

## Authority User Guide

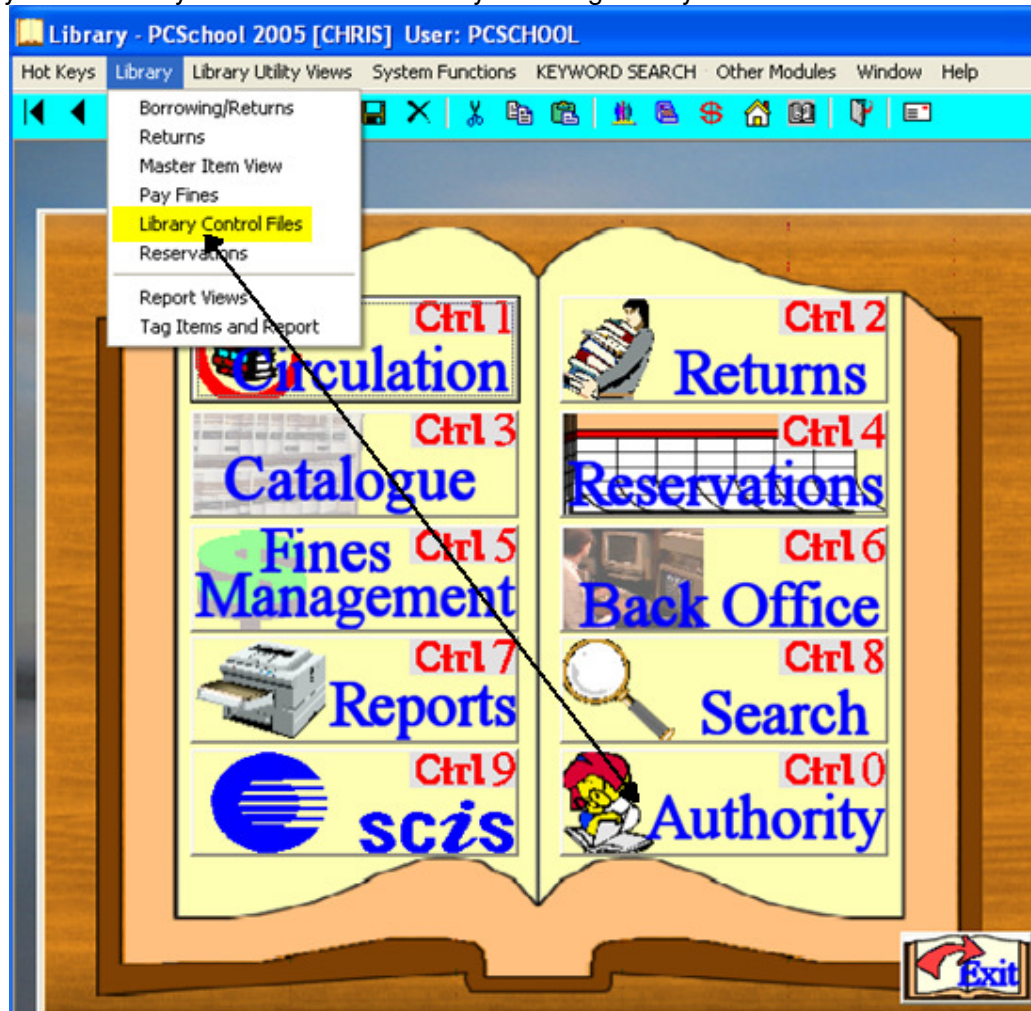


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## Main Menu

The Library Setup Views can be accessed via either the Main Menu by selecting Authority or Authority of the Library on the Menu Toolbar by selecting Library Control Files.



Following the creation of patrons, you will need to setup up the library control files.

## Authority/Library Control Files

Authority/Library Setup Views holds all information appertaining to the Books entered, this includes Publishers and Suppliers;

- Patrons
- Publishers
- Suppliers
- Subjects
- Classification
- Keyword Discard
- See/See Also
- Loan Types
- Series
- Authors
- Verify Counters

## Patrons

Patrons must first be created in the Generate Patrons tan in Back Office but details can be update here and new Patrons manually entered.

When creating new patron records from this view, if it is to be used in conjunction with Generate Patrons, it is recommended you use patron number's greater than 950000.

If the library doesn't use the generate patron feature, then any numbers may be used for the patron number.

Within the Patrons tab you have the option to;

- Manually enter new Patrons
- Change the patron status
- Edit individual details
- Delete individual patrons

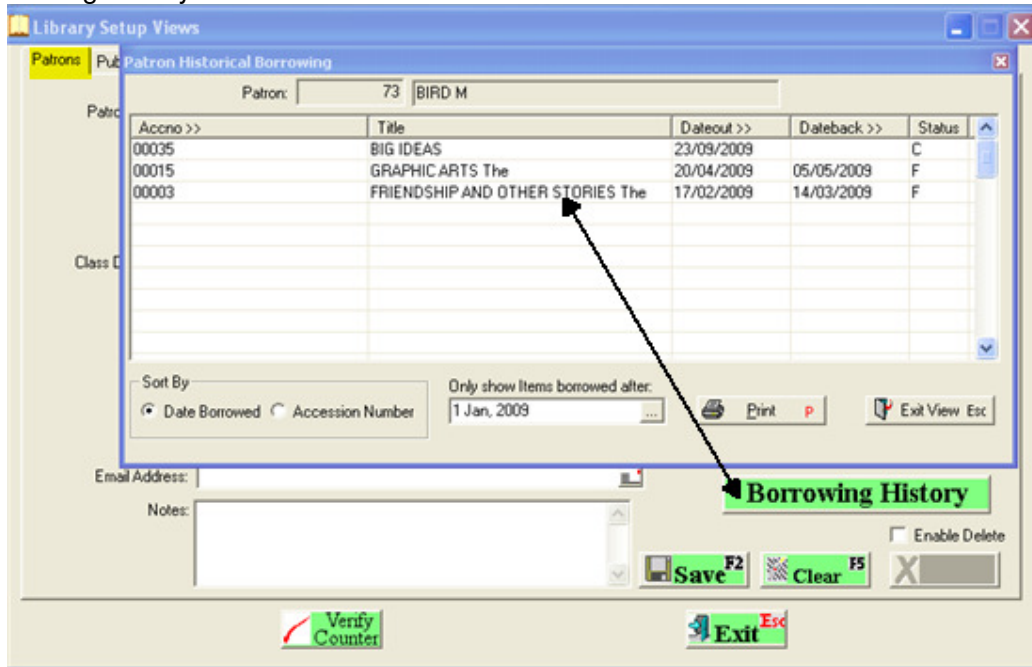
Add, edit or delete individual Patron details.

The screenshot shows the 'Library Setup Views' application window. The 'Patrons' tab is selected. The form contains the following fields and controls:

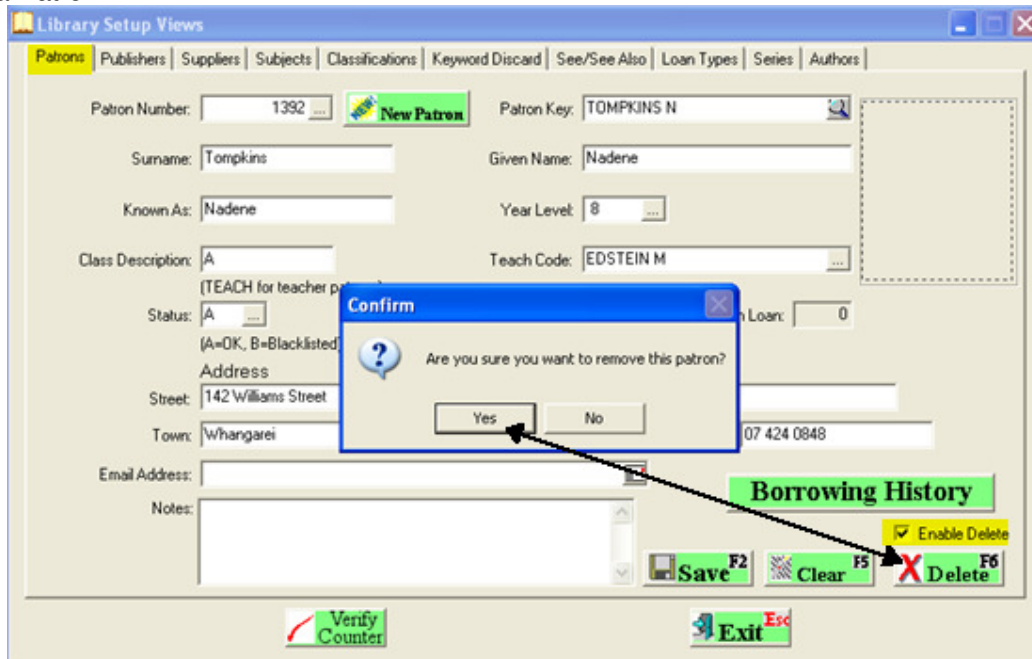
- Patron Number:** 28 (Callout 1) with a 'New Patron' button.
- Patron Key:** ARORA R (Callout 2) with a browse button.
- Surname:** Arora
- Given Name:** Rebecca
- Known As:** Becky
- Year Level:** 8
- Class Description:** D (TEACH for teacher patrons)
- Teach Code:** MILTON D (Callout 3)
- Status:** A (A=OK, B=Blacklisted)
- Max. Items On Loan:** 0
- Currently On Loan:** 1
- Address:**
  - Street:** PO Box 4091
  - Suburb:**
  - Town:** Edmonton
  - Code:** 1008
  - Phone:** 864 7646 (Callout 5)
- Email Address:** arorar@school.qld.edu.au
- Notes:** (Empty text area)
- Buttons:** 'Save' (F2, Callout 4), 'Clear' (F5), 'Enable Delete' (checkbox), and 'Exit' (Esc, Callout 6).
- Borrowing History:** Button on the right (Callout 5).

<b>1.</b>	In Patron Number field; <ul style="list-style-type: none"> <li>• Current Patron; Browse for a Patron to edit or delete</li> <li>• New Patron; Click New Patron and enter a unique Patron number</li> </ul>
<b>2.</b>	In the Patron Key field; <ul style="list-style-type: none"> <li>• Current Patron; Browse for a Patron to edit or delete</li> <li>• New Patron; enter a unique Patron Key</li> </ul>
<b>3.</b>	Enter or edit details including Teacher and Status as necessary.
<b>4.</b>	Click Save when finished.
<b>5.</b>	You can view the borrowing history for the selected Patron.
<b>6.</b>	To delete a current Patron and all existing History; <ul style="list-style-type: none"> <li>• Check the Enable Delete box</li> <li>• The X button will become active, click to delete the Patron</li> </ul>

### View Borrowing History



### Delete a Patron



## Publishers

The Publishers tab allows you to enter Publishers and the place of publication.

1.	If entering a new Publisher click Clear.
2.	The Publishers name must be unique.
3.	The Place of Publication is an optional entry and is used to distinguish Publishers with multiple locations.
4.	Click Save when finished.

## Suppliers

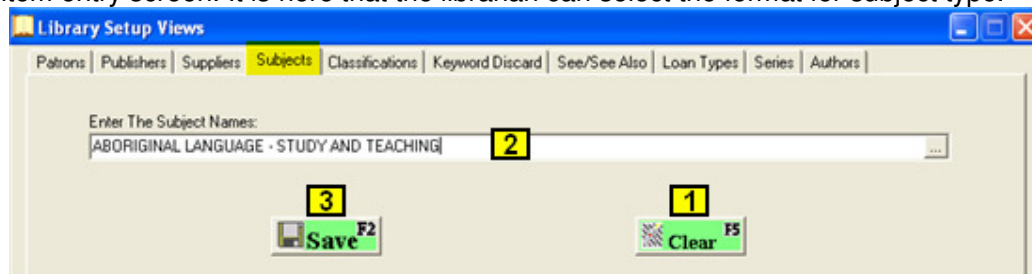
The Suppliers tab allows you to enter Supplier details. These details would then be available from within the Master Item entry module.

1.	Click Clear.
2.	Enter the Suppliers details.
3.	Click Save when finished.

## Subjects

The method of entry of the subject information is kept to the easiest of processes here. Enter the subject description in the format that is used by the particular library. A high level of flexibility is available in that, if at a later date, there is a change of standards for subject listing, the operator can change any item in the file. After the change is made, due to the relational capabilities of the system, those changes are registered throughout the database wherever that particular item is associated.

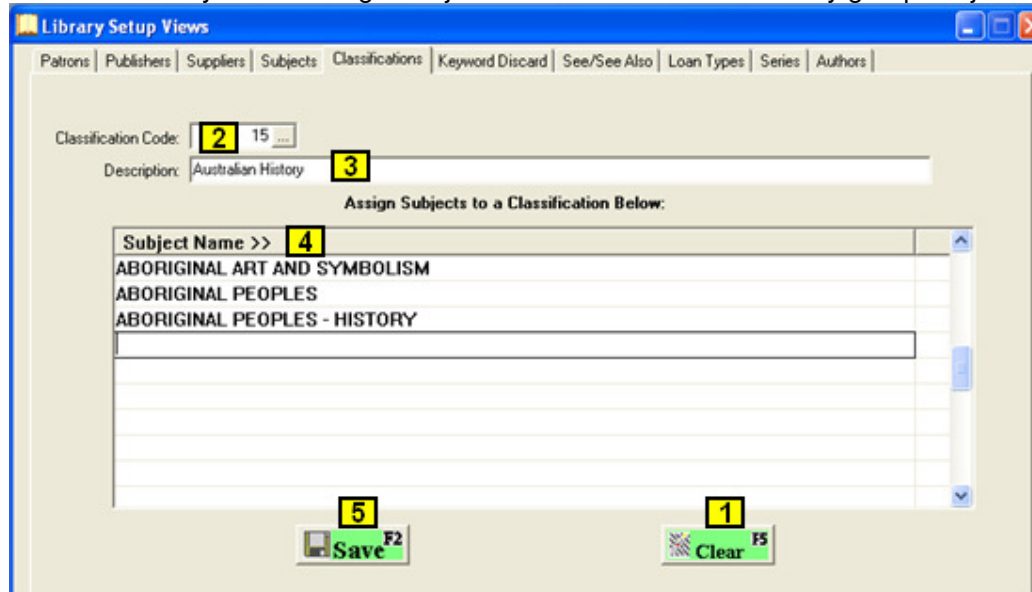
The Subjects tab offers the facility for entering the subject descriptions for subjects used in the Master item entry screen. It is here that the librarian can select the format for subject type.



1.	Click Clear.
2.	Enter the Subject, this is a broad definition of the field of study.
3.	Click Save when finished.

## Classification

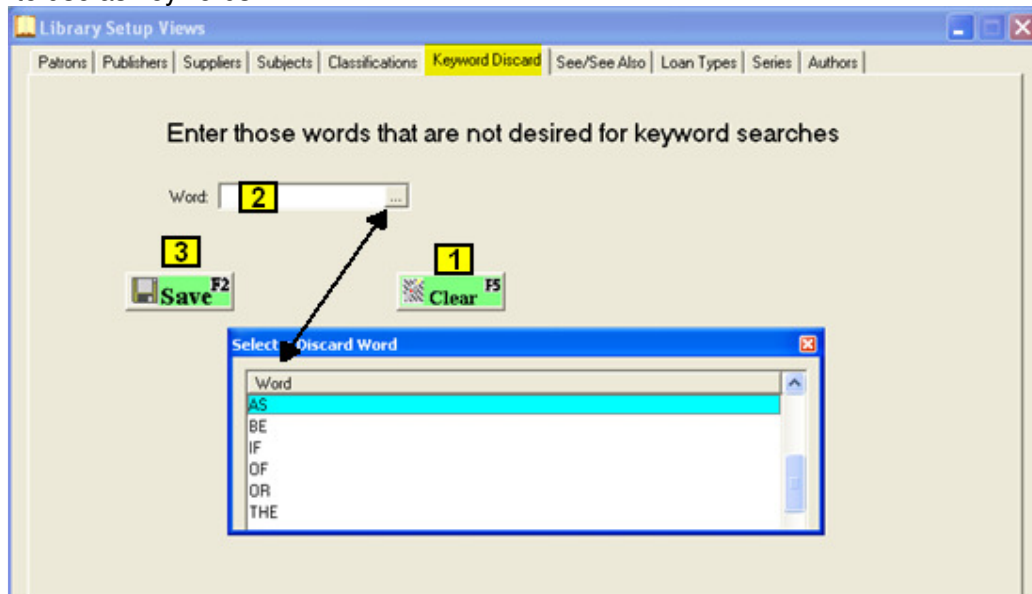
In the Classification tab you can Assign Subject to a classifications that may group subject together.



1.	Click Clear.
2.	Enter a Numeric code up to 8 digits.
3.	Enter Your description for this Classification.
4.	Click Subject Name to add Subjects to this Classification.
5.	Click Save or the Save Icon on the toolbar when finished.

## Keyword Discard

The Keyword Discard facility allows you to indicate those words, such as the, or, as, etc, that you do not wish to use as keywords.



- |    |                 |
|----|-----------------|
| 1. | Click Clear.    |
| 2. | Enter the Word. |
| 3. | Click Save,     |



## See/See Also

The See/See Also tab is used in conjunction with the keyword search. Enter words which when used in the keyword searching, will result in the system automatically updating alternate words to use.

1.	Click Clear.
2.	Enter the Master Word.
3.	Select a Status; <ul style="list-style-type: none"> <li>'S' for See Alternate Words, is used by the keyword search instead of the word entered. An example is if SOUTH PACIFIC was entered as the Master Word with a Status of S and the Alternate Word is OCEANIA if you searched on SOUTH PACIFIC you would be advised that it would be replaced with the word OCEANIA and that the search would be on the word OCEANIA. See Alternate Words may have only ONE alternate word.</li> <li>'A' See Also Words can have many values. An example would be: if MOUSE is entered as the Master Word you could have See Also Words of Mice, Quadruped, and Rodent etc. Then when you enter the word MOUSE in a keyword search you would be advised to See Also MICE, QUADRUPED, and RODENT etc. This ability is especially useful when using the "OR" Search Option.</li> </ul>
4.	Enter the Alternate Word.
5.	Click Save.

## Loan Types

Use this option prior to any attempts to enter data into the system other than the system parameters.

This module provides the system with the information that will be needed to perform such functions as calculation of loan return dates and calculation of overdue fines.

The Loan Type tab allows you to tailor a Standard Loan to include conditions based on;

- Patron Year Level
- Teacher

A loan code is created and then assigned to patrons fitting the desired criteria.

The screenshot shows the 'Library Setup Views' window with the 'Loan Types' tab selected. The window contains the following fields and options:

- Loan Code: 32
- Description: Student Loans
- Loan Period: 14
- Fine Rate: 0.10
- Grace Period: 3
- Section: Loan Periods Based on Year Level:
  - Year Level Option 1: 6, Loan Period Option 1: 14
  - Year Level Option 2: 7, Loan Period Option 2: 14
  - Year Level Option 3: 8, Loan Period Option 3: 21
  - Year Level Option 4: 9, Loan Period Option 4: 21
  - Year Level Option 5: 10, Loan Period Option 5: 28
  - Teacher Loan Period: 345
- Buttons: Save (F2) and Clear (F5)

1.	Click Clear to clear existing records.
2.	Enter a unique two digit Alpha, Numeric or Alphanumeric code.
3.	Enter your description for this code.
4.	Enter the Loan Period in Days;
5.	Optional; Enter a Fine Rate for overdue books.
6.	Optional: Enter a Grace Period for returns.
7.	Optional; The Loan Period can be further defined based on the Patron year level or it can be based on Teacher; <ul style="list-style-type: none"> <li>• Enter the Year Level Option 1 details</li> <li>• Enter Loan Period Option1 details</li> <li>• Follow with other options.</li> </ul>
8.	Click Save when finished.

## Series

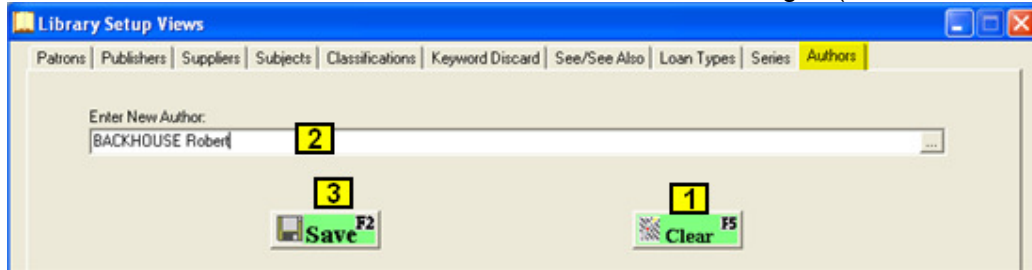
This view is used to setup Series for items.



1.	Click Clear.
2.	Add the Series Title.
3.	Optional; Enter a comment.
4.	Click Save when finished.

## Authors

Once Created the Author will be available for selection within the Catalogue (Master Item View).



1.	Click Clear.
2.	Enter the Authors details.
3.	Click Save when finished.

## Verify Counters

Verify Counter is used when numbers are not calculating correctly.

Library Setup Views

Patrons | Publishers | Suppliers | Subjects | Classifications | Keyword Discard | See/See Also | Loan Types | Series | Authors

Patron Number:   Patron Key:

Surname:  Given Name:

Known As:  Year Level:

Class Description:  Teach Code:

(TEACH for teacher patrons)

Status:  Max. Items On Loan:  Currently On Loan:

(A=OK, B=Blacklisted)

Address

Street:  Suburb:

Town:  Code:  Phone:

Email Address:

Notes:

Enable Delete