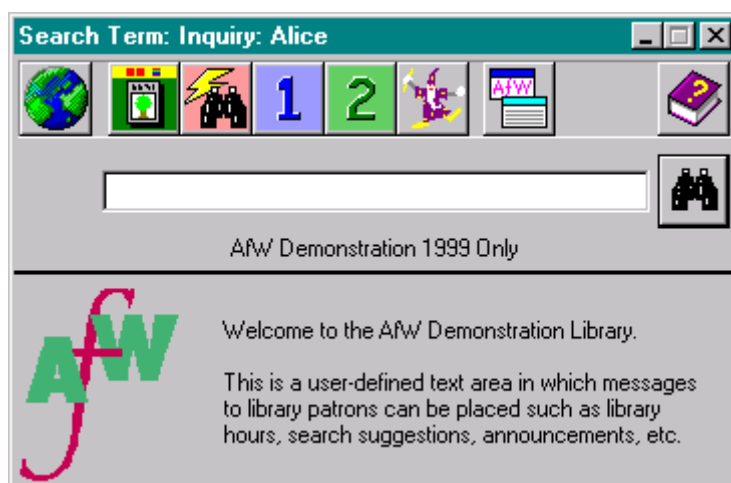
Help is available in all **AfW** modules in several ways:

- Pressing the <F1> function key (located at the top left of most keyboards) for context-sensitive help.
- Selecting **Help** from the title bar



You may search the Help module files as you would with any other Windows 95 software.

- Clicking the **Help** button for context sensitive assistance.

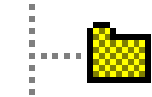


If, for some reason, a Help file is not available when you attempt any of the above methods, please contact Softlink support.

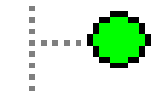
## Opening a Function

There are two folders which allow access to library system functions. The first folder, "Favourites" will initially be empty. This can be used to add the functions you use frequently. The second folder "Alice" provides access to all functions.

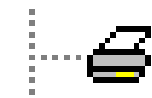
The Alice folder contains three icon types:



a subfolder



a system function



a set of reports

The coloured dots for the system functions have the following meanings:

Red:	You have no access to this function
Yellow:	This function is already open and in use
Green:	You may open this function with a double click of the mouse
Blue:	A function is temporarily disabled

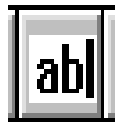
A folder can be opened with a single click, a system function is opened by a double mouse click. To add a system function to the Favourites folder, right mouse click on the required system function and choose "Add to favourites" from the menu.

## Icon Pictograms

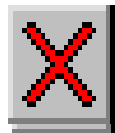
Command buttons in **AfW** are represented by Icon/Pictogram buttons. The meaning of the various buttons are as follows. N.B. Tool Tips will display the meaning of each button.



Add



Edit Text



Find Borrower Name  
or Reserve an item

Finish current transaction  
or Disallow Privilege



Accept/ Confirm/  
OK or Allow  
Privilege



Print



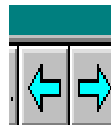
Delete



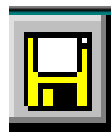
Grab a  
Resource



Put a  
Resource



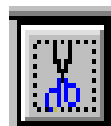
Previous/Next



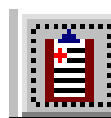
Save



Find



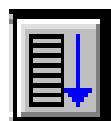
Add Resources from Clipboard/  
Copy Resources to Clipboard



Move to



Find



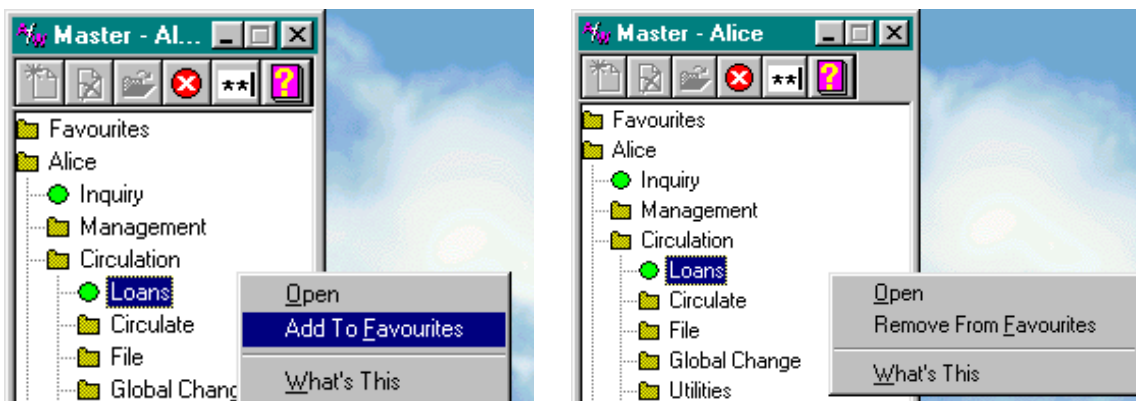
Move from

The exact meaning of these icon buttons will vary according to the module being accessed. These buttons will be referred to throughout this manual.

## Adding a System Function to Favourites

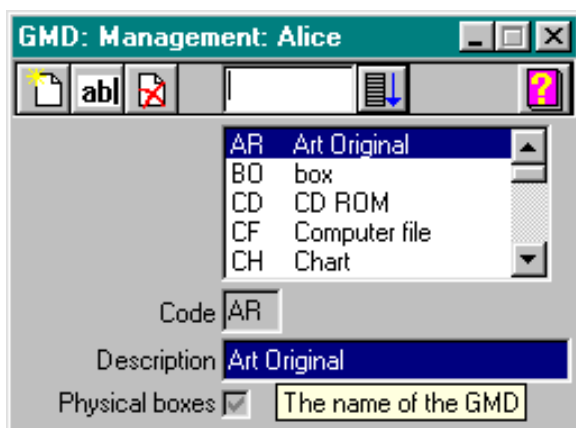
To add your frequently used system functions to Favourites, right click on the system function, then click on **Add to Favourites**.

You may remove a system function from Favourites in the same fashion.

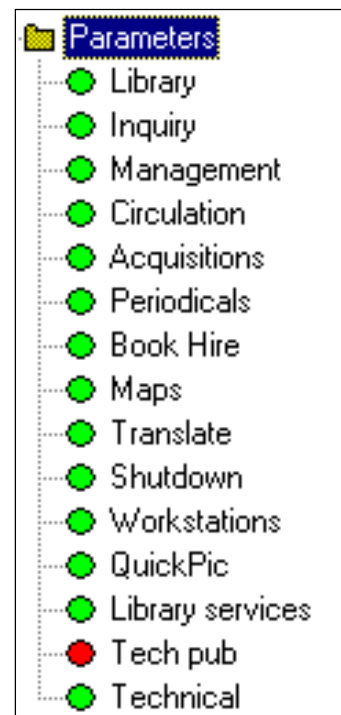
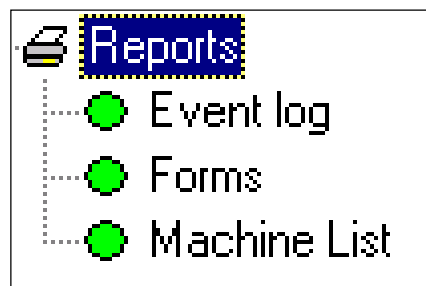
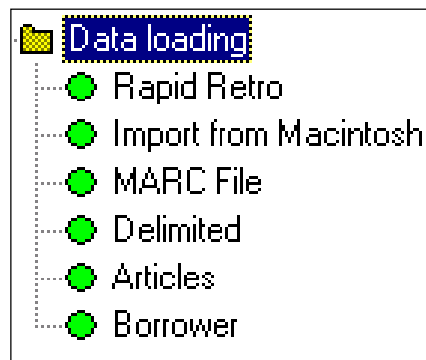
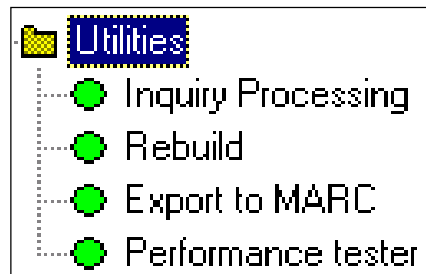
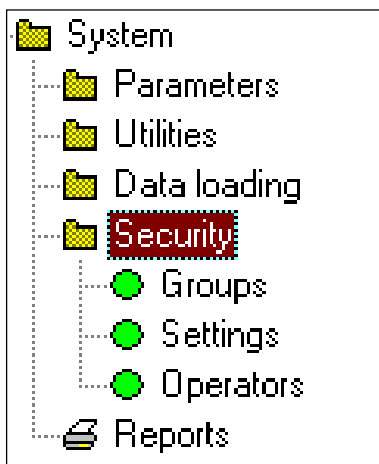


## Tool Tips

When you place the cursor for several seconds on a sub-folder, system function, set of reports, icon buttons or fields a Tool Tip should appear. This will explain what the object is and/or what function it performs, or what to enter into the field.



# System



# Plan Your System Parameters

**AfW** allows you to dictate how your library operates rather than leaving those decisions in the hands of your software. In the following section, you will find descriptions of the system parameter screens that allow you to specify your library-policies and preferences. Please refer to the information given concerning parameters in Part One of this manual. The pages that follow will display each parameter window.

## Library

### Tab: "General"

The screenshot shows a window titled "Library: Parameters: Alice". It has a tabbed interface with tabs for General, Registration, Shutdown, Barcode, and Alphabet. The General tab is active. It contains the following fields:

- Library name: Softlink Australia Demonstration System
- Library code: 2520
- System type: Library (dropdown menu)
- System colour: Change (button)
- PO Box: (empty field)
- Address: Softlink House, 68 Commercial Drive, Shailer Park QLD 4128
- Telephone: 07 3801 4111, 1800 777 037
- Facsimile: 07 3801 4222

Library Name: The name of your library


Library Code: The library code at the end of your **AfW** barcodes. If you have converted from another system, leave this blank.

System Type: This field is automatically set. Please leave it as it appears.

System Colour: This button can be used to adjust the colour of your title bar.

P.O. Box / Address: Place your mailing or physical address in these fields.

Telephone and Fax: Enter your phone and fax numbers in these fields.

As with each screen, the edit  button allows you to edit the information that is displayed. During the editing process the **Edit** button turns into a **Save** button which must be clicked to complete the editing process. To close the window, click the [X] button in the top right-hand corner of the window.

## Library

### Tab: "Registration"

The screenshot shows the same window as before, but with the Registration tab selected. It contains the following fields:

- Name: (empty field)
- Modules: (empty field)
- Code: (empty field)

The three Registration fields contain your license to use the **AfW software**. Please do not adjust these unless directed to do so by Softlink support.



## Library

### Tab: "Shutdown"

Library: Parameters: Alice

General Registration **Shutdown** Barcode Alphabet

Archive Directory: .archive

Number of archives in cycle: 3

Changes before archive: 20000

Shutdown time: 22:00

This is the shutdown machine: ☒

Web inquiry URL:

Archive Directory:	The directory into which archives are stored. *
Number ... in cycle:	The number of archives in the cyclic process. *
Changes before archive:	The number of database changes before archive. *
Shutdown time:	The time, in 24-hour format, at which an automatic shutdown starts
This is the ... machine:	Indicates the current machine is the shutdown machine. Only one machine may run the shutdown process. This is normally set to be the main workstation on the network or even the fileserver.
Web Inquiry URL:	The URL, or web address, associated with Web Inquiry that allows patrons to search the collection over the internet or intranet. <b>AfW</b> will automatically suspend Web Inquiry during shutdown.

\*

**These parameters do not need adjustment as they have already been optimised for normal library operation. Please consult with Softlink technical support before changing these.**

## Library

### Tab: "Barcode"

Library: Parameters: Alice

General Registration Shutdown Barcode Alphabet

Next Barcode

Borrower B00001

Match accession number to barcode ☐

Allow "O" in barcode ☐

Keep 7th character ☐

Incrementing character position 5

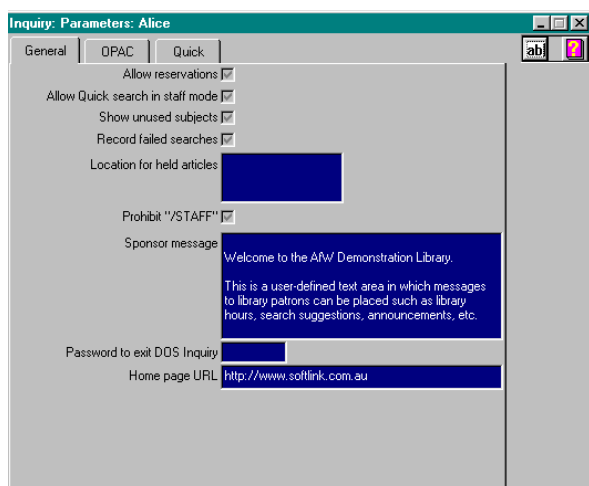
Special barcodes ☐

Character	Position	Rearranging formula
Special barcode 1 <input type="checkbox"/>	0	
Special barcode 2 <input type="checkbox"/>	0	
Special barcode 3 <input type="checkbox"/>	0	

- Next Barcode:** This displays the next borrower or patron barcode to be allocated.
- Match accession number:** If you do not use accession numbers or wish your accession numbers to match your barcodes, tick this box.
- Allow "O" in barcode:** If you have converted from another library program that has used the letter "O" in its barcodes, tick this box.
- Keep 7<sup>th</sup> Character:** If you are using **AfW** barcodes leave this unticked, because, the 7<sup>th</sup> digit is a check-digit and should not be retained.
- Incrementing character position:** When using **AfW** barcodes, the incrementing position is 5. If using other types of barcodes you will need to determine the position of the number that increments. This is used when **AfW** automatically generates barcode information rather than having the barcode scanned or typed in.
- Special Barcodes:** In most cases, this function will not be necessary. If you are using standard Code 3 of 9 barcodes, you will not need this. However, under certain circumstances, usually when converting from other library programs with non-standard barcodes, it will be necessary to use the special barcodes parameter.
- Special Barcodes information:** This area deals with special barcodes when the Special Barcodes box is ticked. This is generally used when converting from another library automation system that did not use conventional barcode standards. Consult with the Softlink support before using the Special Barcodes area.

## Inquiry

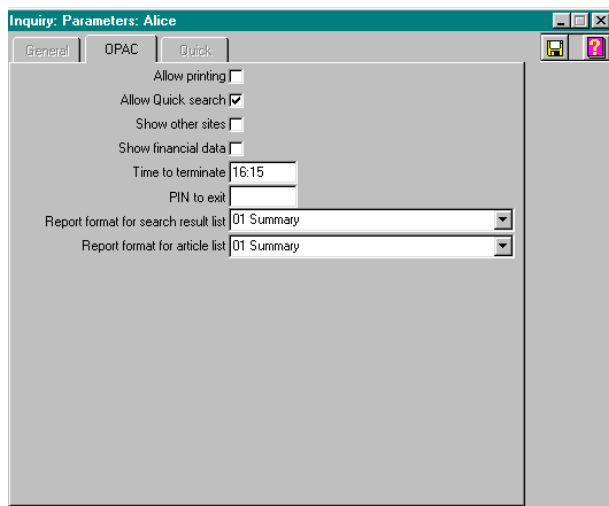
### Tab: "General"



Allow reservations:	Allows library users who are current borrowers to place reservations on items from within the Inquiry (OPAC). If an item is currently on loan, and a patron wishes to be alerted when the item is returned to the library, this will allow the patron to place that reservation.
Allow Quick ... Staff:	Allows the Quick Search capability in Inquiry while logged into <b>AfW</b> .
Show unused subjects:	When ticked, all subjects in the subject authority file will be displayed in Inquiry whether or not there are items catalogued with that subject.
Record failed searches:	Activates the recording of failed searches. The failed search facility displays each search considered "failed" for the purpose of catalogue analysis. For example, if the word "cars" failed numerous times, it may be wise to create a see reference from "cars" to "automobiles" if that were the preferred term. A failed search is defined as any search for which the user decided not to proceed past the initial results screen.
Location for held articles:	Only applicable for those libraries using the Journal Indexing module. This field should contain the location of any photocopied journal articles that have been requested and then received into the library, e.g. Vertical File.
Prohibit "/STAFF:	Prohibit running OPAC Inquiry in staff mode. Generally this should be ticked.
Sponsor message:	The text message that appears on the Inquiry screen.
Password ... DOS...:	The password required to exit from the DOS OPAC.
Homepage URL:	To enable patrons to launch a Web Browser from the first screen in Inquiry. The URL of the web site that you would like people to go to should be entered here.

## Inquiry

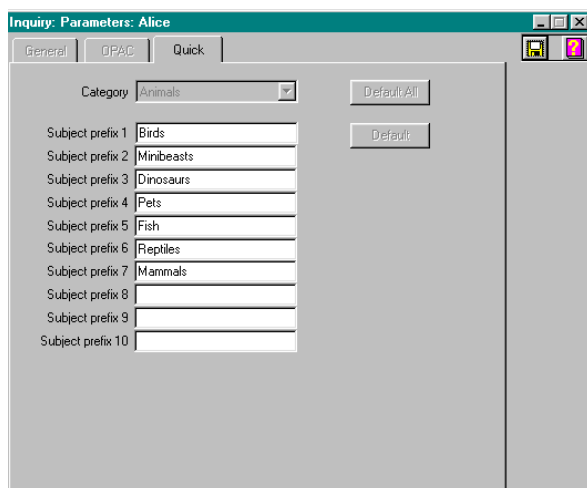
Tab: "OPAC"



- Allow printing:** Allows patrons to print from the Inquiry (OPAC) Resource List screen.
- Allow Quick search:** Enables the Quick Search feature within Inquiry (if installed).
- Show other sites:** Allows the display of holdings at other Union Catalogue Direct sites (if installed).
- Show financial data:** Includes price and financial information in Inquiry displays.
- Time to terminate:** The time of day, in 24-hour format, at which the Inquiry program will automatically terminate and close on each workstation. This may be used to automatically close the Inquiry stations in preparation for an automatic shutdown.
- PIN to exit:** Enter the numeric code required to exit from OPAC Inquiry. If left blank, no code will be required.
- Report ... search result:** The format associated with bibliographies printed from Inquiry.
- Report ... article list:** The format associated with lists of articles printed from Inquiry.

## Inquiry

### Tab: "Quick"



The Quick Search (if installed) feature of **AfW** provides a basic, icon-based searching tool as well as a one-word and a two-word searching tool for younger patrons. There are 12 pre-defined, graphical icons in Quick Search which represent different item categories. Beneath these category buttons are user-defined buttons that point to various Boolean or simple search results.

Default All button	This button sets all category and subcategory definitions to the software default. It may be advantageous to click this button initially, but after Quick Search has been customised to your library, this button should not be clicked. This button overwrites any Quick Search definitions with the software default definitions.
Default button	This button functions similarly to the <b>Default All</b> button, but only returns the currently chosen category to its software defaults.
Category	These refer to the 12 pre-defined graphical icons in Quick Search.
Subject prefix #	The subject prefix fields have a dual purpose. The text in this field becomes the text of a button under this category. In addition, the text provides the search words to search the subject authority file when the button is clicked.

#### Advanced use:

- If you wish to create a more complex search, but keep the button text simple, you may use the pipe symbol “|” to hide the text following this symbol.
- If you wish to combine words in a Boolean style, use the forward slash “/” to indicate OR and the ampersand “&” for AND.

Example #1:  
Subject prefix 1:       Cats | /Cat/Feline  
Button appears as:     Cats

Example #2:  
Subject prefix 2:       Chinese History | History & Chinese  
Button appears as:     Chinese History

## Management

### Tab: "General"

Management: Parameters: Alice

General

Automatic keywords from:

title ☒ notes ☐ edition ☐

Automatic see references:

by term ☒ by word ☒

Default resource loan category:

Fiction: Fiction General Non-fiction: General

Next values:

Accession number: R00540 Resource number: 1000243

Allow keywords for: words with no digits

Automatic suffix generation: ☐

**The automatic keyword generation process does not generate keywords that are members of the "Stop Words" list. These words include articles, prepositions, conjunctions, etc. and can be further adjusted to accommodate local library needs.**

#### Automatic keywords from

- title: All words from titles will be made searchable.  
notes: All words from the notes / annotations will be made searchable.  
edition: All words from the edition field will be made searchable.

#### Automatic see references

- by term See (from) references will be generated to allow searching of subject headings by any term subdivided by dashes, or the word "and" i.e. United States – Civil War – Aerial Operations would be found by searching for "United States", "Civil War", or "Aerial Operations".
- by word See (from) references will be generated to allow searching of subject headings by any word in the heading, i.e. in the previous example, additional hits would now result from searches for "States", "War", or "Operations".

#### Default RLC

- Fiction: When adding new resources, the default Loan Category for Fiction items.  
Non-fiction: When adding new resources, the default Loan Category for Non-fiction.

**The Default RLCs are selected from those entered in Circulation, and may not be added in the parameters. You will need to return to this parameter after entering this information in Circulation. These fields should not be left blank as Circulation will not work efficiently if a resource does not have a Resource Loan Category**

#### Next Values

- Accession no.: The next incremental accession number to be used. If you choose to match accession numbers to barcode numbers, do not edit this field.  
Resource no.: This number will be entered and incremented automatically. It refers to the number of titles entered, not the number of copies entered.

#### Allow keywords for

- ...no digits: Standard words only will be keyworded.  
...some digits: Standard words and those such as "30-Something" will be keyworded.  
...all digits: Additionally, "20,000" will be keyworded if in a title, notes, or edition.

Auto. suffix generation: This will generate the Call Number suffix for resources during cataloguing.

## Circulation

### Tab: "General"

The screenshot shows a Windows-style dialog box titled "Circulation: Parameters: Alice". It has several tabs: "General", "Print", "Special", "Membership", "Overrides", and "Selfcirculation". The "General" tab is selected. Inside the "General" tab, there are several sections:

- Maximum loans by:** Two radio buttons, "Count" (selected) and "Value".
- Reservations:** A checkbox for "Print notices" (checked), a "Hold for" field with "3" days, and a "Default expiry" field with "21" days.
- Loan limit names:** Five text input fields labeled "Category 1" through "Category 5". "Category 1" contains "Fiction", and "Category 5" contains "Other".
- Booking slot name:** A text input field containing "PERIOD".
- Overdue fine description:** A text input field.
- Charge fines for open days only:** A checkbox.
- Purge date:** A date input field.
- Patronymics:** A checkbox.
- Borrower images:** A "Path" text input field containing "IMAGE\" and a "Format" dropdown menu set to "BMP".

Maximum loans by:	This defines how you determine a patron's maximum number of loans. If you determine how many items a person can have by number, select "Count." If you determine this number by the monetary worth of the items they are borrowing, select "Value."
Print notices:	If you wish to print notices to send to patrons that are waiting for a particular item to become available, tick here.
Hold for __ days:	Once available, how many days should an item be held?
Default expiry __ days:	If a patron's requested item does not become available before __ number of days, the patron's request will be cancelled.
Loan limit names:	You may define up to 4 categories and "Other" to determine how many total items a patron may borrow. For example, you may say a borrower type can have 2 AV items and 3 of anything else (Other). Hence, define Category 1 as "AV."
Booking slot name:	How your day is divided, e.g. period, hour, session, block.
Overdue fine description:	The text that describes an overdue book in the fines area.
Charge...open days only:	Fines will only accrue for days the library was open. For example, if an item is not returned on time, days during which the library is closed will not cause an increase in the fine that is owed.
Purge date:	The date before which loan histories should be purged.
Patronymics:	In countries that sort names alphabetically by one's "given name", this box should be ticked. This box is not usually ticked in Australia.
Borrower Images – Path:	The computer path (drive and folder) in which borrower images are stored. This is only relevant for users of the Multimedia module.
Borrower Images–Format:	Select the image file format from the selection box. This is only relevant for users of the Multimedia module.

## Circulation

### Tab: "Print"

The screenshot shows a software window titled "Circulation: Parameters: Alice". It has several tabs: "General", "Print" (which is selected), "Special", "Membership", "Overdues", and "Selfcirculation". There are also icons for saving and help. The "Print" tab contains the following fields:

- Overdue Heading:** A text field containing "OVERDUE NOTICE".
- Messages:** A section with three sub-fields:
  - External overdue:** A text area containing "The items listed are now overdue. Please return to the library immediately. Please note that a fine for overdue items may now be due."
  - Family overdue:** A text area containing "The following items have been overdue for some time. Please ensure they are returned to the library immediately."
  - Recall notice (DATE = Recall date):** A text area containing "The following item/s, not yet due, are required urgently by the library. Please return by DATE. Thank you for your co-operation."
- Borrower loan list format:** A dropdown menu showing "01 Summary".

- Overdue Heading:** This is the heading text to be printed on overdue notices.
- External overdue:** This is the text that will be printed on an external borrower's overdue notice. An external borrower is usually noted as someone that is generally not a member of the libraries parent institution, i.e. a parent or a member of the public.
- Family overdue:** This is the text that will appear on a message sent to a student's family regarding his or her overdue items.
- Recall notice:** This is the text that will appear on a recall notice, sent to request an item be returned to the library before its actual due date. In this notice, typing "DATE" in all caps will print the recall date, i.e. the new date by which the book needs to be returned.
- Borrower loan list:** The report format to use when printing a list of items on loan to a borrower.



## Circulation

### Tab: "Special"

Prompt	Value	Prompt	Value
Prompt 1	Special Needs	Prompt 11	
Prompt 2		Prompt 12	
Prompt 3	Subject (Class) 1	Prompt 13	
Prompt 4		Prompt 14	
Prompt 5	Subject (Class) 2	Prompt 15	
Prompt 6		Prompt 16	
Prompt 7	Subject (Class) 3	Prompt 17	
Prompt 8		Prompt 18	
Prompt 9	Subject (Class) 4	Prompt 19	
Prompt 10		Prompt 20	

These are 20 user-definable prompts for additional borrower data. When defined, these prompts appear in the Circulation area in the following manner:

Borrower ID	Name
S001812520	Bender, Martin John (9B)
S000402520	Benson, Grant (3M)
S001862520	Carmody, Erica Mary (5/6)
S001932520	Cook, Julia Mary (9B)
S100202520	Cronwin, Steven (Mathematic)

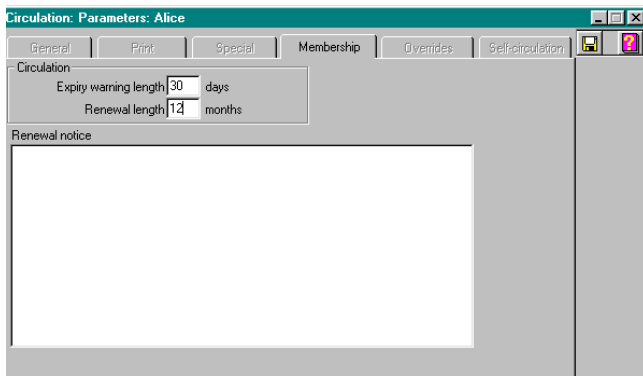
Field	Value
Special 1	Special Needs
Special 2	Subject (Class) 1: Geography
	Subject (Class) 2: Ancient History
	Subject (Class) 3: English
	Subject (Class) 4:

Only those fields that were defined with text in the system parameters will appear within the borrower or patron details area. This allows breaks between fields to be created, as displayed above, between the Special Needs and Subject information. One practical use of the special fields is to enter information about the subjects taken by a student.

The contents in the Special fields may be used to select borrowers when producing overdue notices, using the restriction field called "Borrower Data".

## Circulation

### Tab: “Membership”

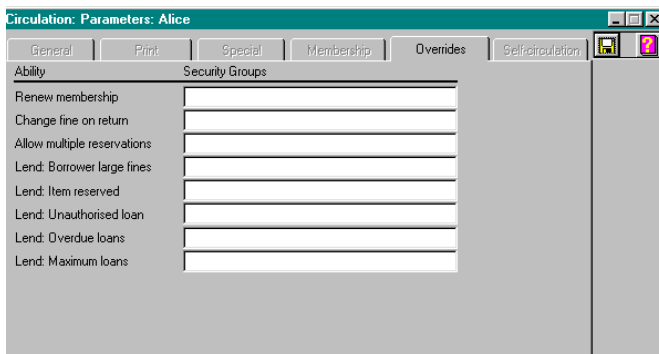


The membership section is predominantly used for public or special libraries that require time-based memberships. Memberships may be set in the patron details area (Circulation/File/Borrower) and may follow these user-defined membership parameters.

- Expiry warning length:** If you setup memberships, you may define the number of days before a borrower's membership expires that a warning message is displayed within circulation.
- Renewal length:** If you setup memberships, you may define the number of months that is the duration of a borrower's membership.
- Renewal notice:** This is the text that appears on a notice sent to a borrower indicating that they need to renew their membership.

## Circulation

### Tab: “Overrides”



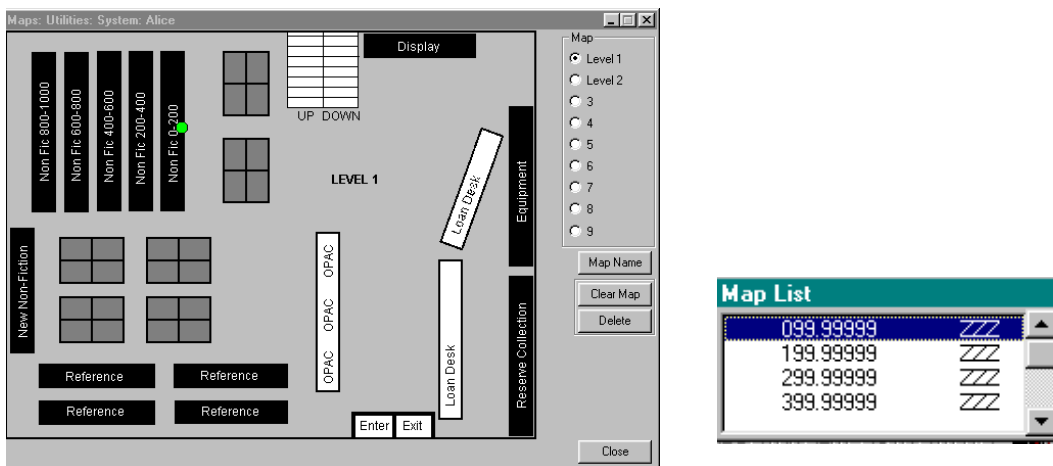
**Hint:**  
Any operator given a security group of 0 (zero) will automatically be permitted all of these abilities.

This section relies on security setup and can be defined at a later point in time if desired. If you wish to continue, think of each person that has a User ID and a Password into **AfW** as an “operator.” Each operator is a member of one or more security groups. An operator's membership in a security group provides that user with that group's permissions or abilities within **AfW**. Please refer to the Security section of the chapter for details on security setup.

### Security Groups:

- The fields on the screen
- Enter into these fields the numbers or letters of each security group for which the noted “Ability” is to be permitted. There is no need to separate the characters with commas or spaces. Simply type them as (eg): AC986.

## Maps



**AfW** includes the ability to incorporate a graphical map of the library that indicates where in the library items are located. From within Inquiry, this is accessed from the Bibliographic Details Screen by clicking on the map button:



### Button Definitions

Map Name: Name the selected map. i.e. 1<sup>st</sup> floor, AV Room, etc...  
 Clear Map: Clear all of the co-ordinates entered into the Map List  
 Delete: Delete the selected co-ordinate from the Map List  
 Close: Close the map parameters component.

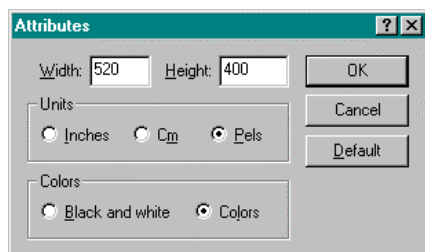
Setting up maps in **AfW** is a three-step process:

1. Draw a map of your library in any drawing program that will save images in bitmap format.
2. In **AfW**, set up the map co-ordinates to match shelf locations of your resources.
3. On each workstation, set the "You are here:" co-ordinate.

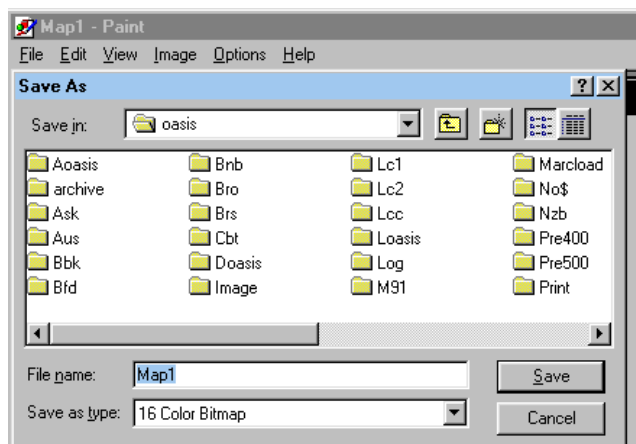
### Step 1:

- The image itself is easily created using a drawing tool such as Paint, which comes with the Windows 95 and Windows NT operating systems.

Up to nine different maps may be created. Each graphic has the attributes indicated in the Attributes window below, which is listed in the Image Menu in Windows 95 Paint. The width and height indicated as 520 x 400 in pixels. This should be set before drawing your map

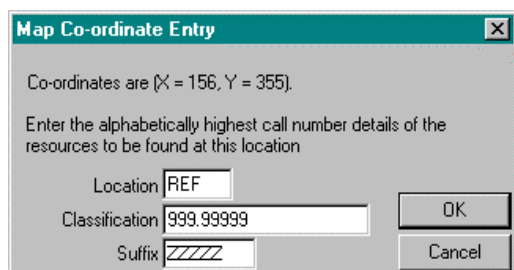


Simply draw a floor plan of the library and save the file as MAP1.BMP in **AfW**'s parent folder, which is generally named OASIS, off the root directory. The naming convention allows the nine different maps to be stored as MAP1, MAP2, MAP3, ..., MAP9, each with the .BMP file extension. For Example C:\Oasis\Map1.bmp



## Step 2:

- By clicking on the map which is displayed in the system parameters area, a dialog appears allowing the user to define the alphabetically highest call number located at the clicked location. For example, to define a small Reference collection on the map, one would note the Location as, for example "REF" and if the entire classification and suffix range is included at this point, the highest values would be 999.99999 and ZZZZZ, respectively.



## Step 3:

- On the library map, in the system parameters area point the cursor to the location of an OPAC terminal, and click on it.
- Make a note of the X and Y co-ordinates of the workstation, then cancel the co-ordinate entry window.
- For example, in the window above the co-ordinates are X=156, Y=355. Make a note of which map number you are viewing, e.g. Map1
- Right click on the **AfW** OPAC shortcut on each OPAC terminal. Click on Properties and add the following to the end of the shortcut "Target".

*/URHERE:xcoordinate,ycoordinate,map number*

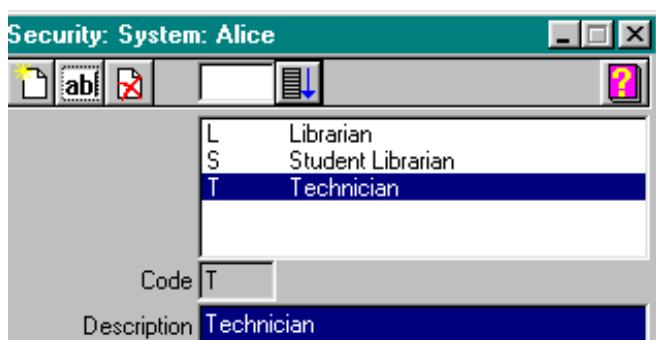
*Using the above example, and assuming **AfW** is installed on the C: drive of this machine, the "Target" for the OPAC terminal would be: C:\oasis\lafwopac.exe /URHERE:156,355,1*

- Repeat the "You are here" setup for all workstations that will be using Inquiry.



## Security

**AfW** allows you to set up Security Groups and Settings which will allow certain types of Operators access to particular functions, and also allow them to perform specific operations within that function.

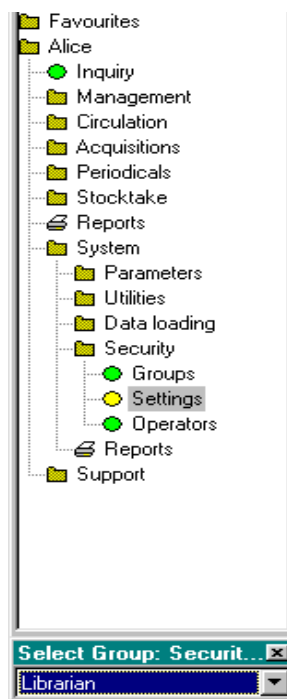
### Groups:



In this screen, we can enter a single character code and a name for each security group. Each security group may denote the position a particular operator has within the library, or a particular workstation's function.

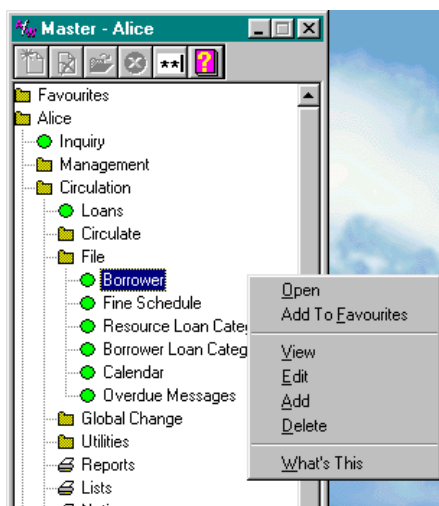
To add a new group, click,  then enter a single character code, a description, and then click  save. When all security groups are entered, you may then move on to Settings to define exactly what functions each group may perform.

### Settings:



To define security settings for a group, open Settings . A selection box will appear at the very bottom of the **AfW** menu. Select the required group from the selection box.

Start at the top of the menu and right mouse click on any functions that you want this security group to be able to access. You will see a special pull down menu.



View	allows you to view or read records
Print	allows you to print reports.
Edit	allows you to edit existing records
Add	Allows you to add complete new records
Delete	allows you to delete complete records

Click on the options required for the group. The option chosen will be ticked. Repeat this process for all menu functions that you want this security group to access. Repeat this process for each security group. When complete, close the Settings window.

#### Operators:

Operators: System: Utilities: Alice

Initials	Name	Security Groups
MA	Master	0

Password:   
 Initials:   
 Name:   
 Security Groups:   
 Default language:

#### Adding Operators

Click

Alice: System: Operator: Add

Initials:

Buttons:

Enter the initials of your new operator, then click .



Operators: System: Utilities: Alice

Initials	Name	Security Groups
PS	Peter Smith	L
MA	Master	0

Password:   
 Initials:   
 Name:   
 Security Groups:   
 Default language:

Enter the details of the operator, including the Security group and default language then click save.



You will then need to enter a password for the new operator. Click the **Password Change** button. Enter in the password twice. Move between fields by using the tab key or click using the mouse.

Alice: System: Operator: Password

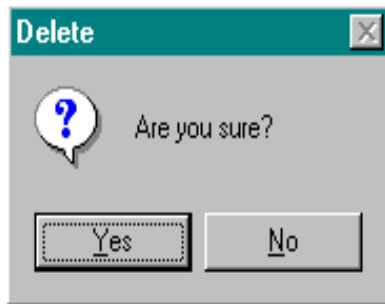
Password:   
 Re-enter password (to verify):

Buttons:



**AfW** allows up to 100 Operators to be entered.

Delete operators by choosing the relevant operator, then click



1. Passwords may be up to 6 characters in length.
2. When passwords are entered, they appear on the screen as \*\*\*\* characters.
3. To enter the first password for a new operator, or to change an existing password, click on the **Change** button in the Operators window then enter in the password twice, as instructed

### Changing a Password

Old passwords may be changed by the operator. At the top of the **AfW** Menu click the **Change Password** button.



Enter your existing and new passwords then click  . If there are problems, you will get a message. If the new password is accepted, no messages will appear.



## **Utilities**

### **Inquiry Processing**

This utility will process any Requests and Reservations that have been entered from the OPAC mode of Inquiry.

### **Rebuild**

Use when advised by Softlink support.

### **Export to MARC**

This utility will produce an export file of selected MARC records.

### **Performance Tester**

This utility will check the configuration of a network installation.

## **Data Loading**

### **Rapid Retro**

For importing catalogue records from BNB and TES Bookfind using the Rapid Retrospective module.

### **Import from Macintosh**

For importing catalogue records in Macintosh format.

### **MARC File**

For importing records in a variety of MARC formats from a variety of sources.

### **Delimited**

For importing catalogue records in a delimited format.

### **Articles**

For importing indexed journal articles from Guidelines, SAGE and Media Scan

### **Borrower**

For importing borrower records from an outside database.

## **Reports**

### **Events log**

This report allows you to print a log of archive and recovery errors.

### **Forms**

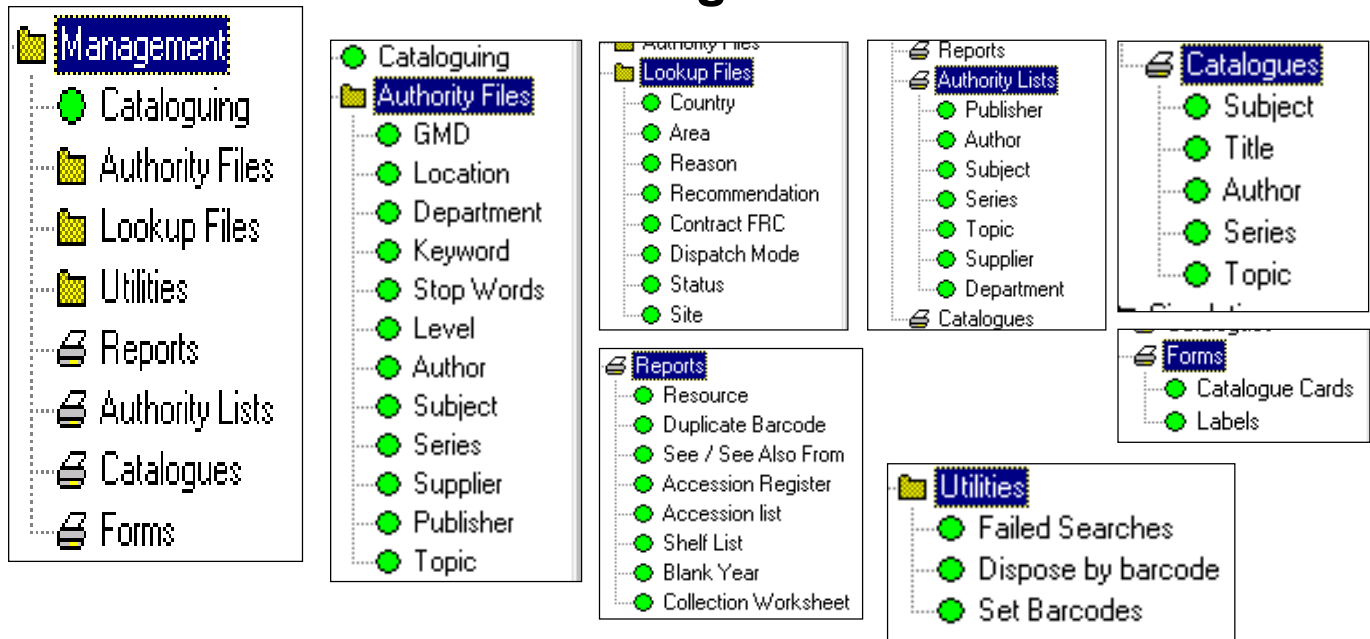
This facility will print Circulation Control Barcodes and test print pages.

### **Machine List**

This report allows you to print a list of the machine numbers and names that have been logged into **AfW**.

## **Guided Tour to AfW**

# Management



## Cataloguing

This option takes you directly into the catalogue records and allows you to Edit, Add and Delete records.

The Accession Tab page contains the main bibliographic details of a resource, including GMD, to allow you to specify the specific format of a resource, e.g. text, video recordings, sound recordings.

**Cataloguing: Management: Alice**

Search: JAPAN

Resource No. 1004284

Janine's genie  
Japan  
Japan

Accession Catalogue Copies Keywords Parts Multimedia Preview MARC Notes MARC

Classification: 915.2  
Suffix: DOW  
Department:   
Notes:   
Curriculum areas:   
Suitable from: to:   
Subjects: Japan - Social life and customs - 1945-  
Topics: Oriental studies

The Catalogue tab page contains local library information such as Location, Classification, Suffix, Notes and Subjects.

**Cataloguing: Management: Alice**

Search: JAPAN

Resource No. 1004284

Janine's genie  
Japan  
Japan

Accession Catalogue Copies Keywords Parts Multimedia Preview MARC Notes MARC

49 915.2 DOW R004080046 Replicate

Item Equipment Maintenance

Barcode: R004080046 Change Copy No. 0  
Location: Loan category: General  
Classification: 915.2 Status: Catalogued  
Suffix: DOW Accessioned:   
Accession No. R00408 Missing/Disposed:   
Comment:   
Supplier:   
Cost: 0.00 Item code:   
Order No. Dissection:   
Ordered:   
Invoice No. Site: Local

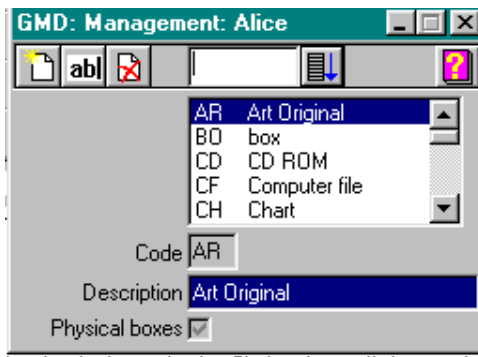
The Copies tab page contains information for individual copies of resources such as Barcode, Location, Classification, Suffix, Accession No. and Price.

Other Tab pages include:

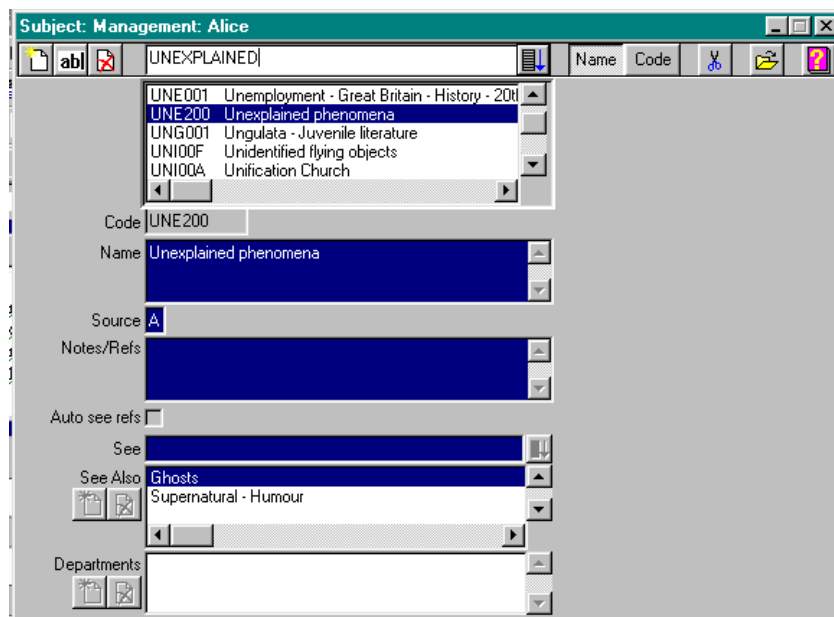
- Keywords: For keywords automatically and manually created.
- Parts: For adding records that are parts of a main item e.g. poems in poetry anthologies, individual programs on videocassettes.
- Multimedia: (N.B. Multimedia module required) for sound, pictures, slide show, video clips.
- Preview: For previewing items prior to purchase.
- MARC Notes: For adding notes in MARC format, instead of adding them in the notes field on the Catalogue tab page

## Authority Files

Each of the authority files are stored in a list which can be added to and maintained. An authority file is where all the terminology of a specific type is held i.e. all the authors and other Names are held in the Name authority file and all the Publishers are held in the Publisher authority file.



Certain authority files have more management facilities than others. They all allow the operator to Add, Delete and Edit authority records, many allow explanatory notes to be entered, many also have Global Move facilities (i.e. if an incorrect term has been entered into a number of catalogue records, you may create the correct term and then move all affected records from the incorrect term to the correct one. You will then be given the option to remove the incorrect term).



Two authority files, Subject and Topic, have further, advanced facilities. You are able to display the list of resource titles which are attached to a particular Subject or Topic. You may Add to or Delete resources from the list. You may do this either by scanning the barcode of the relevant resource(s) or by tagging a series of resources in Inquiry and copying them to the **AfW** clipboard. Topic also allows an expiry date to be added, after which the Topic list disappears from the system.

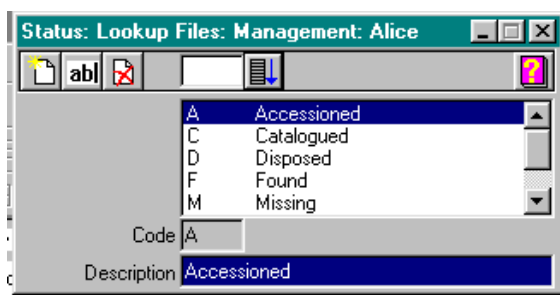
## Lookup Files Menu

These are similar in nature to Authority Files. The files which are of interest to the new user of **AfW** are:

Country            enter a list of Countries of Origin or Languages.

Areas             Curriculum or Study areas

Status            this refers to the status of an item in Inquiry. For example, if you wish to withdraw an item temporarily from circulation, such as in the case that it needs to be repaired, you may give it the status of Unavailable. This will appear for the item in Inquiry, thereby notifying library users that an item is not available for in-house use or for loan.



Reason and Recommendation are related to the Acquisitions module, and Contract FRC and Dispatch Mode are related to the Library Services Module.

## Utilities

### Failed Searches

Searches in Inquiry, where a user does not move onto the resource list, may be saved in the Failed Searches utility. With this utility, you may check to see if you need to fill any subject gaps in your collection or if you need to create any See References.

### Dispose by Barcode

This facility will change resources that you have culled from your collection to a status of Disposed. These resources may be purged from the catalogue using the Stocktake/Purge facility, which will produce a report on items purged.

### Set Barcodes

This facility will change a dummy barcode, used for data loading, to an **AfW** barcode by scanning in the ISBN of the resource.

## Forms

### Catalogue Cards

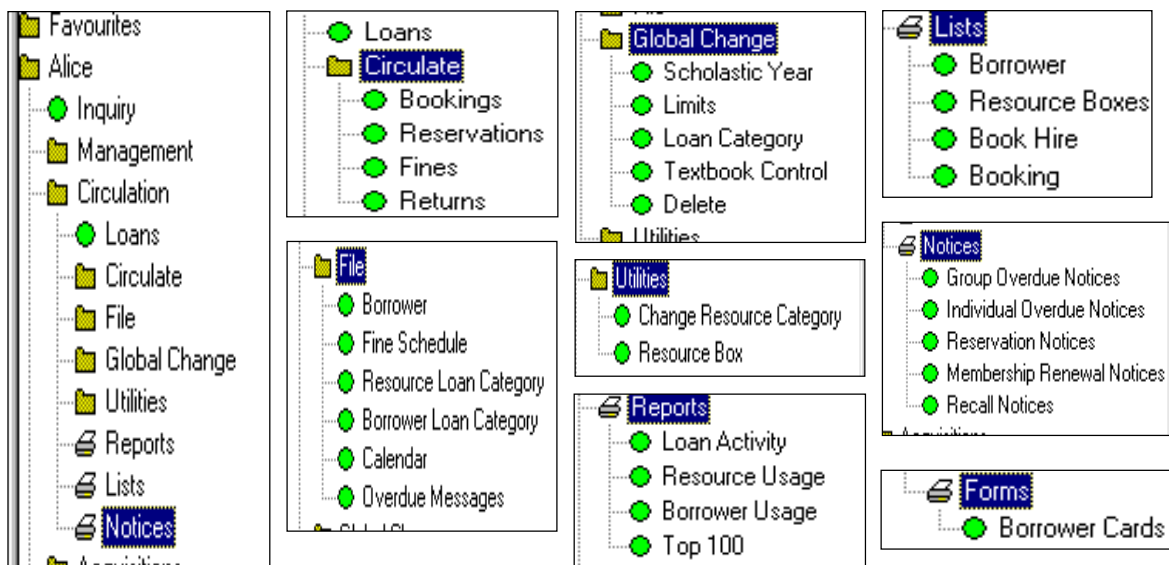
This facility will produce catalogue cards in a variety of formats

### Labels

This facility will produce spine labels and barcodes for resources in a variety of formats. The two components may also be combined.

**See Part 4 for detailed information on cataloguing.**

# Circulation



## Loans and Circulate Functions

Selecting Loans will take you into the Loan/Circulate screen.

Note that the tabs are yellow when you enter a function. This approximates traffic lights. Yellow indicates that **AfW** requires you to enter a borrower barcode. Green indicates that you are able to process a loan. Red indicates that the loans process has been blocked and messages for overdue loans and outstanding fines have not been overridden.

To process a loan, scan in a Borrower barcode into the barcode selection box (top left of screen), then scan in a Resource barcode. Renewals are dealt with in the same fashion, except you will be asked if you wish to renew or extend the loan period for the resource.

At the bottom of the Loan page, you can see the number of resources remaining in the borrower's loan limits.

Click on a tab page to move to another circulation function. Click [X] to exit.

## Circulation

### Tab: Returns

**Circulate: Circulation: Alice**

Enter ITEM barcode

Barcode Location  
☐ Housebound Category  
 Name

Loan Booking Reserve Fine **Return**

Barcode  
 Title  
 Author  
 Call No.  
 Status  
 Loan category  
 Borrower

Date returned  
☒ Today  
☐ Yesterday  
☐ Other

Accession No.  
 Accessioned  
 Cost

**Circulate: Circulation: Alice**

Enter ITEM barcode

Barcode Location  
☐ Housebound Category  
 Name

Loan Booking Reserve Fine **Return**

Barcode 3077  
 Title Insects  
 Author Brandt, Keith 1930- ; Brickman, Robin  
 Call No. 595.7 BRA  
 Status Catalogued  
 Loan category General  
 Borrower Arnold, Camille Elis MR. JONES

Date returned  
☒ Today  
☐ Yesterday  
☐ Other

Accession No. 000554  
 Accessioned 04/08/1997  
 Cost 0.00

To return an item from loan, scan in the resource barcode into the barcode selection box. Note that borrower details are not required to be scanned in before returns are processed. If a borrower is/was already being dealt with, their details remain available/current without affecting the returns process.

If the item is overdue, a message will be displayed on the screen accordingly. If another borrower has reserved the item, a message will be displayed on the screen.

## Circulation

### Tab: Reservations

To process a reservation, scan the borrower barcode and go to the Reserve tab page. Click **Add** and enter the barcode of the item. Alternatively, find the resource required in Inquiry and on the Resource Detail screen click the **Grab** button.



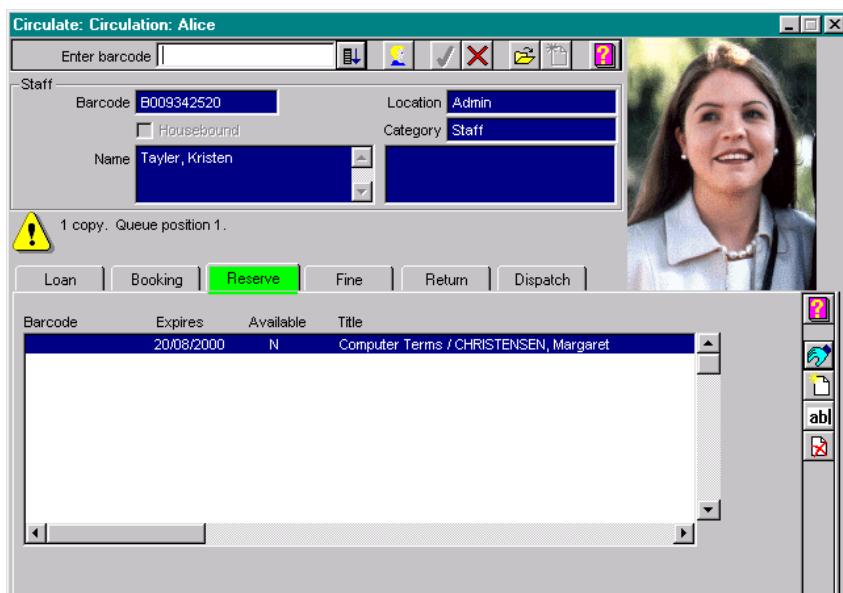
Back on the Circulate window on the Reserve tab, click the **Put** button.



This will import the information into Reservations. Enter the expiry date then choose if you want to reserve this particular copy or any copy, then click







**AfW** will display the borrower's position in the queue of people waiting for the resource.

## Circulation

### Tab: Bookings

**AfW** allows you to designate groups of resources for part day loan. Any of these resources may be booked in advance. Bookings are added like Reservations. **AfW** guards against double-booking by advising when the system is unable to process a booking and listing the periods/hours which are free on that day.

## Circulation

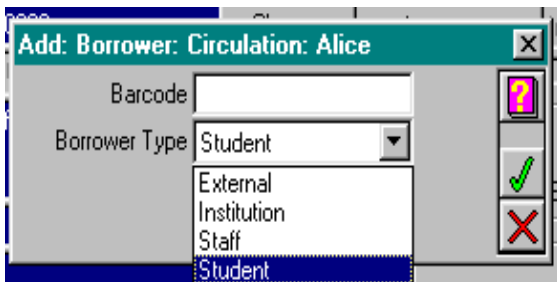
### Tab: Fines

The fine account for a library patron may be viewed and fines may be paid in part or in full. The librarian has discretion over the level of fine and may adjust it accordingly. **AfW** flags an outstanding fine whenever a patron is selected in Circulation.

## File Functions

### Adding a new borrower

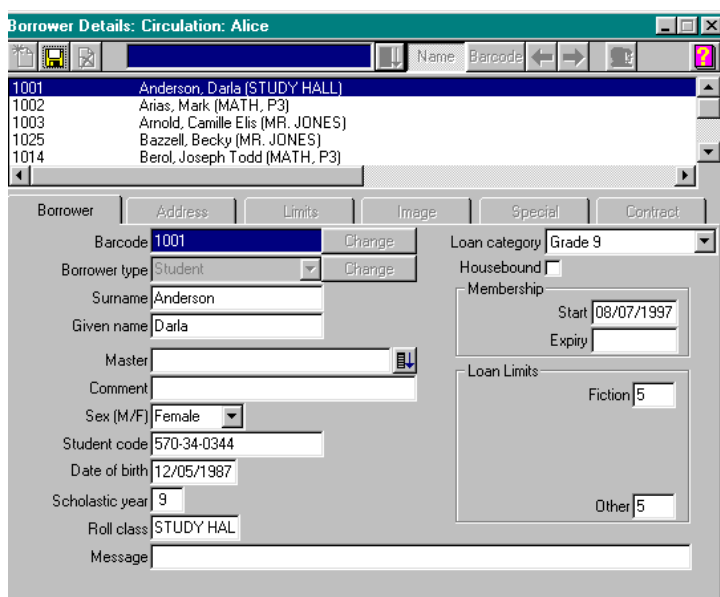
Click the **Add** button.





You will be prompted to enter a borrower barcode, along with borrower type. After you have entered a borrower barcode and borrower type, click



You can now enter the borrower's details, eg Surname, Given Name, Sex etc. Once you have entered all details, click





## Tab: Address.

The address details for the borrower will be displayed. Click  to change the address details. Click  when finished.

If you are registered for the **AfW** Multimedia module, you are able to attach an image to a borrower record. This is done by using the Image tab. If you are not registered for **AfW** Multimedia, the Image tab will not be available.

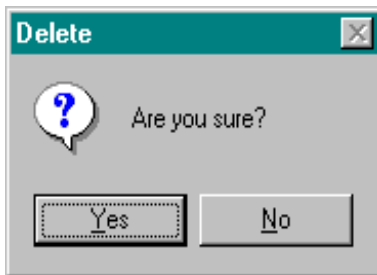
## Viewing Borrower Details

Use the  arrow buttons to move through the borrower file, in alphabetical order,

The  Find button allows you to find borrowers by either Name or Barcode.

## Deleting a Borrower

Click the  button.



Borrowers cannot be deleted if they have outstanding fines and / or loans.

## Fine Schedule

**AfW** allows fine formulae to be created for different resource types and different borrower groups. Maximum fine limits must be set and percentage limits, based on the cost of the item plus any fixed costs (eg postage and processing), may be added on. Fines may be automatically calculated and applied to the borrower account whenever an overdue resource is returned. Fines appear on overdue notices and facilities exist for part payment of fine accounts plus listing of outstanding fines.

## Resource Loan Category

This is where the user establishes and maintains the list of resource loan categories to be attached to resource copies.

## Borrower Loan Category

Borrowers are arranged in groups and each group has certain resource loan categories which they can borrow. This function allows the user to define rules for borrowing.

## Calendar

**AfW** maintains a calendar so that the library can specify which days the library is open and to store loan and inquiry statistics. The user may both generate the calendar for future years and purge it for previous years. **AfW** automatically compensates for "closed days" when calculating the effective due date.

## Overdue Messages

The user is able to enter various messages to print on the overdue notices which correspond to different numbers of days overdue.

## Global Change functions

These functions allow groups of borrower records to be moved up to the next scholastic year, change the borrowing limits, move groups into a different borrower loan category, register groups for, or remove groups from, textbook hire and even the deletion of whole groups of borrowers. Certain safeguards pertain to these functions, but they are time-saving functions for the librarian.

## Utilities functions

### Change Resource Category

This utility allows all resources which have been tagged in inquiry and saved to the **AfW** clipboard, to have their Resource Loan Category changed temporarily or permanently. This is extremely useful for study Topics or current awareness issues which require you to alter the circulation rules for a specified period for a designated set of resources

### Resource Box

A Resource Box is a collection of items, each of which could be loaned individually, which have been brought together as a set and are to be loaned as a set. The user should first create a record using Management/Cataloguing for the “empty” Resource Box and give it a barcode. Then, using the Resource Box utility, tell **AfW** which items are to go into the box.

**AfW** will allow the contents to be amended at any time, and the box and contents may be loaned using the box barcode. The entire contents of the box can be returned either by using the one barcode or by returning each individual item.

## Forms

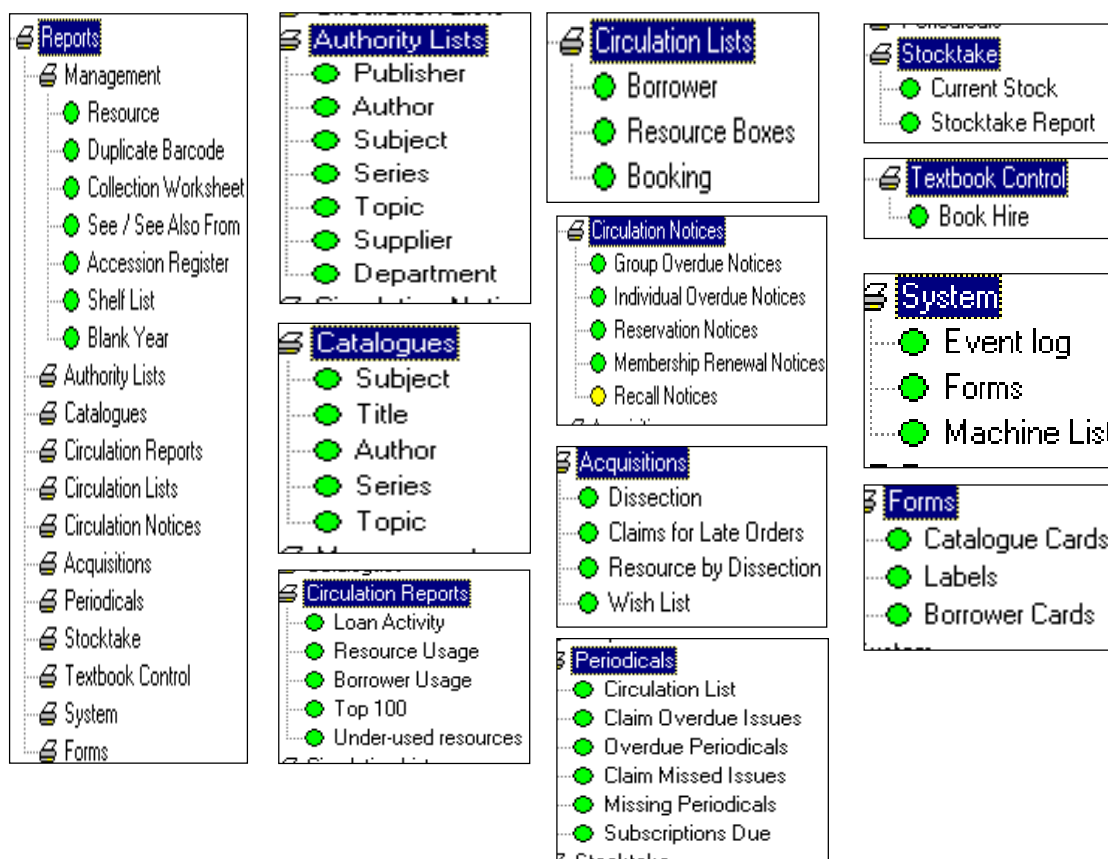
### Borrower Cards

Borrower cards may be produced in a variety of formats.

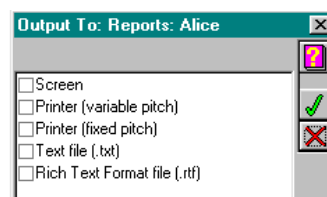
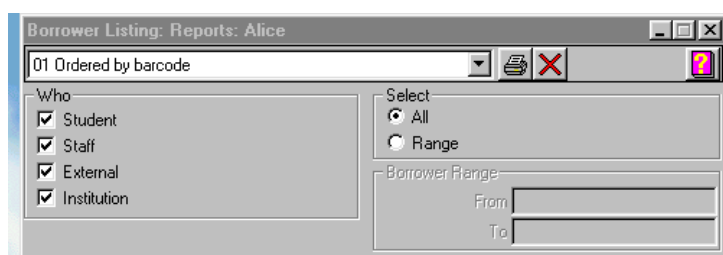
**See Part 5 for more detailed information on Circulation.**

# Reports

Reports appear within both the module sub-folders and in the Reports area.



- Reports fall into a number of different categories, as illustrated above.
- Reports can be produced in a variety of formats, and may be output a number of ways:
  - Screen, so you may view a report directly on screen
  - Printers that are set up in Windows
  - Text files that may be opened in a word processing/spreadsheet program
  - You are able to output a report to more than one option at the same time



See Parts 4 and 5 on cataloguing and circulation for more detailed information on reports.



### **3. System Administrator Functions**

# Shutdown Parameters

The parameters to perform an archive/shutdown are set in two parts. These parameters are set on the Shutdown machine, which is designated at the time of installation.

## 1. System/Parameters/Library/Shutdown

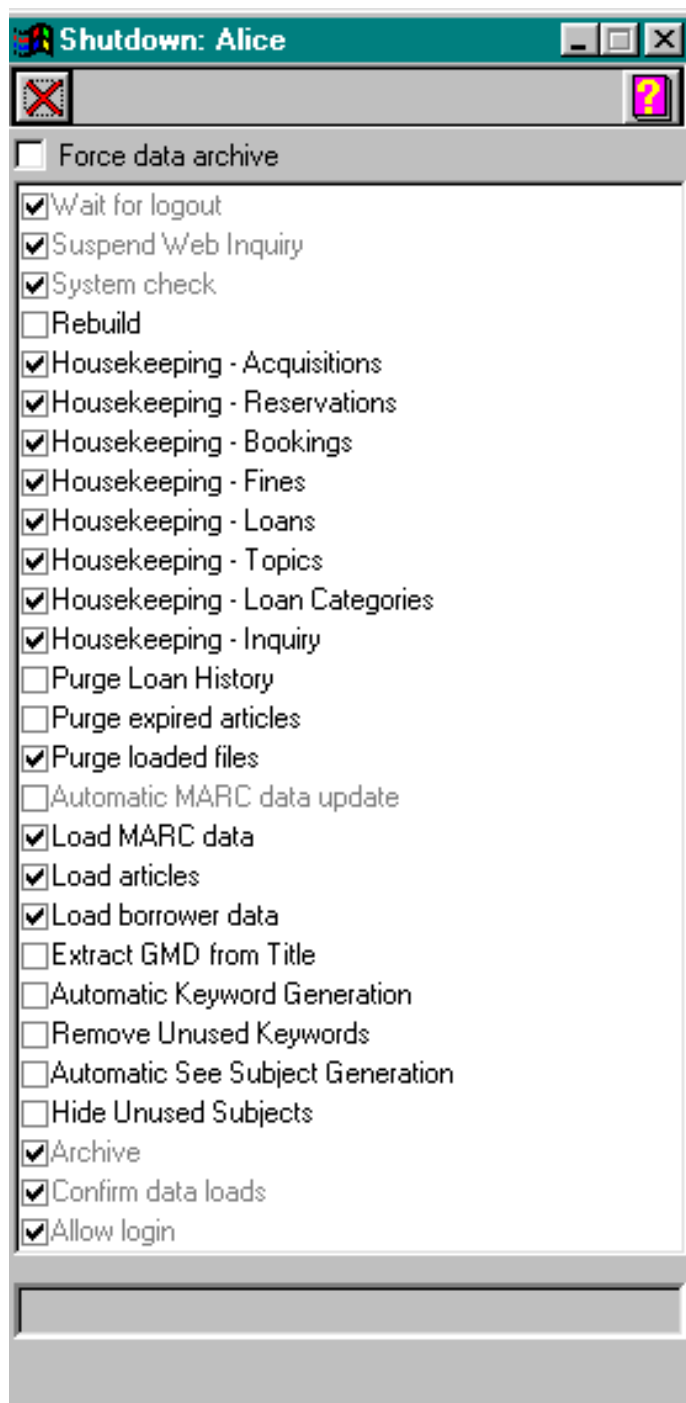
The screenshot shows a window titled 'Library: Parameters: Alice'. It has a tabbed interface with tabs for 'General', 'Registration', 'Shutdown' (which is selected), 'Barcode', and 'Alphabet'. Below the tabs, there are several input fields and a checkbox. The 'Archive Directory' field contains '.archive'. The 'Number of archives in cycle' field contains '5'. The 'Changes before archive' field contains '20000'. The 'Shutdown time' field contains '22:00'. The 'This is the shutdown machine' checkbox is checked. The 'Web inquiry URL' field is empty. A small 'ab|' label is in the top left corner, and a question mark icon is in the top right corner.

- |                               |  |
|-------------------------------|--|
| Archive Directory:            | This shows where the archive, (a hard disk backup) is kept. If you wish to archive your data to a drive other than the <b>AfW</b> drive, please contact your Softlink Support officer.   |
| Number of archives in cycle:  | This parameter is set to the default of 3. This can be edited if necessary.  |
| Changes before archive:       | This parameter is set to 20,000 and should not be edited unless advised by your Softlink Support officer. This parameter denotes the number of entries or edits of <b>AfW</b> data you may make before an archive will be created automatically during a Shutdown. |
| Shutdown time:                | This is the time that a Shutdown will be performed, unless otherwise specified, when you log out of <b>AfW</b> .   |
| This is the shutdown machine: | This is usually set at installation. If you wish to change the shutdown machine, open the parameters on that machine and tick this box.  |
| Web inquiry URL:              | If you have the Web Inquiry module, enter the URL of the Web page from which it is accessed. Web Inquiry will be suspended during a shutdown.  |



## 2. System/Parameters/Shutdown

Default settings for the Shutdown process are set here. If you want to force a data archive, you would indicate this in the parameters before Log out. A data archive should be forced if major changes are going to be made to the **ARW** database.



The screenshot shows a Windows-style dialog box titled "Shutdown: Alice". The title bar includes standard minimize, maximize, and close buttons. Below the title bar is a toolbar with a red 'X' icon and a yellow question mark icon. The main area of the dialog contains a list of checkboxes for various shutdown tasks. At the bottom, there is a large empty rectangular box, likely for a message or log output.

Option	Status
<input type="checkbox"/> Force data archive	Unchecked
<input checked="" type="checkbox"/> Wait for logout	Checked
<input checked="" type="checkbox"/> Suspend Web Inquiry	Checked
<input checked="" type="checkbox"/> System check	Checked
<input type="checkbox"/> Rebuild	Unchecked
<input checked="" type="checkbox"/> Housekeeping - Acquisitions	Checked
<input checked="" type="checkbox"/> Housekeeping - Reservations	Checked
<input checked="" type="checkbox"/> Housekeeping - Bookings	Checked
<input checked="" type="checkbox"/> Housekeeping - Fines	Checked
<input checked="" type="checkbox"/> Housekeeping - Loans	Checked
<input checked="" type="checkbox"/> Housekeeping - Topics	Checked
<input checked="" type="checkbox"/> Housekeeping - Loan Categories	Checked
<input checked="" type="checkbox"/> Housekeeping - Inquiry	Checked
<input type="checkbox"/> Purge Loan History	Unchecked
<input type="checkbox"/> Purge expired articles	Unchecked
<input checked="" type="checkbox"/> Purge loaded files	Checked
<input type="checkbox"/> Automatic MARC data update	Unchecked
<input checked="" type="checkbox"/> Load MARC data	Checked
<input checked="" type="checkbox"/> Load articles	Checked
<input checked="" type="checkbox"/> Load borrower data	Checked
<input type="checkbox"/> Extract GMD from Title	Unchecked
<input type="checkbox"/> Automatic Keyword Generation	Unchecked
<input type="checkbox"/> Remove Unused Keywords	Unchecked
<input type="checkbox"/> Automatic See Subject Generation	Unchecked
<input type="checkbox"/> Hide Unused Subjects	Unchecked
<input checked="" type="checkbox"/> Archive	Checked
<input checked="" type="checkbox"/> Confirm data loads	Checked
<input checked="" type="checkbox"/> Allow login	Checked

# System Administration Functions

For networked AfW installations, all the following System Administration functions must be carried out after all users have logged out of AfW, with the exception of the Shutdown workstation. At the Shutdown workstation you must exit all modules before performing these operations.

For AfW Solo, you must exit all modules before performing these operations.

## 1. Shutdown

- How often? Every day
- When? As you Log out of **AfW** for the day
- How?



Click the X in the top right hand corner of the window.

If the Shutdown is to be performed at a later time, leave the setting as is. If you wish to perform a Shutdown now, click the **Shutdown now** button. If you do not wish to perform a Shutdown (this is not recommended unless you will be logging in again later in the day) click the **Cancel Shutdown** button.

The Shutdown files all the information you have been adding to **AfW** during the day into its correct file and place. It also clears what is known as the Changes Log File, where all the work you do during the day is saved. The Shutdown process will also perform all the Housekeeping functions ticked in Parameters/Shutdown.

## 2. Data Archive

- How often? Once or twice a week
- When? During the Shutdown process
- How?

Perform logging out and Shutdown as usual.

The archive is essentially a backup of **AfW** data to your hard disk. This archive is used if you need to recover data when **AfW** is turned off abnormally, as in a power cut.

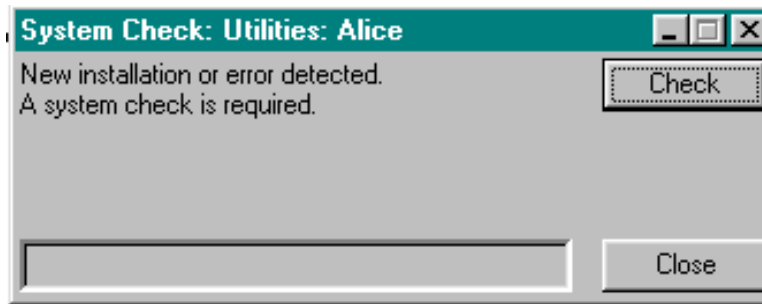
Please note that a Data Archive will be done automatically as part of the Shutdown process, if you exceed the transaction threshold indicated by the Changes Before Archive parameter.

It is important that an external backup, to media such as Zip disk or tape, also be completed on a regular basis. The set-up of your external backup procedure should be discussed with your local IT personnel or your hardware / network vendor.

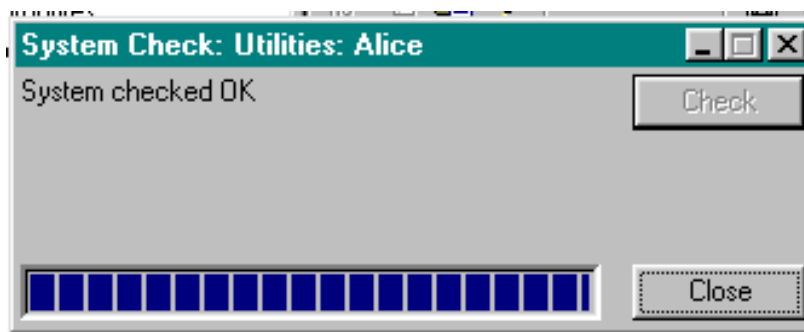
### 3. System Check

How often? As required  
When? When **AfW** informs you.  
How? You will see a message requesting that you perform a System Check.

Make sure all other operators are logged out of AfW, and that you have all modules on your workstation closed.



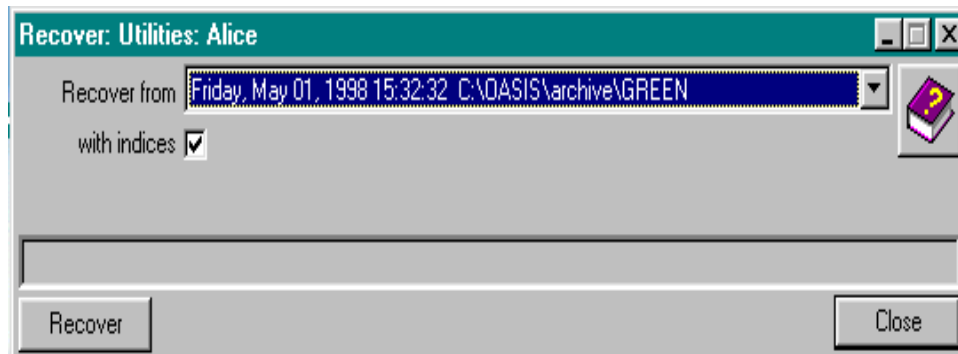
Click the **Check** button. The following message will come up if everything is OK. Click the **Close** button.



If everything is not OK, **AfW** will ask you to perform a Recovery.

## 4. Recovery

How often? As required  
When? When **AfW** informs you a Recovery is required, after a System Check.  
How? **AfW** will take you directly into Recovery mode. Click the **Recover** button.



Click the **Recover** button. **AfW** will keep you informed on the progress of the Recovery.

**If there are any problems with the recovery, AfW will tell you. You should go to System/Reports and open up the Event Log. Print this report out and fax to your Softlink Support Officer .**

When the Recovery is complete, click the **Close** button.

You are now ready to resume normal operation.



## 4. Cataloguing

# Introduction

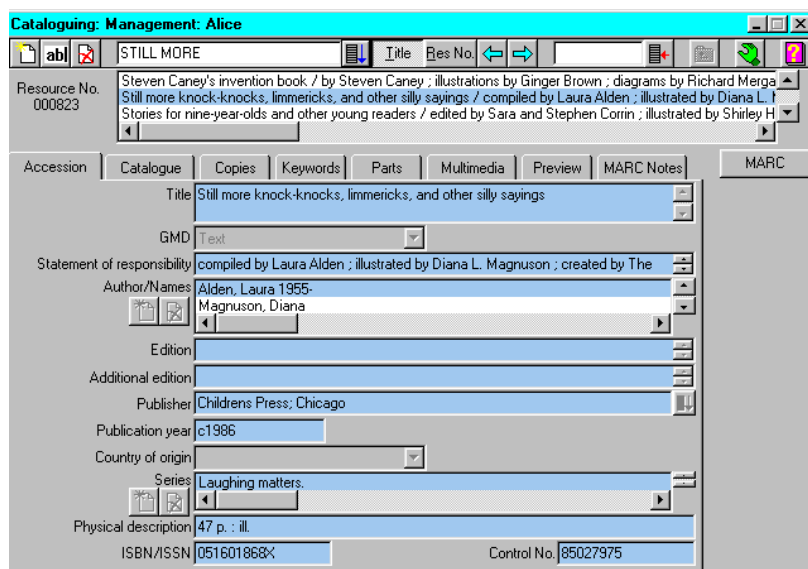
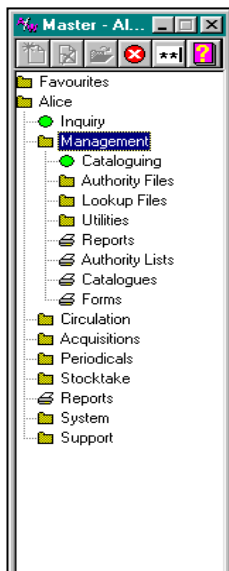
From the **AfW** menu, click once on the Management folder to show its contents. First in the list is “Cataloguing”. It is within this Cataloguing component that **AfW** allows the manual cataloguing and editing of resource records. A resource can be anything you have in your library collection: books, CDs, tapes, periodicals, kits, equipment, etc. Each permanent resource in the collection will require a barcode number to uniquely identify it within **AfW**.

The Catalogue screen has a MARC editor and 8 tab pages – Accession, Catalogue, Copies, Keywords, Parts, Multimedia, Preview, and MARC Notes. When manually cataloguing resources, only the first three tabs are commonly used. The remaining tabs are for special purposes as described later in this chapter. These tab pages provide an easy-to-use template of bibliographic information where no MARC experience is needed to catalogue and edit the library records.

If maintaining a MARC standard in your library is desired, you may use the **MARC** button to access the MARC editor and manipulate the tag and subfield information. To save time and avoid human errors, MARC records may be loaded directly from MARC data disks which can be obtained from databases such as SCIS and Kinetica.

## Cataloguing

For each resource you catalogue, you will need to have an accession record with a title, GMD, and barcode entered to identify the resource. It is required that the resource also be given a resource loan category for circulation purposes. The degree to which you further catalogue any resource is purely up to you. **AfW** supports full AACR2 description format. As with any resource, more details entered into the catalogue will enhance a patron’s opportunity to find and use the resource. Follow this general rule to allow patrons the greatest opportunity to find information they need.



## Cataloguing Tool Bar

Use the tool tips to remind yourself what each button across the top of the **AfW** cataloguing window is for.



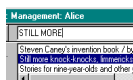
The white page with the sparkle in the upper left corner allows you to add a new data item or resource. Whenever you wish to create something new in an area, look for this button.



To edit a record, click the **Edit** button. While editing, the fields turn white and the **Edit** button becomes a **Save** button which displays a floppy disk image. Click the **Save** button to save the changes you have made.



To delete the displayed resource, record or entry, click the button displaying a white page with a red X. **AfW** will ask you to confirm the action before deleting.



The text area containing the “STILL MORE” text allows you to type a partial title and search for the bibliographic record within **AfW**'s catalogue. Clicking the button directly to this field's right or pressing <Enter> will initiate the search.



Orders the records alphabetically by title.



Orders the records by their internal record number.



Moves to the previous ordered resource screen.  
Moves to the next ordered resource screen.



Enter a barcode number to search by barcode. Use the button immediately to the field's right or the <Enter> key to initiate the search after typing the barcode. To search for a resource by its barcode, click in the barcode search field and scan the barcode label with your barcode reader.



If the resource is catalogued as a part, its main resource can be accessed by clicking the **Open Folder** button. Parts can be alternate titles or multiple titles contained within one physical work.



The **Grab** button can be used to copy this resource and paste it in another **AfW** area.



The **Help** button accesses **AfW**'s on-line help documentation.

When unsure what a button does, place your mouse pointer over the button and wait for the **AfW** “Tool Tip”.

## Accession Tab

The Accession tab contains bibliographic information about a resource. The window below depicts the easy-to-use, template format for creating a MARC record.

The screenshot shows a software window titled "Cataloguing: Management: Alice". It has a menu bar with "abl", a file icon, and a help icon. Below the menu bar is a toolbar with buttons for "Title", "Res No", and navigation arrows. The main area is divided into tabs: "Accession", "Catalogue", "Copies", "Keywords", "Parts", "Multimedia", "Preview", "MARC Notes", and "MARC". The "Accession" tab is active. It contains several text fields: "Resource No." (000890), "Title" (200 illustrated science experiments for children / Robert J. Brown.), "Statement of responsibility" (The agony and the ecstasy, a novel of Michelangelo. Alabama / by Allan Carpenter.), "Publisher" (Tab Books; Blue Ridge Summit, PA), "Publication year" (1987), "Country of origin", "Series", "Physical description" (v. 186 p. : ill. ; 21 cm.), "ISBN/ISSN" (0830628258), and "Control No." (86023196). A pop-up window titled "Add: Cataloguing: Management: Alice" is open over the "Title" field. It has a "Title" field and a list of search results: "200 illustrated science experiments for children / Robert J. B", "The agony and the ecstasy, a novel of Michelangelo.", "Alabama / by Allan Carpenter.", "Alaska / by Allan Carpenter.", and "All the king's men. / With a new introd. by the author.".

To move from one tab to another, make sure you have clicked the **Save** button. If the disk icon is visible, click it to save and move on.

Although **AfW** has several authority files, there is no need to manually maintain them. As described in "Search Fields" and "New and Delete Buttons" below right, the authority files are automatically and dynamically updated. Just select the entry you want or click a button to have **AfW** automatically add a new entry.

- To add a new title, click on the **New** button.
- Start typing the title and press <Enter>. **AfW** will automatically search the catalogue to show you the closest existing match. From this, you will be able to decide whether an existing or new record is needed.
- If the title does not already exist in the catalogue, you would press the **New Resource** button in this window to create a new resource template and MARC record. **AfW**, in the next window, will give you the opportunity to check the spelling and format of what you typed. When you have typed the full title, click the **OK** button.

## Edit Mode

You are now in Edit Mode for this resource record. The GMD (General Material Designation) defaults to Text for ease of use. You may change it via the drop-down menu.

## Directly Typing into Fields

Text fields such as the Statement of responsibility, Edition, Additional edition, Publication year, ISBN, Control No., etc. can simply accept direct typing.

## Search Fields

To enter the publisher, type the beginning of the correct publisher name then click the **Search** button to the field's right. A look-up window will display the publisher authority file in which you can select the closest publisher match from the authority file or add a new publisher and place.

## New and Delete Buttons

To add an author name or series name, click the **New** button, type the name and press <Enter>. **AfW** will look into the authority files for the closest match. As with adding a title, you will be able to choose from the authority file window or create a new authority entry dynamically.



## Catalogue Tab

**Cataloguing: Management: Alice**

Resource No. 000890

200 illustrated science experiments for children / Robert J. Brown.  
The agony and the ecstasy, a novel of Michelangelo.  
Alabama / by Allan Carpenter.

Accession Catalogue Copies Keywords Parts Multimedia Preview MARC Notes MARC

Classification 507  
Suffix BRO  
Department  
Notes Includes index.  
This book contains experiments illustrating many scientific principles and includes a number of projects a child can build.  
Curriculum areas  
Suitable from to  
Subjects Science - Experiments.  
Topics

The Catalogue tab page contains information about how the resource fits into your collection. To edit this information, click the **Edit** button on the top left corner of the toolbar.

- **Classification** Dewey or your preferred classification.
- **Suffix** Generally the first 3 letters of the author's last name.
- **Department** The department to which this resource belongs, for Book Hire only.
- **Notes** Text notes or annotations from the cataloguer.
- **Curriculum areas** Where this resource fits into the curriculum, i.e. Maths, History, etc.
- **Suitable from/to** Indicates a suggested reading level range.
- **Subjects** SCIS, Library of Congress or your preferred subject authority listing.
- **Topic** Local subjects, which do not have an equivalent in your subject authority listing.

## Copies Tab

The Copies tab page allows you to add the details of your copy of the resource you have catalogued. First, click the **New** button to add a copy. You will be asked for the copy's barcode number. Scan or type this in the field. The Classification and Suffix will default to that which was entered or loaded on the Catalogue tab page, but here is where you would indicate if one copy were, for example, shelved in another location while the other copies were shelved in their regular location.

You may be as brief or detailed as you wish in filling out the Copies tab page. However, in order to circulate this copy, you must assign a Loan category. The **Replicate** button allows multiple copies of this resource to be batch added and barcodes will be assigned sequentially.

The **Change** button allows you to change the barcode number of this copy. Click the **Change** button and scan the new barcode number to change the barcode.

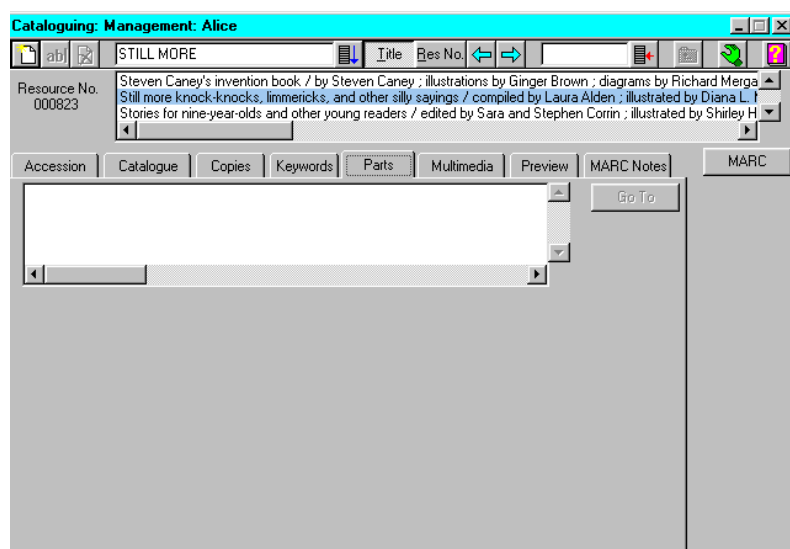
## Keywords Tab

Use the library System Parameters to activate the automatic generation of keywords.

To quickly keyword a phrase on any of the tabs, highlight the phrase, right-click and select Keyword from the pop-up menu.

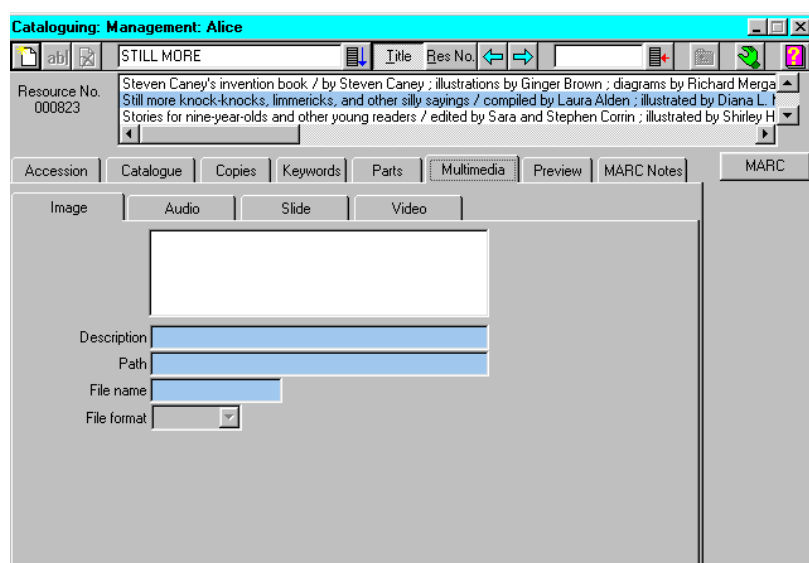
The Keywords tab allows manual tagging of keywords, but Keywords can also be automatically generated. This window, as shown above, displays those words that have been automatically keyworded. If a keyword is added manually, the keywords window will display "Manual".

## Parts Tab



The Parts tab page allows alternate titles to be catalogued for the main resource. For example, a book containing the works of Shakespeare might have numerous parts indicating those plays and poems included in the main work.

## Multimedia Tab



If you have purchased the **AfW** Multimedia module, the Multimedia tab has four sub-tabs that allow images, audio clips, slide shows and videos to be attached to bibliographic records. These multimedia files are made available to patrons searching the catalogue in Inquiry. Each tab page looks the same and provides the following fields:

- Description Text description of the attached file.
- Path Drive letter and path of the stored file, eg: C:\OASIS\IMAGE\
- File name The file name including the three-letter extension.
- File format Use the drop-down menu to select the appropriate file format.

## Preview Tab

Cataloguing: Management: Alice

abl

Title Res No.

Resource No. 000890

200 illustrated science experiments for children / Robert J. Brown.  
The agony and the ecstasy, a novel of Michelangelo.  
Alabama / by Allan Carpenter.

Accession Catalogue Copies Keywords Parts Multimedia Preview MARC Notes MARC

Requested by

Date requested

Date received

Invoiced ☐

Source

Date returned

Previewer 1

Recommendation

Previewer 2

Recommendation

Comment

The Preview tab page works in association with the Acquisitions component of **AfW** in which resources obtained “on approval” can be sent out for previewing. Comments and recommendations can be entered to assist the librarian in purchasing decisions.

## MARC Notes Tab

Cataloguing: Management: Alice

STILL MORE

Resource No. 000823

Steven Caney's invention book / by Steven Caney ; illustrations by Ginger Brown ; diagrams by Richard Merga  
 Still more knock-knocks, limericks, and other silly sayings / compiled by Laura Alden ; illustrated by Diana L.  
 Stories for nine-year-olds and other young readers / edited by Sara and Stephen Corrin ; illustrated by Shirley H

Accession Catalogue Copies Keywords Parts Multimedia Preview MARC Notes MARC

520 A collection of limericks, humorous sayings, and knock-knock jo

A collection of limericks, humorous sayings, and knock-knock jokes on subjects such as science, math, and animals.

The MARC Notes tab page displays notes and tag numbers, from the original MARC record, for records that have been added to **AtW** through a MARC File import or through Rapid Retrospective. To add library specific notes that are not necessarily MARC standard, use the Catalogue tab page instead.

## MARC Button

The screenshot shows a software window titled "Marc: Management: Alice". It is divided into two main sections: "Tag" and "Subfields".

**Tag Section:**

- A list of MARC tags is displayed in a scrollable area:
  - 001 \$a85027975
  - 020 \$a051601868X
  - 082 \$bALD
  - 100 \$aAlden, Laura 1955-
  - 100 \$aMagnuson, Diana
- Below the list, a small input field contains "001".
- To the right of the list are four buttons: "Add", "Insert", "Delete", and "Edit".

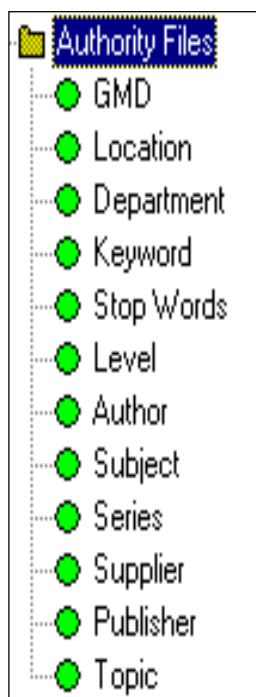
**Subfields Section:**

- A list of subfields is displayed in a scrollable area:
  - x \$a85027975
- Below the list, a small input field contains "a" followed by "85027975".
- To the right of the list are four buttons: "Add", "Insert", "Delete", and "Edit".

At the bottom right of the window is a "Close" button.

The MARC button allows access to the MARC editor screen. Whether loaded as a full MARC record or manually catalogued, this editor provides full control over the MARC record and allows tag and subfield editing.

# Authority Files



This section will discuss all 12 on-line, dynamic authority files that allow user-friendly global changes and full See and See also cross-referencing within **AfW**. Unless specific authority editing, global changes or manual cross-referencing is desired, the authority files do not need to be manually maintained. The authorities are automatically updated with new information during data loads and manual cataloguing. Direct access permits manual addition, deletion and editing.

## New, Edit, Save and Delete buttons:

For each authority, as with resource cataloguing, the tool bar provides the standard buttons to add new entries, edit and save current entries, and delete current entries. Only additional features will be specifically discussed. To make a global change of an authority entry, simply edit the entry, make the change and click the **Save** button. The change will be made throughout the **AfW** system.

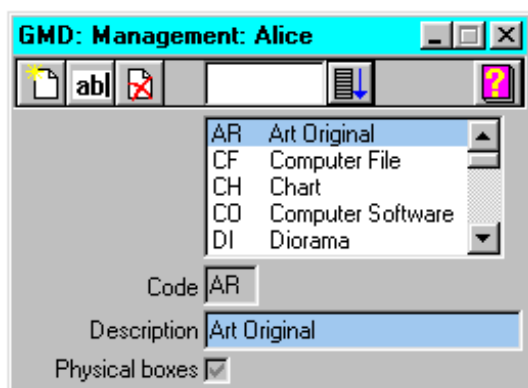
## Name and Code buttons:

The **Name** and **Code** buttons, if available in an authority file, determine the order in which the entries are displayed.

In this section, brief descriptions are provided for each **AfW** authority file. To the right of the authority file name there is an indication as to whether or not **AfW** provides initial information inside the file or whether the authority file's contents are purely user-defined for local needs.

## GMD – General Material Designation

(supplied with **AfW**)

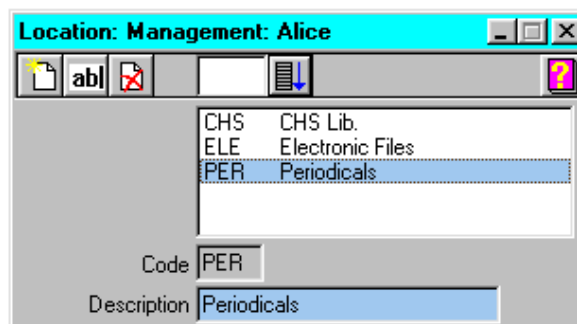


The GMD authority file holds the General Material Designation descriptions that describe, physically, what a resource is. The standard, approved GMDs are loaded with the **AfW** software, but can be modified to accommodate local requirements. Although currently not an official GMD, the code “CD” is often added to represent compact disks. GMDs are used on the Accession tab page in cataloguing.

You may add more GMD authorities if you wish. However, do not delete the pre-set GMD authorities as they are used by **AfW** to identify special cataloguing features. (see Cataloguing Examples for Computer Files and Web Pages)

## Location

(locally defined)



The Location authority file is used to define special shelving locations within the library or outside the library. These locations are unique, as opposed to the general shelves. Examples of common locations include Reference, Audio Visual and Periodicals. Locations are used on the Copies tab of cataloguing.

## Department

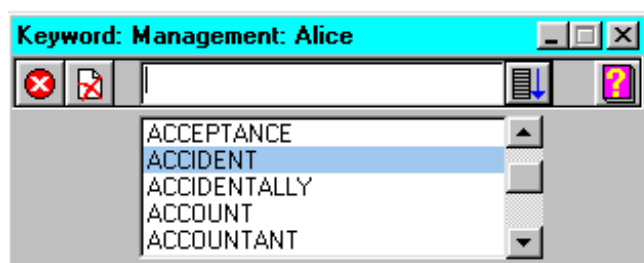
(locally defined)



Departments can be used to indicate a department within a school or corporation which owns a particular resource. If certain copies or titles belong specifically to a department within an organisation, the Department authority file can be used to define these groups. Departments are assigned on the Catalogue tab page in cataloguing. The Department field is only available in cataloguing if you own the **AfW** Book Hire module.

## Keyword

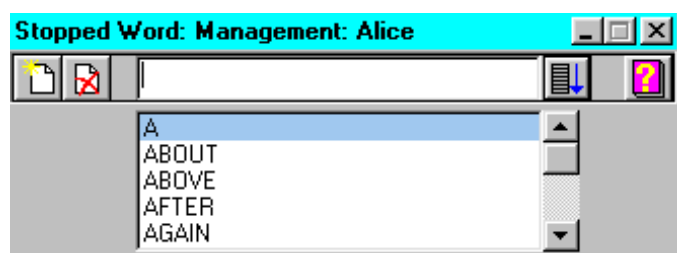
(locally or automatically defined)



Keywords allow full text searching of the Title, Notes and Edition fields. Set keywords to automatically generate from the System/Parameters/Management window. In addition, keywords can be manually added to any resource record. Resource-based keyword maintenance and viewing is done via the Keywords tab page in Cataloguing. The far left button on the tool bar will move the highlighted word to the stopped words list and prevent its use as a keyword. Deleting a keyword successfully removes it from the Keyword list, but this does not prevent its re-creation in the future, as would moving it to the Stop Word list.

## Stop Words

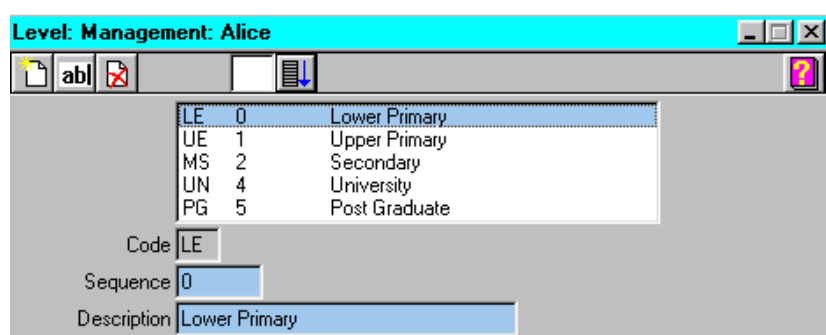
(supplied with **AfW**)



The Stop Word authority file indicates all words that should not be made into keywords during the automatic generation of keywords. Contained in the stopped word list, by default, are prepositions, articles, conjunctions, etc. For special and corporate libraries with a narrow subject focus, it is often wise to use the stop word list to halt keyword generation for words that may well refer to the majority of the collection. For example, a psychiatric library may wish to stop words such as “psychology”, “psychiatric”, etc.

## Level –Suitability Levels

(locally defined)

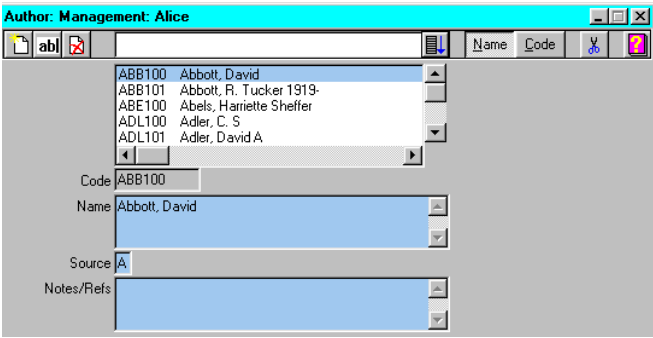


The Level authority file allows the set up of reading level ranges within the library collection. The code, as in all authority files, is only used for internal tracking. The sequence is used to order the levels and starts with zero as the first level. Levels can be used within the Catalogue tab page in cataloguing where the “Suitable from” and “to” fields can be defined.



# Author

(locally or automatically defined)



The Author authority file is generally only used manually to merge two author entries for the same author or to edit a misspelled name. Given that suppliers of MARC records are not perfect in the records they supply, and variations in punctuation and spelling can lead to subtle differences in author names, a single author may appear differently in various MARC records and therefore be loaded into the authority file separately for each variation. As such, **AfW** offers a point-and-click method of merging like author entries. To merge two author entries into the same entry, highlight the non-preferred entry and click the **Scissors** button. Notice this button turns into a clipboard. Highlight the preferred author entry and then click the **Clipboard** button. You will then be asked if you wish to delete the non-preferred entry. The two entries will be merged together.

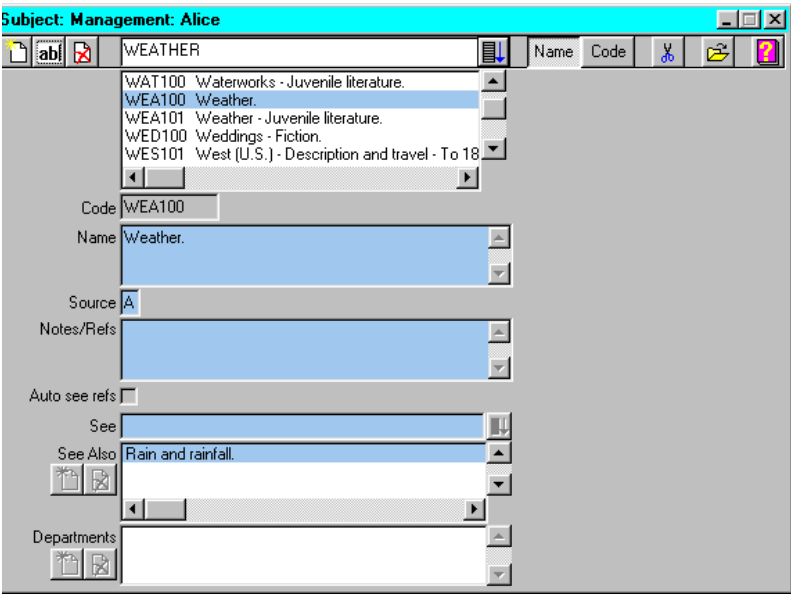
The Source field indicates how the entry was added: A for ASCIS, L for Local.

The Notes/Refs section is a text area in which notes regarding the author entry may be stored. These notes are visible in Inquiry.

The **Name** and **Code** buttons determine the order in which the author entries will be displayed. Generally, code order is used as a support tool when technical assistance is requested.

# Subject

(locally or automatically defined)



If two or more subject headings exist that should be merged into one, highlight the non-preferred subject, click the **Scissors** button, highlight the preferred term and click the **Clipboard** button. If you wish to delete the non-preferred entry, answer yes to the dialog box question that is displayed after the merge.

The Subject authority file is probably the most powerful authority file in **AfW**. As with previous authority files, the Source field indicates whether the entry was added locally (L) or from another source. The Notes/Refs field again allows textual notes to be attached to an entry.

The following entries are of significant importance and can be used to aid library patrons:

### Auto see refs

The Auto see refs check box indicates whether or not see references were automatically generated for this subject. In System-Parameters-Management, **afw** allows the user to specify whether or not see references should be generated and, if so, whether it should be “by term” or “by word”.

by term: A term in a subject is a group of words separated by a hyphen or the word “and”. For example, with this feature turned on, the subject United States – Civil War – Aerial operations can be searched for by any of the three terms.

by word: Expanding on the “by term” example above, subjects could be searched for by any word obtained within the subject. For example, the above subject could be found by searching for “States”, “War”, or “operations” as well.

### See

The see field allows See references to be added. A See reference links a non-preferred term to a preferred term. Simply edit the entry, type all or part of the preferred term into the field, click the **Search** button and click **OK** when the preferred term is highlighted.

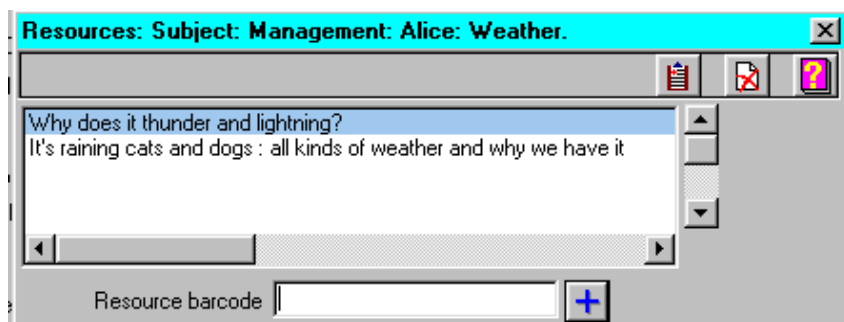
The screenshot shows a software window titled "Subject: Management: Alice". It contains a list of subject codes and names on the left, including CAP100 (CAPE MALAYS), CAR100 (CAREERS), CAR101 (Cars), CAT102 (Catholic high schools - Fiction), and CAT101 (Catholic schools - Fiction). The "CAR101 Cars" entry is selected. Below the list, the "Code" field is set to "CAR101" and the "Name" field is set to "Cars". The "Source" field is set to "L". The "Notes/Refs" field is empty. The "Auto see refs" checkbox is checked. The "See" field is set to "Motor vehicles". Below the "See" field, there is a "See Also" field and a "Departments" field, both of which are empty. The window also has a toolbar with icons for file operations and a "Name Code" tab.

### See Also

The See-Also field allows See Also references to be added. A See Also reference suggests, to a patron searching the catalogue, other subject headings related to the current subject search. For example, a search on “Weather” might suggest also seeing “Rain” and “Rainfall” or “Lightning” as related subjects. To add a See Also reference, click the **New** button next to the See Also field, select the desired subject from the lookup window and click **OK**.

## Maintain button

The **Maintain** button, on the upper right side of the toolbar, allows you to maintain the resources catalogued with the current subject heading. For the subject heading WEATHER, clicking this button yields the window below.

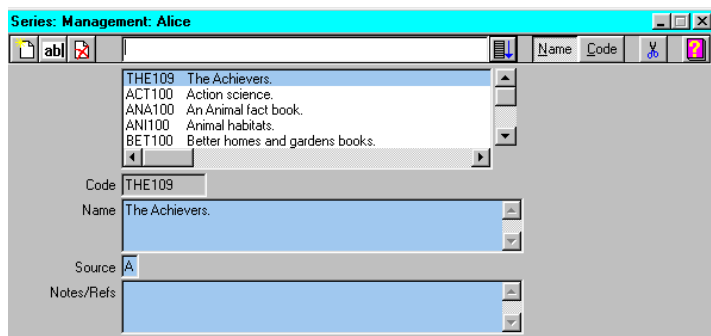


This window tells the user there are two resources catalogued with the subject weather. If a stack of books were present to which this subject heading should be added, the resource barcode of each book could simply be scanned at this point and the additional subject would be added. Likewise, one could use Inquiry to search the collection for resources regarding “Weather”, place the resources on the clipboard, and click the **Clipboard** button above to automatically add the current subject to the resources.

When a group of resources is gathered together on a common theme, it is a good idea to add a subject or topic to each item. Do this by scanning the barcode of each item in the window which is displayed after clicking the **Maintain** button.

## Series

(locally or automatically defined)

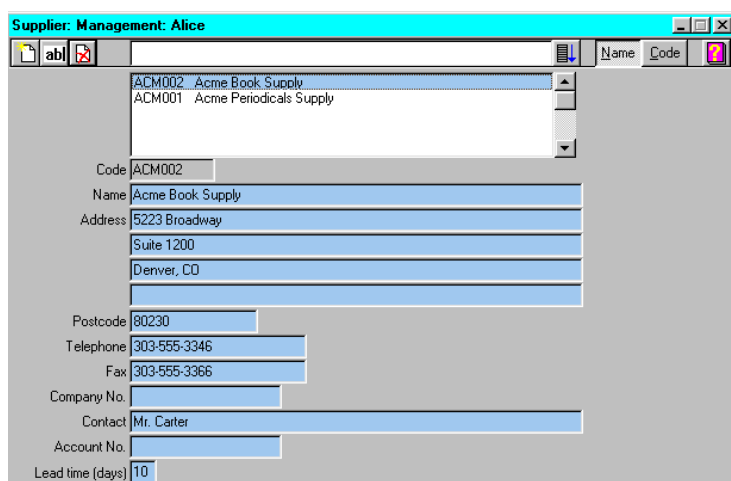


The Series authority file is also dynamically created by data loaded into **AfW**. Like the previous authority files, the Source field indicates locally (L) added entries or from another source. The Note/Refs section is used for attaching text notes to a series authority entry.

The **Scissors** button can be used, as in previous authority files, to merge authority entries and remove non-preferred entries if desired.

## Supplier

(locally or automatically defined)



Supplier: Management: Alice

abl

Name Code

ACM002 Acme Book Supply

ACM001 Acme Periodicals Supply

Code ACM002

Name Acme Book Supply

Address 5223 Broadway

Suite 1200

Denver, CO

Postcode 80230

Telephone 303-555-3346

Fax 303-555-3366

Company No.

Contact Mr. Carter

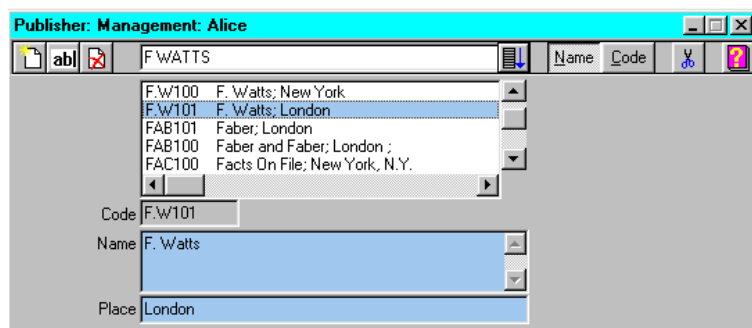
Account No.

Lead time (days) 10

The Supplier authority file is used to maintain extensive details regarding the library's suppliers. These can be suppliers of books, periodicals, equipment, etc. In this authority, fields are available for Name, Address, Telephone, Fax, Company Number, Contact Name, Account Number and Lead time.

## Publisher

(locally or automatically defined)



Publisher: Management: Alice

abl

Name Code

F.W100 F. Watts; New York

F.W101 F. Watts; London

FAB101 Faber; London

FAB100 Faber and Faber; London

FAC100 Facts On File; New York, N.Y.

Code F.W101

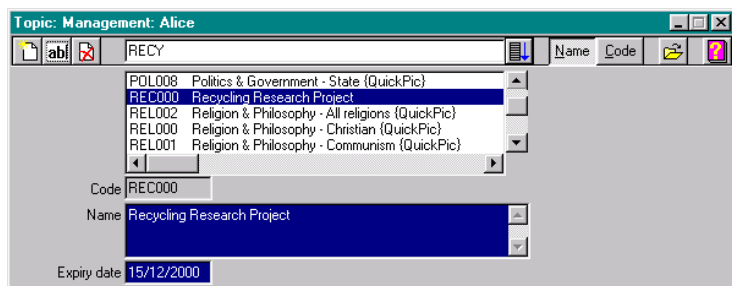
Name F. Watts

Place London

The Publisher authority file maintains information about resource publishers. This authority holds two key pieces of information for each entry: publisher name and publisher place. As with most authorities, the **Scissors** button allows for the easy merging of two similar authority entries.

## Topic

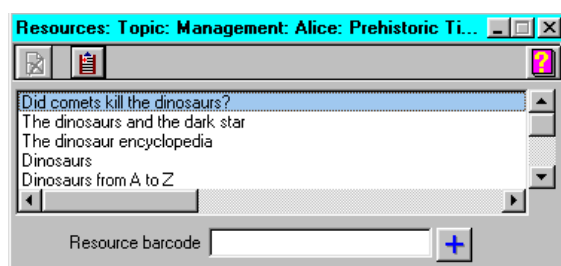
(locally defined)



The Topic authority file contains local subject headings. In the example window above, the Topic authority is being used to establish reading lists for a research project. The Topic authority file functions very much the same way as the Subject authority file and is able to be searched for in Inquiry.

Topics are unique in that they may be set to automatically expire. For example, if in the above the reading list was only required for a period of time, it would be appropriate to enter an expiry date so that the entry automatically deletes itself.

As in the Subject authority file, the **Maintain** button on the upper right side of the toolbar can be used to view the resources catalogued with the highlighted topic. This window can also be used as a convenient tool in which a topic can be added globally to a group of resources.



Clicking on the **Maintain** button will display the, current resources for this topic. Additional resources can be catalogued with the topic by scanning their barcodes or using the **Clipboard** button.

# Lookup Files

Lookup files follow the same functionality format as authority files, but are not true library authorities. The lookup files maintained by **AfW** are:

Country of Origin  
Curriculum Areas  
Reason for Ordering  
Recommendation  
Contract Fee Resource Category  
Dispatch Mode  
Status  
Site

In this section, brief descriptions are provided for each **AfW** lookup file. To the right of the lookup file name it is indicated as to whether or not **AfW** provides initial information inside the file or whether the lookup file's contents are purely user-defined for local needs.

## Country – Country of Origin

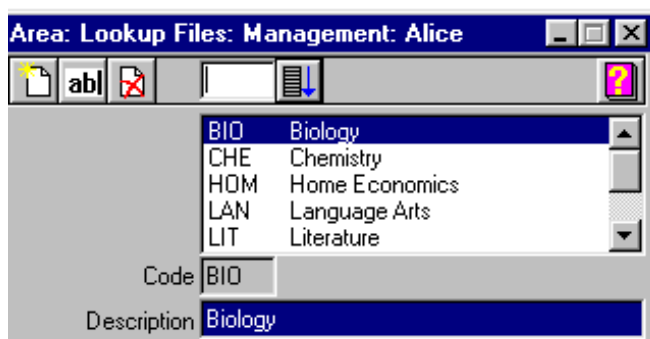
(locally defined)



The Country lookup file is used to attach countries to resources. This is done on the Accession tab page in cataloguing.

## Area – Curriculum Areas

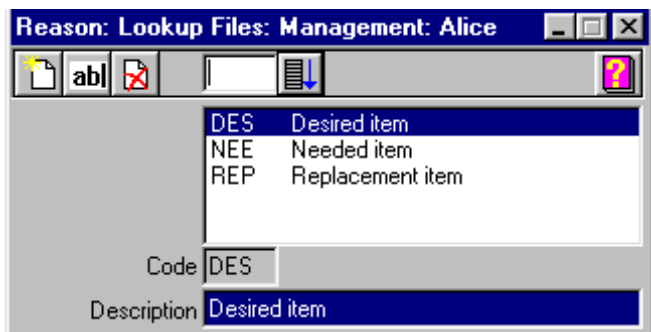
(locally defined)



Curriculum areas can be used to separate resources into curriculum categories such as Mathematics, English, Social Studies, etc. One or more curriculum area is added to resources on the Catalogue tab page in cataloguing.

Reason – Reason for Requesting the Resource

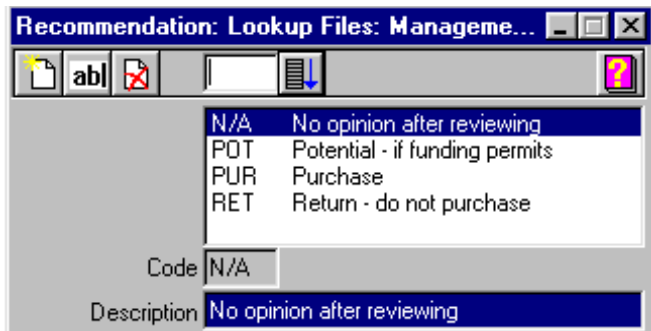
(locally defined)



The Reasons are used in conjunction with the Acquisitions component of **AfW**. These define the reason for a resource being placed on the Wish List or ordered by the library.

Recommendation

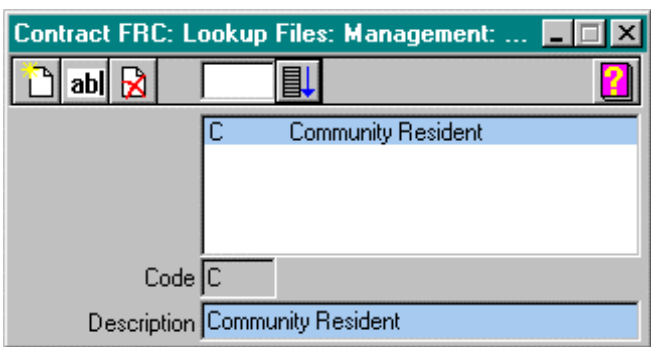
(locally defined)



The Recommendation lookup is generally used in conjunction with the Acquisitions component of **AfW**. When resources are obtained On Approval, the Preview tab page in cataloguing can hold reviews of the resources. The recommendations held in this lookup are approved for use on the Preview tab page.

Contract FRC Contract Fee Resource Category

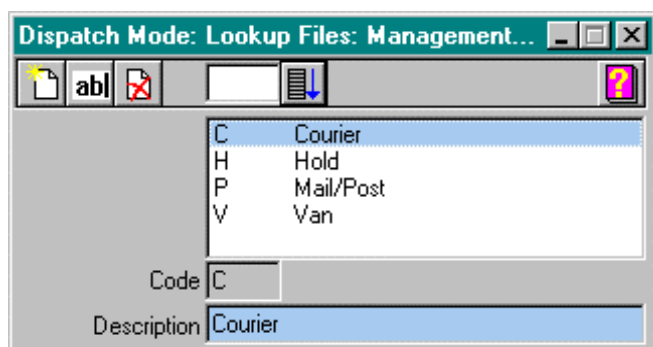
(locally defined)



The Contract FRC lookup allows Categories to be created so that certain patrons can pay a fee for the privilege of a certain number of circulation transactions. This can be thought of as transaction-based membership as opposed to the more common time-based membership. This is used in conjunction with the Library Services module.

## Dispatch Mode

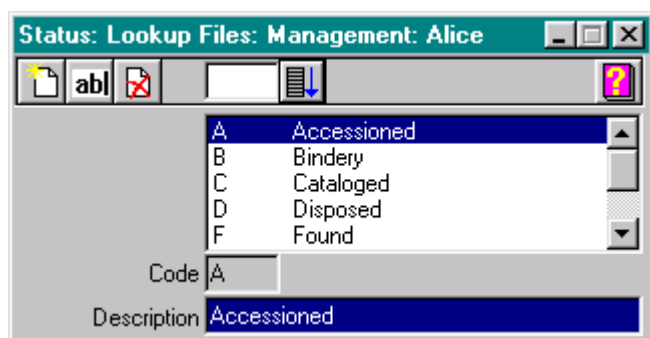
(locally defined)



This is used with the Advance Bookings component of the Library Services module, which allows the mass scheduling of resources in advance while taking into account shipping transit times, alternative booking slots and copy use minimisation. The dispatch mode is the means by which a resource can be shipped to the patron who booked it. Advanced Bookings can cater for multiple modes of dispatch of booked resources.

## Status

(supplied with **AfW**)

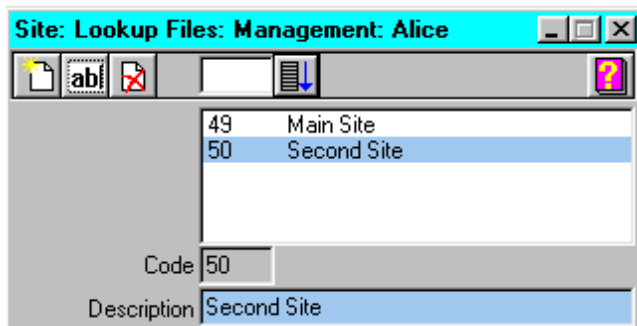


The Status lookup comes with the **AfW** software and indicates possible status descriptions for resources in the collection. For example, a catalogued book may have a "Catalogued" status, whereas a resource that did not appear during a Stocktake would be marked as "Missing".

You may add more status authorities if you wish. However, do not delete the pre-set status authorities as they are used extensively by the Stocktake component.

## Site

(locally defined)

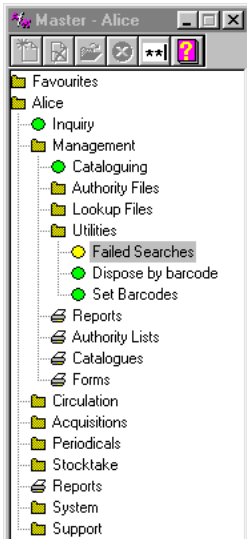


This is for use with the Union Catalogue Direct module only. This lookup file maintains the codes and descriptions for each site in the union catalogue.

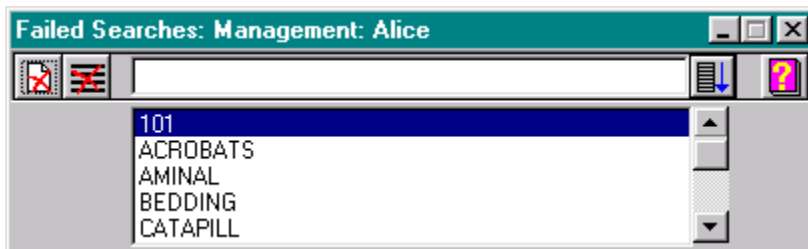


# Utilities

This section will discuss all three Management utilities. The utilities allow for the monitoring of OPAC usage, the fast disposal of weeded resources and the changing of temporary barcodes assigned during data loading.



## Failed Searches

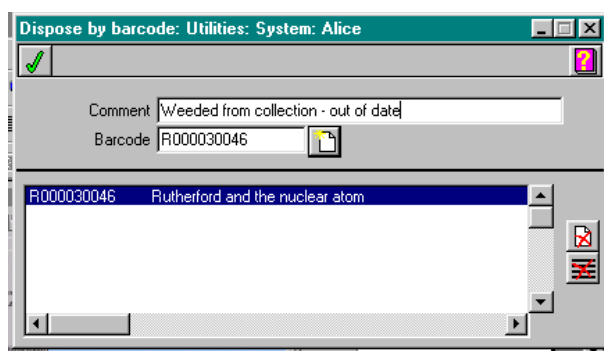


This window displays a list of the search terms entered into **AfW** Inquiry which failed to give an exact match. From this window you can:

- Search for a resource in the Failed Searches list,
- Delete a resource from the list, or
- Clear the list.

Failed searches can indicate several things: a gap in your collection which may indicate the need to purchase new resources, or the subjects entered by Inquiry users do not match the subject headings you have used for resources they are looking for. You may wish to create See references to point Inquiry users to the correct subject headings.

## Dispose by Barcode



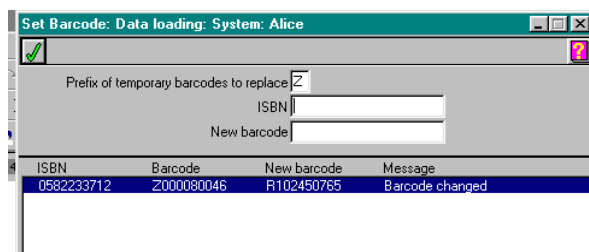
It is recommended that you actually delete copy records using the Purge function in the Stocktake, to allow the printing of a report, giving details of titles and costs for audit records.

This facility allows you to dispose of resource copies without having to go directly to the Copy tab page of the particular resource. This process will not actually delete the copy of the resource from cataloguing. It will change the status of the copy to Disposed. It is recommended that you delete the copy using the Purge process in Stocktake. This will allow you to print a report for disposed resources, giving details of title and the cost of the resource for audit purposes.

Simply scan in all the barcodes of the resource copies. When all resources are scanned in, you may then check all the entries, then click the **OK** button to complete the disposal process.

## Set Barcode

This function facilitates the fast replacement of temporary barcodes, that have been assigned during data loading, with real barcode numbers subsequently attached to resource copies.



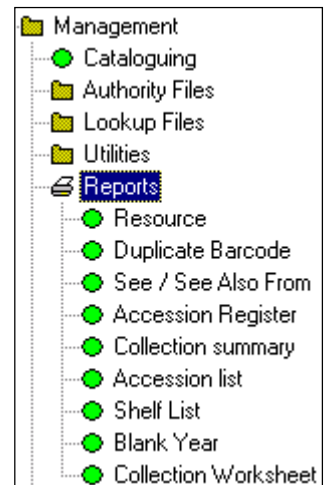
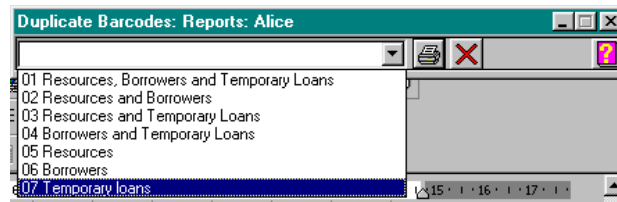
ISBN	Barcode	New barcode	Message
0582233712	Z000080046	R102450765	Barcode changed

Temporary barcodes are assigned a prefix letter different from those used by actual barcodes. Enter the prefix, then scan in the **ISBN** barcode on the back of your resource, or type in the ISBN. Click the **OK** button. Next, scan in the resource barcode, and again click the **OK** button. The temporary barcode will now be changed.

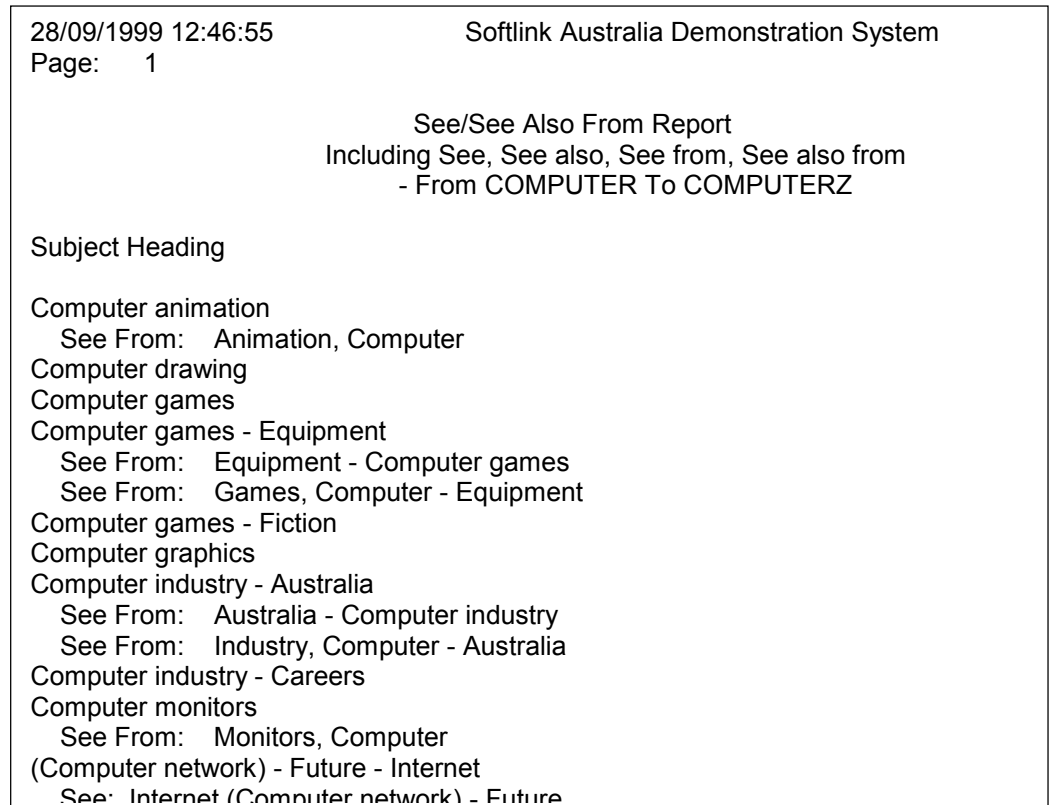
# Reports

**AfW** provides a variety of reports for the Management module.

- **Resource** This report will allow you to check data entry for new resources added, and allow added quality control for cataloguers. It prints all details of resources for a variety of specified ranges and restrictions
- **Duplicate Barcode** This report allows the checking of duplicate barcodes for resources and borrowers.



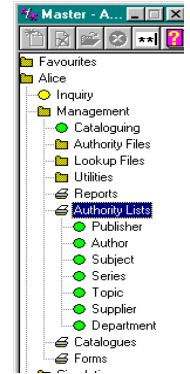
- **See/See Also From** This report will print subject headings with See, See Also and See Also From



- **Accession Register** This report produces an accession register that can be restricted by accession numbers and dates.
- **Blank Year** This report gives details of resources that do not contain a Publication date. It can be restricted to specific GMDs.

# Authority Lists

Authority Lists will allow you to print a report to use to check data entry for information entered into Authority files discussed previously. You can use these to identify mistakes made during data entry, which will facilitate the methods of editing authorities discussed previously.



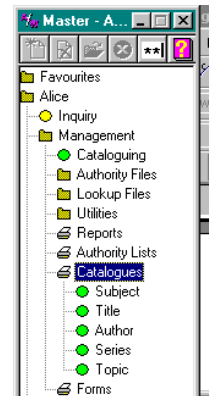
# Catalogues

This function will allow you to print hard copies of your Cataloguing information. There are a wide variety of report formats and restrictions that can be specified when printing a report, which will allow you to cater to a variety of user needs.

- Catalogues may be produced in alphabetical order by:
  - Subject
  - Title
  - Author
  - Series
  - Topic
- Formats include:

• Detailed: full notes	Full bibliographic and location information with full, partial or no notes.
• Detailed: two lines of notes	
• Detailed: no notes	
• Abbreviated	Title, shelf location and copy information.
• Catalogue List	Title, shelf location and barcode information.
- Restrictions include:

• Catalogued date ranges	<div>There are many varieties of reports that can be produced, too numerous to illustrate here. It is recommended that you run trial reports to find the formats that best suit your purposes.</div>
• Publication date ranges	
• Alphabetical range	
• Call Number (Shelf Location) range	
• GMD	
• Resource Loan Categories	

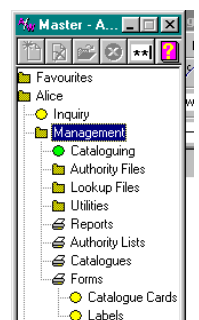


## Forms

The Forms print facility will allow you to print catalogue cards by author, title, subject and/or series. You are also able to produce barcode labels and spine labels for resources in a number of

Always print a test report to paper first so you can select suitable stationery.

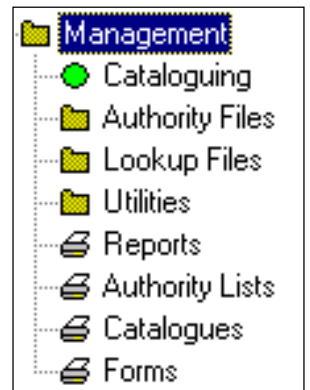
formats.



# Cataloguing Examples

**AfW** provides a powerful cataloguing tool with a wealth of options to fit individual cataloguing preferences and the numerous resource types in today's libraries and media centres. The cataloguing interface within **AfW**'s Management component provides an easy-to-use cataloguing environment for your books, but also provides special options for non-print resources such as: images, sound files, movie files, periodicals, computer files, web pages, and equipment. This section will provide practical cataloguing examples and improve your understanding of the screens and options available within **AfW** Management.

Each example assumes that Management/Cataloguing is open with the Accession tab page active. If this is not the case, click Management in the **AfW** Menu and double-click on Cataloguing. The Accession tab is automatically active when opened. To return to the Accession tab page at any time, simply click it once.

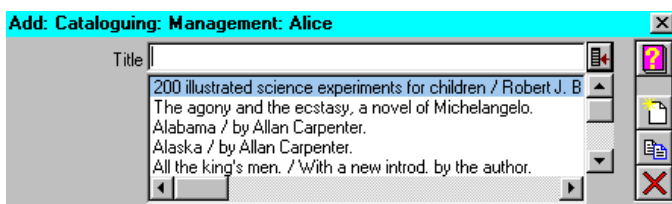


As there can be large amounts of bibliographic information associated with any one resource, **AfW** uses tab pages within the Cataloguing option to organise the information for display and editing. To switch between tab pages when adding a resource, click the **Save** button, then click the next tab.

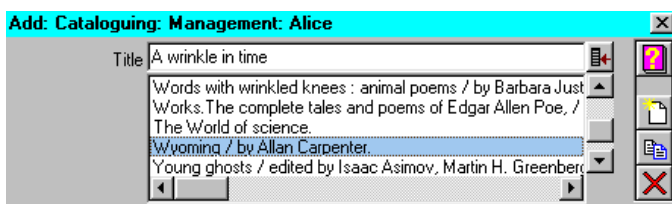
## Example 1: Cataloguing a Book

### Accession Tab

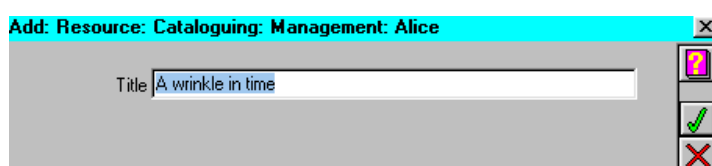
- To add a new title, click the **New** button in the top left hand corner of the Cataloguing tool bar.



- In the field provided, type part or all of the new resource's title then press <Enter> or click the **Lookup** button at the end of the field. **AfW** automatically searches through your collection for the closest matching title and displays this closest match in the centre of a look-up window.



- At this point, there are three choices:
  - New** button: This title is a new title to be added to the collection.
  - Duplicate** button: Create a duplicate of the highlighted title in the look-up window.
  - Cancel**: Cancel the addition of this process – often used if you realise the title you are trying to enter already exists and you wish, instead, to simply add copies to the existing resource record.
- As this example focuses on adding a truly new resource to **AfW**, we would click the **New** button.
- A window appears in which spelling and punctuation may be checked. Click **OK** to proceed.



- The following screen is a template for the new resource. Already in edit mode, the title you entered is displayed and the GMD defaults to Text.

The screenshot shows the 'Cataloguing: Management: Alice' window. The 'Accession' tab is selected. The title field contains 'A wrinkle in time'. The GMD dropdown is set to 'Text'. Other fields like Author/Names, Edition, Additional edition, Publisher, Publication year, Country of origin, Series, Physical description, ISBN/ISSN, and Control No. are visible and empty.

The **Duplicate** button is useful if you would like to catalogue encyclopaedias as separate catalogue entries rather than as copies of one entry. Duplicate a record, then edit the volume information for the duplicate.

- As completely or briefly as you desire, complete the fields in this template. As noted previously, most fields simply accept typing. Fields with the **New** and **Delete** buttons to their left dynamically access the authority files when the **New** button is clicked. The Country of origin is selected using a drop-down menu. To enter a Publisher, type part of the publisher's name, then click the **Search** button to the field's right to access the Publisher authority file. Select the correct publisher and click **OK** or click the **New** button for a new publisher. When entering a new publisher, a publisher name and location may be entered.
- When entering an ISBN, **AfW** performs a check to ensure the number entered is a valid ISBN. Invalid ISBNs may be stored, but **AfW** will alert you to their presence.
- When you have finished entering these details, click the **Save** button toward the left of the tool bar.

## Catalogue Tab

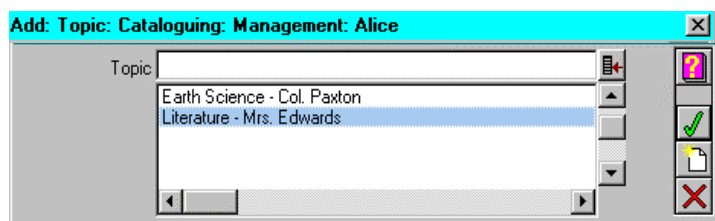
- Click the Catalogue tab then click the **Edit** button on the tool bar.

The screenshot shows the 'Cataloguing: Management: Alice' window with the 'Catalogue' tab selected. The title 'A wrinkle in time' is displayed. The 'Edit' button is visible in the tool bar. Fields for Classification, Suffix, Department, Notes, Curriculum areas, Suitable from, Subjects, and Topics are visible.

- In this tab page, enter the **Classification** and **Suffix** of the new resource.
- If this resource was specifically purchased for a **department**, note this in the Department field. This is only available if you own the **AfW** Book Hire module.
- The **Notes** field holds general notes or annotations you wish to attach to the record. If you wish to be specific with regards to MARC standards for notes, the MARC Notes tab page should be used instead.
- **Curriculum areas** are set up in Management/Lookup Files/Areas. This field indicates the curriculum area(s) that are relevant to this resource.
- **Suitable from and to** indicates the reading level range into which this resource fits. The reading levels are set up in Management/Authority Files/Levels.
- **Subjects** are added using the **New** button. Clicking the **New Subject** button displays the following window.



- Type the beginning of the subject you wish to add then press <Enter> or click the **Lookup** button at the end of the field. In the same fashion as entering a new title, **AfW** will find the closest existing match within the Subject authority file. If you find the subject you wish to enter, simply highlight it and click **OK**. If you wish to add a new subject heading to the authority, click the **New** button, check the spelling and punctuation and confirm its addition. As many subjects as desired may be added to a resource. Repeat the process above to add additional subject.
- **Topics** is a user-definable and searchable index. This is not a part of the standard MARC record, but rather a search index to provide solutions for local requirements.



Topics can be created within Management/Authority Files/Topic or can be created on-the-fly within the Catalogue tab page. Topics can be used for any local searching needs. It is easiest to approach topics in the same manner as subjects with one exception. Topics can be made to automatically expire if edited within the authority file. To add a new topic on-the-fly, click the **New topic** button then select or add the desired topic from the window depicted above.

- To move to the next tab page, click the **Save** button on the tool bar.

## Copies Tab

- Click the Copies tab. To add a new copy, click the **New** button on the tool bar.

- Enter the resource's barcode by typing or scanning with a barcode reader. If the barcode is typed, simply press <Enter> or click the **OK** button. If the barcode is scanned, the barcode reader will automatically click OK for you.

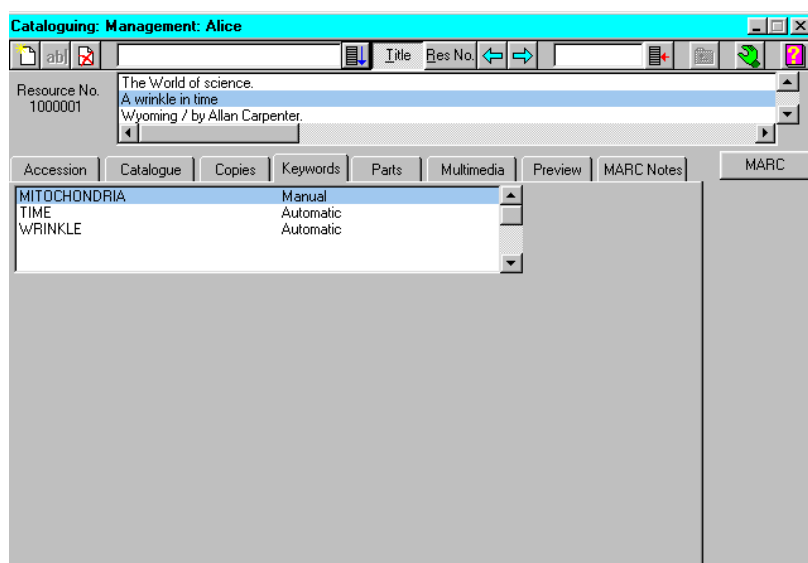
- Location** information is defined in Management/Authority Files/Location and is used to differentiate distinct shelving locations in the library such as Reference, Audio Visual, or Periodicals that are separated from the general collection. New locations should be added within the authority file. The location of a specific resource may be noted within the Copies tab page by using the Location drop-down menu.
- The **Classification** of a resource will default to that which was entered on the Catalogue tab page. As copies of the same resource may be given different classifications, this may be noted here.
- The **Suffix** of a resource defaults to the first three letters of the author's last name. This may be edited on the Copies tab page.
- Accession numbers** were previously used in libraries as the unique identifier of a resource for book keeping. In the days of library automation, this has generally been replaced by the use of barcodes. If you do not use accession numbers or wish the barcode numbers to act as your accession numbers, a system parameter may be set to "Match accession numbers to barcodes". This is found within System/Parameters/Library on the Barcode tab page.
- The **Copy No** field can be used to indicate a copy number stamped on the resource. This is most frequently used when cataloguing textbooks. This field is only available if you own the **AfW** Book Hire module.
- Each resource copy should have a **Loan Category**. Set up within Circulation/File/Resource Loan Category, this category is used to group resources of like circulation policies. This is further discussed within the Circulation section of this User Manual.



- The **Status** of a resource indicates its current standing within the library. For example, a resource may be noted as Accessioned, Catalogued, Missing, etc. **AfW** comes with some standard Status entries, but permits the addition of those that suit local needs. Status entries are maintained within Management/Lookup Files/Status.
- The **Accessioned** field indicates the date the resource was added to the collection.
- The **Missing/Disposed** field indicates the date the resource was determined to be missing or deliberately disposed. If, during a Stocktake, a resource is not accounted for, its status will be changed to missing and the date will be noted in the Missing/Disposed field automatically.
- The **Comment** field is a short, text field in which to make notes about this copy of the resource.
- The **Supplier** field accesses the Supplier authority file. First, set up the suppliers inside Management/Authority Files/Supplier. When cataloguing, simply type part of the supplier's name and click the **Search** button to the right of the supplier field. Highlight the correct supplier and click the **OK** button.
- **Cost** indicates the purchase price of the resource. When entering the cost, enter dollar and cents amounts without the decimal point. **AfW** will automatically insert the decimal point.
- If desired, the **order number** and **invoice number** for this purchase can be noted.
- **Item Code** can be used to indicate the resource or stock code used to order the copy.
- The **Dissection** field can be used to indicate where the funds came from to purchase this resource. Dissection codes are set up within the Acquisitions component of **AfW** and are accessed via a drop-down menu.
- To move to the next tab page, click the **Save** button on the tool bar.

## Keywords Tab

The Keywords tab page is used to manually enter keywords with which this resource can be found in Inquiry (OPAC). As it is recommended that **AfW's** automatic generation of keywords be used to facilitate full-text searching, this tab page is normally only used for viewing the keywords as opposed to adding new ones. The automatic generation of keywords option can be chosen within System/Parameters/Management and can be individually turned on or off for words in the title, notes or edition areas.



The keywords tab shows both the keywords and their means of entry, i.e. Automatic or Manual.

## Parts Tab

Parts of a main resource indicate alternate titles or discrete works contained within the resource. To add a new part, click on the Parts tab and click the **New** button. The **New** button behaves in the same manner as adding a new title to the collection. Enter the name of the part, press <Enter> and either select an existing title that doesn't have any copies, or add a new title as the name of the part.

## MARC Notes Tab

The MARC Notes tab allows strict MARC cataloguing rules to be followed with regards to the cataloguing of notes. Notes in a MARC record can exist in various tags depending upon their content. During a MARC data load, the MARC structure will be followed. During manual cataloguing, the specific notes' structure may be defined by clicking the **New** button, indicating the tag number and subfield letter. An example of this is displayed below. If you do not wish to enter your notes into a specific MARC tag, you should enter them into the Notes field on the Catalogue tab page.

## Example 2: Cataloguing other Resource Formats

### Accession Tab

As with book items other resource formats may be catalogued in **AfW**. The most important difference in adding a non-book resource is the need to change the GMD field from the default of Text.

This will result in a non-text GMD appearing next to the title of a resource in square brackets [ ], both in Cataloguing and Inquiry.

**Cataloguing: Management: Alice**

Resource No. 1000002

Fish Face / Patricia Reilly Giff ; illustrated by Blanche Sims.  
 Flambards [Video recording]  
 Florida.

Accession Catalogue Copies Keywords Parts Multimedia Preview MARC Notes MARC

Title Flambards

GMD Video recording

Statement of responsibility

Author/Names

Edition

Additional edition

Publisher

Publication year

Country of origin

Series

Physical description

ISBN/ISSN Control No.

If you are cataloguing World Wide Web sites or computer files, you will also need to insert the drive letter and file name for a computer file, or the URL of the Web site you are cataloguing in the Physical description field.

**Cataloguing: Management: Alice**

Resource No. 1000003

SOFTLINK

Silent invaders / by Harriette S. Abels ; illustrated by Rodney and Barbara Furan ; edited by Howard Schroeder  
 Softlink International Web Server [World Wide Web]  
 South Carolina / by Allan Carpenter.

Accession Catalogue Copies Keywords Parts Multimedia Preview MARC Notes MARC

Title Softlink International Web Server

GMD World Wide Web

Statement of responsibility

Author/Names

Edition

Additional edition

Publisher

Publication year

Country of origin

Series

Physical description softlink.com.au

ISBN/ISSN Control No.

All other details for all other tab pages may be completed as in a book item. A barcode must be added if the item is to be seen as available in Inquiry. When cataloguing a Web site or a Computer file, the barcode can be a "phantom" barcode, e.g. W00001 might be your first Web site.

## Example 3: Cataloguing Equipment

### Accession Tab

In the same manner as books are catalogued, pieces of equipment can also be catalogued and circulated using **AfW**. Following the same cataloguing process as a book, equipment requires a title, a GMD of Equipment and a copy specified by the barcode placed on the piece of equipment.

As described in the following example, catalogued equipment can be maintained and circulated as a library resource and can also have its equipment details and maintenance record automated.

The example used is for an overhead projector.

1. Add a new resource to the collection with an appropriate title for the equipment piece.
2. Change the GMD to "Equipment".
3. Click the **Save** button on the tool bar.
4. Click the Copies tab.
5. Click the **New** button, enter the equipment's barcode and click **OK**.

Two new tab pages in the copies area are now available: Equipment and Maintenance.

The left screenshot shows the 'Equipment' tab in the 'Copies' area. It displays fields for 'Description' (Overhead projector), 'Make' (Sony), 'Model' (DP-651), 'Serial No.' (S-66234-A-OEM-9), 'Engraved' (checkbox), 'Cost to library' (125.00), 'Cost to donor' (0.00), 'Comment', 'Building' (Main), 'Room' (Library), 'Responsible staff' (Lib), 'Date last sighted', 'Last sighted by', 'Disposed', 'Method', and 'Remark'. The right screenshot shows the 'Maintenance' tab in the 'Copies' area. It displays a list of maintenance requests with columns for 'Date requested' and 'Maintenance required'. The 'Date requested' field is set to 02/05/1997, and the 'Maintenance required' field is set to Repair fan. Below the list, there are fields for 'Date action taken' (05/07/1997) and 'Comments on action taken' (Repaired loose wire).

The **Equipment tab page** allows details of equipment to be entered and stored such as the make, model and serial number. The **Maintenance tab page** allows a history of maintenance requests and actions to be recorded. Simply click the **New** button to add a maintenance request and date. When the requested maintenance is performed, use the **Edit** button to record the date and a comment on the action taken.

If desired, use **AfW** to catalogue, circulate and inventory your equipment such as VCRs, TVs and projectors that are scheduled for use.



## **5. Circulation**

# Introduction

The circulation component of **AfW** is the area in which you record resource transactions. Circulation allows resources to be loaned out to borrowers and returned to the library. Circulation also maintains and follows your library policies regarding who can loan out what resource type and for how many days. In addition, circulation manages fines and overdues. In general, the Circulation area handles the distribution, return and policies regarding resources in your library.

Clicking on the Circulation/Loans option on the **AfW** menu accesses the circulation features within **AfW**. This provides access to the Loan, Booking, Reserve, Fine, and Return tabs with the Loan tab activated. The Circulate folder provides four more access points to the same screen, but with each of the other tab pages active instead of Loan. These access points are most commonly used for adding to one's Favourites folder and in determining your security setup.

## Planning Your Circulation Setup

The options within the Circulation/File folder define the rules associated with the circulation of the library resources. The options that are involved in the Circulation setup include Borrower Loan Category (BLC) or borrower types, Resource Loan Category (RLC) or loaning policies, fine schedules, and the calendar.

Although the policies by which your library runs can be changed at any time, it is wise to spend some time thinking through the way in which you wish to define the Circulation setup. If you are running a school library, you may wish to group all students into one BLC or separate them by scholastic year or other types of groupings. In a school library it may also be advantageous to create a BLC for Teachers and Staff, holding them to different or less restricted borrowing rules. If you are managing a special library, you may wish to create a different BLC for each department in the organisation. These choices are fully user-definable.

The resources in the library may all fit into one "General" loaning policy (RLC) or perhaps it would be preferable to create separate RLC's for Fiction, Non Fiction, Audio/Visual, Reference, Equipment, Non-circulating, and Overnight Loan resources. Again, these decisions are user-definable. Each resource copy should be given a RLC in Management/Cataloguing/Copies tab page.

Having created BLCs and RLCs, it is now possible to define the length of time one type of borrower may have one type of resource. For example, you may wish to allow Faculty staff to have Reference materials overnight, but restrict Students from loaning them out at all. Likewise, in a school library if you separate the scholastic years into different BLCs, you may wish to let older students loan out certain resource types for longer periods of time than younger students. As an alternate example, in a medical library you may wish to let doctors and nurses loan out resources for a longer period of time than interns or lab technicians. Each borrower must be given a BLC (Circulation/File/Borrower/Borrower tab page or this can be globally defined for a group of borrowers in Circulation/Global Change/Loan Category).

If you charge fines for overdue resources, you may set up one general fine schedule such as 10¢ per day or you may be as detailed as creating a fine schedule for each BLC/RLC. Fines may be charged for overdues on a per-day, flat-fee, or grace-period basis. Define these within Circulation/File/Fine Schedule.

# Loans

## Overview

When selecting Circulation/Loans, this is the window that appears. The cursor is automatically positioned in the **Enter barcode** field and awaits a barcode or command.

1







You may manually adjust the calculated due date by clicking on the **Date due** button. Do this for exceptions to your library rules.

The tool bar to the right of the Enter Barcode field consists of several buttons, which are explained below.

- Find Searches for all barcodes and commands that are scanned or typed into the Enter Barcode field.
- Name Borrowers may be selected by name by using this button.
- Override Override a warning message and allow privilege.
- Finish Cancel current transaction.
- Borrower Displays current loans and loan history for selected borrower.
- Item Used to lend an uncatalogued resource.
- Help Access to **AfW** help.

NOTE: You may scan any of the commands listed above that are on your Circulation Control Card. The command area at the left of the enter barcode field will prompt you for the information **AfW** is awaiting.

**Circulate: Circulation: Alice**




Override or Finish       

Student:

Barcode  Location

☐ Housebound Category

Name

 **Overdue loan(s)**  

Barcode	Date due	Call No.	OVERDUE LOANS	Title
S001862520	03/11/1988	F H&N		Muenna loves old movies / written by Libby Handu illustrated by

On the screen above, the borrower has overdue loans. The command area displays “Override or Finish”. Scan OVERRIDE or click the green tick to allow further loans. Scan FINISH or click the red X to disallow further loans.



## Tab Colours

The circulation tabs may appear with a green, yellow or red background. These colours serve as a visual reminder to the librarian. These colours are defined as follows.

- Green tab Ready to circulate or perform the action associated with the tab.
- Yellow tab The borrower has not yet been entered for this transaction.
- Red tab The transaction is restricted for this borrower.

## Loan

To loan out a resource, scan the borrower's barcode or find the borrower by name. When the name or barcode is entered, the Loan tab will turn green indicating resources may now be scanned. Scan the resource barcode on each resource the borrower wishes to have and the transaction is complete. It is that simple. The window below shows the circulation screen in which two barcodes were scanned: Darla's and then the resource's. **AfW** automatically calculates the due date according to your library policies.

The screenshot shows the 'Circulate: Circulation: Alice' window. At the top is a text field 'Enter barcode'. Below it, the 'Student' section contains fields for 'Barcode' (1001), 'Location' (9 (STUDY HALL)), 'Housebound' (checkbox), 'Category' (Grade 9), and 'Name' (Anderson, Darla). To the right is a photo of a young woman. Below the student information are tabs: 'Loan' (highlighted in green), 'Booking', 'Reserve', 'Fine', 'Return', and 'Dispatch'. Under the 'Loan' tab is a table with columns 'Barcode', 'Date due', 'Call No.', and 'Title'. The table contains one row: '3210', '08/10/1999', 'FIC DEL', and 'Kitty from the start'. At the bottom, there are 'Remaining' counts: 'Fiction 2' and 'Other 5'.

## Switching to a New Borrower

When one borrower is finished and you wish to move on to the next, simply scan the next borrower barcode. As long as unique barcodes are used among borrowers and resources combined, **AfW** knows the difference and will automatically take you to the new borrower record, ready to loan out.

## Temporary Resource Loan

To loan a resource not catalogued in **AfW**, select the borrower first, then click or scan ITEM. Enter a temporary barcode, title, and Resource Loan Category to complete the loan.

## Borrower Information

Click or scan BORROWER to view resources on loan to the selected borrower and their loan history.

**AfW** uses standard Windows display settings. If you would like to change the colours of the **AfW** screens, simply change your Windows display settings.

Information on Current Loans, Overdue Loans and Loan History

Circulate: Circulation: Alice

Enter barcode

Student

Barcode: 1001 Location: 9 (STUDY HALL)

☐ Housebound Category: Grade 9

Name: Anderson, Darla

Loan Booking Reserve Fine Return Dispatch

Barcode	Copy number	Return	ALL LOANS Call No.	Title
3210		08/10/1999	FIC DEL	Kitty from the start / Judy Delton.
3019		04/01/2000	FIC ADL	The fourth floor twins and the skyscraper parade / b
3025		04/01/2000	FIC AIK	The moon's revenge / by Joan Aiken ; illustrated by

☐ Overdue loans ☒ All loans ☐ Loan history

When a borrower record is on screen, you may view all current loans, all overdue loans and the loan history for the borrower. Click the **Borrower** button or scan. This will show all current loans. You may switch to other functions by clicking the appropriate radio button.

For current and overdue loans, you may print out a listing by clicking the **Print** button in the bottom right hand corner of the window. For current loans, you may renew loans, by highlighting the relevant loan record and clicking the **Renew** button next to the **Print** button.

A borrower's loan history may be reviewed by clicking on the Loan History radio button.

LOAN HISTORY

Barcode	Return	Call No.	Title
3019	26/03/1999	FIC ADL	The fourth floor twins and the skyscraper parade / by David A. &
3025	27/03/1999	FIC AIK	The moon's revenge / by Joan Aiken ; illustrated by Alan Lee.
3025	27/03/1999	FIC AIK	The moon's revenge / by Joan Aiken ; illustrated by Alan Lee.
3089	27/03/1999	E BRO	Arthur's Christmas / Marc Brown.
3190	27/03/1999	FIC COR	The lemonade trick. / Illustrated by Paul Galdone.
















☐ Overdue loans ☐ All loans ☒ Loan history

Loan history will be purged periodically according to settings in the System Parameters.

# The Circulation Control Card

Within the circulation window, multiple means of accessing commands are available. If you are using the mouse, click on the appropriate tab page or button. If you have your hands on the keyboard, simply type the name of a tab page or command and press <Enter> to move to that area or perform the indicated command. Likewise, since much of the time a barcode reader is in your hands, circulation allows command barcodes to be scanned.

Supplied with the **AfW** software is a Circulation Control Card. This card contains several barcode commands used within circulation. You are also able to print the Circulation Control Card using the Forms option in System/Reports. The Circulation Control card is reproduced below for reference.

CIRCULATION CONTROL CARD		
 <b>BOOKING</b>	 <b>LOAN</b>	 <b>RETURN</b>
 <b>RESOURCE</b>	 <b>FINE</b>	 <b>RESERVE</b>
 <b>OVERRIDE</b>	 <b>NAME</b>	 <b>RENEW</b>
 <b>BORROWER</b>	 <b>ITEM</b>	 <b>FINISH</b>
 <b>PRINT</b>	 <b>SALE</b>	 <b>DISK</b>

Either by clicking buttons, typing or scanning barcode commands, the areas of circulation are made readily accessible.

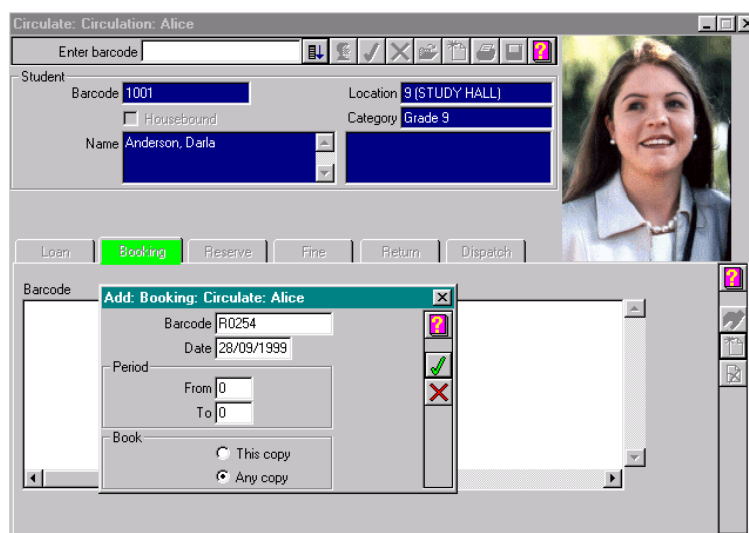
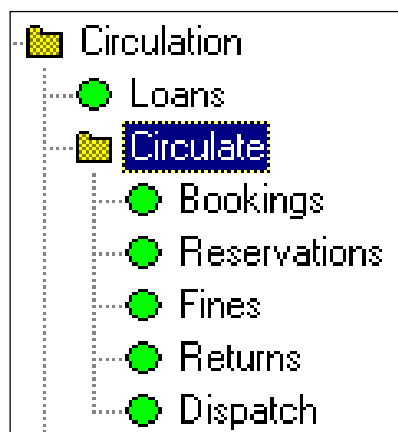
## Barcode Commands – scanned while viewing the circulation window

- **BOOKING**      Activates the Booking tab
- **RESOURCE**      For use with Rapid Retrospective
- **OVERRIDE**      For authorised operators, issues an override command
- **BORROWER**      For a borrower, displays the current resources on loan and loan history
- **PRINT**      Issues the print command
  
- **LOAN**      Activates the Loan tab
- **FINE**      Activates the Fine tab
- **NAME**      Opens the window in which borrowers can be selected by name
- **ITEM**      Used when loaning an uncatalogued resource
- **SALE**      For use with the Library Services Module
  
- **RETURN**      Activates the Return tab
- **RESERVE**      Activates the Reserve tab
- **RENEW**      Used while renewing an resource
- **FINISH**      Completes a transaction and clears the screen
- **DISK**      For use with the Library Services module

# Circulate Folder

The following areas of Circulation can be accessed by simply clicking the desired tab on the circulation screen. Additional access is provided through the Circulation/Circulate folder.

## Bookings

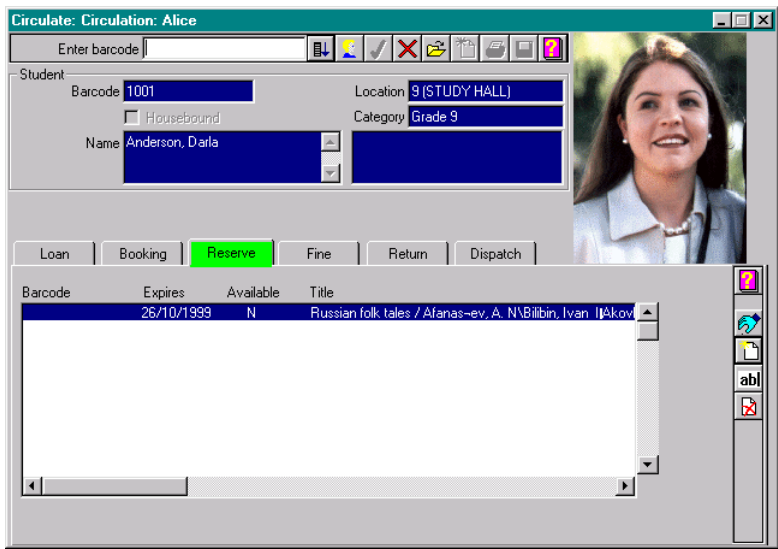


The Booking tab offers a means of booking resources for future use on a user defined time basis. Bookings may not currently span days (the Advanced Bookings section of the Library Services module is available for in depth handling of multiple day scheduling, resource routing and per-copy minimisation of use). To book a resource, it must first have a RLC defined as a part-day loan. This is defined by a check box in Circulation/File/Resource Loan Category. Click the **New** button on the right column of the Bookings tab page then enter the requested information:

- Barcode                      The barcode of the resource to be booked.
- Date                         The date on which the resource is requested.
- Period from                The first hour or time slot of the day the resource is needed.
- Period to                  The last hour or time slot of the day the resource is needed.
- Book                        Specify whether any copy or a particular copy is requested

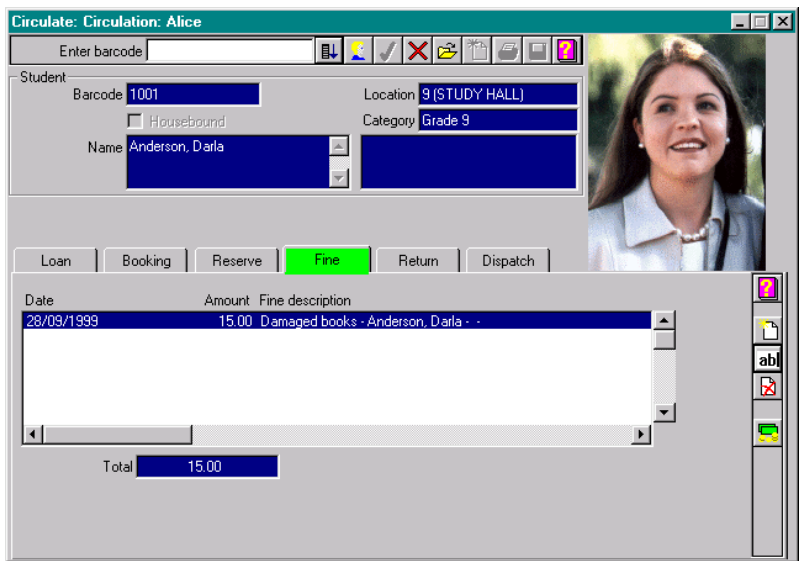
If you do not know the barcode of the resource to be booked, you may use the **Grab** button in Inquiry to copy the resource and then use the **Put** button to paste the resource into the Booking tab page. This process uses **AfW**'s multitasking capabilities and demonstrates its fully-integrated design.

# Reservations



The Reserve tab page allows borrowers to request resources that are currently on loan. Borrower requests are held in a queue sequenced in the order in which the requests were made. When a resource is returned for which there is a Reservation, **AfW** will alert the librarian and permit a Reserve Notice to be printed and sent to the borrower. When the borrower next uses the library, a message will alert the librarian that a requested resource is now available. As with bookings, the **New** or **Grab** buttons may be used to add a reservation.

# Fines



When adding, editing, or receiving payment on a fine, you do not need to type the decimal point.

Fines for overdue resources are automatically calculated based on the Fine Schedule

The Fine tab displays fines that were automatically generated according to the system parameters for overdue resources and also allows manual fine entries to be created. Authorised operators, can also edit, partially pay, pay in full, and delete fines.



- Help    Access to **AfW** help.
- Add    Add a fine manually.
- Edit    Edit the selected fine.
- Delete    Delete the selected fine
- Pay    Receive payment for selected fine. Partial payments are accepted.

## Returns

Use the Date returned radio buttons to note the day on which resources were returned, if they are being scanned in on a different day.

If a resource is returned damaged, use the Status button to change the status to "Disposed".

The Return tab page allows rapid scanning of resources. When a resource barcode is scanned into the Return tab page, **AfW** will provide status information on the screen in case it is of importance to the librarian. The information displayed includes the borrower who had the book and their details on the lower portion of the tab page as well as resource information on the upper half of the tab page. The **Status** button can be used to make changes to the status of a resource immediately upon its return. If a resource is overdue, the number of days overdue will appear in red type above the loan tab.

The **Date returned** area allows the librarian to return resources as of today, yesterday or another date. This is useful when scanning books in the morning that were returned the previous day, if borrowers are being allocated fines for late items.

No keystrokes or commands are necessary between resources being returned, if no message is displayed.

## Circulation Warning Messages

While circulating resources, **AfW** will provide warning messages to alert you to events such as unauthorised loans, overdue resources, fines, etc. The following tables list the possible warning messages and the corrective actions that may be taken for each.

### Warning Messages on Returns

NOTE: Words or numbers noted in *Italics* are merely examples. Your data may be different.

Warning Message	Reason / Corrective Action
Resource marked as Missing on <i>01/01/98</i>	(see: Warning Messages on Loans). Resource status may be changed by clicking the Status button on the Return tab page or until the next Shutdown .
Resource not currently loaned	This resource is not recorded as being on loan.
Overdue by <i>10</i> days	This resource is overdue by <i>10</i> days.
Fine is <i>5.00</i>	An overdue fine of <i>5.00</i> has been charged to the borrower. Change the fine amount if you wish by the <b>Override</b> button. *
Barcode <i>009876</i> is invalid	(see: Warning Messages on Loans)

\* Overrides are only permitted for operators with the appropriate security settings.

## Warning Messages on Loans

NOTE: Words or numbers noted in *Italics* are merely examples. Your data may be different.



Warning Message	Reason / Corrective Action
Unauthorised loan. Resource Category of resource 1234 is Unknown.	This resource has not been assigned a Resource Loan Category. Assign a Loan Category in Management/Cataloguing/Copies tab page. Look in System/Parameters/Management to see that "Default resource loan categories" for Fiction and Non-Fiction resources is not blank.
Unauthorised loan. Resource Category of resource 1234 is <i>General</i> .	Look in the borrower information at the top of the screen and see that this borrower has been assigned a Loan Category. Look in Circulation/File/Borrower Loan Category and see that the "Master Due Date" is not in the past. Also look in Circulation/File/Borrower Loan Category/ <b>Loans</b> button to check that a "Fixed due date" is not in the past.
Maximum 'Other' loans reached	The maximum permitted loans in the 'Other' Limit Category has been reached. Click the <b>Override</b> button to allow the loan if desired. If you would like this resource to have a different Limit Category, change the Limit Category for its Resource Loan Category in Circulation/File/Resource Loan Category *
Maximum 'Items' loans reached	The maximum permitted loans in the 'Items' Limit Category has been reached. Do not permit this loan, or click the <b>Override</b> button to allow the loan if desired. *
Overdue Loan(s)	This borrower has overdue loans. Do not permit this loan or click <b>Override</b> to allow the loan. *
Outstanding Fines (5.00)	This borrower has outstanding fines exceeding the Fine Borrowing Limit as defined in the Borrower Loan Category. Do not permit further loans, or <b>Override</b> to permit loans. *
Barcode 009876 is invalid	<b>AfW</b> does not recognise this barcode as being a part of the catalogue. Check to see that this resource has been catalogued and ensure that the correct barcode has been assigned in <b>AfW</b> . Use the ITEM loan if you do not wish to permanently catalogue this resource, but wish to loan it as a temporary resource. See if the barcode in the warning message matches that on the barcode label. This may have been a mis-scan. If this error occurs regularly, you may need to set a "Special Barcode Formula". Consult with the Softlink support staff if this is the case.
Resource already on loan to <i>Anderson, Darla</i>	This resource is already recorded as being on loan to another borrower. Return the resource, then loan it to the new borrower.
Resource marked as Missing on 01/01/98	The Status of this resource is "Missing" with a "Missing/Disposed" date of 01/01/98. The loan will be permitted.
Resource 1234 is Reserved	This resource is reserved by another borrower. Do not permit the loan, or <b>Override</b> to allow the loan. *
<i>No Books on Witchcraft!</i> Borrower message will now be cleared	This is the borrower's alert message as entered in Circulation/File/Borrower. Clear this message by clicking the red X button, or keep the message by clicking the green ✓ button.

\* Overrides are only permitted for operators with the appropriate security settings.



# File Folder

## Overview

There are two general ways to input all your borrowers into **AfW**. The easiest way is simply to export the borrowers from your administration software and import the file into **AfW**. The second way of entering borrowers is to do it manually. Manual entry or editing is accomplished in the Circulation/File/Borrower option.

The other options within the Circulation/File folder define the rules associated with the circulation of the library resources. Examples of Circulation/File options include: BLC's or borrower policies, RLC's or loaning policies, fine schedules and the calendar.

## Borrower (Editing and Maintenance)

To open the Borrower option, select Circulation/File/Borrower from the **AfW** menu.

### Borrower Tab page

**Borrower Details: Circulation: Alice**

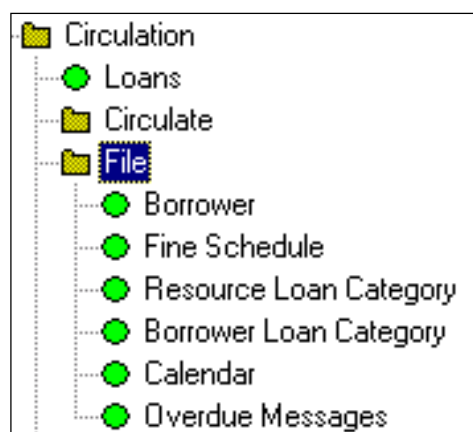
1014 Berol, Joseph Todd (MATH, P3)  
1015 Berol, Kristin (HISTORY)  
**1007 Bonham, Jason E. (SCIENCE)**  
1039 Bush, Steve (HISTORY)  
1011 Cifaloglio, Peter (SCIENCE)

Borrower | Address | Limits | Image | Special | Contract

Barcode: 1007 Change  
Borrower type: Staff Change  
Surname: Bonham  
Given name: Jason E.  
Master: [dropdown]  
Comment: [text]  
Sex (M/F): Male  
Department: SCIENCE

Loan category: Administration  
Housebound: ☐  
Membership: Start: 08/07/1997, Expiry: [text]  
Loan Limits: Fiction: 5, Other: 5

Message: [text]



## Tool Bar Functions

- |                 |                              |
|-----------------|------------------------------|
| • Add           | Add a new borrower           |
| • Edit          | Edit the selected borrower   |
| • Delete        | Delete the selected borrower |
| • Search        | Search by surname or barcode |
| • Name          | Sort by Name                 |
| • Barcode       | Sort by barcode              |
| • ←             | Browse previous borrower     |
| • →             | Browse next borrower         |
| • Group Display | Group information            |
| • Help          | Access to <b>AfW</b> help    |



The Borrower tab page holds general information about the highlighted borrower. It is on this tab page that the **New** button is used to manually add a new borrower. New borrowers are added by clicking the **New** button at the left end of the tool bar, entering the borrower barcode, choosing a borrower type, then clicking **OK**, and filling in the tab page. As a minimum, borrowers should have a name, a barcode, a loan category, and loan limits.

Clicking the **New** button allows a new borrower's barcode number to be entered using the keyboard or a barcode reader. The Borrower type may be selected from a look up. Different Borrower types will store different information unique to that Borrower type.

#### Borrower Type - Student

Borrower	Address	Limits	Image	Special	Contract
Barcode	1001	Change		Loan category	Grade 9
Borrower type	Student	Change		Housebound	<input type="checkbox"/>
Surname	Anderson			Membership	Start 08/07/1997
Given name	Darla			Expiry	
Master				Loan Limits	
Comment				Fiction	5
Sex (M/F)	Female			Other	5
Student code	570-34-0344				
Date of birth	12/05/1987				
Scholastic year	9				
Roll class	STUDY HAL				
Message					

#### Borrower Type – Staff

Borrower	Address	Limits	Image	Special	Contract
Barcode	1027	Change		Loan category	Staff
Borrower type	Staff	Change		Housebound	<input type="checkbox"/>
Surname	Zeigler			Membership	Start 08/07/1997
Given name	Jeff			Expiry	
Master				Loan Limits	
Comment				Fiction	8
Sex (M/F)	Male			Other	8
Department	STAFF, RM1				
Message					

#### Borrower Type- External

Borrower	Address	Limits	Image	Special	Contract
Barcode	B00002	Change		Loan category	External
Borrower type	External	Change		Housebound	<input type="checkbox"/>
Surname	Dunne			Membership	Start
Given name	Robert			Expiry	
Master				Loan Limits	
Comment				Fiction	5
Sex (M/F)	Male			Other	5
Message					

## Borrower Type – Institution

Once the barcode and Borrower type have been entered, details about the borrower may be edited. You should enter a barcode number, Surname, Given name, choose a Loan category (BLC), and enter into the Loan Limits area how many resources this person is allowed to have at once. The Loan Limits area can be defined globally for a group of borrowers so that your job is made easier when entering large numbers of students or making changes to borrower data files loaded into **AfW**. This can be done globally in Circulation/Global Change/Limits.

The membership start and expiry date is not mandatory and can be left blank for indefinite membership.

- **Barcode** This field displays the barcode entered for the borrower. The **Change** button allows a borrower barcode to be changed in the event a barcode is damaged or lost.
- **Borrower type** The broad borrower group the borrower belongs to.
- **Surname** The borrower's family name.
- **Given name** A borrower's first name.
- **Master** The name of the borrower who is responsible for this borrower's library transactions. This is generally used in public libraries where parents are responsible for younger children's transactions (overdues and fines). For school and special libraries, this will generally be left blank.
- **Comment** A field to hold brief, text notes regarding this borrower.
- **Sex** The gender of borrower

- **Student Code** This field is used to hold the unique number for a borrower that is used within an administration system. This allows an export from the administration system to be imported into **AfW**, accounting for new and updated borrower information. This process is discussed in the data loading section.
- **Date of birth** A borrower's birth date in the date format specified in the system parameters.
- **Scholastic year** In a school library, a borrower's scholastic year number
- **Roll Class** The roll class, registration group/class code for the borrower.
- **Message** The text will be displayed as an alert message when the borrower is scanned or entered in loans.
- **Loan category** The loan category, or borrower policy, of this borrower.
- 
- **Membership** Allows the start and expiry dates of a borrower's membership to be entered.
- **Loan Limits** The number of loans allowed for each of the categories that you have defined in the Circulation system parameters.

Borrower information can be loaded via a delimited file transfer from an administration database. Using this borrower transfer feature to add and update **AfW** saves valuable time that would otherwise be spent typing.

The Borrower type may be changed if necessary, however this should be used with caution as not all information may be transferred. The tab page will remain in Edit mode for you to add information as necessary.

## Address Tab

**Borrower Details: Circulation: Alice**

Toolbar: [Icons for Name, Barcode, and other functions]

ID	Name
1001	Anderson, Darla (STUDY HALL)
1002	Arias, Mark (MATH, P3)
1003	Arnold, Camille Elis (MR. JONES)
1025	Bazzell, Becky (MR. JONES)
1014	Berol, Joseph Todd (MATH, P3)

Selected Borrower: 1001 Anderson, Darla (STUDY HALL)

**Address Tab Fields:**

- Mailing title: The Anderson Family
- Address: Softlink House, 68 Commercial Drive, Shailer Park, QLD
- Postcode: 4128
- Contact name: David
- Phone: 07 3978 4089
- Father Work: 07 3452 1234
- Mother Work: 07 3547 4902

The address tab holds mailing address information as well as contact name and phone number data. The address entered in these fields will be used as the mailing address for Overdue Notices.

Limits Tab

The limits tab is only used if you have purchased the, Book Hire, or Library Services modules.

- Book hire member  
This check box, when checked, indicates the borrower is allowed to loan out Book hire resources. This parameter default can be set within the book hire parameters.
- Restrictive Loan  
When using the Contract FRC in Library Services, the **Category** field defines the category from which this borrower is allowed to borrow resources. The **Limit** field indicates how many total loan transactions they are allowed to make.
- Delivery  
For users of the Advanced Bookings section of the Library Services module, these are the delivery modes for shipping resources to borrowers. Delivery modes track lead time and lag time for the shipment and receipt of library resources.

Image Tab

Borrower images can be used for identification at the point of issue for borrowers wishing to loan out library resources.

If you have purchased the Multimedia module, an image can be attached to borrower records. The Circulation system parameters indicate where borrower images are held and the **Image File** field on the Image tab indicates the file name of a particular borrower's image.

Special Tab

Borrower Details: Circulation: Alice

abl [Name Barcode] [Navigation icons]

1001	Anderson, Darla (STUDY HALL)
1002	Arias, Mark (MATH, P3)
1003	Arnold, Camille Elis (MR. JONES)
1025	Bazzell, Becky (MR. JONES)
1014	Berol, Joseph Todd (MATH, P3)

Borrower | Address | Limits | Image | **Special** | Contract

Special 1 | Special 2

Contact 1 Name: Mrs. Terry Anderson

Contact 1 Phone: 284-4998

Contact 2 Name:

Contact 2 Phone:

The Special tab page allows each user-definable field that has been given a name within the Circulation system parameters to contain additional information related to the borrower. These fields are generally not necessary, but are available if local requirements for borrower information go beyond the standard fields available on the other tab pages. Unnamed special fields will appear completely blank, as shown beneath “Contact 1 Phone” above. There are 20 fields customisable fields, evenly split between two subtab pages.

Fine Schedule

Fine Schedule: Circulation: Alice

abl [Navigation icons]

Code	Description	Amount
G	General Fine	0.00
P	Periodical Fine	0.00

Code: P

Description: Periodical Fine

Overdue surcharge: 0.00 +

Overdue per day: 0.25 +

Replacement surcharge: 0.00 +

Item replacement: 0 %

Minimum fine amount: 0.00

When setting up fine amounts all amounts should be entered in cents, without the decimal point.

If you charge your borrowers fines for overdue resources, you may set up one or more fine schedules to govern the calculation of fines. If you do not charge fines, you may skip this task.

If you charge the same fines for all your resources no matter what person borrowed them, you need only add one fine schedule. For example, you could enter a code of “G” with a description of “General Fine” that had a “per day” cost of 10¢.

If you charge different types of fines, depending upon who or what was loaned, you may add additional fine schedules.

- Code A single-character code for the fine type.
- Description A text description of the fine schedule.
- Overdue surcharge A fixed or permanent cost that will be charged, i.e. a fixed cost of \$2 means \$2 will be charged no matter what for an overdue resource.\*
- Overdue per day A per-day cost to be charged.
- Replacement surcharge A fixed fine associated with a lost book.
- Item replacement If lost, the percentage of the resource's Cost that will be charged.
- Minimum fine amount Overdue fines must accumulate to this amount before **AfW** will charge the borrower a fine. \*

### Assigning a maximum Fine amount

The combination of the Replacement surcharge and Item replacement act as a cap on fines. Overdue charges will stop accumulating when the fine has reached the Replacement surcharge + the Item replacement.

### \*Defining Grace Periods:

The Fines feature in **AfW** is very flexible, and allows you to assign any fine schedule you would like. In defining grace periods, **AfW** offers two options:

EXAMPLE 1: Let's say you wanted to charge \$0.10 per day for overdue resources, offer a grace period of 2 days, and have the charges start on day 3. To accomplish this, enter negative 20¢ (-020) in the "Overdue Surcharge" area and 10¢ into the "Overdue Per Day" area. Negative fines are calculated to be zero, i.e. nothing due. Therefore, **AfW** will have to count up to zero before charging a fine of \$0.10 on the third day. When setting the negative amount in the overdue surcharge, it MUST be in parenthesis. (-020)

EXAMPLE 2: Let's say you wanted to charge \$0.10 per day for overdue resources, offer a grace period of 2 days, but have the entire fine charged on day 3. To accomplish this, enter 0 (zero) in the "Overdue Surcharge" area and 10¢ into the "Overdue Per Day" area. Then set the "Minimum Fine Amount" to \$0.20. **AfW** will not actually charge the fine until it reaches the minimum fine amount. Therefore, after the two day grace period, a fine of \$0.30 will be charged on day 3.

Because a replacement resource will cost more today than it did when you purchased it, **AfW** allows you to set the Item Replacement percentage to a number greater than 100%. This can account for the increase in cost of the resource if it is ever lost and needs to be replaced.

Do not leave the Replacement surcharge at \$0. If the cost of the overdue resource has not been catalogued or is left at \$0, NO fine will ever be charged because the maximum fine amount will be \$0. Set an amount, possibly for administration costs associated with replacement, so that fines will always be charged.

# Fine Schedule - Worksheet

The set-up of RLCs versus BLCs determines how long different borrower types can loan out different resource types from your library. This can sometimes be difficult to picture or decide. The following chart may be of help in setting up your library. Remember the definitions are:

- RLC: Resource Loan Category – types of loaning policies in your library
- BLC: Borrower Loan Category – types of borrowers that will use your library

RLC → BLC ↓	Audio Visual	Equipment	General	Periodicals	Reference
Year 7			Days: 10 Fine: G	Days: 2 Fine: G	
Year 8			Days: 10 Fine: G	Days: 2 Fine: G	
Year 9			Days: 10 Fine: G	Days: 2 Fine: G	
Admin.	Days: 1 Fine: G	Days: 1 Fine: G	Days: 15 Fine: G	Days: 5 Fine: G	Days: 1 Fine: G
Teachers	Days: 1 Fine: G	Days: 1 Fine: G	Days: 15 Fine: G	Days: 10 Fine: G	Days: 1 Fine: G

In the example above, borrowers in Years 7, 8, and 9 are treated the same: General resources 10 days, Periodicals 2 days. Admin. borrowers can take AV and Equipment for 1 day, General resources 15 days, Periodicals 5 days and Reference 1 day. Each type of borrower is charged a “G” General fine for any overdue resource.

Each RLC/BLC combination, requires a length of time in days. If left undefined, it is assumed the loan is not permitted. Each RLC/BLC combination may have the same or a different fine schedule to determine what fine, if any, is calculated.

*Write in the chart below as a worksheet:*

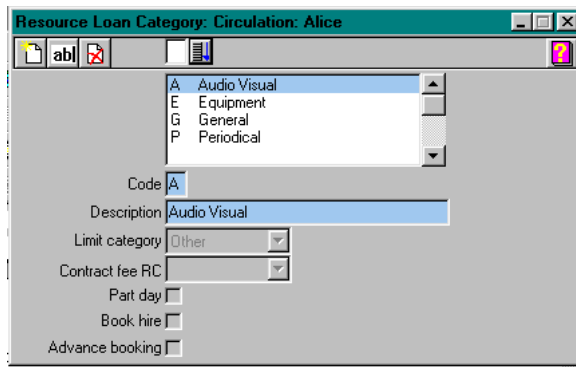
RLC → BLC ↓					
	Days: Fine:	Days: Fine:	Days: Fine:	Days: Fine:	Days: Fine:
	Days: Fine:	Days: Fine:	Days: Fine:	Days: Fine:	Days: Fine:
	Days: Fine:	Days: Fine:	Days: Fine:	Days: Fine:	Days: Fine:
	Days: Fine:	Days: Fine:	Days: Fine:	Days: Fine:	Days: Fine:
	Days: Fine:	Days: Fine:	Days: Fine:	Days: Fine:	Days: Fine:

- “Days:” determines the number of days before the resource is due back.
- “Fine:” determines which fine schedule will be followed if you charge fines.

Use the blank chart as a worksheet to determine what RLCs and BLCs you wish to use. At the category intersections, enter the number of days the loan is permitted to last and the fine type, if any, that will be charged if overdue.

Fines will be calculated for every day a resource is overdue, including closed days, unless you have set in the System/Parameters/Circulation to have fines charged for open days only.

## Resource Loan Category (RLC)



A Resource Loan Category (RLC), or loaning policy, is a group to which resources in your library belong that defines their circulation characteristics, e.g. General (this could be split into Fiction and Non-Fiction), Audio Visual, Equipment, Overnight, Reference and Periodicals. A different RLC is required for each group of resources that are circulated differently.

In this area, add each of the RLCs you think you will use. Remember that you may make changes to this in the future.

- Code A single-character code for the RLC.
- Description A text description of the RLC.
- Limit category As setup in the parameters area, the category you wish this RLC to be part of, with respect to how many resources a person may borrow.
- Contract fee RC Only for use with the Library Services module. If you do not have this module, leave this blank.
- Part day Check this if the resource can only be borrowed for individual hours or periods during the day.
- Book hire If you are using the Book Hire module check this box if this loaning policy is a part of the book hire scheme.
- Advance booking If you are using the Advance Bookings section of Library Services check this box if the resources may be scheduled via Advance Bookings.

Keep it simple. If your fiction, non-fiction, and easy reader books all circulate for the same length of time and to the same borrowers, create one "General" RLC rather than separate categories for each.



## Borrower Loan Category (BLC)

Keep it simple. If your first, second, and third scholastic year students are all allowed to have the same resources for the same length of time, create one BLC for “Scholastic years 1-3” rather than separate categories for each. Remember, these are only examples. You may label your BLCs as you see fit. Also refer to earlier sections of this manual for information on BLC’s

A Borrower Loan Category or BLC is a group to which borrowers in your library belong that defines their circulation characteristics, e.g.: Year 7, 8, 9, Administration, Staff. Different BLCs exist because borrowers in these groupings are allowed to borrow resources from different RLCs for different amounts of time. It may be that you circulate AV resources to scholastic years 7, 8, and 9 overnight, but allow Administration and Staff borrowers to have AV material for 5 days.

In this area, add each of the BLCs you think you will use. Remember that you may make changes to this in the future. In a school you may wish to separate borrowers by scholastic year level or merely make the distinction of Student, Teachers and Staff.

### Left window:

**Code:** A single-character code for the RLC.

**Description:** A text description of the RLC.

**Master due date:** This date is usually entered as the date at the end of the semester, term, or year, that you would like to start trying to get resources back.

**Fine borrowing limit:** This is the monetary limit of a borrower’s fines at which you decide not to loan books out anymore. For example, if you stop loaning out books to someone if he or she has a fine of over \$2.00, you would enter 200 here.

**Maintain (open folder) button:** Allows you to add each RLC that can be loaned out by borrowers in this BLC, and define how long they can keep the resource and what fines will be charged if the resource is overdue.

### Right window:

**Loan Period:** Sets how long this BLC can have resources of this RLC.

**Fixed length :** The number of days that a borrower may have resources with this RLC.

**Fixed due date :** Borrower’s with this BLC may have resources with this RLC until specified date, no matter what date the resource was loaned.

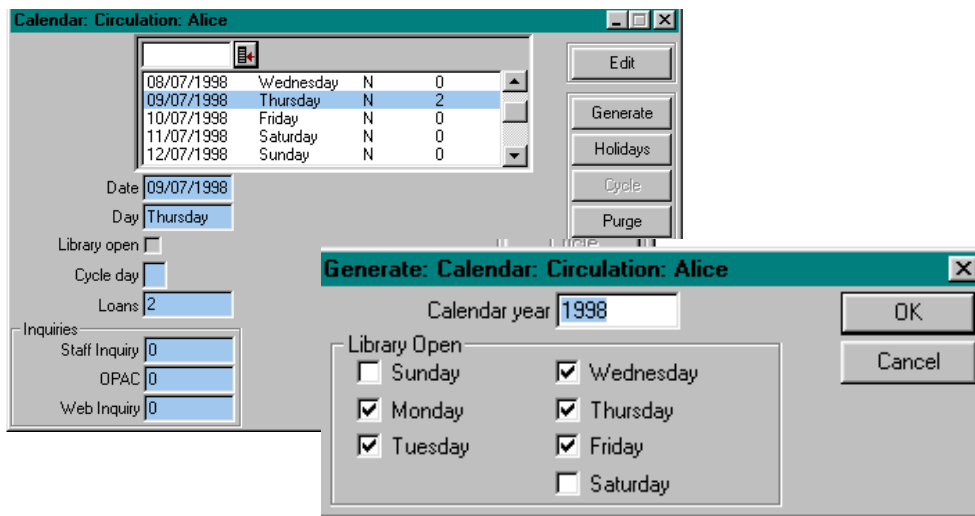
**Part day only :** Borrowers with this BLC may have resources with this RLC for part of a day only.

**Fine schedule:** If you charge fines, select which fine schedule you will use (as previously set up in the Fine Schedule option).

**Due Date:** This is automatically calculated according to your entries to let you know how this RLC/BLC combination will be handled. It also lets you know if loans are possible.

To define what RLCs are available to a BLC, highlight the BLC and click the **Maintain** (open folder) button. This will display the window to the far right where loan periods and fines can be defined.

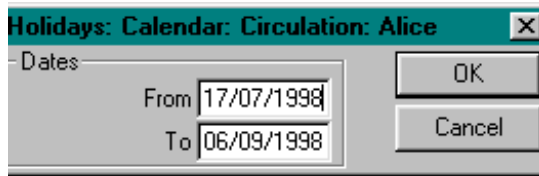
## Calendar



So that **AfW** knows which days the library is open and to keep loan and inquiry statistics, a calendar year must be generated. To generate a new calendar year use the following steps:

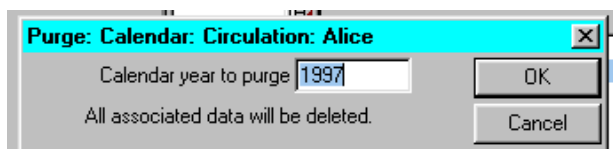
- Open the Circulation/File/Calendar option.
- The main window depicted (top left image) appears on the screen.
- Click the **Generate** button to reveal the Calendar Generation (top right image) window.
- Enter the year you wish to generate.
- Ensure the check marks properly indicate which days the library is open.
- Click the **OK** button to generate the calendar.

It is recommended that a calendar be generated for the current year and the following year as well.



### Holidays:

Single days can be toggled between open and closed by pointing to the day in the calendar, clicking the **Edit** button and toggling the tick in the Library open checkbox. To define a span of days as a holiday, click the **Holiday** button. The Holidays window appears (above) and allows a date range to be entered. Enter the first and last days the library will be closed and click the **OK** button.

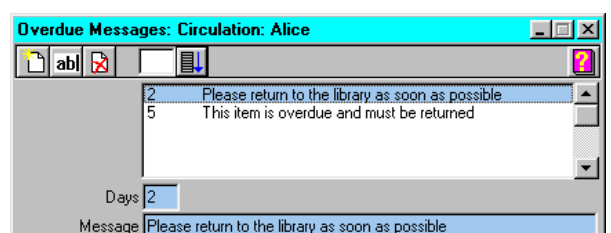


### Purge past years:

To purge past years from the calendar, click the **Purge** button. The Purge window (above) appears. Enter the calendar year to purge and click the **OK** button. It is recommended that the current year be kept, but past years should be purged as soon as their statistics are no longer required.

## Overdue Messages

This option allows you to add messages to be included on Individual Overdue Notices. Messages can be customised based on how many days a resource is overdue. This message will appear on overdue notices against individual resources.



# Global Change

The global change options within circulation allow for global processing of borrower records. Borrowers can be “rolled up” to the next scholastic year level, have their loan limits set, and have their Borrower Loan Category set. If you are using the Book Hire module, you can globally assign borrowers the permission to loan out textbooks. Borrowers can be globally deleted by scholastic year, for easy removal of the scholastic year level that has graduated from a school. Borrowers with outstanding loans or fines will not be deleted when the global deletion is run.

## Scholastic Year

Scholastic Year: User Group: Circulation: Alice

☒ Increment all student scholastic years

☐ Decrement rather than increment

☐ Change one student scholastic year

Current scholastic year

New scholastic year

Roll Class

This roll class option allows the roll class to be changed as well. The scholastic year is still included.

☐ Also change roll class

The Scholastic Year global change option allows the scholastic year field in the borrower data to be globally incremented. For example, at the beginning of the school year, the library should run this function to move each borrower into the next scholastic year, i.e. a Year 7 will become 8.

The **also increment roll class** feature should only be used if you are using sequential codes in the roll class field. If you are using teacher names or room names as the student's roll class, DO NOT run this function.

The **decrement** feature can be used to reverse the results of having mistakenly run the increment feature. If you have incremented the Roll Class in error in addition to the Scholastic Year, you will need to tick **also increment roll class** to decrement it using this operation.

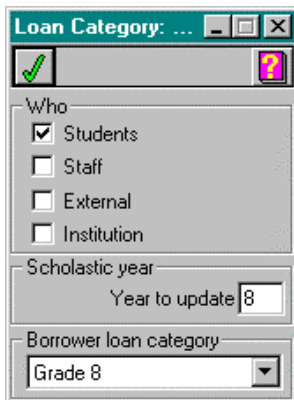
## Limits



The dialog box titled "Limits: User Gr..." has a title bar with standard window controls. Below the title bar is a toolbar with a green checkmark icon and a pink question mark icon. The main area is divided into three sections: "Who" with four checkboxes labeled "Students", "Staff", "Institution", and "External"; "Scholastic year" with a text field labeled "Year to limit"; and "Limit to" with two checkboxes labeled "General" and "Other".

The Limits global change option allows the lending limits, pertaining to the limit categories setup within System/Parameters/Circulation, to be changed globally for a set of borrowers. When the Students check box is ticked, the entry of a Scholastic year is required. If the change you wish to make involves more than one scholastic year, each must be done separately. Simply click on the check boxes indicating who will be affected by the change, enter the student Scholastic year if appropriate, enter the number of loans to Limit the group to and click the **OK** button.

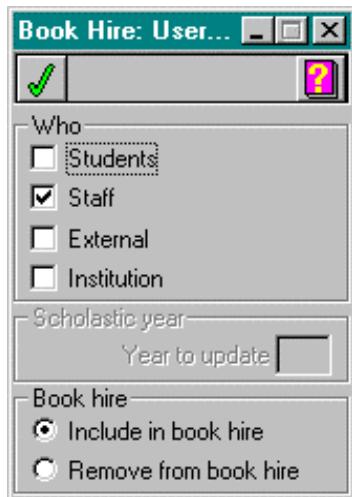
## Loan Category



The dialog box titled "Loan Category: ..." has a title bar with standard window controls. Below the title bar is a toolbar with a green checkmark icon and a pink question mark icon. The main area is divided into three sections: "Who" with four checkboxes labeled "Students", "Staff", "External", and "Institution"; "Scholastic year" with a text field labeled "Year to update" containing the value "8"; and "Borrower loan category" with a dropdown menu showing "Grade 8".

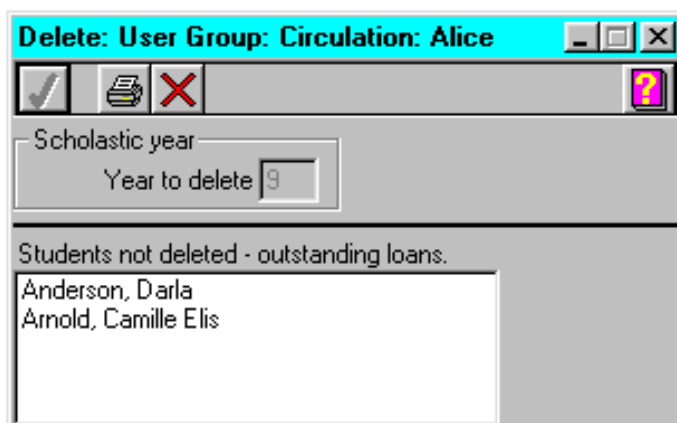
The Loan Category global change allows borrowers to be globally moved to a new BLC, based upon their borrower type and scholastic year. At the beginning of a school year, it is necessary to move all borrowers to their new BLC, or borrower policy. If you group all students into the same borrower loan category, this function would not be necessary unless changes are made to your setup.

## Book Hire



If you have purchased the Book Hire module, this global change option allows you to specify Who, among borrowers, is allowed to loan out a resource catalogued as a textbook. When making this global change for Students, you must specify a Scholastic year and repeat this process for each scholastic year. The Book hire radio buttons at the bottom determine whether this privilege is being added or removed from the specified borrower type.

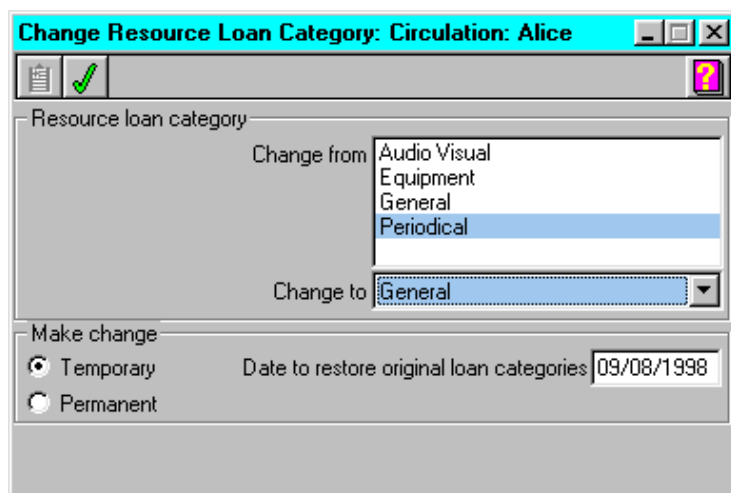
## Delete



The Delete global change option allows former students to be deleted from **AfW**. The increment global change will have incremented the scholastic year of graduating or matriculating students to a number that is one beyond the highest scholastic year level in the school. Indicate this scholastic year number in the **Year to delete** field and click **OK**. **AfW** will not delete borrowers that still owe fines or have outstanding loans. Such borrowers are displayed in the window and can be printed in a report of delinquent borrowers by clicking the **Printer** button.

# Utilities

## Change Resource Category

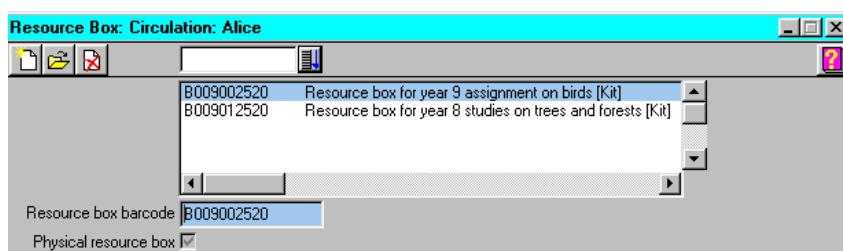


This option is designed to allow the temporary or permanent change of the RLCs of a group of resources .

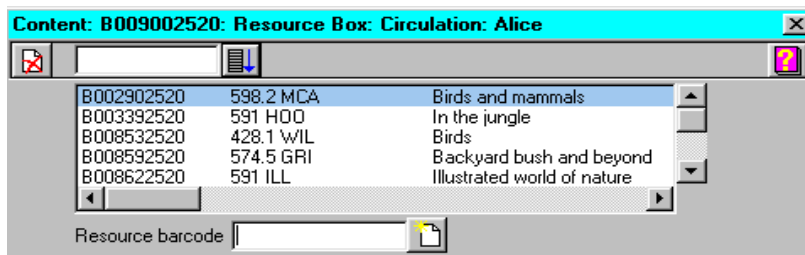
- Use Inquiry to place each resource in question on the **AfW** clipboard.
- Open the Change Resource Category utility.
- Highlight the RLCs that you wish to change the resources from.
- Use the drop-down menu to select the destination RLC.
- Choose either Temporary or Permanent by clicking the appropriate radio button.
- If Temporary is chosen, provide a date on which the resources are to automatically change back to their original RLC.
- Click the **Clipboard** button to import the selected resources.
- Click the **OK** button to activate the change.

Any resources which have been temporarily assigned RLCs will be moved automatically to their original RLC after the date indicated has passed. This is processed during the Shutdown.

## Resource Box



A resource box allows multiple resources to be loaned out using one barcode. The example shown is a box of resources on a particular topic. With the box and each resource barcoded and catalogued, the resources can be made a part of the resource box. Within circulation, when scanning the resource box barcode, each volume not on loan is loaned out to the borrower. Upon return, scan the box barcode and the librarian is given the option of assuming all resources are present or scanning them individually. Resource boxes may be used for any grouping of resources that are normally used and circulated together.



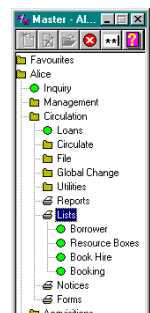
The **Maintain** (open folder) button displays the resource box contents and allows resources to be added by scanning the resource barcodes. To create a resource box:

- Catalogue each resource that will be in the resource box.
- Catalogue an additional resource for the resource box itself and give it a barcode.
- In the Resource Box utility, click **Add** and enter the resource box barcode.
- Click the **Maintain** button and enter or scan each resource to be held within the resource box.

Resource box contents can still be individually circulated. If one or more contents of the resource box are loaned out individually, when the resource box is circulated **AfW** keeps track of who has what resource for you. This is the reason for individual resource scanning when a resource box is returned.

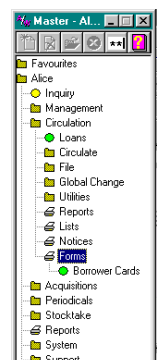
## Lists

This function allows you to print lists for borrowers, resource box contents and current loan status, Book Hire faculties and resources, and lists of future bookings for resources booked in Circulation.



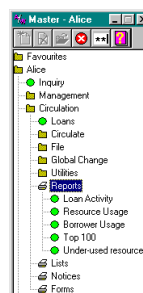
## Forms

Borrower cards may be produced for selected borrowers.



# Reports

The reports function allows you to print various reports particularly in regard to the usage of your library resources. The information in these reports is collated from the Loan History file, that is the resources detailed have been on loan and returned. It does not include current loans for a resource or borrower.



## Loan Activity:

This report is particularly useful for determining the usage of resources in your library. It can be defined by shelf location range and loan date range, and can be restricted by year of publication, GMD, RLC and Topic. You may also set the number of loans per copy, therefore printing reports for little used or well used resources.

## Resource Usage:

Similar to Loan Activity, although the number of restrictions is fewer. Using the Summary format, you may select to print out the report for a specific range of Titles, Shelf Location or Subject. This will print out a report giving the number of times a resource has been borrowed. Detailed Resource Usage Reports produce Loan History reports for resource titles, again using the above restrictions. The Detailed format prints the name of each borrower that has borrowed each of the resources printed.

## Borrower Usage:

This report allows you to print out reports on the number of resources a borrower has borrowed. This may be produced for a particular group of borrowers for a specific range of names and loan dates. Detailed Borrower Usage Reports produce Loan History reports for groups of borrowers or individual borrowers.

## Top 100:

This report ranks the most popular resources according to number of loans. You may limit this to any number up to 100, for GMD, sex of borrower, Loan Limit Categories, RLCs and BLCs.

## Under used resources:

Prints resources not loaned since a specific date, for sex and Scholastic Year range. It may also be restricted by Loan Limit Categories, RLCs and BLCs.

# Notices

Group overdue notices

For Student and Staff borrowers.

Individual overdue notices

For all borrowers. You may choose to send them internally or to a residential address.

Reservation notices

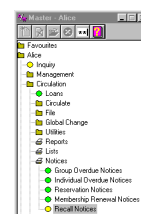
Used to notify a borrower that a resource on reserve for them is available to collect.

Membership Renewal notices

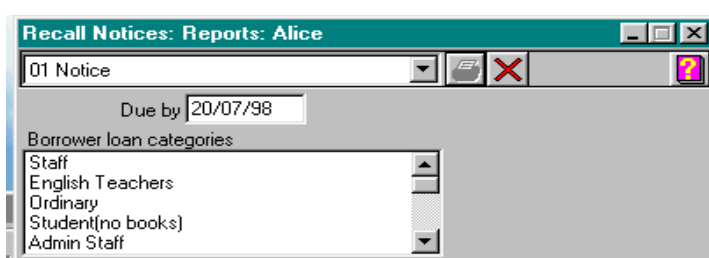
For libraries with set membership periods.

Recall Notices

To recall resources not yet overdue, that are urgently needed by the library for another borrower etc.



To produce recall notices, the resource must be identified in Inquiry and placed on the Clipboard first. The date required is entered and the BLC of the relevant borrower is selected.



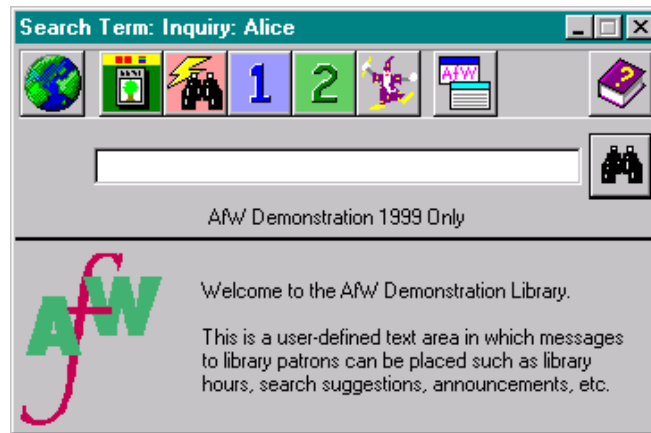




## **6. Using Inquiry**

# Introduction

**AfW** provides a powerful, yet easy-to-use, search interface to locate items in your library collection. The OPAC (On-line Public Access Catalogue) interface is often referred to as OPAC, Inquiry, or Search. Each of these refers to the same search engine interface within **AfW**.



To open **AfW**'s search interface in Staff mode, double-click the Inquiry option on the **AfW** menu. On student workstations, the **AfW** Inquiry interface is usually available via a single desktop icon from which patrons access Inquiry only and cannot access the **AfW** menu tool.

**AfW** Inquiry has numerous features and customizable options. For example, a school library may wish to have the Quick Search feature activated for younger patrons while a corporate library would wish to disable this feature. Likewise, a school library may wish to turn off the direct web access button while a corporate library may wish to have this available to patrons. **AfW** Inquiry offers a wide range of flexibility and search options in an easy-to-use interface so library patrons can quickly search the library catalogue.

## Inquiry Options

Referring to the initial search screen captured above, a brief description of the main search paths is provided. The subsequent pages will provide more detail regarding each method of searching the **AfW** library collection.



Web Launch. Directly launches your Web browser to the URL defined in the system parameters.



Quick Access to the Quick Pic module.



Quick Search by category



Quick Search. One-word searching for younger or more inexperienced patrons.



Quick Search. Two-word Boolean searching for younger or more inexperienced patrons.



Access to Book Wizard.



On-line Help for Inquiry.




Link Menu. Displays other programs for patrons to access.



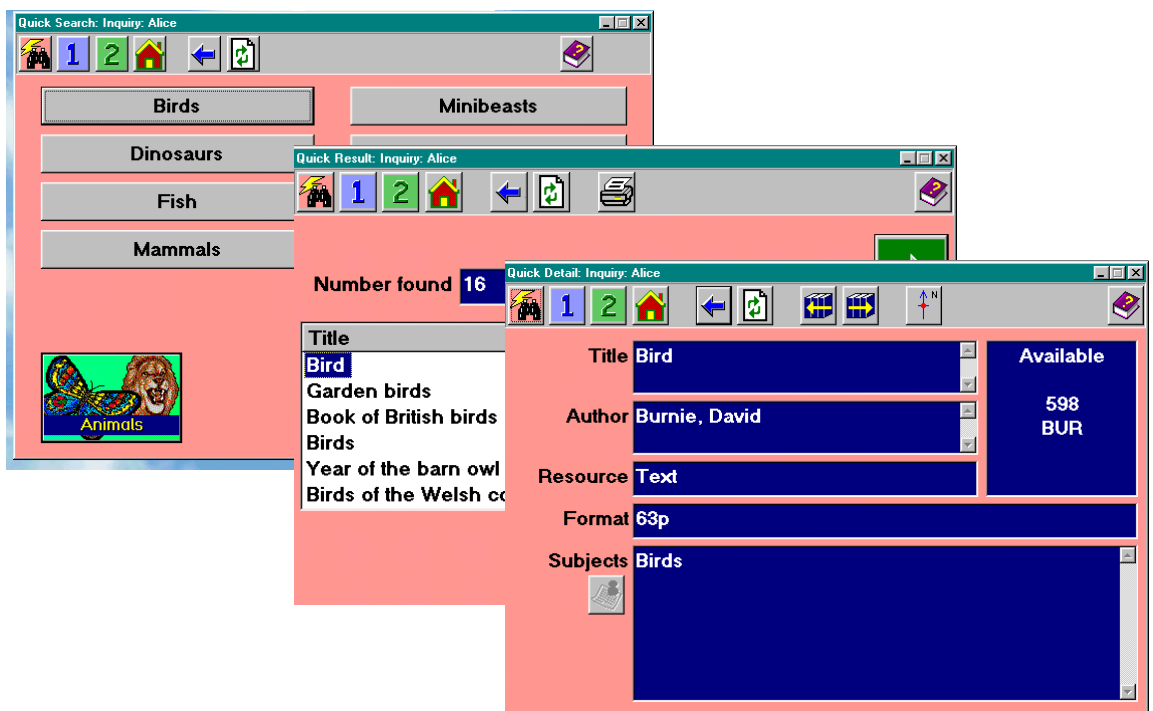
Standard Search. Type a word or phrase in the white field, press <Enter> or click this button.

# Quick Search – By Category

Quick Search is an integrated, simplified searching tool for your library that has three unique search methods. The first of these methods is the category searching. Clicking this button yields  the category screen.



Click, for example, the **Animals** button and find a screen of library-defined subject buttons that relate to the icon clicked in the previous screen. In this example, the first available subject button is **Birds**.

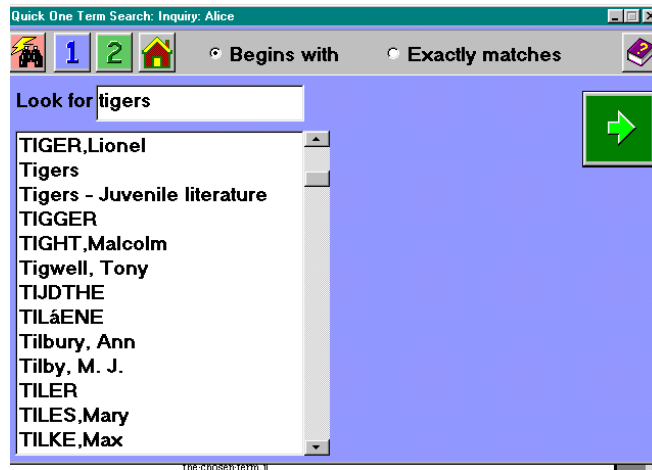


Clicking on the **Birds** button performs a search for “birds” and yields a simplified results screen indicating the matching titles. Click the **View** button to see the details screen.

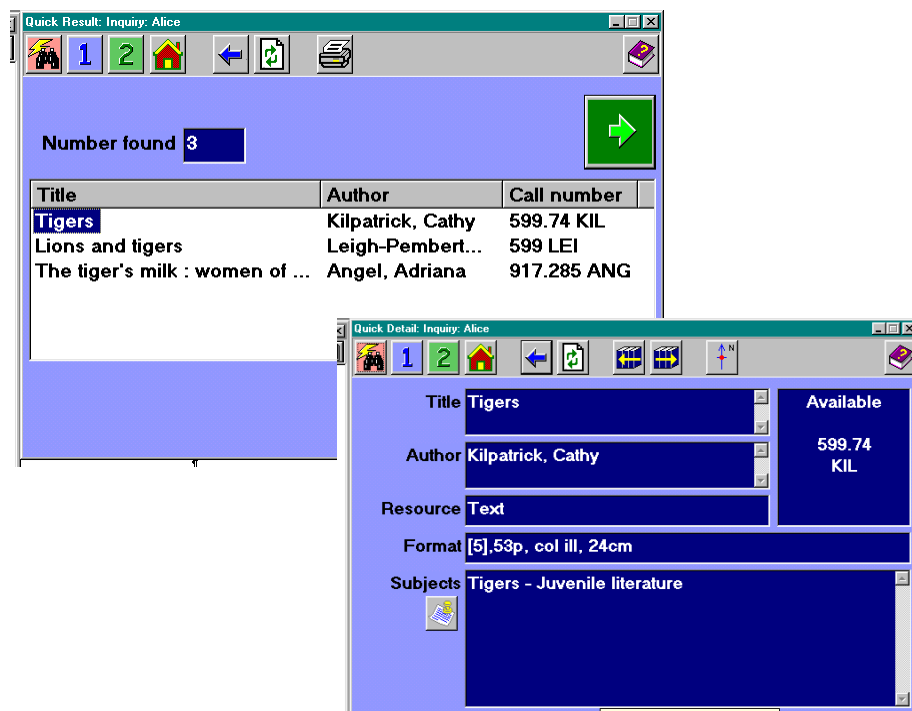
# Quick Search – One-Word


1

The second Quick Search method is a simplified one-word search where younger patrons who are beginning to spell and type can search the library. Click the “1” button to enter this search mode.



Notice the results windows are dynamically updated with each letter typed to provide quick results. Once the desired search term has been entered, pressing <Enter> or clicking the right arrow button yields the title list screen. This screen displays all titles matching the chosen term.



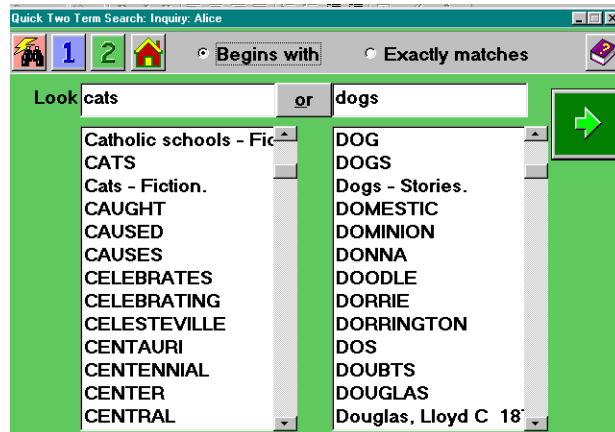
The total number of matching titles found is displayed. Click the title you wish to view and press <Enter> or click the right arrow button on the screen to display details about the selected item. The lower area toggles between Subjects and Notes by using the  button. You may also move from one title to another using the next and previous buttons to avoid returning to the previous title list screen.

## Quick Search – Two-Word

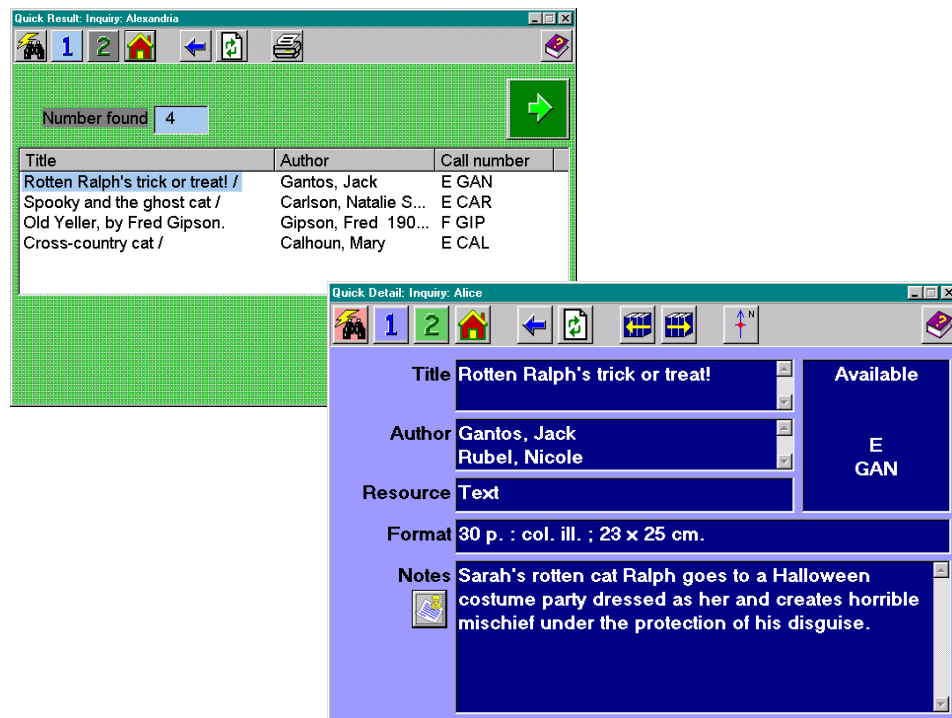
2

The third Quick Search method is a simplified Boolean search involving two words with the AND or OR operator. This is useful for younger patrons as an introduction to Boolean searching. Click the “2” button to enter this search mode.

The closest subject heading match for each term is automatically highlighted. The tab key can be used to move between entry fields. Boolean operator changes can be made by simply clicking the AND/OR button which displays the current operator. Once the two desired terms are selected, press <Enter> or click the right arrow button on the screen to display the title list screen.

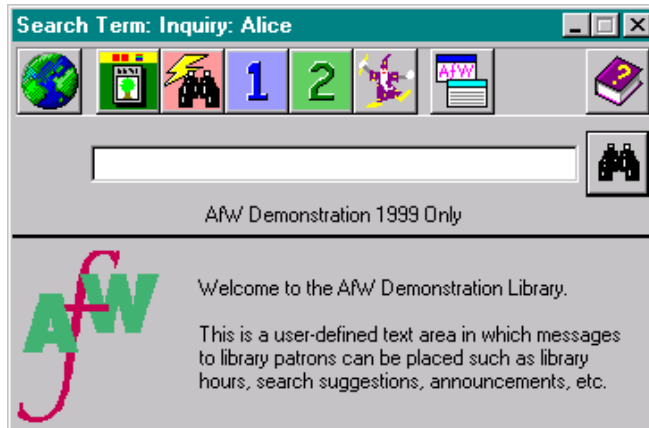


The bibliographic details for a title are still available in the same manner as each Quick Search. In this example, the notes were displayed by clicking on the button to the left of the Subjects/Notes field.



# Standard Search

The standard search interface is the most comprehensive area within **AfW** Inquiry. By simply typing a word or phrase and either pressing <Enter> or clicking on the **Search** button, an initial results screen displays the closest match and the way in which it was found. Although the search can be limited, this means a patron is never required to specify his or her search scope to be only subjects or only authors – **AfW** searches everything and eliminates this step.



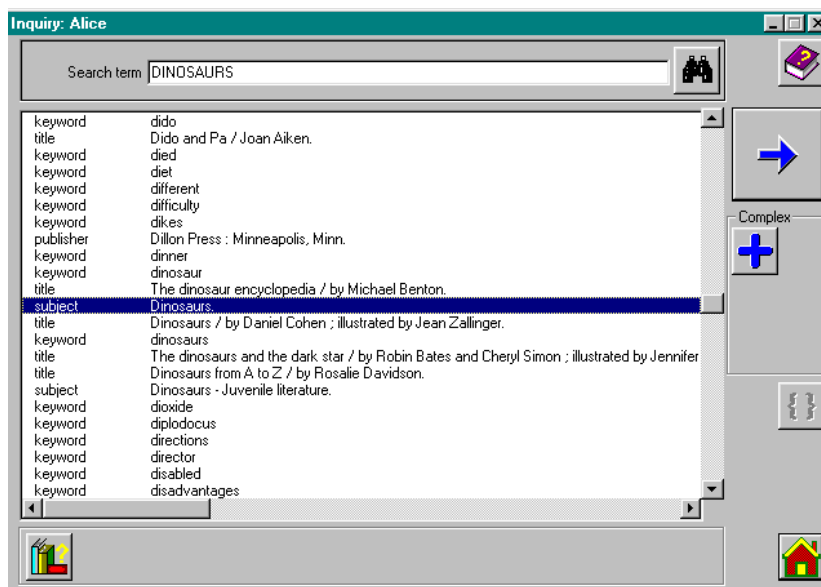
**AfW** uses standard Windows display settings. If you would like to change the colours of the **AfW** screens, simply change your Windows display settings.

The search interface is designed along the following patron assumptions:

1. A patron generally is not familiar with exactly how a library operates.
2. A patron often does not know specifically what he or she is searching for.
3. A patron frequently makes spelling or typing mistakes.

Following these parameters, the interface is designed to provide a user-friendly environment in which patrons can search without being hindered by their age or knowledge of library material.

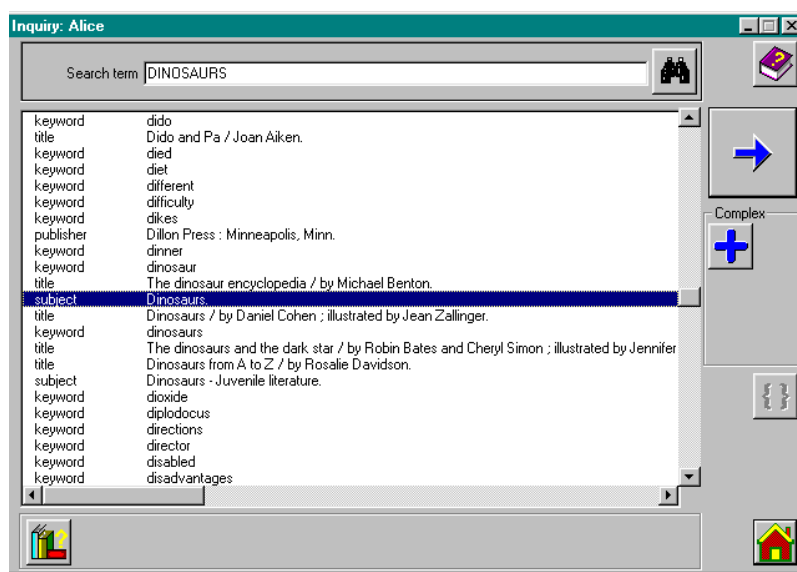
Enter a search term and press <Enter> or click the **Start** button to begin. This will yield the initial results screen centred on the closest match to the word or phrase entered.



**AfW** centres on the subject “Dinosaurs” in this example. Pressing <Enter> or clicking the right arrow on screen will move to the next screen showing all the title matches to the selected term. One may also choose to pick from among the terms displayed in the window to dynamically refine the search.

## Initial Results Screen

The initial results screen contains several buttons. These are described below.



The **View** button opens the next screen in Inquiry expanding upon what is highlighted. This button automatically has focus so that pressing the <Enter> key is the same as clicking this button. This makes searching easy by mouse or keyboard.



The **Include** button tags a highlighted term to begin a complex or Boolean search. This button is also used as the Boolean operator OR. Further Boolean information is contained later in this section.



The **Scope** button allows one to restrict searches to a particular index. For example, using the radio buttons that appear when clicking this button, one can restrict the search to particular search terms, e.g. authors, subjects, titles.



The **Home** button ends the current search and returns the user to the initial Inquiry screen ready to begin a new search.



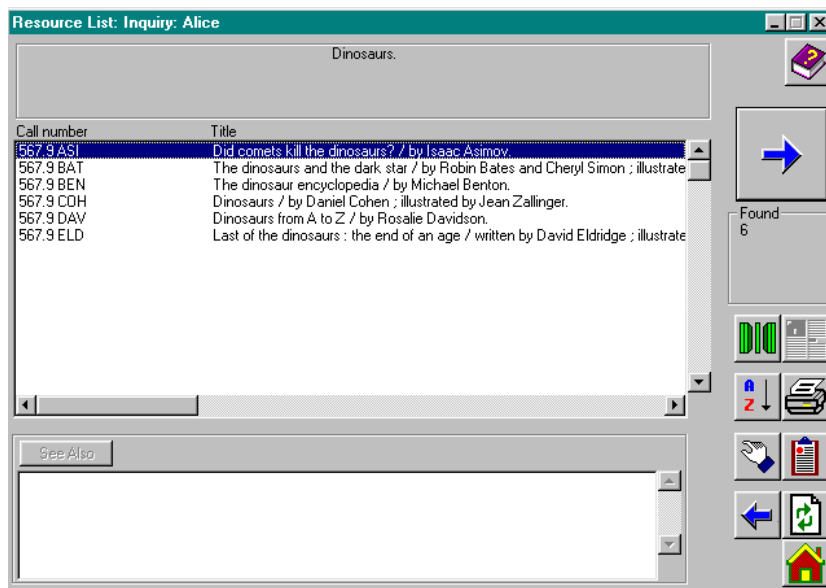
If you wish to search another term without going back to the initial screen, or if you wish to add an additional term to a Boolean search, simply use the search term field at the top of this page and click this button. This will search without cancelling tagged Boolean terms.



The **Help** button will display the **AfW** help.

## Resource List Screen

Once a search term has been selected from the initial results screen, a list of titles is presented. This screen displays all titles matching the search criteria and the item call number(s). The buttons on this screen are described below.



The **View** button opens the next screen in Inquiry expanding upon what is highlighted. This button automatically has focus so that pressing the <Enter> key is the same as clicking this button. This makes searching easy by mouse or keyboard.



The **Restrict** button restricts the Resource List to those titles not currently on loan



The **Sort** button sorts the title results into call number order.



The **Print** button will print a bibliography report of the titles (format determined in parameters).



The **Grab** button copies the highlighted item for dropping into circulation functions, i.e. reservations.



The **Clipboard** button copies the list of titles shown onto the **AfW** clipboard for use elsewhere, i.e. adding to a topic.



The **Back** button moves one screen backward. This can also be accomplished by pressing <Esc>.



The **Refresh** button returns to the initial results screen so another term can be searched and tagged.



The **Home** button ends this search and returns to the initial Inquiry screen.



The **Help** button accesses the **AfW** on-line Help.



## Resource Details Screen

This screen provides the most detailed information for a selected title and provides access to copy-specific information as well as specific subject headings used to catalogue the item. Most importantly, this screen shows in its largest area the item's availability. Patrons can immediately tell whether a book is available or on loan. Authorised users can determine who has an item, when it is due back, and what pending reservations and bookings exist. If made available by the librarian, patrons can place reservations on items directly from this screen.

All relevant details present in the MARC record or manually catalogued are presented in this easy-to-read layout for patrons. The buttons used on this page are described below.



These next and previous buttons move through copies displaying each call number.

The **Where is it?** Button displays details of who has a resource on loan and when it's due back. On the OPAC terminals the details of who has the resource is not available.



Grab the item	Where is it?	Help
Library Map	Images	Slide Shows
Book Wizard	Sound Clips	Video Clips

### Copies button

This button displays copy information for each copy of the item.

### Subjects button

This button displays all subject, topics and keywords attached to this item.



The **Parts** button shows alternate titles or titles of parts within a main item, i.e. plays in a collective works book, movies on one tape, or short stories within one bound item.



The **Next** and **Previous** buttons move through the titles shown on the previous title list screen.



If permitted by the librarian, this button allows patrons to reserve a copy of a resource. This is system parameter controlled.

**Resource Detail: Inquiry: Alice**

Title	Did comets kill the dinosaurs? / by Isaac Asimov.		Available 567.9 ASI	
Authors/Names	Asimov, Isaac 1920-			
Edition	A Gareth Stevens children's books ed.		Copies Subjects 	
Publisher	Milwaukee : G. Stevens Pub., 1988	Country of origin		
Series	Isaac Asimov's library of the universe.	ISBN		1955323472
		Control No.		87042590
		Department		
		Acquisition	None	
Physical description	32 p. : col. ill. ; 27 cm.			
Notes	Includes index. Bibliography: p. 30. Examines the mass extinction of dinosaurs and offers a possible explanation of the causes.			
Curriculum Areas		Suitable for:		

The **Include** button tags a highlighted term for use in a Boolean search. This is the Boolean operator OR. Further Boolean information is contained later in this guide.



The **Exclude** button tags a highlighted term for use in a Boolean search. This is the Boolean operator NOT. Further Boolean information is contained later in this guide.



The **Back** button moves back one screen. The <Esc> key moves backward as well.



The **Refresh** button returns to the initial results screen so another search may be added.

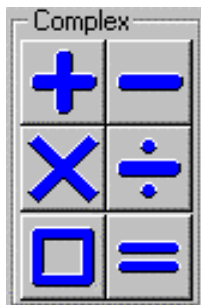


The **Home** button ends the current search and returns the user to the initial Inquiry screen.

# Boolean Searching

**AfW**'s Boolean searching is extremely powerful. **AfW** allows you to tag as many terms as you require for use in a Boolean search. Terms can be tagged using the OR (include), AND (refine), AND NOT (exclude) operators and a restriction window allows you to specify item criteria.

The buttons displaying the Boolean operators remain hidden until the first term is tagged. This maintains a "clean" screen layout for patrons not using the Boolean capability. Once a desired term is highlighted and the **Include** button is clicked, the complex search button grouping appears.



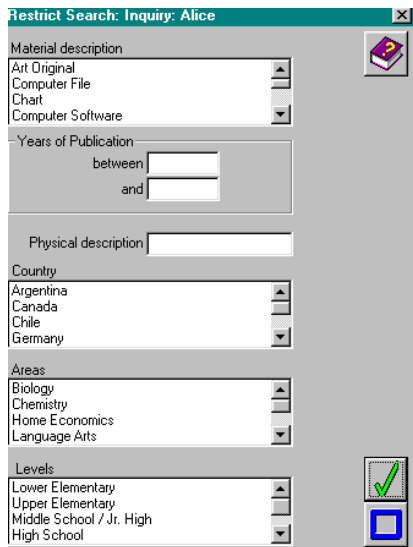
Include – OR	Exclude – AND NOT
Refine – AND	Restrict – add item criteria
Clear the tagged terms	View the tagged terms

## The Boolean Search Process

Screen	Action
1. Initial Search	Enter a search word or phrase and start the search.
2. Initial Results	With a term highlighted, click the Include/OR button.
3. Initial Results <i>Note</i>	Enter a new search term, search and click a Boolean button. <i>Repeat steps 2 and 3 to include all the desired terms.</i>
4. Initial Results	If desired, click the <b>Refine</b> button to add specific item criteria.
5. Initial Results <i>Note</i>	Click the <b>View</b> button to see the tagged terms and their operators <i>The Boolean operators may be manipulated on this screen.</i>
6. Tagged Entries	Click the <b>View</b> button to see the results of the search.

## Item Criteria Restrictions

One can place certain restrictions to further qualify the items that result from a Boolean search. It may be advantageous to restrict by publication date, physical description, GMD, etc. By clicking the **Restrict** button, the following screen appears. In it, restrictions can be made or cleared. When ready to proceed, click the **OK** button.



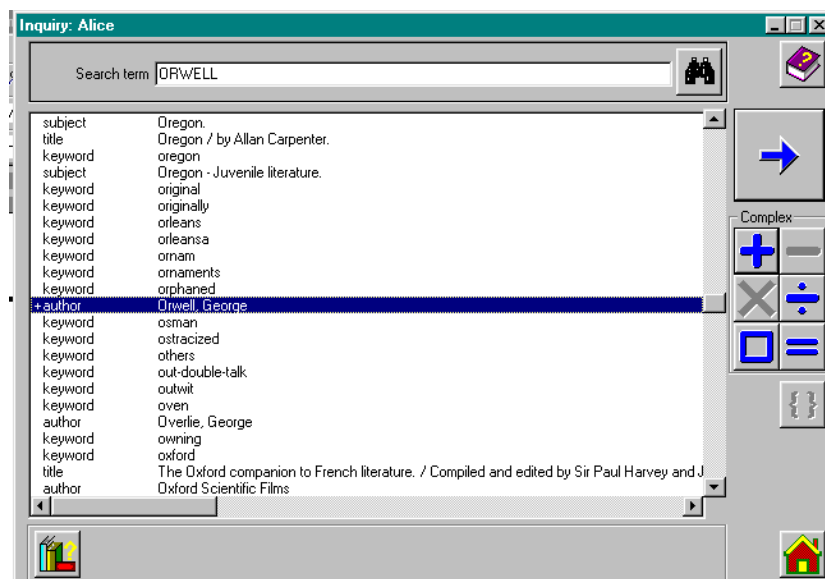
The 'Restrict Search: Inquiry: Alice' dialog box contains several sections for applying filters:

- Material description:** A list box with options: Art Original, Computer File, Chart, Computer Software.
- Years of Publication:** Fields for 'between' and 'and' with input boxes.
- Physical description:** A text input field.
- Country:** A list box with options: Argentina, Canada, Chile, Germany.
- Areas:** A list box with options: Biology, Chemistry, Home Economics, Language Arts.
- Levels:** A list box with options: Lower Elementary, Upper Elementary, Middle School / Jr. High, High School.

On the right side, there are icons for a book, a checkmark, and a blue square button.

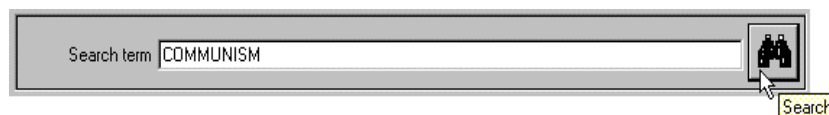
## Boolean Search Example

To perform a Boolean search looking for a book written by George Orwell that has to do with communism one would do the following. Begin by searching for "Orwell" and click the **Include/OR** button. When a term is tagged, it's operator sign appears to its left.



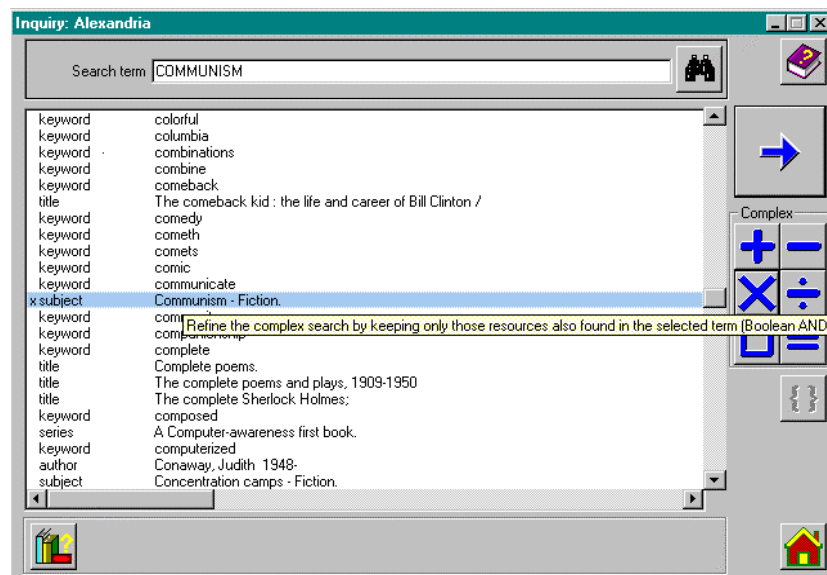
The 'Inquiry: Alice' window shows search results for the term 'ORWELL'. The search term is entered in the top field. Below, a list of results is displayed with various tags like 'subject', 'title', 'keyword', and 'author'. The entry for 'Orwell, George' is highlighted. To the right of the list is a 'Complex' panel with buttons for Boolean operators: +, -, x, ÷, and =. A blue arrow button is also present.

Now, click in the Search Term field, type "communism" and press <Enter> or click Search.



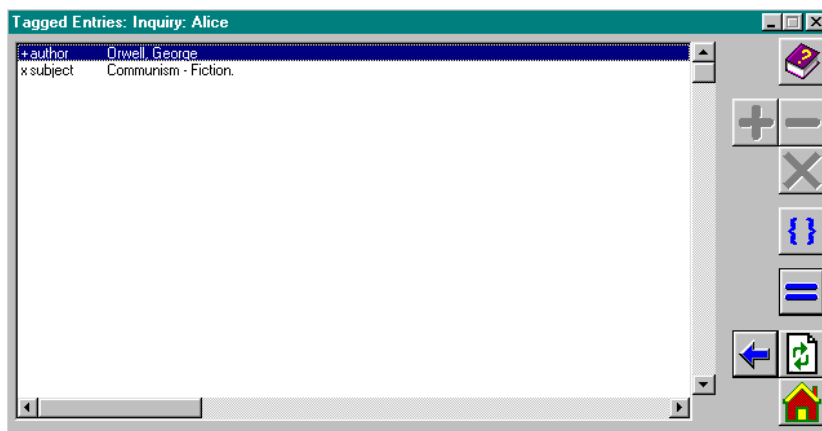
A close-up of the search term field showing the text 'COMMUNISM' entered. To the right of the field is a button with a magnifying glass icon and the word 'Search' below it.

Once “communism – fiction” appears, click the **AND** button to refine the search. Notice that **AFW**'s tool tips will help you remember which Boolean button performs which operation.



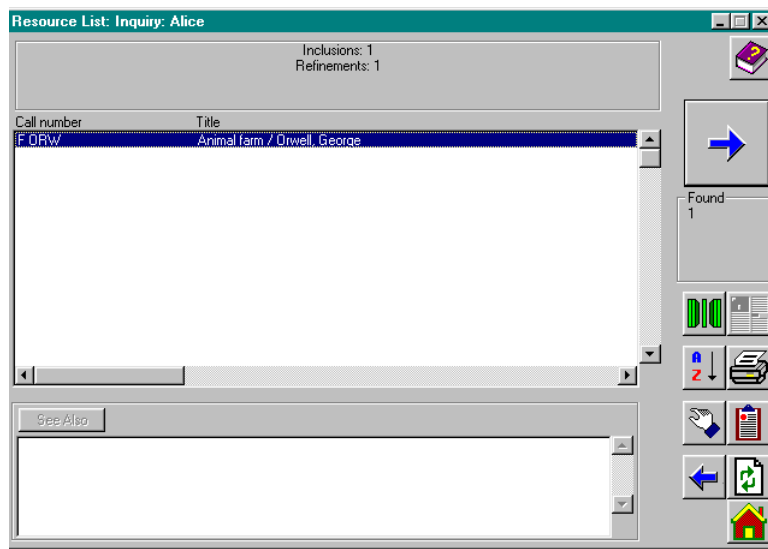
Now that both “Orwell, George” and “Communism – Fiction” have been tagged using OR & AND, if we click the = **View** button respectively, we can view the Tagged Entries window. This becomes very valuable when tagging numerous terms and serves as a review window as well as a forum in which to alter which operators are being used with which terms.

Clicking on the = **View** button yields this review window with familiar buttons.

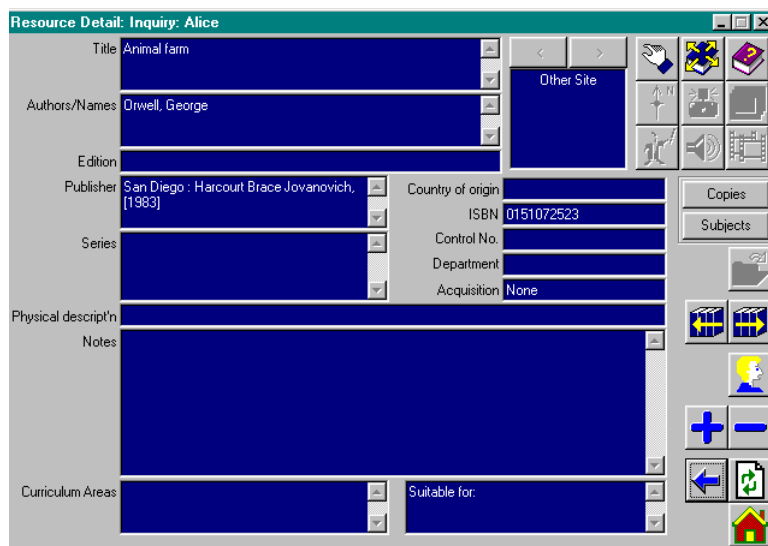


The { } **Sets** button can be used to store the results of a Boolean search for use in a future search. Just give the search a name and continue.

Click the = **View** button on this page and the resulting title matches are displayed in a title list screen. As with any search, more information on any title can be viewed on the bibliographic details screen.



If the results of a Boolean search do not satisfy your goal, simply click the **Refresh** button, add additional terms if desired, click **View** to show the tagged entries, change any Boolean operators and again **View** the results. There is no need to start all over!



# Accessing Computer Files and Web Sites

## Non-Print Items

When a patron search finds certain non-print items, additional options become available. Parallel to the discussion of cataloguing non-print materials, items such as computer files and web sites replace the **Reserve** button with a button that allows access to the electronic item.



### Computer files:

Computer files can range from word processor documents, saved Web documents, catalogued applications such as CD-ROM programs, etc. If the item found in Inquiry is a computer file, the **Reserve** button is replaced with a button showing a computer. Clicking this button opens the catalogued computer file in a separate window. When the patron eventually closes that separate window, Inquiry is available from the point at which they left.



### Web sites:

Web pages catalogued directly by their URL allow the web browser to be launched in an active mode that connects live to the internet. For web page items, the **Reserve** button is replaced with a **Globe** button. This button will launch the installed web browser and attempt to connect to the catalogued URL.

If live access to the web is not desired, catalogue only saved web pages (html files). Disable the web access from the Inquiry screen by removing the URL from the Inquiry system parameters.

Resource Detail: Inquiry: Alice

Title

Authors/Names

Edition

Publisher

Series

Physical description

Notes

Country of origin

ISBN

Control No.

Department

Acquisition

Curriculum Areas

Suitable for:

Copies

Subjects



## Inquiry Conclusion

The **AfW** Inquiry interface has proven over the years to be an easy interface for patrons of all ages and a powerful interface for patrons with high demands. With its simple method and powerful tools, Inquiry brings the library items into quick view for every patron.

To maintain consistency within **AfW**, the search interface for librarians and patrons was designed to look the same. With respect to security, however, trust fully that OPAC access from a patron workstation is fully secure, follows the rules set forth in the system parameters and holds private any patron-based information such as circulation statistics. These are only available from a librarian workstation to an authorised user.