Library

Revised edition 2000
Contents

Acknowledgements 3

Introduction to the Training Program 5

Section 1
Library Management 11

Section 2
Library Circulation - Booklet 1 59

Section 3
Library Circulation - Booklet 2 107
Acknowledgements

Material in this booklet was developed by

- Joann Sayers, incorporating the OASIS Library v2 Circulation booklet produced by the Metropolitan East Region Information Technology Unit. Extracts of documentation issued by Technology Directorate have been used in this booklet.

- Christine Bellchambers incorporating training material developed by Information Technology Directorate.

- School Technology Support, Technology Directorate.

- Curriculum Directorate.

- Training and Development Directorate.

- The revised edition was prepared by Doug Jenkins, Information Technology Bureau.
Introduction to the Training Program

This program is designed to introduce new users of OASIS to the system and to give new users the skills required to use the system in the school. It is aimed at all staff who are unfamiliar with, or just starting to use OASIS.

What is OASIS?

OASIS is the Office Automation and School Information System used by the NSW Department of School Education.

OASIS consists of a number of interrelated modules

School Information

Student and Staff Information

Library Management

Financial Management

System Maintenance

Backup and Recovery

Standard Reports

School Timetable

Report Generator

OASIS allows the gathering of school management information into a single data base.
Program Design

The program is learner centred and materials are designed to be used flexibly. The learning material is print based and can stand alone. Sections within each component follow the same pattern which includes description of learning outcomes, and specific activities designed to achieve these outcomes.

Learning Outcomes

The learning outcomes are presented as a list in the introduction of each section. Use the list to assess your current level of knowledge and to assist you to decide how much time you will need to spend on each section.

The outcomes are designed for self assessment. Determine which outcomes you need to achieve prior to commencing. This self assessment should be done in consultation with your supervisor in your school.

Training Process

Discuss the process of self paced training with your supervisor. You should complete each part of the training program through the appropriate section in the Palm Tree Central tutorial prior to commencing work on the schools data. When you begin to work on school data negotiate with your supervisor to ensure the level at which you should process data.

All management decisions are the responsibility of the teacher librarian. Library assistants will need to work with their teacher librarians when using this material.
Information and Activities

Each section of the training program includes information about the particular function of the system being learned, its purpose and function in school administration, finance or library system.

The activities consist of step by step guides to performing the functions of the system.

In order to complete the activities you will need access to a computer loaded with OASIS Version 2 Y2K.

Study Options

The components are based on the principles of open learning and are designed to be used flexibly. You will need to decide which sections or parts of sections are appropriate for you given your background skills, current knowledge and employment needs.

You may like to form a study group with others in your area and work through the material with other people. You may decide to study the material on your own, occasionally discussing your progress with a more experienced colleague.

Determine the best method for you in consultation with your supervisor.

Time Commitment

The time taken to work through a section will depend on your level of knowledge and the depth to which you wish to study and practice the material. Times for the completion of activities within a section have not been given as this will depend on your starting skill.
OASIS Help

If you are using OASIS in your workplace and are in any doubt about the correct procedure contact the School Technology Support Unit on:

Phone: 132348

Library Management

This booklet is based on the assumption that:
(a) you are adding bibliographic records to OASIS Library
(b) you use SCISWEB and/or SCISCD as the major source of bibliographic data entry

The notes will take you through the basic data entry set up requirements. If basic functions such as system parameters and resource loan categories have already been completed, you can skip these sessions.

If the school chooses to change these settings then revisiting these sessions would be worthwhile.

The reference manuals that accompany OASIS Library Version 2, and the OASIS Library Tutorial manual explain and describe functions and operations in fuller detail. For information on SCIS products and services refer to:

Using SCISWeb, New South Wales Department of Education and Training 1999

For current information refer to the following websites:
Library Circulation: Section 1

This section assumes that you are about to begin circulation. The notes will take you through the basic circulation setup. If some of these functions such as generating the calendar or refreshing student information have been completed, you may skip these sessions.

The reference manuals that accompany OASIS Library Version 2 explain and describe functions and operations in fuller detail. Make a habit of referring to the OASIS Library Reference Manual Volumes 1 and 2 if you need further explanation.

Library Circulation: Section 2

This section assumes that you have completed Section 1 of the Library Circulation Introductory Training Program. Circulation setup is not complete unless the tasks in the first training session have been finalised.
Library Management
Data entry using SCISWEB and SCISCD
Contents

Outcomes 15

Session 1
Setting up the barcode reader 17

Session 2
Set System Parameters for Library 21

Session 3
Setting up Locations 27

Session 4
Resource Loan Categories 29

Session 5
The OASIS H1 Rapid Retrospective Module 33

Session 6
Ordering catalogue records using the SCIS products 35

Session 7
Downloading SCIS Records in OASIS Library 37

Session 8
Checking the Downloaded Catalogue Records 49

Session 9
Editing Details in General Resources 53
Outcomes

On completion of this section, participants will be able to:

✔ Set up the barcode reader
✔ Attach a portable barcode reader
✔ Set system parameters for library
✔ Set system parameters for barcodes
✔ Set up locations
✔ Set up resource loan categories
✔ Set system parameters for H1 Rapid Retrospective
✔ Rebuild Rapid Retrospective files
✔ Order Catalogue records using the SCIS products
✔ Produce a data validation report for resources
✔ Find downloaded SCIS records in OASIS Library
✔ Check downloaded SCIS records in OASIS Library
✔ Edit details for individual catalogue records in General Resources
✔ Add an additional copy of a resource
✔ Delete duplicate records for the same resource
Setting up the Barcode Reader

A barcode reader can be used to facilitate use of the ordering facility with the SCIS products. This may be either portable or fixed. If the school has only one reader, it is preferable that it is a portable one. This will be able to be used in portable mode for stocktake and taken to the library shelves to scan resources.

The barcode reader, whether portable or fixed, cannot be attached to the fileserver. It must be attached to a workstation on the network. Before attempting to attach the barcode reader, ensure that both the barcode reader and the workstation are turned off. Attach the barcode reader to the workstation as per the diagram below.
Once the barcode reader has been attached to the workstation, check that there is power to both the workstation and the barcode reader home base. Turn on the workstation followed by the barcode reader. The battery in the portable barcode reader should be allowed to charge overnight before use.

Keep the battery of an ASP portable barcode reader charged by turning the portable barcode reader OFF, but leaving it connected to the Home Base which is still turned ON.

The portable barcode reader is usually supplied with settings that will enable it to read OASIS barcodes and ISBN barcodes on books. However it is wise to check these settings to ensure that it will perform as expected.

- Turn the power off on the barcode reader and disconnect the reader from the Home Base
- Turn the power on at the barcode reader. At the ? prompt, press (Func) then press 0 and 1
- Press (No) to all codes displayed until CODE 39 and UPC/EAN appear. Press (Yes) when CODE 39 and UPC/EAN appear.
- At the ? prompt, press (Func) then press 0 and 2. When IBM AT appears press (Yes)
At the ? prompt, press \texttt{Func} then press \texttt{0} and \texttt{3}. A “1” should appear in the top right-hand corner of the screen. If it does, press \texttt{Enter}. If it doesn’t, press \texttt{1} then \texttt{Enter}. For the following options press \texttt{Enter} until you have the ? prompt again.

The portable barcode reader now has the correct settings to work in either fixed or portable mode. To operate in fixed mode, turn the power off on the barcode reader, attach it to the Home Base and then turn the barcode reader on again. The reader is ready for wanding when the ? prompt is displayed.

When connecting and disconnecting the portable reader with the Home Base the power should be turned OFF to the reader. Where practicable, the workstation to which the barcode reader is attached should be returned to the OASIS main menu.

The current model of the ASP barcode reader stores information in the memory of the reader even when it is being used while connected to the Home Base. It is therefore necessary to periodically clear the memory of the unit. The unit will eventually display a “Memory Full” message if this is not done.

To clear the memory, first turn the power off to the reader and disconnect it from the Home Base.

Turn the barcode reader on and at the ? prompt, press \texttt{Func} then press \texttt{1} and \texttt{9}.

When prompted with the message “Erase mem Y/N?”, press \texttt{Yes}. This will clear the memory.

Turn the power off to the reader and reconnect it to the Home Base.

For more detailed information on configuring the ASP barcode reader and caring for your barcode reader, refer to the instruction booklet supplied with the reader.
Other barcode readers:

If you are using a fixed barcode reader or another type of portable barcode reader, refer to the manufacturer’s instructions for information on attaching and configuring the barcode reader.

To check if the **ASP barcode reader** is set up to enable it to read ISBN barcodes:

- Check Function 00
- If the model of the reader is 258+ select Function 4 and continue to press Enter until the field *Convert “978”... to ISBN* is reached. Change this setting to “Y” for “YES”. Continue to press Enter until taken back to the “?” prompt.
- The reader should now be able to read OASIS barcodes normally and scan ISBN barcodes when using the SCIS products.
- If the barcode reader is an older model than 258 contact the manufacturer, AFP Microcomputers, on 0395787600 or 1800061642. They will provide a quotation to have the reader upgraded to enable it to read ISBN barcodes.

For **ALL BARCODES READERS:**

- Open the manufacturer’s booklet to page 1 in the section containing barcodes.
- Scan setup 1 from this page.
- From page 2 scan the barcode for continuous mode - ssen.
- From page 29 scan the ISBN enabler barcode.
- From page 1 scan the update barcode.
- The All Barcodes reader should now be able to scan ISBN barcodes when using the SCIS products. Contact your supplier or the manufacturer if these procedures are different for the model of the reader you have purchased.
Set System Parameters for Library

Before commencing this unit on setting systems parameters for OASIS Library management decisions will need to be made in the following areas:

- Automatic Generation of Keywords
- Automatic Generation of See subjects
- Automatic Generation of See subjects by Word
- OASIS Word available
- Time to terminate Enquiry & Self Circulation

Decisions in these areas are part of the responsibility of the teacher librarian. Such decisions will reflect the educational program of the school library and the information needs of staff and students. *The Handbook for School* (second edition) will assist in formulating policy in these areas. Decisions will be recorded in the manual of policies and procedures maintained by the teacher librarian. Library assistants will need to work with their teacher librarian when completing this unit.

- Login to OASIS using a password with Library group A level of access
- At the main OASIS menu *press B* then 1 to *select* Library Management
- \*Press C* then 1 to *select* System Parameters
- *Press L* for <L>ibrary from the option bar
The following fields are highlighted:

**Library Name**
- *Type* your school’s name in full and *press* \[Enter\]

**Address**
- *Type* your school’s address including the postcode and *press* \[Enter\]. These address details will be used on library orders and be available for use in school designed reports.

**P O Box Number**
- *Type* your school’s PO Box number if applicable and *press* \[Enter\]. *Press* \[Enter\] to leave the field blank.

**Telephone - 1, -2**
- *Type* your school’s telephone number/s with the STD area code in brackets preceding the number/s and *press* \[Enter\].

**Fax Number**
- *Type* your school’s fax number with the STD area code in brackets preceding the number and *press* \[Enter\].

**Library Code**
- *Type* your school’s four digit code and *press* \[Enter\]. This code will be used as the last four digits of your school library’s barcodes.

**L. C. Classification Used (Y/N)**
- *Type* N (for No) and *press* \[Enter\]. Since schools use the Dewey Decimal Classification scheme, you should not enter yes here to use the Library of Congress Classification scheme.
Automatic Generation of Keywords (Y/N)

- If you wish to generate keywords for every word in the title of resources added to the database, except for words like “the”, “a” and “but”, etc., type Y (for Yes) and press Enter. Alternatively, type N (for No) and press Enter.

Auto Generation of See Subjects (Y/N)

- If you wish to generate see references for subject headings that have a dash or a comma, e.g. Animals - Australia; Art, Australian, type Y (for Yes) and press Enter. Alternatively, type N (for No) and press Enter.

It is recommended that the 3 automatic generation options are set to Y for YES. This enhances the ability of students to complete a successful search in the inquiry module.

Auto Gen of See Subjects by Word (Y/N)

- If you wish to generate see references for every word used in subject headings, e.g. Motor cars; Drug abuse, type Y (for Yes) and press Enter. Alternatively, type N (for No) and press Enter.

OASIS Word Available (Y/N)

- OASIS Word can be used for off line orders for SCIS Web.
- If you wish to use OASIS Word and the mailmerge facility to produce follow up letters for very overdue student loans and overdue loans to external borrowers, type Y (for Yes) and press Enter. Alternatively, type N (for No) and press Enter.

In Library Circulation it is possible to print overdue notices for external borrowers (B4) and a Message to Family (B2) for very overdue student loans. This can take the form of a mailmerge file for creation of a form letter in OASIS Word (Yes entered in this field) or an overdue notice with address details and a short message at the top of the overdue notice (No entered in this field).
OASIS Finance Available (Y/N)

- Type N (for No) and press Enter. Since orders created in OASIS Library cannot be transferred on floppy disk to the OASIS Finance module, No must be entered here.

Days to look ahead for standing orders

- Press Enter to leave this field blank or with the number zero. This field can be edited at a later date when you are using Library Acquisitions to generate orders for renewing periodical subscriptions.

Time to terminate Enquiry & Self Circ.

- Press Enter to leave this field blank. Do not type the number zero. If you wish to have the Library Enquiry Terminals (logged in from the boot menu option OASIS Library Enquiry or OASIS Adlib Enquiry) log themselves out at a designated time of the day, type the logout time here in 24-hour clock format. E.g. 16:00 will mean that the Enquiry terminals are logged out automatically at 4 pm each day.
When complete Press \text{Esc} to quit the Library System Parameters.

Press B for <B>arcode from the option bar.

The following fields are highlighted:

\textbf{Match Accn - Barcode (Y/N)}

- Unless you have particular reasons to match the accession number and the barcode type \textit{N} (for No) and press \text{Enter}

\begin{quote}
This is a management decision which is the responsibility of the teacher librarian and should be recorded in the teacher librarian’s policies and procedures documentation and requires careful thought of the implications, e.g. How will a barcode which has been destroyed be replaced? Also this is only an option for new school library collections where there is no stock that has previously been accessioned. Where previously accessioned library resources are being entered into OASIS their existing accession number should be entered into OASIS to link it back to the manual accession register as per audit requirements.
\end{quote}

\textbf{Next Barcode to Allocate, Next Borrower Barcode, Next Accessn No. To Allocate}

- Check that the following resource barcode, borrower barcode and accession numbers offered by OASIS are accurate and available. If they are not, you may overtype them. Press \text{Enter} to accept each field

\begin{quote}
To assist in making sure no input errors are made in overtyping barcodes, consider using the workstation that has the barcode reader attached. The correct barcodes can be scanned into the fields, eliminating the chances of typing errors.
\end{quote}
Next Order No. to Allocate

- If you are not using the Acquisitions module then leave the Order No. field blank by pressing Enter. If you are using the acquisitions module, type your next available order number in this field and press Enter.

Special Barcodes (Y/N)

- Unless you are converting barcodes from another system, type N (for No) and press Enter.

- When complete press Esc twice and press Q then U to exit Library Management

```
<Fl> for Help  SYSTEM PARAMETERS - PARAMETERS Palm Tree cent.

Match Accn - Barcode (Y/N) : N
Next Barcode to Allocate : R010732520
Next Borrower Barcode : B000012520
Next Accessn No to Allocate : 028886
Next Order No to Allocate : L00112
Special Barcodes (Y/N) : N

Foreign Barcode 1
==========================
Identifying Character :
Position in Barcode (1-12) :
Rearranging Formula :
Foreign Barcode 2
==========================
Identifying Character :
Position in Barcode (1-12) :
Rearranging Formula :
Foreign Barcode 3
==========================
Identifying Character :
Position in Barcode (1-12) :
Rearranging Formula :
<Esc>
```
Session

Setting up Locations

Decisions on the locations which will be used need to be considered carefully. Such decisions are the responsibility of the teacher librarian as part of the process of managing the information systems and services of the school library. Decisions will be recorded in the manual of policies and procedures maintained by the teacher librarian. Library assistants will need to work with their teacher librarian when completing this unit.

Location is used to identify those resources not held in the main library collection. The location field is used to indicate to the user where to look for the resources within the library, e.g. R = Reference shelves, and AV = Audiovisual Collection; or within the school, e.g. SR = Staff room, and PO = Principal’s Office.

Locations can be added as resources are entered in OASIS Library. When using SCIS products for entering resources into OASIS, it is preferable to set up the Location authority file before starting data entry.

It is important to ensure that Locations are added in B1 B1 before data entry. This helps ensure that the locations are consistent. For example, it would be very confusing if the location for reference materials used various forms e.g. R R: REF. It is particularly difficult to carry out a stocktake where this error has occurred with multiple location symbols.
To add a location:

- From the OASIS main menu, press B then 1 to select Library Management. To select Location press B then 4.
- Press A for <A>dd from the option bar.

You can now enter the location code and description.

- To add a location for Reference, for example, type R in the highlighted location field and press Enter.
- Type Reference in the description field and press Enter.
- When all locations have been added, press Esc twice and press Q then U to exit Library Management.

<table>
<thead>
<tr>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AV</td>
<td>Audiovisual Room</td>
</tr>
<tr>
<td>BB</td>
<td>Big Bookstand</td>
</tr>
<tr>
<td>J</td>
<td>Junior</td>
</tr>
<tr>
<td>KR</td>
<td>Kindergarten Room</td>
</tr>
<tr>
<td>PF</td>
<td>Picture File</td>
</tr>
<tr>
<td>PO</td>
<td>Principal's Office</td>
</tr>
<tr>
<td>R</td>
<td>Reference</td>
</tr>
<tr>
<td>SR</td>
<td>Staff Room</td>
</tr>
<tr>
<td>VF</td>
<td>Vertical File</td>
</tr>
</tbody>
</table>

Manual for school libraries suggests 3 digit codes eg. REF for reference etc.
Teacher librarians have responsibility for decisions on the resource loan categories to be used. Such decisions need to be made as part of the process of managing the information services provided by the school library. Decisions will be recorded in the manual of policies and procedures maintained by the teacher librarian. Library assistants will need to work with their teacher librarian when completing this unit.

In most libraries different groups of resources are lent to borrowers for varying lengths of time and some resources are only lent to particular groups of borrowers. Resource loan categories describe the pattern in which resources will be lent.
You may wish to use some of the resource loan categories used in Palm Tree Central.

Since teachers and students are able to borrow fiction, non-fiction albeit for varying time periods all these resources could have a general loan category. A heavy demand loan category would be used to enable a shorter loan period for resources that are in high demand because they are popular or needed for assignments / projects. Therefore different loan categories are required only if you wish to restrict the loan of certain resources to particular groups of borrowers or limit the length of the loan period.
You may add as many resource loan categories as you require. Each category will require a different one letter code.

- Write down the loan categories you wish to use and the one letter code you are going to allocate to each category

**To add a resource loan category:**

- From the OASIS main menu, *press B* then 2 to *select* Library Circulation. To *select* Resource Loan Category *press D* then 1
- *Press A for <A>dd* from the option bar

You can now enter the resource code and description.

- To add the resource category General, *type G* in the highlighted code field and *press Enter*
- *Type General* in the description field and *press Enter*
- The Part Day Loan field will be highlighted. Typing N (for No) will indicate that this a loan category for resources lent for one or more days. Alternatively *type Y* (for Yes) only if you intend resources with this loan category to be due back on the day of the loan
- The Borrowing limit category description field will be highlighted. The heading for this field will be determined by the description entered in the System Parameters for Circulation (see Library Management B1, System Parameters C1 and <C>irculation). If you decided to set borrowing limits on the basis of Fiction and Other, then the heading for this field will be Fiction and you will *type Y* (for Yes) for loan categories that apply to fiction resources and *N* (for No) for loan categories that apply to other resources and *press Enter*
- When all resource categories have been added, *press Esc* and *press Q* then U to exit Library Circulation.
The OASIS H1 Rapid Retrospective Module

The Curriculum Corporation no longer supports the Rapid Retrospective product. However, the module of the same name in OASIS, Rapid Retrospective is still used to select options to download SCIS records and load the SCIS Subject Headings disk.

Hence the system parameters for Rapid Retrospective are no longer relevant as the SCIS service has been replaced by SCISWeb and SCISCD. The information contained within it should remain but is no longer used, as orders for catalogue records are no longer made from this module. In fact all the options within H1 Rapid Retrospective module are blocked with the exception of 4. These 4 options are:

A1 To enable download of the subject reference structure from SCIS

G2 To enable the download of catalogue records ordered from SCISWeb and SCISCD

C1 System Parameters

C2 Rebuild RR

The need to rebuild the module from time to time means that the data in C1 has to remain to enable the rebuild to process.
Ordering catalogue records using the SCIS products


Use this section to complete a training session on ordering catalogue records from SCIS.
Session

Downloading SCIS Records in OASIS Library

1. Create the order file from SCISWeb or SCISCD

2. Save the USMARC.DAT file to a floppy disk and take it to an OASIS workstation.

3. Contact Curriculum Corporation on 1800 337 405 if you have a problem creating the USMARC.DAT file.

4. Contact School Technology Support on 132348 if you have questions or difficulties with the download process into OASIS Library.

5. Use the flow chart LOADING MARC RECORDS ORDERED FROM SCISWEB OR SCISCD. (SEE NEXT PAGE) The following notes explain the flowchart in detail.
1. Getting ready

From the OASIS Menu select B4 then N1 - Rebuild
Complete a full Data Backup
From the OASIS Menu select H1 then C1 - System Parameters.
Check that the Drive/Directory is set to OASIS/SCS
Select C2 to rebuild Rapid Retrospective
<C>onfirm
<Q>uit from RR

2. Loading instructions

From the OASIS Menu select H1 then G2 - Load Marc Records
Select SCS SCIS/USMARC and press <ENTER>
Select <C>ontinue and then press <B>ulk or <S>ingle from the option bar
Accept the first barcode default or type/scan the first available barcode in its place

Clear the default accession number and press <ENTER>
Yes
Have the resources had accession numbers allocated?
No
Accept the default accession number or type the first available accession number

Press <ENTER> to accept the file path and Name as displayed on the screen.
Note: If the data disk is in Drive B, change the path name from A to B

Insert the data disk and select <C>onfirm
Select <U>pdate
Yes
Do you wish to attach the records to Abbreviated Entries/Entries ordered through Acquisition?
No
Select <A>dd

* Remember a full data backup is essential after a <B>ulk download. see Issue 4.

Print and check all reports which are offered
B4 F5 Data validation report
<S>elect on the date the download was completed in the "from" and "to" date field. Select <A>ll and <S>ummary to <P>rint the report
OPTION 1: Downloading SCIS records with no abbreviated entry in General Resources

- From the OASIS menu select H1 to select the Rapid Retrospective module.

- Select **G2 Load Marc Records**.

- Select **SCIS/USMARC** and press **Enter**.

- Select **<C>ontinue** provided that a B4 N1 rebuild has already been processed.

- Select **<B>ulk** if the disk you are loading has more than 30 records. If less than 30 records select **<S>ingle** (see Issue 4: page 43).

- Check that the first barcode to be allocated by OASIS is the next unattached number on the barcode sheet. Scan or type in the correct barcode if necessary. Then press **Enter**.

- Check that the default accession number is correct. Then press **Enter** to confirm.

- At the file path and name ensure that the disk is in the correct drive i.e. either drive A or drive B. Change the field to read B:\USMARC.DAT if the disk is being loaded from drive B. Then press **Enter**.

- Ensure that the disk is in the drive before selecting **<C>onfirm**.

- Select **<A>dd** from the option bar to load the records.

- Ensure that all reports offered are printed (see Issue 7: page 46).

- Ensure that a B4 F5 data validation report is printed (see Issue 8: page 47).
OPTION 2 Downloading SCIS records with abbreviated entries (This procedure is for those resources processed through the Acquisitions module or entered in skeletal form in B1 D2)

- From the OASIS menu select **H1** to select the **Rapid Retrospective module**.
- **Select G2 Load Marc Records.**
- **Select SCIS/USMARC** and press **Enter**.
- **Select <C>ontinue** provided that a B4 N1 rebuild has already been processed.
- **Select <B>ulk** if the disk you are loading has more than 30 records. If less than 30 records **select <S>ingle** (see Issue 4: page 43).
- Check that the first barcode to be allocated by OASIS is the next unattached number on the barcode sheet. Scan or type in the correct barcode if necessary. Then press **Enter**. Note that this barcode must still be correct even though the operator does not intend to have barcodes allocated. They have already been allocated either in the Acquisitions module or in B1 D2.
  - Delete the default accession number. When the field is blank press **Enter**.
  - Note that the accession number has already been allocated. Leaving a number in this field could create a second copy of the resource.
- At the file path and name ensure that the disk is in the correct drive i.e. either drive A or drive B. Change the field to read **B:\USMARC.DAT** if the disk is being loaded from drive B.
  - Then press **Enter**.
- Ensure that the disk is in the drive before selecting **<C>onfirm**.
- **Select <U>pdate** from the option bar to load the records.
- Ensure that all reports offered are printed (see Issue 7: page 46).
- Ensure that a B4 F5 data validation report is printed (see Issue 8: page 47).
ISSUE 1 Downloading multiple SCIS orders from several disks

It is necessary to create different orders so the correct path to download can be selected from the two options above. There is no point in creating a USMARC.DAT file with records for items that are at different stages of processing. Creating multiple orders on several disks assists in:

- avoiding duplications or unnecessary copies of resources in B1 D1
- making the process more manageable in terms of time by downloading records frequently in small batches of up to 30 records at a time
- allowing the selection of the <S>ingle disk option that archives log changes (see Issue 4: page 43)
- keeping data in good order by downloading after a B4 N1 rebuild (see Issue 2: page 42) and a full data backup (see Issue 3: page 42).

The multiple disk recommendation does allow for consecutive downloads. That is, the operator can download 1 disk after another without having to perform backups in-between. For example, you may have created 3 order disks with SCIS records:

- Disk 1 with 22 records created and downloaded using Option 1
- Disk 2 with 7 records created and downloaded using Option 2
- Disk 3 with another 11 records created and downloaded using Option 1.

These disks can all be downloaded one after another without the need to do full data backups before and after each download. In other words after the B4 N1 rebuild and full
data backup the downloading of the 3 disks can occur. The system warning reminding the operator to “backup data now” can be avoided until all 3 disks are loaded. Then the data backup must be processed.

**Issue 2 B4 N1 Rebuild**

It is essential to rebuild before downloading records. The rebuild:

- recreates the index files
- keeps data in good order
- helps prevent data corruption
- makes possible a successful recovery if it is required for any reason (e.g. a power or hardware failure during the download). The data will be recovered in good order with correct index files.

**Issue 3 Full K1 data backup**

It is essential to do a full data backup prior to any downloading process such as Refresh Students or SCIS downloads. This creates a starting point to which the system can be returned if a recovery has to be processed.

This need not be a backup done just for the purposes of doing the download. The download can be done at a time immediately after a normal backup is processed as part of the backup cycle the school performs. The use of timed backups overnight wherever possible restricts the impact on operational time.

Full K1 data backups should also be completed when the download is processed.
Rebuilds and backups are an essential part of good management with OASIS Library. Doing a K1 full backup both before and after SCIS downloads can be a time consuming process.

Rapid Retrospective orders were in minimum batches of 100 records. Hence when downloads were processed the <B>bulk</B> option was always selected and rebuilds and backup preceded and followed the operation. At the time this was the most effective way of managing the process. Selecting the <B>bulk</B> option meant that changes to the log file were not archived, hence the need for a full data backup at the end of the process. This method ensured that large numbers of records were loaded relatively quickly.

K1 backups were processed prior to the download so that if an error occurred (e.g. power or equipment failure) it was relatively easy to restore the system to the starting point without loss of data.

With the new SCIS products where records are ordered in small batches, the situation is somewhat different. It is still necessary to do a rebuild and a K1 full data backup prior to the download, but wherever possible this should be a timed backup that has not impinged on the normal operational hours of the library.

The download can be processed by selecting the <S>ingle</S> option. This takes the same amount of time, but when the process is finished it takes longer to exit the module. The option bar reads “archiving changes log file”. This means that records are processed as part of the CTR. If a system error occurred, the download would be recoverable along with other processed items such as loans and returns.
While not eliminating the need for a full data backup, it does allow the backup to be deferred to the first opportunity outside operational times, such as a CTR backup at the end of the day followed by a timed backup overnight.

Wherever possible in terms of work practice, downloads should be processed to suit the normal backup cycle. This should also help minimize down time for library systems.

In summary, the \textbf{Bulk} option can be selected for any orders with more than 30 records. The \textbf{Single} option can be chosen for orders of less than 30 records. Rebuilds and backups must precede either of these options. The \textbf{Single} option gives the opportunity to defer a full K1 data backup, but takes longer as it archives changes to the log file at the end of the download process.

\textbf{Issue 5 Error messages during the download process}

1.  \textit{No disk/no file found matching file path}  
   
   Either the disk has no USMARC.DAT file or the disk is in the wrong drive. Check the disk in M1 List files on a floppy if the disk is in drive A. If drive B is used check by using the directory command at the DOS prompt.

2.  \textit{The same records have been downloaded as the last SCIS download}  
   
   Ensure that the disks used to save the USMARC.DAT file created from the SCIS products have been reformatted prior to re-use.

3.  \textit{Error base/1133 bound error array assign}  
   
   The USMARC.DAT format has not been correctly established on the disk. Re-order the SCIS records on a newly formatted disk. Also check to ensure that the H1 Rapid Retrospective C1 System Parameters have the drive/directory set to \texttt{\OASIS\SCS\}
4. *Error message relating to creating a temporary work file* \\
\texttt{\textbackslash OASIS\textbackslash LOASIS\textbackslash MARC.DAT}  \\
Ring School Technology Support on 132348 for assistance.

5. *File locked by another user* \texttt{\textbackslash OASIS\textbackslash OPARAM.DBF}  \\
Ring School Technology Technology Support on 132348 for assistance

6. *Instances where the download has been attempted using*  \\
\texttt{\textless A\textgreater dd} as per OPTION 1 but the data does not transfer successfully.  \\
Select C2 to rebuild Rapid Retrospective  \\
\texttt{\textless QU\textgreater} the module  \\
*Select H1 Rapid Retrospective and G2 Load Marc Records.*  \\
Proceed as per OPTION 1 but select \texttt{\textless U\textgreater pdate}  \\
Try this process several times in case of difficulty. Contact School Technology Support on 132348 if the problem persists.

**Issue 6 Data corruptions caused by incorrect procedures**

In instances where downloads have been processed without a B4 N1 rebuild and a full K1 data backup and a system error occurs, there can be some disastrous consequences. If OASIS prompts an operator to perform a recovery after a download has been done using the \texttt{\textless B\textgreater ulk} option, but before a full K1 data backup has been completed, the data files consist of blanks where the SCIS records should be located. If a full K1 data backup had not been completed prior to the download, there is no good data set to restore from and the data may need to come to School Technology Support for correction.
Saving time by taking risks and not following procedures can sometimes result in having no system to operate at all while data corruptions are being removed by support staff. Schools cannot operate at all while data is being corrected. Data backups have to be sent to School Technology Support to have data corruptions removed and this creates a great deal of inconvenience for the school. The OASIS Library system cannot be used at the school while data correction is taking place.

**Issue 7  SCIS/USMARC load amendments report**

*SCIS/USMARC Amendments Report*

This report lists data that was part of the SCIS record but has not been loaded into OASIS Library. The USMARC tags for example give series titles several times when appropriate. However, OASIS Library can only accept one series title. In a case such as The Baby-sitters Club, there is another series title, An Apple Paperback. This second series title will be listed in this report as it was not loaded into the school’s data. This gives schools the option of adding this additional information into the notes field in OASIS Library, if the teacher-librarian thinks it is important. The terms can then be tagged to make them searchable in keywords.

Reviews written for the resource can also appear in this report. They are not downloaded into OASIS Library. If the teacher-librarian believes the notes add to the value of the resource for users, they can be added manually to the notes field in OASIS Library. Again individual terms can be tagged to make them searchable as keywords.

The series titles and subject headings added during the download are provided to enhance library management. Authority files can be checked to ensure that duplicate entries have not occurred. Also checks can be made to ensure that
subject headings that have been effected by changes have been dealt with in the subject reference structure.

**Issue 8 Data validation Reports**

See Session 8 “Checking the downloaded catalogue records pp. 49.

**Issue 9 Uploading ISBN order files to SCISWEB**

A7.1 **Creating the order file in OASIS Word**

1. Select A2 from the main OASIS menu.
2. Enter the 10-digit ISBN, ISSN, or 6-digit SCIS number, e.g. 901123.
3. Press Enter to move to the next line.
4. Repeat this procedure for each number.
   (Remember to press Enter after the last entry.)

A7.2 **Using the barcode scanner**

1. Scan in the ISBN/ISSN barcode (this will display as ten digits).
2. Repeat this procedure for each number.
   Note: On ASP barcode readers set Function 4 (as per instructions) so reader will scan ISBNs.
   Note: The cursor automatically moves to the next line.

A7.3 **Saving the file if 3½” drive in OASIS workstation is drive A**

1. Insert floppy disk in disk drive.
2. Press Alt-S to save file.
3. File Type: TAB to Text Enter.
4. Destination: TAB to Floppy Enter.
5. Name: type in a name for the file, e.g. Library 1 (then next file can be Library 2 and so on).
6. Description: type in description, e.g. ISBNs for SCIS download Date Enter.
7. Press Alt-Q to quit from OASIS Word.
8. Quit OASIS Word: Y Enter.
A7.4 Saving the file if 3½” drive in OASIS workstation is drive B

1. Insert floppy disk in disk driver.
2. Press F6 Setup.
3. Arrow down to Directory and press Enter.
4. Directory Name: B: Enter.
5. Press Alt-S to save file.
6. File Type: TAB to Text Enter.
8. Name: type in a name for the file, e.g. Library 1 (then next file can be Library 2 and so on).
9. Description: type in description, e.g. ISBNs for SCIS download Enter.
10. Press Alt-Q to quit from OASIS Word.
11. Quit OASIS Word: Y Enter.

Issue 10 Data Backup Sets

The minimum data requirement is that at any point in time the school should be able to access an external backup (done to tape or hard disk) of 3 weeks duration. In the YR2K version of OASIS Library there are 15 colour sets in the K1 backup cycle. These colour backups are processed twice on the hard disk of the server. The server also has a tape backup process that at any point in time contains up to 30 colour backup sets. Schools should perform a full K1 data backup on each operational day. The colour backup sets are standard and should not be changed.

School libraries are unique in that they accumulate a very large data base over a period of time when operating an automated library system. It is important to remember that all the data the library processes has to be carefully backed up and a copy kept off site. This is performed by the system administrator who is responsible for the nightly and end of term server backups done to tape.

If the need arose for data to be restored that was destroyed by lightning strikes, equipment failure etc., then this can be retrieved in most cases from the server tape backup.
Checking the Downloaded Catalogue Records

After the SCIS cataloguing records have been downloaded, they should be checked to ensure that they are correct and that all details are complete and accurate. To facilitate this checking process a Data Validation Report should be printed.

To produce a data validation report:

- From the OASIS main menu, press B then 4 to select Reports Utilities. To select a data validation report for General Resources press F then 5.

- For Date Range select <S>elect and the screen will prompt you to enter the date range for the date you download the SCIS cataloguing records. Type the date you did the download in six digit format and press (Enter). Again, type the date you did the download and press (Enter).

- For Shelf Location select <A>ll.

- Press S for <S>ummary and press P for <P>rint. This will print a report in shelf location order showing the shelf location, title, author, barcode and accession number for the downloaded SCIS records.
Press $\text{Esc}$ and press $\text{Q}$ then $\text{U}$ to exit Reports Utilities

Selecting $<A>l{l}$ for date range would produce a report that listed all resources that have been added to your OASIS cataloguing database - this could be hundreds or thousands of titles. The option to print a $<D>e$tailed Report will print the full cataloguing record and this will take half a printed page per title, i.e. a download of one hundred (100) titles will produce a printout of fifty (50) pages.

**To find and check the downloaded cataloguing records:**

- From the OASIS main menu, press $\text{B}$ then $\text{1}$ to select Management. To select General Resources press $\text{D}$ then $\text{1}$.

- The screen will display the catalogue record for the last resource title that was added or edited. To find the first title on your printed data validation report, from the option bar select $<\text{F}>ind$. Select $<\text{T}>itle$ and type the exact title of the resource as given on the printed report and press $\text{Enter}$. It is possible to omit typing a, an and the at the beginning of the title of a resource. Alternatively, select $<\text{B}>arcde$, type the barcode and press $\text{Enter}$ or select $<\text{A>ccession No}$, type the accession number and press $\text{Enter}$.

- The screen will display the first title on your data validation report. Select $<\text{N}>ext$. Select $<\text{P}>revious$ twice to ensure that the title on the screen only appears once, i.e. a duplicate entry does not exist for this title. Press $<\text{N}>ext$ to return to the first title on your data validation report.

*The General Resources file is in alphabetical order by title. Repeatedly selecting $<\text{N}>ext$ from the option bar will take you through the file in alphabetical order by title. Repeatedly selecting $<\text{P}>revious$ will take you through the file in reverse alphabetical order.*
The OASIS cataloguing records appear on the screen in three sections:

Top     : first field is Title; contains the full bibliographic description for the resource
Middle  : first field is Notes; contains the subject cataloguing
Bottom  : select <C>opies; first field is Barcode; contains the local information about each copy of the resource held by the library

Press Esc to exit the Copies information for the current title on the screen

To find the next title on your data validation report, press the plus [*] key. You can check that it is the next title on the data validation by noting that the Resource No (top left-hand corner of the screen) has increased by one

For each record, check the item details with the catalogue record to ensure that all details are correct. If the SCIS classification differs to that on the resource in your library, it is recommended that you change the call number on the resource so that it conforms to the SCIS cataloguing. Where a manual accession register exists for the resource, it is a school based decision as to whether or not to add the supplier and cost into the copies details.

Press Esc and press Q then U to exit Library Management.
Editing Details in General Resources

Usually the SCIS cataloging record should not require alteration or amendment. It is not recommended that the bibliographic detail be changed in any but unusual circumstances. However, there is sometimes a need to edit the record in General Resources when a typing error has been made.

- From the OASIS main menu, press B then 1 to select Management. To select General Resources press D then 1.

- Select <F>ind, select <T>itle, <B>arcode or <A>ccession No, type the title, barcode or accession number for the resource you wish to edit and press Enter.

- To edit the resource details, select <E>dit. The following option bar will be displayed:

  <Title <C>atalogue <K>eywords <S>ubjects <R>eview Notes <Esc>

- To edit the details in the top third of the screen, i.e. the title and/or bibliographic details, select <T>itle. The Title field will be highlighted. Overtype if you wish to edit the title and press Enter. Alternatively, press Enter to move the highlighted block to a field that you wish to edit, overtype in the field and press Enter. Press Enter until you have the following option bar again.
For some fields in the General Resources file, there are authority files or lookup tables. As you add data the current entry will be checked against the existing entries in the file to determine whether there is a match or a need to add to the authority file. If no match is found, you will need to select Add, type in the full details and press Enter.

The fields where there are authority files or lookup tables are Names, Pblshr/Distr and Place, Series, Location, GMD, Subjects, Loan Category and Supplier.

- To edit the shelf location and/or the GMD, ISBN or SCIS No, select Catalogue. The Location field will be highlighted. Overtype if you wish to edit the location field and press Enter. Alternatively, press Enter to move the highlighted block to a field that you wish to edit, overtype in the field and press Enter. Press Enter until you have an option bar with choices again.

- For some resources, such as videorecordings, computer software and kits, review notes are added to assist the library user in the selection of resources. To add review notes, select Review Notes, select Edit and type in your notes. To tag a word in the notes as a keyword move the cursor so that it is under the first letter of the word and press the function key F3. When finished adding the notes, press Esc twice.

- Press Esc twice and press Q then U to exit Library Management.
To edit copies information in General Resources:

- From the OASIS main menu, press B then 1 to select Management. To select General Resources press D then 1

- Select <F>ind, select <T>itle, <B>arcode or <A>ccession No, type the title, barcode or accession number for the resource for which you wish to edit the copies information and press Enter.

- Select <C>opies and, if there is more than one copy of the resource select <N>ext or <P>rev to view the copy information required. Select <E>dit. The Location field will be highlighted. Overtype if you wish to edit this field and press Enter. Alternatively, press Enter to move to the field you wish to edit, overtype and press Enter. Press Enter until you have an option bar with choices again.

- Press Esc twice and press Q then U to exit Library Management.

To add another copy of a resource:

- From the OASIS main menu, press B then 1 to select Management. To select General Resources press D then 1

- Select <F>ind, select <T>itle, <B>arcode or <A>ccession No, type the title, barcode or accession number for the resource for which you wish to add another copy and press Enter.

- Select <C>opies and select <A>dd. The option bar should be offering the next available resource barcode. If accurate, press Enter. If not, overtype with the correct resource barcode and press Enter.
The Location field will be highlighted. If the resource is located on the normal fiction and non-fiction shelves, press Enter to leave the field blank. Alternatively, type the location code and press Enter.

Type the relevant information for the copy of the resource in the following fields and press Enter at the end of each field. When finished the option bar will read:

Do you want to add another copy ... <Y>es <N>o <B>ulk

If you do not have further copies to add select <N>o, select Esc twice, press Q then U to exit Library Management.

If you have an additional copy, select <Y>es, press Enter to accept the next available resource barcode and type the relevant information for the next copy of the resource in the following fields and press Enter at the end of each field. When finished the option bar will again read:

Do you want to add another copy ... <Y>es <N>o <B>ulk

Select <N>o, select Esc twice, press Q then U to exit Library Management.

If you have numerous additional copies, select <B>ulk. The option bar will read:

Enter Number of Copies to be added
Type the total number of copies to be added, including the copy that has just been added and press Enter. The next available barcode and accession number will be added to each of the copies now added automatically and the shelf location, loan category, supplier and cost will be the same as that for the first additional copy added. Select Esc twice, press Q then U to exit Library Management.

**To delete a duplicate record:**

After checking the downloaded SCIS records you may find that you have duplicate entries for the same resource. Alternatively, you may find that a downloaded SCIS record did not match up with the abbreviated entry for a particular resource. To ensure there is no duplication in the file, you will need to delete records in the following way.

- From the OASIS main menu, press B then 1 to select Management. To select General Resources press D then 1

- Select <F>ind, select <T>itle, <B>arcode or <A>ccession No, type the title, barcode or accession number for the resource you know is duplicated and press Enter

- The screen will display the desired resource title. Select <N>ext, then Select <P>rev (for Previous) twice to check that there is a duplicate entry for this title. Select <C>opies, check the barcode and copies information for each entry for the resource, then press Esc. By Selecting <N>ext or <P>rev display on the screen the record you wish to delete. If the duplication occurred because the downloaded SCIS record did not match up with an abbreviated entry for the same resource, note the barcode, accession number and copies information for the abbreviated entry and plan to delete that entry
Select <C>opies and ensure that you have the full record on the screen for the incorrect entry. Select <D>elete and select <C>onfirm deletion.

After several deletions a rebuild of Library data should be completed. From the OASIS main menu, press B then 4 to select Reports Utilities. To select Rebuild Files press N then 1 and select <C>onfirm Rebuild. Press Q then U to exit Reports Utilities.

Where copies information now has to be added to a record, select <N>ext or <P>rev to display the desired record on the screen. Select <C>opies, select <A>dd, type the relevant information in each of the fields and press Enter. When finished the option bar will read:

Do you want to add another copy . . . <Y>es <N>o <B>ulk

Select <N>o, select Esc twice, press Q then U to exit Library Management.
Library

Circulation

Section 1
Contents

Outcomes 63

Session 1
Setting up the Barcode Reader 65

Session 2
Set System Parameters for Circulation 69

Session 3
Generating a Calendar 75

Session 4
Borrower Loan Categories 79

Session 5
To Add a Borrower Loan Category 81

Session 6
Setting up Loans 83

Session 7
Refresh Borrowers 87

Session 8
To Set Borrowing Limits 91

Session 9
Overdue Parameters 93

Session 10
Borrower Details 95

Session 11
Printing ‘Borrowers’ Cards (from OASIS) 99
Outcomes

On completion of this section, participants will be able to:

✓ Set up the barcode reader
✓ Attach a portable barcode reader
✓ Set system parameters for circulation
✓ Generate a calendar
✓ Set borrower loan categories
✓ Set up loans
✓ Set due dates
✓ Download (refresh) borrowers from OASIS administration into OASIS library
✓ Refresh borrowers
✓ Set borrowing limits
✓ Enter overdue parameters
✓ Find borrower details
✓ Edit borrower details
✓ Change borrower barcodes
✓ Delete borrowers
✓ Print borrower cards
✓ Attach barcodes to borrowers cards
Setting up the Barcode Reader

A barcode reader should be purchased before starting circulation. This may be either portable or fixed. If only one reader is purchased, a portable one is preferable as it will be able to be used in portable mode and taken to the shelves for stocktake.

School Technology Support provides support for barcode readers that are on contract. Support for non-contract barcode readers is available from both manufacturers and suppliers.
The barcode reader, whether fixed or portable, cannot be attached to a fileserver. It must be used at a workstation. Before attempting to attach the portable barcode reader, ensure that both the barcode reader and the workstation are turned off. Attach the barcode reader to the workstation as per the diagram below.

Illustration: Daniel Rose 1997.
Once the barcode reader has been attached to the workstation, check that there is power to both the workstation and the barcode reader home base. Turn on the workstation followed by the barcode reader.

The current model of the ASP barcode reader stores information in the memory of the reader even when it is being used while connected to Home Base. It is therefore necessary to periodically clear the memory of the unit. The unit will eventually display a ‘Memory Full’ message if this is not done.

- To clear the memory, first disconnect the reader from Home Base
- At the ? prompt, press Func then press 19
- Press Yes when prompted to Erase Memory?

This will clear the memory.

- Reconnect the reader to Home Base

**ASP reader should remain attached to Home Base to remain charged.**
**Leave connected to Home Base and power supply during holiday periods. Reader can be turned off but Home Base is still connected to power supply.**

**Other barcode readers:**
If you are using a fixed barcode reader, refer to the manufacturer’s instructions for attaching the barcode reader.
Set System Parameters for Circulation

The teacher librarian needs to consider all the following options. Decisions should be made as part of the process of managing information to meet the needs of the staff and students of the school.

- The teacher librarian will log in to OASIS using a password with Administrator security level (8)

- At the main OASIS menu press B then 1 to select Library management

- Press C then 1 select System Parameters

Select <C>irc from the option bar. The following fields are highlighted:

**Default fiction resource loan category:**
The default Fiction loan category refers to the resource loan category which will automatically be offered to every resource which is given an F classification when it is entered in General Resources.
Resource Loan Categories should be set up in B2 D1

- If your resource loan category for Fiction resources is F then **type** F in this field and **press Enter**.
- If it is another letter, **type** that letter in the field and **press Enter**.

**Default non-fiction resource loan category:**
This field refers to the default resource loan category which is offered when entering Non Fiction resources in OASIS. It is best to select the most common category for Non Fiction resources for this field.

- If your Non Fiction resource loan category is G (for Non Fiction) type G in this field and **press Enter**.
- If it is another letter, **type** that letter in the field and **press Enter**.

**Password to override overdue loans:**
This password allows the operator to override overdue loans during borrowing. The password may be any word up to five characters.

- **Type** your selected password in this field and **press Enter**.

**Password to override maximum number of loans:**
This password allows the operator to override the maximum number of loans during borrowing. The password may be any word up to five characters.

- **Type** your selected password in this field and **press Enter**.
Password to override reserved items:
This password allows the operator to lend a resource to a borrower when it has been reserved for a different borrower. The password may be any word up to five characters.

- Type your selected password in this field and press Enter.

> The override passwords may be the same for all three categories. Having the same password for all three categories makes it easier for circulation operators as they only have to remember one password.

> The use of one password by library monitors could be a problem. Consider the issue carefully before allowing library monitors to override the standards the teacher-librarian has set up for library circulation.

Borrowing limit category description:
When establishing the maximum number of resources a borrower is allowed, the resource loan categories are divided into a number of groups, for example Fiction. All resources with loan categories other than Fiction are regarded as part of the group known as Other.

- Type Fiction in this field and press Enter

Term used to refer to time slots:
This refers to the most common unit of time in a school day during which materials may be borrowed. For primary schools this might be ‘lesson’ or ‘session’, for high schools it might be ‘period’.

- Type the appropriate word and press Enter

Student/staff module available (Y/N):
If students have been entered into the OASIS Administration module and you intend downloading (transferring) student details from the Administration module then Y (for Yes) must appear in this field. If you do not propose to use this downloading process and want to enter details manually, then N (for No) must appear in this field.
It is recommended that Y for Yes is selected. This ensures that student information maintained in Administration is able to be updated in the Library system.

■ **Type** Y (for Yes) and **press** Enter

**Default no. of days to expire reservations:**
A reservation for a resource is cancelled after the number of days entered here. A date is calculated and displayed in Reservations using this default value.

■ **Type** the number of days e.g. 7 (for one week) and **press** Enter

**Reservation notices printed (Y/N):**
■ If you wish to print reservation notices to be given to borrowers when their reserved resources become available, **type** Y (for Yes) and **press** Enter. Alternatively, **type** N (for No) and **press** Enter

If you select “No” you are not offered the next field.

**Days to hold items after notices printed:**
This field sets the number of days an item will be held after the borrower has been notified of the reservation.

■ **Type** the number of days e.g. 7 (for one week) and **press** Enter

**No. of idle seconds before time out applies:**
This field refers to how long the circulation screen is left idle after finishing a transaction before the screen reverts to the Enter Borrower’s Barcode Number OR Command option bar. Ninety-nine seconds is the longest time you can set. However, if you prefer that the screen doesn’t revert enter a zero in this field. Ninety seconds is recommended.

*A screen saver (Press any key) is included in the Loans program and is not affected by this field.*

■ **Type** the number of seconds and **press** Enter
Record loan history:
For the loan history of titles and borrowers to be recorded Y (for Yes) must appear in this field.

- Type Y and press Enter
Alternatively, if you do not wish to record loan histories, type N (for No) and press Enter.

Loan history is only available from the point in time at which this option was set to Yes. Loan history can be purged using the B2 R1 Purge option. This prompts for the specific year the operator wants to be purged.

The remaining two parameters are only available when the field OASIS Word available in the <L>ibrary section of System Parameters is set to No. This parameter may be changed back after completing the message fields.
Message to put on External Overdues: The message here will appear on all overdue notices for External Borrowers.
Message to put on Overdues to Family: The message entered here will appear on all overdue notices sent to families.

Heading for overdue notice:
This is the heading which will appear on all overdue notices.
Note that the school name will automatically print at the top of the report.

- Type in your heading eg. OVERDUE NOTICE and press Enter

Barcode parameters:

- Press B for <B> arcode from the System Parameters option bar.

- The first highlighted field is Match Accn - Barcode (Y/N). Unless you have particular reasons to match the two numbers type N (for No) and press Enter.

This field is available for those schools converting from non-OASIS systems. Do not select “yes” unless you have discussed the issue with School Technology Support.
Using a workstation with a barcode reader attached enables the barcodes to be scanned into these fields rather than typed. This assists in preventing incorrect allocation of barcodes due to typing errors.

- Check that the following resource barcode, borrower barcode and accession numbers offered by OASIS are accurate and available. If they are not, you may overtype them. Press Enter to accept each field.

_ACCESSION NUMBERS SHOULD BE 6 DIGIT NUMBERS EG. 0 0 1 2 3 4_

- If you are not using the Acquisitions module then leave the Order No field blank by pressing Enter. If you are using the Acquisitions module, type your next available order number in this field and press Enter.

.ORDER NUMBERS SHOULD BE 6 DIGIT NUMBERS EG. L00124

- Unless you are converting barcodes from another system, type N (for No) in the Special Barcodes field and press Enter.

- When complete press Esc twice and press Q then U to exit the Library Management module.

<F1> for help

SYSTEM PARAMETERS - BARCODE

Palm Tree Cent

Match Acn - Barcode (Y/N) : N
Next Barcode to Allocate : R010722520
Next Borrower Barcode : B000012520
Next Accessn No to Allocate : 028884
Next Order No to Allocate : L00124
Special Barcodes (Y/N) : N

Foreign Barcode 1

Identifying Character :
Position in Barcode (1-12) :
Rearranging Formula :

Foreign Barcode 2

Identifying Character :
Position in Barcode (1-12) :
Rearranging Formula :

Foreign Barcode 3

Identifying Character :
Position in Barcode (1-12) :
Rearranging Formula :

<Esc>
Generating a Calendar

A current calendar is essential for borrowing as OASIS cannot calculate due dates nor permit resources to be loaned unless a current calendar is generated. This section steps you through the process of generating a calendar and specifying holiday periods. You may find it helpful to get a list of all holidays and non-school days before starting to enter the dates. From the main OASIS menu press B then 2 to select Library Circulation.

- Press F then 1 to select Maintain Calendar
- From the option bar press G to <G>enerate
- The current year is offered. Press Enter to accept this or type the calendar year required and press Enter
- Press C to <C> to confirm generation of the calendar. This will take about two minutes

Note that the calendar is displayed on the screen. You can use the <F>ind option to move the cursor to specific dates. Days are marked as either S (School) or W (Weekend).
**Entering holiday periods:**

Once the calendar has been generated, you should specify the school holidays to ensure that resources are returnable during school time, not holiday periods.

- Add the main holidays first by selecting **<H>olidays** from the option bar.
- Type the first date of the holiday period to be specified and press **Enter**. Type the last date of the holiday period and press **Enter**.
- Press **C** to **<C>onfirm**.

Continue adding holiday periods in this manner.

- When you have finished adding the holiday periods press **Esc** to return to the calendar option bar. The dates you specified as holiday periods should now be marked as **H** (Holiday).

You can now enter public holidays and other single non-school days.

- Press **F** for **<F>ind** from the option bar. Type the date of the holiday eg. 25/04/97 (Anzac Day) and press **Enter**. The cursor will appear opposite this date.
- Press **E** for **<E>dit** from the option bar, type **H** in the highlighted field and press **Enter**. This marks the date as a holiday.
- Continue this process for all other holidays. When complete, press **Esc** to return to the Circulation menu.
<table>
<thead>
<tr>
<th>Date</th>
<th>Day</th>
<th>Classification</th>
<th>Loans</th>
</tr>
</thead>
<tbody>
<tr>
<td>19/6/97</td>
<td>Thursday</td>
<td>S</td>
<td>0</td>
</tr>
<tr>
<td>20/6/97</td>
<td>Friday</td>
<td>S</td>
<td>0</td>
</tr>
<tr>
<td>21/6/97</td>
<td>Saturday</td>
<td>W</td>
<td>0</td>
</tr>
<tr>
<td>22/6/97</td>
<td>Sunday</td>
<td>W</td>
<td>0</td>
</tr>
<tr>
<td>23/6/97</td>
<td>Monday</td>
<td>S</td>
<td>0</td>
</tr>
<tr>
<td>24/6/97</td>
<td>Tuesday</td>
<td>S</td>
<td>0</td>
</tr>
<tr>
<td>25/6/97</td>
<td>Wednesday</td>
<td>S</td>
<td>0</td>
</tr>
<tr>
<td>26/6/97</td>
<td>Thursday</td>
<td>S</td>
<td>0</td>
</tr>
<tr>
<td>27/6/97</td>
<td>Friday</td>
<td>S</td>
<td>0</td>
</tr>
<tr>
<td>28/6/97</td>
<td>Saturday</td>
<td>W</td>
<td>0</td>
</tr>
<tr>
<td>29/6/97</td>
<td>Sunday</td>
<td>W</td>
<td>0</td>
</tr>
<tr>
<td>30/6/97</td>
<td>Monday</td>
<td>H</td>
<td>0</td>
</tr>
<tr>
<td>01/07/97</td>
<td>Tuesday</td>
<td>H</td>
<td>0</td>
</tr>
<tr>
<td>02/07/97</td>
<td>Wednesday</td>
<td>H</td>
<td>0</td>
</tr>
<tr>
<td>03/07/97</td>
<td>Thursday</td>
<td>H</td>
<td>0</td>
</tr>
<tr>
<td>04/07/97</td>
<td>Friday</td>
<td>H</td>
<td>0</td>
</tr>
<tr>
<td>05/07/97</td>
<td>Saturday</td>
<td>W</td>
<td>0</td>
</tr>
<tr>
<td>06/07/97</td>
<td>Sunday</td>
<td>W</td>
<td>0</td>
</tr>
</tbody>
</table>
Borrower Loan Categories

Just as you had to specify the types of resources you have in your library, you also have to specify the types of borrowers. Setting borrower categories determines the groups of borrowers in OASIS Library. The categories distinguish between the different types of borrowers and the rights they have. The teacher librarian is responsible for making these decisions as part of the process of managing information to support the teaching and learning programs of the school. The recommended borrower loan categories are:

E...........External
D...........Student
S...........Staff

It is not appropriate to use more than one student code. The Refresh process in OASIS Library only allows the allocation of one code to new borrowers. Additional codes will make follow-up more time consuming once the Refresh is complete.
To Add a Borrower Loan Category:

From the Library Circulation menu, press D then 2 to select Borrower Loan Category.

- Press A to Add from the option bar

You can now enter the borrower code, description and master due date.

- To add the borrower category for Student, for example, type D in the highlighted category field and press Enter.

- Type Student in the description field and press Enter. The master due date field will be highlighted

  This should be the calendar date for current year when you require all resources for that borrower category to be returned.

- Type an appropriate date and press Enter. Continue adding borrower groups in the same manner.

- When all borrower groups have been added, press Esc.
<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Master Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>D</td>
<td>Student</td>
<td>01/12/00</td>
</tr>
<tr>
<td>E</td>
<td>External Borrower</td>
<td>08/12/00</td>
</tr>
<tr>
<td>S</td>
<td>Staff</td>
<td>19/12/00</td>
</tr>
</tbody>
</table>
Setting up Loans

Once borrower loan categories have been set up, each borrower group must be authorised to borrow resources. The loan period will also be determined at this point and can be altered for each borrower group e.g. Teachers may borrow Fiction for one term while Students may borrow Fiction for only two weeks. The teacher librarian is responsible for making these decisions as part of the process of managing information to support the teaching and learning programs of the school.

- **Press** D then 2 to select Borrower Loan Category
- Use the scroll ↑↓ keys to place the cursor next to a borrower category e.g. D for Student
- From the option bar **press** L for <L>oans
- **Press** A to <A>dd. You now have to specify which resource loan categories this borrower group is authorised to borrow and the length of the loan period
- Leave the highlighted bar blank and **press** [Enter]. A lookup file appears which contains your Resource Loan Categories
- Scroll ↑↓ the cursor to the category you wish this borrower group to be able to borrow eg. F for Fiction and press Enter.

- You may now specify (in days) the loan period for Fiction resources for students. If the loan period is, for example, two weeks, type 14 and press Enter.

  Note that OASIS automatically calculates the due date. Now add for example, G for General resources in the same manner.

- Continue to add resources to the borrower category and set appropriate loan periods.

- Press Esc when finished allocating all resource Loan Categories for that particular Borrower category.

- Press Esc again to return to the borrower loan categories first screen.

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
<th>Master Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>D</td>
<td>Student</td>
<td>12/12/97</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Resource</th>
<th>Loan Category</th>
<th>Period (Days)</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>F</td>
<td>Fiction</td>
<td>14</td>
<td>10/06/97</td>
</tr>
<tr>
<td>H</td>
<td>Heavy Demand</td>
<td>1</td>
<td>28/05/97</td>
</tr>
<tr>
<td>G</td>
<td>General</td>
<td>14</td>
<td>10/06/97</td>
</tr>
<tr>
<td>R</td>
<td>Reference</td>
<td></td>
<td>27/05/97</td>
</tr>
</tbody>
</table>

<F>ind  <E>dit  <A>dd  <D>elete  <PgUp>  <PgDn>  <↑>  <↓>  <Esc>
Now select another borrower loan category, e.g. S for Staff Borrower, and add the resource loan categories appropriately.

For staff you may wish to enter 0 days and manually set a return data eg. the end of each term.

Continue this process for each borrower loan category. When complete press (Esc) twice to return to the circulation menu and press Q then U to return to the main menu.

Note that for any resources which were designated as a part day loan in Resource Loan Categories, the due date defaults to today’s date.

Each category of borrower must be allocated EVERY resource category you wish them to be able to borrow, i.e. if you want students to be able to borrow Fiction, Non Fiction, Heavy Demand and Audio Visual then each of these resource loan categories must be allocated to the student borrower category together with the appropriate due dates. If a resource loan category is not allocated then the borrower will not be able to borrow that type of resource and any attempt to do so will result in an Unauthorized Loan message.

If a number of days is not specified, a specific date the resources are due can be entered. This is particularly useful for staff whose loans can be due at the end of the term / semester / year.
It is now time to enter the details for borrowers (e.g., Name, sex, roll class etc.). Rather than entering all the borrower details manually, you can copy the information from OASIS Administration onto floppy disk and transfer it into OASIS Library. Downloading (Refresh) of borrowers is only possible if your Office has OASIS Administration and has entered all student and staff data, and Y (for Yes) has been entered for the option ‘Student/Staff module available Y/N?’ in Circulation System Parameters.

It is recommended that a Rebuild and a Data Backup of your OASIS Library system be done before downloading borrowers in case problems occur.

To download borrower information you will need three new or reformatted blank formatted floppy disks. Two of these disks are required for the transfer of student data. One should be labelled ‘Student’ and the other ‘Family’. Another disk is required for staff, so label the third disk ‘Staff’.

The first part of this process needs to be carried out at a workstation logged into the OASIS Administration module. This can be accessed from the library provided the operator has a password with the appropriate security level, and that no Administration operators are logged into the Student Information module at the time the information is being saved to floppy disk. Negotiate with Administration staff to work out the most appropriate time and circumstance for access to the downloading option for your school.
At an OASIS workstation logged into the Administration module:

- Ensure that no users are logged into the Student Information Module

- From the main OASIS menu press E then 2 to select Student and Staff and press \(\text{PgDn}\)

- Press I then 3 to select Export to Library

The option bar offers the choice of \(<\text{M}>\)ember of staff or \(<\text{S}>\)tudent.

We will do the students first so select \(<\text{S}>\)tudent.

The option bar now offers \(<\text{E}>\)xport or \(<\text{R}>\)efresh.

The option bar now instructs you to insert a blank disk. Remove the boot disk (if it is the floppy disk drive) and insert the disk you labelled STUDENT.

- Press C to \(<\text{C}>\) onfirm.

When this is complete, the option bar asks you to insert a blank Family disk.

- Insert the disk labelled Family and press C to \(<\text{C}>\) onfirm.

  When the process is complete, press \(\text{Esc}\)

- Press I then 3 to select Export to Library again and this time select M for \(<\text{M}>\)ember of staff. The same process is followed for staff as for students except that when Refresh is selected for staff, the option bar prompts. Do you want address information refreshed?

  \(<\text{Y}>\)es \(<\text{N}>\)o \(<\text{Esc}>\)’

Only one disk is required for transferring staff details.
It is recommended that <N> be selected for details of staff information. This will ensure that address and telephone numbers of staff is not transferred to OASIS Library. This information would be accessible to library operators including student monitors.

When complete, remove your disk, and replace their boot disk in the disk drive. It is recommended that ‘write protect’ tabs are placed on your disks to prevent any possible overwriting of the data.

The second part of the process is to transfer the information on the floppy disks into OASIS Library. Remember that before downloading data into the OASIS Library system, you should have done both a B4 N1 Rebuild and a Data Backup. : B4 K1.

**At a workstation logged into OASIS Library:**
Take your disks to a workstation with a floppy disk drive. Ensure that all other users are logged out and that the password is administrator level not clerical level.

- From the main OASIS menu press B then 4 to select Library Reports Utilities and press **PgDn**

- **Press R then 3 to select Refresh Students.** OASIS prompts you enter the borrower loan category for new students. **Type** the desired borrower category, e.g. D for Student and press **Enter**

- OASIS will then offer the next available borrower barcode (as it appeared in the Barcode option in System Parameters). Ensure that this barcode is available. If necessary, you may overtype or scan the barcode offered with another barcode. **Press Enter** to accept the barcode.

*The borrower barcode must be the first of a run of new barcodes that have NOT been previously allocated. The run must be sufficient to cater for the number of new students about to be downloaded into OASIS Library.*
OASIS then prompts you to insert the Student disk in the disk drive. Insert the Student disk and press C to <C>onfirm.

When the processing is complete, OASIS prompts you to insert the Family disk. Remove the student disk, insert the Family disk and press C to <C>onfirm. This may take some time to process.

When that is done, OASIS returns to the Library Reports Utilities menu.

To transfer the staff details:

Press R then 4 to select Refresh Staff

Do not select IMPORT.

Type the borrower loan category for staff and press Enter

Press Enter again to accept the borrower barcode offered or overtype and press Enter if required

Insert the Staff disk and press C to <C>onfirm

OASIS will process the request. When complete, press Esc to return to the Library Reports Utilities menu and then press Q then U to return to the main menu

You have now completed transferring student and staff details.
Session

To Set Borrowing Limits

The teacher librarian is responsible for making these decisions as part of the process of managing information to support the teaching and learning programs of the school. Once borrower information have been added you need to specify the maximum number of items which can be borrowed by staff, students or external borrowers.

- From the main OASIS menu press B then 2 to select Library Circulation
- Press I then 2 to select Set Borrowing Limits

How to set student borrowing limits:

- Select Stu<D>ent from the option bar
- Start with your first scholastic year by typing eg. 7 for Year 7 in the highlighted scholastic year field and pressing Enter

- At the Number of Fiction Items Allowed field, type the maximum number of Fiction resources you will allow that particular scholastic year to borrow eg 2, and press Enter
At the **Number of Other Items Allowed field**, **type** the maximum number of other resources (this includes Non Fiction) you will allow that particular scholastic year to borrow eg 3, and **press Enter**

**Press C** to **<C>onfirm** from the option bar to confirm these borrowing limits.

All students in that particular scholastic year now have the same maximum number of loans. **Press Esc**

Continue the above process for all scholastic years. When complete, **press Esc**

**To set staff borrowing limits:**

- **Press S** for **<S>taff** from the option bar
- **Type** the maximum number of Fiction loans you wish staff to be able to borrow and **press Enter**
- **Type** the maximum number of other loans for staff and **press Enter**
- **Press C** to **<C>onfirm** from the option bar. When complete **press Esc**
- Follow the same procedure for External borrowers but **select** the **<E>xternal** option
- **Press Esc** twice to return to the Circulation menu

*These limits may be varied for INDIVIDUAL students, staff, or external borrowers by editing the information in Borrower Details B2 A1.*
Overdue Parameters

The teacher librarian is responsible for making these decisions as a part of the process of management of information to support the teaching and learning programs of the school.

This function allows you to add and maintain messages and fines for overdue items.

- From the Library Circulation menu press G then 1 to select Overdue Parameters
- From the option bar press A to <A>dd
- Type the minimum number of days a book can be overdue before you notify the borrower, e.g. 5 and press Enter
- If you impose fines, type the amount in the next field e.g. $1.00 (don’t forget the decimal point) and press Enter
- If you don’t impose fines, press Enter to leave this field blank
You can now type a message which will appear on the notice given to borrowers whose books are overdue.

For example, Please return your overdue book(s) to the Library. Type your message and press Enter.

You may continue to add additional number of days overdue in the same manner. OASIS will automatically place the correct message on the overdue notice depending on how many days the item is overdue.

When finished press Esc twice to return to the Circulation menu.

These parameters may be changed at any time.

<table>
<thead>
<tr>
<th>Days Overdue</th>
<th>Fine</th>
<th>Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>0.00</td>
<td>Please return your overdue book to the library.</td>
</tr>
<tr>
<td>10</td>
<td>0.00</td>
<td>Please see the Teacher Librarian.</td>
</tr>
<tr>
<td>≥ 15</td>
<td>0.00</td>
<td>Borrowing privileges are suspended.</td>
</tr>
</tbody>
</table>

<F1> for help            OVERDUE PARAMETERS         Palm Tree Cent

<F>ind  <E>dit  <A>dd  <D>elete  <PgUp>  <PgDn>  <↑>  <↓>  <Esc>
Borrower Details

This option allows you to view and edit details for each borrower individually. OASIS will automatically have entered personal details and details such as number of items allowed if you followed the previous instructions.

Finding borrower details:

- From the Library Circulation menu press A then 1 to select Borrower Details

- Press F for <F>ind

- Press <S>urname or <B>arcode. Type the borrower’s surname or barcode (scan the barcode) and press Enter

The details for that borrower are displayed

<table>
<thead>
<tr>
<th>Barcode</th>
<th>:B0018352520(Student)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Surname</td>
<td>Bryant</td>
</tr>
<tr>
<td>Given Names</td>
<td>Gerald</td>
</tr>
<tr>
<td>Loan Category</td>
<td>D Student</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>29/04/80</td>
</tr>
<tr>
<td>Sex (M/F)</td>
<td>M</td>
</tr>
<tr>
<td>Roll Class</td>
<td>8A</td>
</tr>
<tr>
<td>Scholastic Year</td>
<td>8</td>
</tr>
</tbody>
</table>

Number of Items Allowed
- Fiction : 2
- Other : 2

Comment :
Message :

Family Mail. Title: Mr & Mrs Bryant Phone (Home) : 284-5672
St No./ Property : 34 Phone (Work) :
Street Name : Main St - Father : 284-5111
Town/Suburb : SIMPSON PC: 2999 - Mother: 284-3322

<F1> for help BORROWER DETAILS Palm Tree Cent
**Editing borrower details:**
If you wish to alter any details you may do so by selecting <E>dit from the option bar. You may change any HIGHLIGHTED field.

**Comments and messages:**
Comments and messages may be added using the <E>dit option. If you add a message here, when the borrower next borrows a resource, OASIS will ‘beep’ and the message will automatically appear in the option bar. The option bar will ask if the message should remain or be cleared. You may select Y (for Yes) or N (for No).

A comment will remain as part of the borrower details until it is overtyped or deleted. It will appear each time a borrower loans an item. It can be a comment that is useful to both the library staff and the student e.g.” Use large print material whenever possible” for a visually impaired student.
It is important to remember that the comment is visible to the borrower so it should not be negative or demeaning in any way.

A message will appear each time a borrower loans an item. Once the message is acted upon the library operator can select Y for Yes to clear it. It is useful to remind library operators that they have a message for the student e.g. messages relating to property that has been left in the library.

**Changing a borrower’s barcode:**
If a barcode needs to be changed (eg. student has lost his/her library card) select <C>hange from the option bar. The barcode field is now highlighted and you can enter a new barcode number.

**Viewing a borrower’s loans:**
One way of checking which resources a borrower has on loan is to select <L>oans from the option bar in Borrower Details.
OASIS will display a list of the borrower’s loans or indicate that there is **No data on file**. It is possible to renew loans at this point by matching the cursor to the item to be renewed and selecting <R>enew.

**Viewing a borrower’s reservations:**
If you wish to check which items a borrower has reserved, select <R>eserve from the option bar. OASIS will display the reservations or indicate that there is **No data on file**.

Remember that every time you Refresh students or staff, if the Administration system is up-to-date, borrowers who have left will automatically be deleted. You may choose to wait until a Refresh is done, rather than delete individual students.

Borrowers who still have resources on loan cannot be deleted from the system until the items are returned. Even when students have been refreshed at the beginning of the next school year, students from the previous year who have left the school but still have overdue resources will NOT be deleted.

To enable the system to clear these borrowers next time a refresh is performed:

1. Return the overdue item by typing in the barcode number in B2 E2 Returns
2. Update the status for the item in B1 D1 by changing the status to M for missing in the copies details. Add the date in the next field and add a comment e.g. Not returned by Martin Bender when he transferred to Palm Tree North School.

- Press (Esc) to return to the Library Circulation menu and then press Q then U to return to the main OASIS menu.
A large number of schools have their borrowers’ cards commercially printed or designed and printed using a Desktop Publishing program. OASIS provides the option of printing borrowers’ cards if you have decided against having the cards made those ways.

- From the main OASIS menu press B then 4 to select Library Reports Utilities. Press C then 1 to select Borrowing Cards.

- From the option bar select the desired size, eg. <R>egular. (Some of the design options are not available for small cards). Sample of the two sizes can be found in the OASIS Library Reference Manual Volume 2 on pages 7-37 and 7-38.
■ Select the appropriate borrower category from the option bar, eg. Student

■ Press Enter to accept Y for the barcode to be put on the front of the card (this refers to whether or not you are going to attach barcodes to the front of the card). Barcodes need to be stuck on the cards for borrowing purposes

■ OASIS will ask if you would like to print the scholastic year. It is preferable to select N (for No) so that a card will not expire or need updating. Press Enter. (If Y is selected, each student’s scholastic year, for up to 3 years, will appear on the card. However, since only three years can appear, cards may have to be reprinted after the three years have expired.)

■ OASIS now asks if you want the barcode to be printed on the front of the card. Type N (for No) since you have already indicated that barcodes will be attached to the card and press Enter.

> Printing the barcode No. is a great idea when attaching the barcode label. Provides a double check on the number without having to refer back to Borrower detail.

A window appears with a card format. You now have the opportunity to personalise the card for your school.

> Note that there is room for a photograph.

■ From the option bar press E for Edit. Type the name of your school and press Enter. There are two rows available for the school name.
Note that the field is not very long and you may have difficulty fitting in your school name if it is long.

The Expiry Date field is now highlighted. Type the date the card will expire and press Enter.

Printing borrowers cards:

The option bar offers a selection of five different groups for printing out the cards. You may select any of these but if you would like to check whether you like the appearance of the card before printing a lot of them, press I for Individual.

Type a student’s name and press Enter.

Print the card to screen or paper in the usual manner.

If you like the appearance, print a whole scholastic year or the staff. OASIS will print 8 cards per sheet. If you are using cardboard you may have to manually feed each sheet.

When finished, press Esc to return to the Library Reports Utilities menu and then press Q then U to the main OASIS menu.

After printing, the cards should be cut up and the barcodes will need to be attached.

If your school has a very long name extra lines can be gained in the school name field by entering N in the Barcode To Be Put on Front of Card (Y/N) field. There will still be sufficient room for a barcode.
Contents

Outcomes
Session 1
Circulation Barcodes
Session 2
Lending Resources
Session 3
Returning Resources
Session 4
Reservations
Session 5
Bookings
Session 6
Resource Boxes
Session 7
Class Loans
Session 8
Printing Overdue Notices
Session 9
Loan Statistics
Session 10
Changing Resource Loan Categories
Outcomes

On completion of this section, participants will be able to:

✔ Use the circulation barcodes to move between options
✔ Use the circulation barcodes to perform specific operations
✔ Lend resources
✔ Return resources
✔ Record reservations
✔ Record bookings
✔ Create, lend, return and disband resource boxes
✔ Complete class loans
✔ Print overdue notices
✔ Change resource loan categories temporarily
All schools received a laminated set of Circulation command barcodes with OASIS v2 LIBRARY TUTORIAL MANUAL. There is also a copy in the Reference Manual. Keep the set of command barcodes as near as possible to your circulation terminal.

**Sample barcodes:**

The commands displayed on this sheet can be entered by:
Wanding the appropriate barcode or typing the appropriate word and pressing Enter.

The circulation barcodes consist of commands used to move between options (eg. Loans and Returns) and commands used to perform operations (eg. Name and Item).
Barcode commands used to move between options:
These commands are used whenever the option bar prompts
Enter Borrower’s Barcode Number OR Command or there is
a blank highlighted field such as a barcode field.

- You can make a menu selection without returning to the
  menu screen by entering or wanding the command.
  This is a shortcut method to move between these menu
  selections:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>E1</td>
<td>LOANS</td>
</tr>
<tr>
<td>(When typing the word, use LOAN, not LOANS)</td>
<td></td>
</tr>
<tr>
<td>E2</td>
<td>RETURNS</td>
</tr>
<tr>
<td>E3</td>
<td>RESERVATIONS</td>
</tr>
<tr>
<td>E4</td>
<td>BOOKINGS</td>
</tr>
<tr>
<td>E5</td>
<td>RESOURCE BOXES</td>
</tr>
</tbody>
</table>

For example:
- From the main OASIS menu press B then 2 to select
  Library Circulation
- Press E then 1 to select Loans
- Wand the RETURN command barcode or type
  RETURN and press Enter. Notice that you have now
  moved to the returns screen
- Wand the command RESERVE or type RESERVE and
  press Enter. Notice that you have moved to the
  reservations screen. Wand or enter LOAN to return to
  the loans screen. Press Esc to return to the Circulation
  menu
**Barcode commands used to perform operations:**
The commands Borrower, Override, Finish, Renew, Item and Name are used within menu choices to perform operations. These commands can be used in a variety of ways and the following descriptions outline the steps involved. You may like to practice using the commands in Palm Tree Central Tutorial.

**BORROWER command:**
After a borrower’s barcode number or name has been entered in E1 Loans, entering this command displays all items currently on loan to that borrower. A printout to screen or paper of all the borrower’s current loans can then be generated by selecting *<L>*ist from the option bar.

**OVERRIDE command:**
This command is used to perform two different operations:
(a) To override an unauthorized loan. When the unauthorized loan message is displayed, scanning this command will enable the transaction to continue.
(b) To change the date due of a resource. The override command is scanned after the resource barcode has been entered. The due date field is highlighted and can then be changed.

**NAME command**
This command is used when you do not have the borrower’s barcode number. When the option bar prompts *Enter Borrower’s Barcode Number OR Command and NAME* is entered, the borrower’s surname can be entered in the option bar. A lookup window of borrowers appears. The correct name can then be selected by matching the cursor to it and pressing *(Enter)*.
ITEM command
This command has a number of applications:

(a) In E1 Loans, when a resource barcode has just been entered, if ITEM is entered in the highlighted barcode field, the circulation and reservation details of the resource are displayed.

(b) When ITEM is entered at the option bar, the operator can find which borrower has a nominated title on loan.

- At the Enter Borrower’s Barcode Number’ prompt, wand ITEM or type ITEM and press Enter. The option bar prompts you to enter the title
- Type your title
- A lookup window appears with the cursor pointing to the nearest correct title. If this is correct press Enter
- Alternatively, match the cursor to the correct title and press Enter

The screen displays the details of the resource as well as the current borrower OR it displays a message to indicate that the resource is available for loan.

- If <R>eservations is selected from the option bar following the procedure described above, a listing of all borrowers who have reserved the item is displayed or the option bar displays the message

The item command can also be used to allocate a temporary barcode to a resource.

- In Loans, after wandng the borrower’s barcode, type a temporary number or word (see note below) in the barcode field and press Enter. An invalid barcode message appears and the number or word you typed disappears from the barcode field
In the case of an item which is not barcoded the ISBN number could be used. If the resource is a piece of equipment, the name of the resource could be used eg. extens (for extension cord). This field only allows 6 characters.

- **Type** ITEM in the barcode field and **press** (Enter). A window appears which allows you to type the title of the resource followed by the loan category you wish to assign (this will determine the due date for the loan).

- **Enter** the title and the loan category to be used.

  The number or word used as a temporary barcode now appears in the barcode field.

**WARNING:** DO NOT USE ANY OF THE CIRCULATION COMMANDS AS TITLES FOR TEMPORARY LOANS. OASIS WILL BE UNABLE TO ALLOW THE RETURN OF SUCH ITEMS.

The title appears as you typed it and the due date is recorded. When the resource is returned the temporary barcode and title are removed from the system.

When the item is returned, type in the ISBN number if you used it, or the word that was used as a temporary barcode. If the ISBN number is not used, you may need to keep a note of the word or number used as a temporary barcode so that the item can be returned.

**RENEW command**

This command is used to renew a loan for a borrower. The borrower’s barcode is entered followed by the item’s barcode. Where the item is already on loan to the borrower, the RENEW command is displayed and can be used to renew the loan.
To renew a resource:

- In E1 Loans, **wand** the borrowers’ barcode number
- **Wand** the barcode of the resource to be renewed
- When prompted to RENEW, **wand** the command RENEW. The resource is re-issued to the borrower and OASIS calculates the new due date. If, however, the item for renewal is overdue, you must use the password set in System Parameters to override overdue loans. The item can then be renewed

**FINISH command**

This command can be used to end some operations and can be used in place of Esc.
Lending Resources

To process a loan:

- From the main OASIS menu **Press** B then 2 to **select** Library Circulation.

- Then **press** E then 1 to **select** Loans.

- **Wand** the borrower’s barcode or **enter** NAME in the option bar (if using NAME, follow the instructions above under NAME).

A screen appears which has the borrower details in the top half. A highlight appears in the lower half of the screen.

*Note that the title, due date and the resource loan category of the resource being borrowed are displayed. It is good practice at this point to ensure that these details are correct.*

- Continue **wanding** resource barcodes until all the resources the borrower requires are recorded.
**Finishing the loan transaction:**
When finished with a borrower, **wand** across the **FINISH** barcode or **press** (Esc). Alternatively, you may leave the screen as is. When a new borrower wishes to borrow you can enter his/her barcode and his/her details will appear on the screen.

OASIS is ready to lend resources to the new borrower.

The screen will return to the Enter Borrower’s Barcode Number or Command option bar after the time-out period set in System Parameters.

**When operating Loans, OASIS may ‘beep’ and the following messages may be displayed:**

**Maximum loans reached:**
OASIS will ‘beep’ and display the Maximum loans reached message when the borrower has reached the maximum loans allocated in Borrower Details. You may either **press** (Esc) and not loan the resource or enter the password defined in System Parameters to override the maximum number of loans and continue lending resources to the borrower.

*The resource has not been loaned if you press (Esc).*
*The password will not appear on the screen.*

**Overdue loans:**
If the borrower has any overdue loans OASIS will ‘beep’ and list the overdue resource(s). You may either **press** (Esc) if you do not want that borrower to borrow any more resources or type the password which was defined in System Parameters to override overdue loans, **press** (Enter) and continue to lend resources.

*The resource has not been loaned if you press (Esc).*
**Invalid barcode:**
This message indicates that the barcode for the resource has not been entered in General Resources, or that the barcode has been entered incorrectly. Wand again just to make sure. If the message appears again, check the details of the item in General Resources.

**Unauthorized loan:**
This message most commonly indicates that the borrower’s loan category has not been authorized to borrow items with a particular resource category or that the due dates have expired. The message appears with a 2 letter code eg Unauthorized Loan E P’. This indicates that, for example, borrowers with a loan category E (External borrowers) have not been authorized to borrow resources with a loan category periodicals.

Regardless of the reason, the loan transaction can be continued by using the Override command.

**Item reserved by another borrower:**
This message indicates that the resource is held for another borrower. When the resource’s barcode has been entered and a reservation exists, the screen displays the borrower who has reserved the resource. The password to override reserved items (which was defined in System Parameters) may be used to allow the loan to continue.

**Already on loan:**
This message indicates that the resource is currently recorded against another borrower. Return the resource by using the RETURN command and then entering the resource barcode. The resource can then be lent to the new borrower.
**Messages:**
If you record a message in Borrower Details it will be displayed in the option bar and OASIS will ‘beep’ to draw your attention to it. You may then elect to clear or leave the message by selecting Y (for Yes) or N (for No) from the option bar.

*The screen will automatically display the ‘Press any key’ screen saver after a specified period of time this is part of the OASIS program and is independent of System Parameters.*
Session

Returning Resources

The menu option RETURNS cancels the loan transaction for an individual borrower.

This option can be accessed via the Circulation menu by pressing E then 2 to select Returns or by using the RETURN command. A screen appears which displays the highlighted barcode field.

- **Wand** or enter the barcode of the resource being returned. The resource details are displayed as well as the name of the borrower. Resource and borrower information is displayed about the item being returned.

- Continue returning further resources in the same manner.
Barcode : 
Title : Usborne guide to the supernatural world
Author : Maple, Eirc; Humberstone, Eliot; Myring, Lynn
Shelf Location : 133 MAP Accession No : 028758
Status : C Accessioned : / /
Loan Status : G General Cost : 0.
Borrower : Gerald Bryant 8A Times Borrowed : 4

When operating Returns OASIS may ‘beep’ and the following messages may be displayed:

**Item not currently on loan:**
This message indicates that either the resource has not been loaned to a borrower or an invalid barcode has been entered.

**Item belongs to a resource box:**
This message indicates that the resource has been assigned to a resource box (resource boxes will be explained in further detail later in this booklet). The resource should be returned to its resource box.

**Overdue by ... days:**
If a resource is overdue, OASIS ‘beeps’ and displays the number of days it is overdue. Action is not required and you may continue returning books.

**Reserved:**
This message indicates that the resource being returned has been reserved. The reservation details are displayed and a reservation notice can now be generated. The resource can be put aside for collection.
Reservations

This option is used to reserve items which are currently on loan. It can be accessed via the Circulation menu by pressing E then 2 to select Reservations or by using the command when in one of the other circulation options (E1-E5).

- Access reservations
- Enter the borrower’s barcode number

If the borrower already has books reserved these will appear in the lower half of the screen. If there are no reservations the option bar indicates No data on file, press A to Add or press Esc.

- Press A to Add. You can add by either Title or Barcode

Title is more common.

- Press T for Title. Type the title to be reserved in the highlighted bar and press Enter. A lookup window appears with the cursor pointing to the nearest correct title
- If this is correct press Enter or scroll ↓↑ through to find the correct title and press Enter.

- The ‘Expires’ field is highlighted. This is the date on which the reservation will be cancelled. A default expiry date appears (based on the number of days to expire reservations which was defined in System Parameters). Accept this by pressing Enter or overtype it with an appropriate date eg. if the item is required for an assignment type in a date appropriate to when that assignment is due. If the borrower is happy to accept the item at any time type in a date closer to the end of the year and press Enter.

- The option bar also displays the following options:
  <D>elete: allows the reservation to be deleted. Confirmation is required

  <L>oans: moves the screen to the Loans option and allows resources to be borrowed.

  <B>ookings: moves the screen to the Bookings option and resources can be booked.

  <R>esources: moves the screen to the Resource Boxes option and resource boxes can be created.
**Copies currently available:**
The resource being reserved is available and can be borrowed.

**Already reserved:**
Indicates that other borrowers have reserved the item.

- Press C to <C>onfirm

The option bar will display how many reservations exist for this resource.

Press I for <I>tem from the option bar and the resource appears with the name of the previous reserver.

**Press** Esc and **press** C to <C>onfirm and the new borrower will be added to the reservation list.

**INVALID loan:**
Indicates that authorisation has not been allocated to link the borrower and resource. The resource is not reserved. e.g. accessing by linked title rather than title proper.

**Messages:**
As recorded in Borrower Details.

*It is not possible to reserve individual resources from a Resource Box.*
Bookings

This option is used to book resources for part of a day. ONLY resources whose resource loan category was designated part day loan in Resource Loan Categories can be booked. ONLY borrowers who have had the resource loan category added to their borrowing rights may book these resources.

The Bookings option can be accessed via the Circulation menu by pressing E then 4 to select Bookings or by using the command when in one of the other circulation options (E1-E5).

- Access bookings
- Enter the borrower’s barcode number. The borrower’s details are displayed at the top of the screen and the details of the booking at the bottom. If a borrower had already made a booking this will be displayed. Otherwise a No data on file message is displayed
To add a booking:

- **Press** A for <A>dd

You may enter the resource by title or barcode.

- **Press** T for <T>itle. Type the title in the highlighted bar and **press** Entr

A lookup window appears.

- If the title is correct **press** Entr
- Alternatively, scroll ↓↑ to the correct title and **press** Entr
- **Type** the date of the booking and **press** Entr.
Resource boxes

This option is used to group a collection of resources so that they can be borrowed in bulk and only the barcode of the resource box needs to be recorded, thus reducing handling. Whilst it is time consuming to set up resource boxes the long term benefits make it worthwhile e.g. class set of dictionaries.

Before attempting to set up a resource box, gather the collection of resources you wish to put in the resource box. This group of resources might be for a unit if work e.g. Transport, or a kit with many components which you would like to be able to lend individually.

Before using this option in Loans the following steps must be completed:

Adding the resource box to general resources

The resource box container e.g. crate, bag or whatever must be entered in OASIS and allocated a barcode.

- From the main OASIS menu press B then 1 to select Library Management
- Press D then 1 to select General Resources
- Press A to <A>dd
In the title field enter a resource box description container entitled eg. Resource box No. 1, Transport resource box or Prejudice project.

Enter any other relevant details in the appropriate fields. Ensure it has a location, classification and suffix.

- When offered a barcode, check that the barcode is correct and available, if so accept it by pressing \texttt{Enter}. Alternatively, enter the correct barcode.

It is \textsc{ESSENTIAL} to allocate a barcode to the resource box.

- Attach the barcode to the container.

Do not give the resource box an accession number.

- \textbf{Press} \texttt{Enter} to leave the field blank.

The resource box must be allocated the resource loan category for resource boxes.

- \textbf{Type} the appropriate resource loan category and \texttt{press Enter}

\texttt{Enter} details in other fields if appropriate.

Ensure that all resources which will be included in the box have already been entered in General Resources and have barcodes allocated.
Press (Esc). Quit from Library Management and return to Resource Boxes Selection (B2 E5)

Adding resources to a resource box:
- Wand or enter the barcode number of the resource box.
- From the option bar press A for <A>dd. The barcode field is highlighted.
- Wand the barcode of the first resource being added to the resource box. The barcode and the title will appear.
- Wand the barcodes of the other resources to be included in the resource box. These resources will now become members’ of the resource box. You may add more resources at a later date. The status of each resource is displayed ie. whether the item is in the box or on loan’.

<table>
<thead>
<tr>
<th>Barcode</th>
<th>Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>R002902520</td>
<td>Birds and mammals</td>
<td>IN</td>
</tr>
<tr>
<td>R008112520</td>
<td>Woof!</td>
<td>IN</td>
</tr>
<tr>
<td>R008522520</td>
<td>A - Z of Australian Wildlife</td>
<td>IN</td>
</tr>
<tr>
<td>R008532520</td>
<td>Birds</td>
<td>IN</td>
</tr>
<tr>
<td>R008632520</td>
<td>Bush dwellers of Australia</td>
<td>IN</td>
</tr>
<tr>
<td>=&gt; R008642520</td>
<td>Little birds, big birds</td>
<td>IN</td>
</tr>
<tr>
<td>R008672520</td>
<td>Ginger the Kitten</td>
<td>IN</td>
</tr>
<tr>
<td>R008682520</td>
<td>The new cat handbook : care, nutrition, diseases and</td>
<td>IN</td>
</tr>
<tr>
<td>R009822520</td>
<td>Cat in a flap</td>
<td>IN</td>
</tr>
</tbody>
</table>

Press (Esc) three times to return to the Library Circulation menu.
Lending a resource box:
Once set up, the resource box can be lent as a whole unit or individual components can be borrowed in the normal manner.

From the Library Circulation menu press E then 1 to select Loans or use the loan command if in Returns, Reservations, Bookings or Resource Boxes.

- Enter the borrower’s barcode number.
- Wand the barcode of the resource box container. All resources within that box are included in the loan to that borrower.

If you have elected to make the resource box loan category available for a part day loan OASIS will require you to enter the periods for the loan.

Printing a contents list of a resource box:
It is useful to print a list of contents of the resource box. This could even be attached to the container so that borrowers know exactly what should be in the box.

- From Page 2 of the Circulation Menu press M then 3 to select Resource Box Listings.
- The option bar prompts you to select <A>ll or <S>elect resources boxes. If you only want to print the contents of a specific resource box, choose <S>elect. Alternatively, select <A>ll.
- If you chose <S>elect, OASIS prompts you to enter the barcode of the resource box. Enter the barcode in the first field, press Enter. Enter the barcode again or the barcode of the last box in the range you want to print and press Enter.
- Print in the normal manner.
Returning a resource box:
When returning resource boxes it is important to ensure that every component is returned. For that reason OASIS requires that you enter the barcodes of all returned resources.

- If you are in E5 Resource Boxes, scan or type the barcode of the resource box into the option bar and press Enter.

- From the option bar press R for <R>trn. OASIS immediately displays the returns screen. Alternatively, access Returns from where you are.

- Return each item in the box by wanding or entering the resource barcode. When the item is returned OASIS beeps and displays the message ‘Item belongs to a resource box’. This is normal and is a reminder to the operator that the resource should go back in the resource box.

  If a returned item is overdue AND it belongs to a resource box, the overdue message Overdue by ... days will appear on the returns screen as it takes precedence over the Item belongs to a Resource Box message.

- Return the resource box container by wanding across the barcode of the box.

Disbanding the resource box:
If the items are no longer required for the resource box they need to be deleted as members of the box.

- Press E then 5 to select Resource Boxes from the Circulation menu. Wand or enter the resource box barcode number. The contents of the box will be displayed.

- Place the cursor against the first resource to be removed from the box and select <D>elete from the option bar. Select <C>onfirm and the resource will be removed from the contents of the resource box.
Continue this process until all items in the box have been deleted as members.

The resource box can remain in General Resources and can be used for a different collection of resources in the future.

In resource boxes the option bar displays the following options:

**<D>elete:** This option deletes the resource indicated by the pointer. Confirmation is required.

**<C>nt:** This option counts the total number of resources in the box. It displays the number of items on loan and the total number in the resource box at the top of the screen e.g. ON LOAN 0 of 28

**<B>kng:** The Bookings option is displayed and resources can be booked.

**<L>n:** The Loans options is displayed and resources can be borrowed.

**<R>trn:** The Returns option is displayed and resources can be returned.

**Reser<V>e:** The Reservations option is displayed and resources can be reserved.

When operating Resource Boxes OASIS may ‘beep’ and the following messages may be displayed:
**Invalid barcode:**
Indicates that the resource’s barcode has not been included in General Resources.

**Already exists:**
Indicates that the resource has already been allocated to the resource box.

**Belongs to another resource box:**
Indicates that the resource has already been allocated to another resource box. The barcode of the resource box is displayed as part of the message.
Class loans is used to issue library resources to a class so that teachers can then lend individual resources to their students. The resources may have been selected by the librarian and sent to the class or they may have been selected by students following a visit to the library. The resources can be lent to the students by their teacher in the classroom.

The following steps are necessary to record the class loan:
(a) Instructions to the teacher are recorded on an issue sheet;
(b) The issue sheet and the appropriate set of resources are sent to the teacher;
(c) The teacher issues the resources to the students and records the student’s name and barcode on the issue sheet;
(d) The issue sheet and the non-issued resources are returned to the library and the details are entered in OASIS Library.

**Teacher instructions:**
- From the Library Circulation menu **press** N then 1 to **select** Teacher Instructions.
- The pre-written instructions to teachers are displayed.
- If you wish to alter these instructions **press** E for <E>dit from the option bar and edit the text as you wish.
- **Press** Enter after each line.
- **Press** Esc when finished to return to the Circulation menu.
Loan items:
This option is used to record the items which are to be issued by the teacher to students. It also nominates the teacher responsible for issuing the resources.

- Press N then 2 to select Loan Items.
The borrower field is highlighted.

- Enter the teacher’s borrower barcode.

- In the due date field type the date that the class loan is to be returned and press Enter.

- Wand or enter the barcodes of the resources to be issued. The title of each item appears.

- When finished, press Esc or use the FINISH command.

- Press C for <C>onfirm to confirm the class loan.

- Press P for <P>rint from the option bar to print the list of items together with the instructions to the teacher.

<table>
<thead>
<tr>
<th>Title</th>
<th>Barcode</th>
<th>Borrower Number</th>
<th>Name</th>
<th>Roll Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wild places of Australia</td>
<td>R000322520</td>
<td>:<em>:</em>:<em>:</em>:<em>:</em>:<em>: :</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Plants of prey in Australia</td>
<td>R002892520</td>
<td>:<em>:</em>:<em>:</em>:<em>:</em>:<em>: :</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Building conservation in Australia</td>
<td>R003002520</td>
<td>:<em>:</em>:<em>:</em>:<em>:</em>:<em>: :</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dot &amp; circle: a retrospect</td>
<td>R003032520</td>
<td>:<em>:</em>:<em>:</em>:<em>:</em>:<em>: :</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The world book university</td>
<td>R003152520</td>
<td>:<em>:</em>:<em>:</em>:<em>:</em>:<em>: :</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Old gold and mining towns</td>
<td>R003372520</td>
<td>:<em>:</em>:<em>:</em>:<em>:</em>:<em>: :</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bush dwellers of Australia</td>
<td>R008632520</td>
<td>:<em>:</em>:<em>:</em>:<em>:</em>:<em>: :</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Art and Australia</td>
<td>R008902520</td>
<td>:<em>:</em>:<em>:</em>:<em>:</em>:<em>: :</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Time Australia</td>
<td>R009422520</td>
<td>:<em>:</em>:<em>:</em>:<em>:</em>:<em>: :</em></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total number of books taken : 9

Number issued class : Number of unused books returned :
If you wish to print another copy press R to <R>eprint. It is recommended that you print a second copy for your records.

If you don’t wish to reprint press C to <C>ontinue.

OASIS will return to the Circulation menu.

The resources can now be placed in a class loan box. The class loan box is given to the teacher together with the printed list. The teacher fills in the list by writing (against the resource’s barcode number) the student’s barcode number (if the student has his/her library card available) and/or their name and roll class. The resource can then be given to the student.

The teacher returns the class loan box to the library together with the completed printed list and/or any items which have not been issued.

The library staff can now record the assigned borrowers at a convenient time.

**Assign borrowers:**

It is now necessary to assign the correct borrower to each resource or return the resource if it was not borrowed. The Assign Borrowers option assigns individual student borrowers to resources. The students can then be transferred to the database and they will be responsible for the return of the item in the usual manner.

Press N then 3 to select Assign Borrowers from the Library Circulation menu. A highlighted Issue No. bar is displayed. This Issue Number appears at the top of the printed list.

Type the issue number and press Enter.

Press Enter to accept the Due Date offered. You may overtype this date if you wish to alter it.

A list of resource barcodes is displayed.
To assign borrowers to each resource, match the cursor to the first resource barcode and **press E for <E>dit** from the option bar.

Wand or **enter** the borrower’s barcode into the highlighted bar

*The command NAME may be used if the borrower’s barcode is unknown. If an item has not been loaned press the F5 key. Note that RETURN is entered into the field.*

**Press** *(ESC)* **when finished.**

This screen can be accessed as often as required even when OASIS has returned to the Circulation menu. Changes can be made and borrowers can continue to be assigned. The changes are not recorded in circulation until the <C>omplete option has been run.

Resources which have not been assigned to a borrower or marked for return will still be recorded as the teacher’s loan.

*Don’t select <C>omplete too early.*

**Completing class loans:**

**Press** N then 3 to **select** Assign Borrowers from the Library Circulation menu. In the Issue No. field **enter** the same number as above.

Accept or overtype the date and press **Enter**.

OASIS displays the same class loan screen.

From the option bar **press** C to <C>omplete. This will update the loans records to reflect the student borrowers. Confirmation is required.

**Press** C to <C>onfirm. When complete OASIS will return to the Circulation menu. Once confirmed this issue number can no longer be accessed through the Assign Borrower option.

All issued items can be returned by students in the normal manner.
Printing overdue notices

OASIS has a variety of formats for overdue notices.

Student overdue notices can be printed as individual notes to each student (Student Notices), roll class overdue lists (Roll Class Lists) or as a message to the family (Messages to Family). Staff and External Borrower overdue lists can also be printed.

As an example we will print Roll Class Notices for students.

- From the main OASIS menu press B then 2 to select Library Circulation.

- Press B then 5 to select Roll Class Notices.

- You are prompted to specify the date for items overdue as at. The field will automatically default to today’s date.

- Press Enter to accept this date or overtype with the desired date and press Enter.

- Type Y (for Yes) or N (for No) as to whether items due on the date entered above are counted as overdue. Press Enter.
To print all roll classes select <A>ll. To print a range of roll classes select <S>elect, enter the first roll class and enter the last roll class to be printed.

To print all resource loan categories i.e. everything that is on loan, select <A>ll Resource Loan Categories. Alternatively, you can <S>elect a specific loan category eg. just Fiction resources that are overdue.

<P>rint in the usual manner.
Loan Statistics

It is possible to print a report of the number of loans recorded on each day of the week in a given period.

To print loan statistics:
- From page 2 of the Library Circulation menu, press M then 1 to select Loan Statistics.
- Type the first date to be included and press Enter.
- Type the last date to be included and press Enter.
- Print in the usual manner.

<table>
<thead>
<tr>
<th>Week Beginning</th>
<th>Sun</th>
<th>Mon</th>
<th>Tue</th>
<th>Wed</th>
<th>Thu</th>
<th>Fri</th>
<th>Sat</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>18/05/97</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>25/05/97</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>TOTALS:</td>
<td>0</td>
<td>0</td>
<td>4</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>4</td>
</tr>
</tbody>
</table>

Wiley Park Public School
* * * END OF REPORT * * *
Changing resource loan categories

This feature is useful for temporarily changing resource loan categories to limit loan periods during peak demand. Such a decision is the responsibility of the teacher librarian as part of the information management processes to support the teaching and learning program of the school. The loan category can revert to the original category at a specified date. For example, you may wish to change the resource loan category for all the ‘World War I’ resources from a 14 day loan to overnight loan for one month because all of year 11 have an assessment task on that topic.

- From the main OASIS menu press B then 2 to select Library Circulation.
- PressPgDnto move to the second page of the Library Circulation menu

Using the change by enquiry option to change by enquiry:

- PressL then 2 to select Change by Enquiry.
- PressA to <A>dd.

The Library Enquiry ‘Enter Searchwords’ screen is displayed.
Search for the subjects, keywords, titles etc. as per normal to change and <M>ark each using the option in the option bar. Mark as many titles etc. as you wish to change.

- When finished, press F2.

**The items 'marked' are displayed as selections:**

- Select <C>hange.

- **Type** the resource loan category to change the resources to (eg. your O for overnight or H for Heavy Demand category) and press <Enter>.

- You are prompted to make the changes either permanent or temporary. As we want these resources to return to their normal resource loan category once the assessment task is complete, type T and press <Enter>.

  *If you want to make the changes permanent select <P>ermanent.*

- **Enter** the date the resources will revert to their original category and press <Enter>.

- Select <C>onfirm Change Loan Category.

- When finished, OASIS will prompt you to press <Esc>.

- Press <Esc> twice to return to the Circulation menu.

  *The date the resources return to the original category is displayed in the Missing/Disposed field in the <C>opies details of the resource in General Resources for the duration of the change.*

The first Weekly Housekeeping run after the temporary change has expired will return the resources to their original category and remove the date from the Missing/Disposed field.

  *The options L1 Change by Barcode and L3 Change by Location are also available. Refer to the manual for further instructions.*