



adlib

model applications 4.2
release notes

Adlib Information Systems

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Contents

| | |
|--|-----------|
| 1 Adlib Serials | 1 |
| 1.1 Introduction | 1 |
| 1.2 SUBSCRIP, a new database..... | 2 |
| 1.3 Available data sources in Adlib Serials | 3 |
| 1.4 Changes in fields | 5 |
| 1.4.1 Subscription code (formerly Short title) | 5 |
| 1.4.2 Title | 6 |
| 1.4.3 Do not print distribution list? | 7 |
| 1.4.4 Cost centre and Allocation..... | 7 |
| 1.4.5 Insert occurrence for new issue?..... | 8 |
| 1.4.6 Remarks in the subscription record | 9 |
| 1.4.7 Supplier details..... | 9 |
| 1.4.8 Reader details | 11 |
| 1.4.9 The Brief display Subscriptions list screen | 13 |
| 1.5 Automatic procedures..... | 13 |
| 1.5.1 Generate order letters (wserord and wserord2) | 14 |
| 1.5.2 Print a claim list (claimlst)..... | 14 |
| 1.5.3 Generate claim letters (wclaim and wclaim2)..... | 15 |
| 1.5.4 Generate renewal letters (wrenew) | 16 |
| 1.5.5 Generate cancellation letters (wcancel)..... | 16 |
| 1.5.6 Printing distribution lists (printlst) | 17 |
| 1.5.7 Printing linked titles per distribution list per reader..... | 17 |
| 1.5.8 E-mailing scanned contents..... | 17 |
| 1.5.9 Purging of old serial issues and loose-leaf sets..... | 18 |
| 2 Adlib Acquisitions | 20 |
| 2.1 Introduction | 20 |
| 2.2 ORDITEMS, a new database | 21 |
| 2.3 Changes in fields | 22 |
| 2.3.1 Discount | 22 |
| 2.3.2 Item ID | 22 |
| 2.3.3 Title (not in catalogue) | 23 |
| 2.3.4 Allocation..... | 23 |
| 2.3.5 Supplier details..... | 23 |
| 2.3.6 Requester details | 25 |
| 2.4 Automatic procedures..... | 27 |
| 2.4.1 Letters..... | 27 |
| 2.4.2 Orders list..... | 28 |
| 3 Adlib Library | 29 |
| 3.1 The Loose-leaves data source | 29 |
| 3.2 The Subscriptions screen tab..... | 29 |
| 3.3 The Holding field..... | 29 |

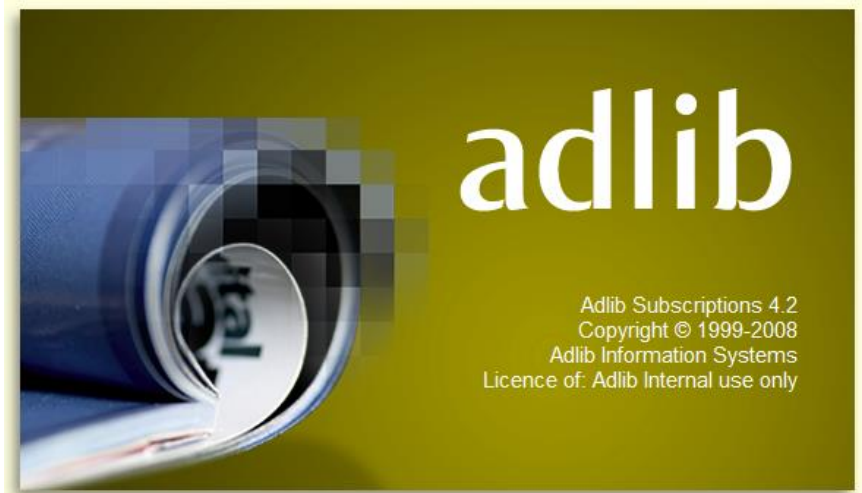
Adlib applications 4.2 release notes

| | |
|--|-----------|
| 3.4 Series number added | 30 |
| 3.5 New detail screen Advanced cataloguing | 30 |
| 3.6 New zoom screen Library catalogue | 30 |
| 3.7 New screens for copies | 32 |
| 4 Adlib Museum | 34 |
| 4.1 Spectrum accreditation | 34 |
| 4.2 New Research/use data source | 38 |
| 4.3 Packages and package types | 39 |
| 4.4 New Rights and Loss/damage screens | 40 |
| 4.5 Locations and movements..... | 40 |
| 4.5.1 Changing locations efficiently | 41 |
| 5 Adlib Loans Management..... | 47 |
| 5.1 Extended reminder procedure..... | 47 |
| 5.1.1 Setting up a remind policy per borrower category | 47 |
| 5.1.2 Linking borrowers to a remind policy | 49 |
| 5.1.3 If Adlib cannot process letters as instructed..... | 51 |
| 5.1.4 Other settings..... | 51 |
| 5.2 Loans history..... | 51 |
| 5.3 Picture of borrower for loan transactions | 52 |
| 6 All applications | 53 |
| 6.1 Use software version 6.5 or higher | 53 |
| 6.2 Feedback links everywhere | 53 |
| 6.3 All adapls in one folder | 54 |
| 6.4 Registering more personal details | 54 |
| 6.5 Pointer file methods for all data sources..... | 56 |
| 6.6 Status field for terms and names | 56 |
| 6.7 Searching for terms on the source of entry or edit | 56 |
| 6.8 Record owner and access rights per record | 57 |
| 6.9 Other changes | 58 |

These release notes only describe the changes from 3.5 to 4.2.

1 Adlib Serials

1.1 Introduction



The Adlib Serials module has received a substantial upgrade, of which the most important aspects are that:

- each subscription is now registered in its own record in a database named SUBSCRIP;
- subscriptions on loose-leafs are kept separate from subscriptions on serials;
- in the DOCUMENT database just bibliographical data is still stored (among which that of serials and loose-leafs);
- distribution lists and letters to suppliers can be printed to Word templates from now on, which improved the layout;
- letters to suppliers can be created in the language of the supplier, and may be printed as well as be sent by e-mail;
- the address and personal details of readers can be registered more extensively;
- the general operation of the application has become more user-friendly.

In this version of the Adlib Serials module, the bibliographical data of serials and loose-leaves can still be viewed, and you can also quickly create a new title, but the separation with subscriptions has been made clearer: titles are registered best in Adlib Library and the subscriptions to them in Adlib Serials.

1.2 SUBSCRIP, a new database

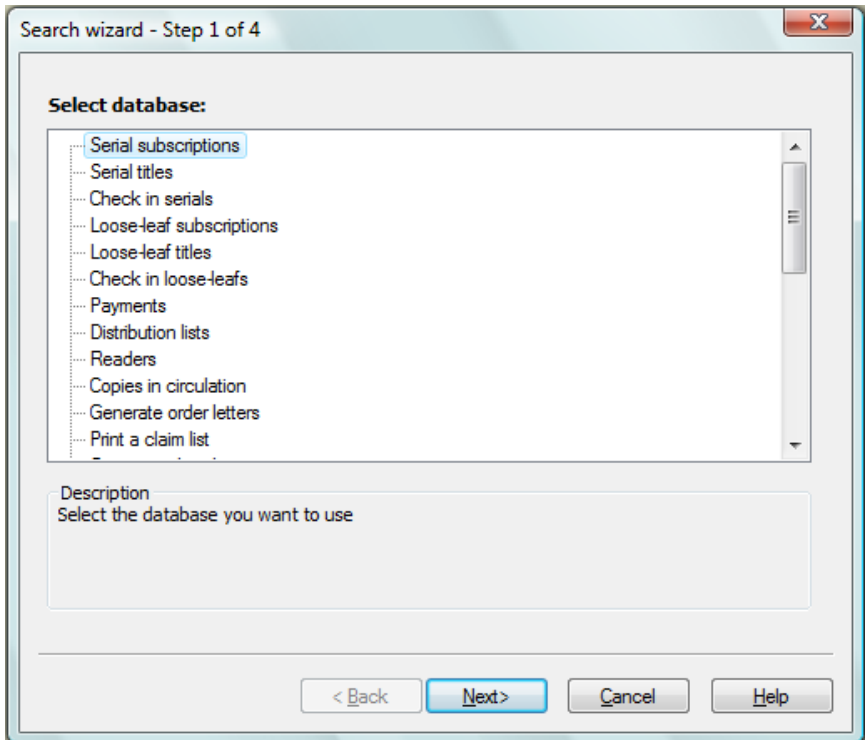
In model applications 3.5 and older, subscription data was stored in the same database (DOCUMENT) as bibliographical data of titles. That was not an optimal situation, not just because of the fact that it concerns different types of data, but also because any next subscription to the same title meant that the title had to be registered again, which caused redundancy.

In model applications 4.2, a separation has been realized: from now on, DOCUMENT will only contain bibliographical data, like it should, and the new SUBSCRIP database will contain all subscription data. Now, a title only needs to be registered once in DOCUMENT, while multiple subscriptions (records in SUBSCRIP) just refer to the title via a link. A selection of title data can still be edited, from a zoom screen, or from within the *Serial titles* and *Loose-leaf titles* data sources which have been added to the application for this purpose.

Vice versa, you'll also be able to see which subscriptions there are to a title, in the detailed display of a title on the *Subscriptions* screen. And in a zoom screen you can view detailed data per subscription.

| Title, author, imprint, collation | Series, notes, ISSN | Abstract and subject terms | RAMEAU subject headings | Reproductions |
|-----------------------------------|------------------------------|----------------------------|-------------------------|----------------|
| Relations | Free fields and numbers | Copies and shelf marks | Management details | Catalogue card |
| Subscription data | | | | |
| Subscription code | ab0023 | End date subscription | | |
| Start date subscription | 2008-07-09 | | | |
| Number of subscriptions | 1 | | | |
| Frequency | 1 Issues per | month | | |
| Last received issue | Vol. 7 2008, no 10 - October | on | 2008-10-16 | |

1.3 Available data sources in Adlib Serials



- In *Serial subscriptions* and *Check in serials*, you register your subscriptions and check in received copies. (Both data sources offer the same screens, but display them in a different order.) In *Loose-leaf subscriptions* and *Check in loose-leafs*, you do the same for loose-leafs.
- In *Serial titles* and *Loose-leaf titles*, you can view and/or enter a selection of bibliographic data of titles. The second screen offers a quick overview of all current subscriptions to a title.
- In *Payments* you book in the payments on subscriptions, to the desired cost centres.
- In *Distribution lists* you define reader lists. Those lists can be linked to subscriptions via the subscription records. As soon as you book in a new issue, automatically the proper distribution lists will be printed.
- In *Readers*, you register personal details of readers. This is the same database in which also borrowers in the Loans module and

requesters in the Acquisitions module are saved. You can now provide more personal details than in earlier versions, and the presentation on the screen tabs has been improved.

- In *Copies in circulation* you can find out which issues are currently in circulation and in who's possession they are.
- The *Generate order letters*, *Print a claim list*, *Generate claim letters*, *Generate renewal letters* and *Generate cancellation letters* options do not represent databases, they start print procedures. You generate letters with them. Only *Print a claim list* directly sends output to the printer, with the other options Adlib exports the data to Word templates. The resulting documents will be opened in Microsoft Word, where you may edit them before you actually print them.
Note that for each of these options, certain settings in the subscription records must have been made. For instance, if you choose *Generate order letters*, Adlib will search for subscriptions in which the *Create order letter?* field has been set to *Yes*. And claim letters are only generated when issues are overdue or when ordered subscriptions haven't arrived yet.
- In serial subscription records you can link to scanned tables of contents and enter readers to whom those documents must be sent by e-mail. Use the *Send scanned contents* option to automatically send all still to process e-mails at once.
- When purging issues, you delete check-in data of old issues. With *Automatically purge issues*, removal is automatic, following the purge policy which you set per subscription. A summary of the deleted data is copied to the *Holding* field on the *Copies and shelf marks* tab in the *Serials* data source in the Library application. With *Manual purge of issues/sets* you must search for subscription records to be purged, after which you can indicate per issue or set whether it should be purged or not. In this case, removed data is copied to a text file.
- In *Persons and institutions (contains suppliers)*, you register institutions, companies, customers, contacts and suppliers, but no readers. If you register a supplier, you can provide additional data on the *Supplier details* screen tab, like the language in which the supplier must be contacted, and the letters which could be sent to this supplier. You can also indicate whether communication with the supplier should proceed through letters (on paper) or via e-mail.

Adlib applications 4.2 release notes

- The *Thesaurus* is new in this module. Only a couple of fields are validated against this database, but it is always handy to be able to edit or delete terms that you added in the past.
- In *Cost centres* you define budgets, and in *Payment history* expenditures and commitments per cost centre are kept up-to-date for you.
- In *Currencies* you define currency units and exchange rates, to be used with foreign suppliers.
- In *Letters* you can find records which hold standard texts for letters to suppliers. These texts will only be used if Adlib cannot find the new Word templates for letters. So normally speaking, you only need to adjust the texts in the Word templates to make them relevant to your situation.
- In *Languages*, you have to provide translations for all labels used in letters to suppliers, in every language in which you may want to send those letters (if those translations are not present yet). These translations are also used when printing to Word templates.
- In *Layout distribution list* you'll find one record in which you can make some print settings in case you are not going to print distribution lists to Word templates. However, by default distribution lists are now printed to Word templates, and these settings won't be used.
- In *Charging details* you decide whether reader or serial budgets must be used, and the standard cost centre for them.

1.4 Changes in fields

1.4.1 Subscription code (formerly Short title)

A field in SUBSCRIP that deserves some attention is *Subscription code* (tag *kt*). Previously, a (not necessarily unique) short title was saved in this field to be able to quickly refer to subscriptions to a title, while now, the subscription code acts as a unique key to a subscription record. When you describe a subscription, you choose a unique subscription code: in this code you could include abbreviations for supplier and title, for instance. Later on you can quickly search for a subscription record via this code, but the code is also used with links to other databases, and you may also come across this code when printing subscription data. The subscription code and the title of the subscribed serial publication are displayed on most screens with subscription details, at the top of the screen tab and usually as read-only fields. Only on *Subscription details* you can enter or edit the field (see the figures below).

Adlib Subscriptions 4.2 - [Serial subscriptions] (Version 6.5.0, build 29)

File Edit View Record Search Mark Combine Language switch Data language Options Screen tabs Help

Subscription details | Bibliographic details | Financial details | Booking | Scanned contents | Payments | Management details

Title data
 Subscription code
 Title

Subscription details
 Start date 17-10-2008 End date 17-10-2008
 Frequency Issues per
 Supplier
 Subscription number Number of subscriptions 1
 Remarks
 Distribution lists Do not print distribution list?

Create order letter? Serial ordered on 17-10-2008
 Order number
 Claim when first issue has not been received before 17-10-2008
 Renew/cancel Before 17-10-2008
 Renewed on 17-10-2008 Cancelled on 17-10-2008
 Claim this serial when overdue
 Grace period for claims in days
 Purge policy for old issues
 After how many months should old copies be purged?

Adlib Subscriptions 4.2 - [Loose-leaf subscriptions] (Version 6.5.0, build 29)

File Edit View Record Search Mark Combine Language switch Data language Options Screen tabs Help

Subscription details | Bibliographic details | Financial details | Booking | Payments | Management details

Title data
 Subscription code
 Title

Subscription details
 Supplier
 Subscription number No. of subscriptions 1
 Remarks

Administrative details
 Create order letter? Serial ordered on 17-10-2008
 Order number
 Claim when first set has not been received before 17-10-2008
 Renew/cancel before 17-10-2008
 Renewed on 17-10-2008 Canceled on 17-10-2008

1.4.2 Title

In the *Title* field you now link to title records in DOCUMENT, another database indeed. From this field you can quickly register a new title as well. Details about the title linked here, can be viewed on the read-only *Bibliographic details* tab.

1.4.3 Do not print distribution list?

The *Do not print distribution list?* field is new. It relates to the distribution list to the left of it. So to a serial subscription record you can link to multiple distribution lists, for instance as many as the *Number of subscriptions* (copies) which you receive of each issue. And per distribution list you can, if you wish, indicate (by marking *Do not print distribution list?*) that you, for whatever reason, do not want Adlib to automatically print lists for the concerning distribution lists.

1.4.4 Cost centre and Allocation

Previously, the *Cost centres* box on the *Financial details* tab contained three rows of fields *Allocation – Cost centre – Balance*. This were also nine different database fields. So you could allocate costs to a maximum of three cost centres.

In version 4.2 this has changed: now there are just three fields left, but you can repeat them as often as needed. By default, you'll only see one row of fields, but you can add extra occurrences to this field group normally if you wish to split up the costs over multiple cost centres. (For example, place the cursor in the *Cost centre* field, and press **Ctrl+Enter**.)

The screenshot shows the 'Adlib Subscriptions 4.2 - [Serial subscriptions] (Version 6.5.0, build 29)' window. The 'Financial details' tab is selected, showing a form with the following sections:

- Title data:** Subscription code, Title
- Subscription price:** Price (input field), Currency (input field), Rate (input field), Total (input field)
- Cost centres:** Allocation (input field), % (input field), On (input field), Cost centre (input field), Balance (input field)

You'll encounter the same cost centre allocation on the *Payments* screen tab.

1.4.5 Insert occurrence for new issue?

Adlib Subscriptions 4.2 - [Serial subscriptions] (Unified Version 6.4.0, build 415)

File Edit Record Search Mark Combine Language switch Data language Options Screen tabs Help

Subscription details Bibliographic details Financial details **Booking** Scanned contents Payments Management details

Title data
Subscription code
Title
Subscription number No. of subscriptions 1
Remarks

Issues
 Insert occurrence for new issue?

Next expected issue
Volume Issue no Issue name Year Expected on
17-10-2008

Missing issues
Remarks

On the *Booking* tab in a serial subscription record you'll find the *Insert occurrence for new issue?* checkbox. Click it to insert a new field group occurrence in the *Issues* box for a received issue which is currently still occupying the *Next expected issue* box, and which you are about to check in. In older applications automatically a new field group occurrence was added as soon as you opened this screen tab; in 4.2 this happens only when you click the checkbox. The data from the *Next expected issue* will then be moved to the fields for the issue to be checked in, and the data for the new next issue will be calculated.

Adlib Subscriptions 4.2 - [Loose-leaf subscriptions] (Version 6.5.0, build 29)

File Edit View Record Search Mark Combine Language switch Data language Options Screen tabs Help

Subscription details Bibliographic details Financial details **Booking** Payments Management details

Title data
Subscription code
Title
Subscription number No. of copies 1
Remarks

Issues
 Insert occurrence for new set?

Year Serial number Number of received sets Number of pages Date received Inserted
17-10-2008

Missing sets
Remarks

Adlib applications 4.2 release notes

For loose-leaf subscriptions, usually there are no details available about the next expected sets, so those fields are missing here (see the figure below). But here too you have to click the *Insert occurrence for new set?* checkbox to generate a new field group occurrence for the loose-leaf set that you want to check in.

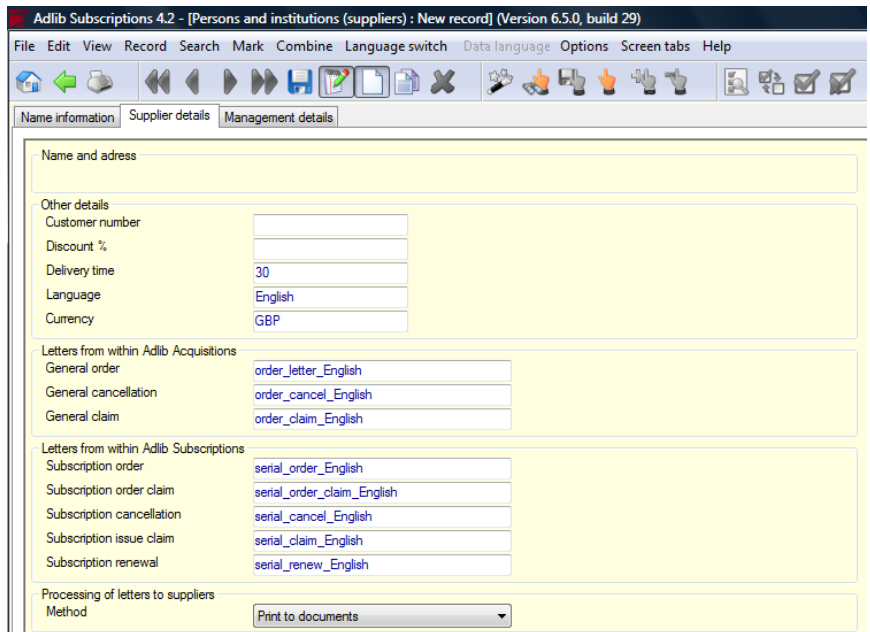
Note that for loose-leaves you can enter the number of pages of a set, and in *Inserted* you can indicate whether the set(s) have already been inserted in the relevant binders.

1.4.6 Remarks in the subscription record

On the *Subscription details* tab you can enter any remarks about this subscription in the *Remarks* field. On the *Booking* and *Payments* tabs, in the *Title data* box, you'll encounter these remarks again as read-only fields.

On the *Payments* tab, in the *Payments* box, you'll also find a *Notes* field in which you may enter any remarks about the payments.

1.4.7 Supplier details



| Name information | | Supplier details | Management details |
|---|----------------------------|------------------|--------------------|
| Name and address | | | |
| Other details | | | |
| Customer number | | | |
| Discount % | | | |
| Delivery time | 30 | | |
| Language | English | | |
| Currency | GBP | | |
| Letters from within Adlib Acquisitions | | | |
| General order | order_letter_English | | |
| General cancellation | order_cancel_English | | |
| General claim | order_claim_English | | |
| Letters from within Adlib Subscriptions | | | |
| Subscription order | serial_order_English | | |
| Subscription order claim | serial_order_claim_English | | |
| Subscription cancellation | serial_cancel_English | | |
| Subscription issue claim | serial_claim_English | | |
| Subscription renewal | serial_renew_English | | |
| Processing of letters to suppliers | | | |
| Method | Print to documents | | |

If you are going to register a supplier in *Persons and institutions (contains suppliers)*, then in the new record first select *supplier* in the *Name type* drop-down list on the *Name information* tab. After making that choice and leaving the field, a number of default values is auto-

matically entered on the *Supplier details* tab (so that you don't have to do that manually anymore).

The default *Delivery time* value is retrieved from *seracq#.txt* files, line number 26. If you wish to get a default delivery time different from 30 days, you may adjust this number in said text files. But you can adjust the entered delivery time manually (in the field) as well, of course. The other fields offer the same flexibility.

The *Language* in which the supplier needs to be contacted, is set to the current interface language of your Adlib application, directly after selecting the *supplier* name type. This is a linked field to the *Languages* database, which means that you can only pick languages for which a *Languages* record exists; although you may create a new *Languages* record for a new language instantly. That record must hold translations of field labels which can be used in letters to suppliers. So it is important that a fully translated record is, or will be present in the *Languages* database, for the language of a supplier.

The names of the letter templates in the *Letters* box are automatically put together for you by adding the supplier language to a default partial name in English. If you select another language and leave the *Language* field, Adlib will ask you if you'd like Adlib to automatically re-adjust the names of the letter templates to be used. Choose *Yes* if you use the default templates present in your Adlib application: each language has its own templates because the fixed texts in it are in a different language.

Only if you've created your own templates with entirely different names, which is allowed too, you probably don't want your manually entered letter template names to be replaced by default names, if you happen to change the supplier language. Then choose *No* if Adlib asks for a confirmation of the replacement.

Note that the standard templates can be found in the Adlib folder `\Worddoc\templates`. You may adjust their fixed texts and layout to your liking. Do make sure that you leave the special codes in the templates intact. Remember to save any adjusted templates with the *.dot* extension.

The new *Processing of letters* field is set to *Print to document* by default. This means that the above entered templates will be used, and that the letters will be created in MS Word, from where you can print them. If you don't want or can't print letters via Word templates, then move the Word templates to another folder. Adlib won't be able to find the templates, and will search the *Letters* database for records with the names of the letter templates you entered or agreed with. By means of the fixed texts in those records, letters will be printed to the printer directly.

Adlib applications 4.2 release notes

The other processing option is *Send by e-mail*. You can only set this option if you provide an e-mail address for the supplier. Another requisite is that your sender address and the name of your SMTP server must have been set in line numbers 278, respectively 192, in *adlib#.txt* files. A copy of every e-mail is sent to your sender e-mail address, so that you have proof of sending the e-mail. Records from the *Letters* database provide the fixed texts in the e-mail letters: these records have the same names as the letter templates listed for the supplier. So check and customize all *Letters* records with the template names used by you, before you start e-mailing letters. Note that if you do not use the default template names, you must create *Letters* records with your custom names, if you want to be able to e-mail letters (or if you want to be able to print without Word templates).

1.4.8 Reader details

Adlib Subscriptions 4.2 - [Readers] (Version 6.5.0, build 29)

File Edit View Record Search Mark Combine Language switch Data language Options Screen tabs Help

Personal details Addresses Reader details Management details

Name and number

User number

Site main

Name

Contact person

Term of address

Title

Surname

First name

Initials

Insertion

Maiden name

Date of birth 17/10/2008

Sex

Class/department

Borrower category normal

Registered since 17/10/2008

Image

Identification numbers

ID Number ID type

In the *Readers* data source (the BORROWER database), a number of new fields is available and the working of some fields has changed. (A reader may be a reader, a borrower and/or a requester all at the same time, since this database is used in the Serials module, as well as in the Loans module and the Acquisitions module.)

Name is now a read-only field which is put together by Adlib at the moment you save a reader record. The composition is as follows: the preference is the format Surname, Initials Insertion, so for in-

stance *Winkel, R. van*. If no initials are available and a first name is, then it becomes *Surname, First name Insertion*, so for example *Winkel, Rupert van*. If no first name is available either, then this reader is probably an institution and the *Surname* suffices as *Name*.

The department or class where a reader can be found daily, can be registered as well now. It will also be printed on distribution lists, which eases the distribution of issues in large companies and institutions.

In *ID-number* you can enter a passport or other identification number like that of a driving license or public transportation card for instance, should it be required.

The screenshot shows the 'Addresses' tab in the Adlib Subscriptions 4.2 software. The form is titled 'normal' and contains the following fields and options:

- Address type:** A dropdown menu currently set to 'home'.
- Postal address:** A checkbox that is currently unchecked.
- Address:** A text input field.
- House number:** A text input field.
- Print house number in front of address:** A checkbox that is currently unchecked.
- Postcode:** A text input field.
- Print postcode behind city name:** A checkbox that is currently unchecked.
- City:** A text input field.
- Country:** A text input field.
- Telephone type:** A dropdown menu.
- Telephone number:** A text input field.
- E-mail address:** A text input field.
- Bank account number:** A text input field.

In *Address type*, on the *Addresses* tab, you indicate whether the address is "home" or "workplace". If it is a postal address as well (either with or without a P.O.Box number), then mark the *Postal address* checkbox. In *Address*, just enter the street name or "P.O.Box". So, in *House number* a P.O.Box number may be entered as well. In some countries, on letters the house number must be printed in front of the street name and/or the postcode in front of the city name. Mark the relevant checkboxes if this is the case.

In the repeated field group *Telephone* you can enter multiple telephone numbers, and not necessarily just of telephones. In *Telephone type* you specify which device is linked to the number: you may choose from "landline", "mobile phone" and "fax".

Adlib applications 4.2 release notes

On the *Reader details* screen (see figure below) you'll find the new fields *Field type* and *Content*. These are useful in case you wish to register some personal detail of readers, for which no applicable field is present. In *Field type* you then supply a name or short description of your new field and its contents can be entered in the *Content* field behind it.

The new *Personal details* and *Addresses* screen are also present in Adlib Loans management and Adlib Acquisitions, in the *Borrowers* and *Requesters* data sources respectively.

1.4.9 The Brief display Subscriptions list screen

The *Brief display Subscriptions* list screen which is used in the *Serial subscriptions*, *Check in serials* (and the loose-leaf equivalents) and *Payments* data sources to display search results, now shows (from left to right) the *Subscription code*, *Title*, *Subscription number* and *Supplier* fields. (Previously, the *Title* and *Publisher* were displayed here.)

1.5 Automatic procedures

Almost all of the print formats in this module have been improved significantly: printing is now mostly done to Word templates. Printing the old way is only done if a template is not present. Structurally there's also been a lot of improvement: letters to one and the same supplier will often be combined on one letter. This means that, for example, multiple orders to the same supplier will be printed to one letter, just like multiple claims. Another improvement is that entire letters can be printed in the language of the supplier, if you've got a template available in that language, and if you have created a *Languages* record in that language. In Adlib, you can still keep working in your own language, while printing is automatically done in the language of the supplier.

And finally, a lot of adapl code has been checked and rewritten where necessary, to make printing and other procedures more reliable.

1.5.1 Generate order letters (wserord and wserord2)

In *Step 1* of the *Search wizard* you'll find the *Generate order letters* option. This print option starts the *wserord* adapl. This adapl collects all subscription records in which the *Create order letter?* field has been set to *Yes*, and exports the required data for an order of the serial publication to the *serial_order_<language>.dot* Word template (instead of *<language>* you'll find it reads "nederlands" or "english", for example). Orders will be collected per supplier and then placed on one letter.

The created documents will be opened in MS Word, where you can still edit them before actually printing them. If the template is not present in the language of the supplier or if printing this way fails, the letter will be printed directly as plain text. If the supplier must be contacted through e-mail – this can be set with the supplier details – then the letter is sent via e-mail, so nothing will be printed on paper. For e-mailing, the template is not used. Of each e-mail sent, a copy is sent to the sender address (which you set in line 278 in *adlib#.txt* files), so that you have proof of sending the e-mail.

After printing, today's date will be saved in the *Serial ordered on* field in the subscription record.

The *wserord2* adapl is derived from *wserord* and has practically the same function, yet as the output format *Order letters*. The difference is that here you need to search for and mark the records for which you want to print order letters. Then you start the *Print wizard* and select the mentioned output format. Adlib will then print order letters for all marked records, regardless (!) of whether the *Create order letter?* field has been set to *Yes* or *No*. If you want orders for one and the same supplier to come on one letter, then first sort all your marked subscription records on the *Supplier* field.

1.5.2 Print a claim list (claimlst)

In *Step 1* of the *Search wizard* you'll find the *Print a claim list* option. This print option starts the *claimlst* adapl. This adapl prints a list of serial issues which need to be claimed; that list is intended for internal use. The adapl only applies to serials since loose-leaf sets are usually released irregularly and therefore cannot be claimed. This adapl does not use a template.

An overdue issue can only be claimed if the *Claim this serial when overdue?* field (in a subscription record) has been set to *Yes*, and the *Grace period for claims in days* has past.

By the way: dates are printed in ISO format, for example: 2007-12-31.

1.5.3 Generate claim letters (wclaim and wclaim2)

In *Step 1* of the *Search wizard* you'll find the *Generate claim letters* option. This print option starts the *wclaim* adapl. This adapl creates two types of claim letters at once, namely claims for ordered subscriptions of which the first issue or set has not been delivered yet, and claims for existing subscriptions of which one or more copies of an issue haven't yet arrived. For a subscription, letters of the first kind can only be generated if in the relevant subscription record the *Claim when first issue has not been received before* field has been filled in and that date has expired. An overdue issue of an existing subscription (the second letter type) can only be claimed if the *Claim this serial when overdue?* field (in a subscription record) has been set to *Yes*, and the *Grace period for claims in days* has past. (Note that the latter type of letters cannot be generated for loose-leafs.)

So the adapl collects claims per letter type and also per supplier, and exports the required data to the *serial_order_claim_<language>.dot*, respectively *serial_claim_<language>.dot* Word templates (instead of *<language>* you'll find it reads "nederlands" or "english", for example).

The created documents will be opened in MS Word, where you can still edit them before actually printing them. If the template is not present in the language of the supplier or if printing this way fails, the letter will be printed directly as plain text. If the supplier must be contacted through e-mail – this can be set with the supplier details – then the letter is sent via e-mail, so nothing will be printed on paper. For e-mailing, the template is not used. Of each e-mail sent, a copy is sent to the sender address (which you set in line 278 in *adlib#.txt* files), so that you have prove of sending the e-mail.

The *wclaim2* adapl is derived from *wclaim* and has practically the same function, yet as the output format *Claim letters*. The first difference is that here you need to search for and mark the records to which you want to apply the output format: however, the same conditions apply as for printing claims from within the *Search wizard*, so letters will only be created for relevant records in the selection. The second difference is that the two possible claim letter types (as explained in the paragraph above) are now combined in one letter; the *serial_claim_<language>.dot* template is used for this purpose. After marking a record selection, you start the *Print wizard* and select the mentioned output format. If you want claims for one and the same supplier to come on one letter, then first sort all your marked subscription records on the *Supplier* field.

1.5.4 Generate renewal letters (wrenew)

In *Step 1* of the *Search wizard* you'll find the *Generate renewal letters* option. This print option starts the *wrenew* adapl. This adapl collects all subscription records in which the *Renew/cancel* field has been set to *Renew* and in which the *Before* field contains a date which is at least 30 days after today's date, and exports the required data for a renewal of the subscription to the *serial_renew_<language>.dot* Word template (instead of *<language>* you'll find it reads "nederlands" or "english", for example). Renewals will be collected per supplier and then placed on one letter.

The created documents will be opened in MS Word, where you can still edit them before actually printing them. If the template is not present in the language of the supplier or if printing this way fails, the letter will be printed directly as plain text. If the supplier must be contacted through e-mail – this can be set with the supplier details – then the letter is sent via e-mail, so nothing will be printed on paper. For e-mailing, the template is not used. Of each e-mail sent, a copy is sent to the sender address (which you set in line 278 in *adlib#.txt* files), so that you have proof of sending the e-mail.

After printing, today's date will be saved in the *Renewed on* field in the subscription record.

1.5.5 Generate cancellation letters (wcancel)

In *Step 1* of the *Search wizard* you'll find the *Generate cancellation letters* option. This print option starts the *wcancel* adapl. This adapl collects all subscription records in which the *Renew/cancel* field has been set to *Cancel* and in which the *Before* field contains a date which is at least 30 days after today's date, and exports the required data for a cancellation of the subscription to the *serial_cancel_<language>.dot* Word template (instead of *<language>* you'll find it reads "nederlands" or "english", for example). Cancellations will be collected per supplier and then placed on one letter.

The created documents will be opened in MS Word, where you can still edit them before actually printing them. If the template is not present in the language of the supplier or if printing this way fails, the letter will be printed directly as plain text. If the supplier must be contacted through e-mail – this can be set with the supplier details – then the letter is sent via e-mail, so nothing will be printed on paper. For e-mailing, the template is not used. Of each e-mail sent, a copy is sent to the sender address (which you set in line 278 in *adlib#.txt* files), so that you have proof of sending the e-mail.

After printing, today's date will be saved in the *Cancelled on* field in the subscription record.

1.5.6 Printing distribution lists (printlst)

In 4.2, distribution lists are printed to the *Circlist#.dot* Word template in the current interface language, by default. These templates can be found in the Adlib folder *\Worddoc\templates*. As usual, a distribution list is printed after you've registered a newly received serial issue. The department of a reader is a new field on the distribution list. You may of course adjust the layout of these templates in MS Word.

If the printing of distribution lists to Word templates is not desirable, then you'll still have the option of printing the old "DOS" way. Adlib does this automatically if the template in the current language cannot be found. So, just move the *Circlist#.dot* files to another folder, if you wish not to employ them. A few layout characteristics for the "DOS" way of printing can still be set in the *Layout distribution list* data source, but you'll have significantly fewer options than in Word templates.

1.5.7 Printing linked titles per distribution list per reader

The new output format *Overview of linked titles per distribution list per reader* has been added to the *Readers* data source. Search and mark the readers for whom you wish to print this overview, open the *Print wizard* and choose *Create a report with a predefined output format*, after which you can select the new output format. Of each reader, the distribution lists to which the reader is subscribed are listed, and per distribution list the serial titles are listed to which that distribution list is linked. This provides a quick overview of the titles that each reader receives.

The adapl that collects the data is named *readers.adapl*; this adapl uses the *CirclistsAndTitlesPerReader.dot* template to print to.

1.5.8 E-mailing scanned contents

The screenshot shows the 'Adlib Subscriptions 4.2 - [Serial subscriptions] (Version 6.5.0, build 29)' application window. The menu bar includes File, Edit, View, Record, Search, Mark, Combine, Language switch, Data language, Options, Screen tabs, and Help. The toolbar contains various icons for file operations and navigation. The 'Scanned contents' tab is active, displaying a form with the following fields:

- Title
- Subscription code
- Title
- No. of copies: 1
- Issues table with columns: Volume, Issue number, Date received, Scanned contents, Still to e-mail (checkbox), and Sent on.
- Readers scanned contents
- Readers

The *Scanned contents* field on the tab with the same name in a serial subscription record is an application field in which you can link to all sorts of files, but it is meant for documents of scanned tables of contents of received serial issues. The field group is repeatable, so you can link as many documents as you wish. Mark the *Still to e-mail* checkbox behind the name of a document if that document still has to be sent by e-mail to the readers which you list in the (repeatable and validated) *Readers* field.

At this point no e-mail is actually sent, not even when you save this record. Only if you choose *Send scanned contents*, in *Step 1* of the *Search wizard*, then Adlib will harvest linked scanned contents for which the *Still to e-mail* checkbox is marked, and subsequently sends them to the *Readers* (for whom a valid e-mail address must have been registered, of course). After mailing, the *Still to e-mail* checkbox will automatically be emptied, and the date of today will be entered in the *Sent on* field.

A second way to send the scanned contents is to create a record selection first, open the *Print wizard* and choose the output format *Send e-mails with scanned contents*. In all marked records, the relevant adapl will check if the *Still to e-mail* checkbox is marked, and only for those records then generate e-mails and send them.

1.5.9 Purging of old serial issues and loose-leaf sets

When purging issues, you delete check-in data of old issues. With the *Automatically purge issues* option in *Step 1* of the *Search wizard*, removal is automatic, following the purge policy which you set per serial subscription (see the figure below); for loose-leaf subscriptions, automatic purging does not apply.

A summary of the deleted data is copied to the *Holding* field on the *Copies and shelf marks* tab in the *Serials* data source in the Library application. All deleted data will also be saved automatically to hard disk in a text file with the name format `purged_<current ISO date>.txt`.

If, in *Step 1* of the *Search wizard*, you choose *Manual purge of issues/sets*, you must subsequently search for subscription records to be purged, after which you can indicate per issue or set whether it should be purged or not by marking a checkbox in front of it. On saving of the edited record, the marked issues or sets will actually be purged. In this case, removed data is copied to a text file with the name format `purged<ISO date>_<subscription code>.txt`.

Adlib applications 4.2 release notes

Adlib Subscriptions 4.2 - [Serial subscriptions] (Version 6.5.0, build 29)

File Edit View Record Search Mark Combine Language switch Data language Options Screen tabs Help

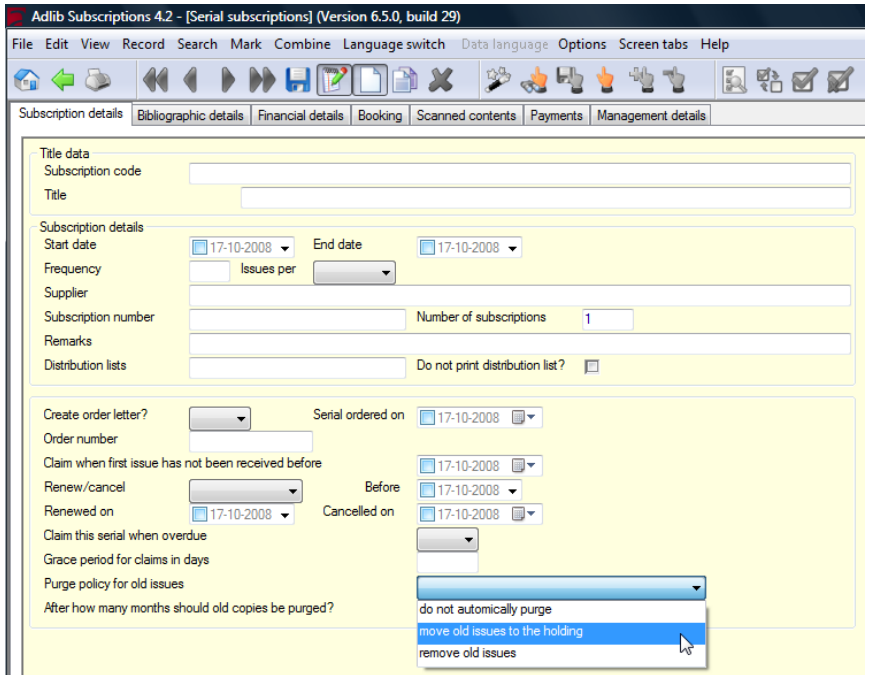
Subscription details Bibliographic details Financial details Booking Scanned contents Payments Management details

Title data
Subscription code
Title

Subscription details
Start date 17-10-2008 End date 17-10-2008
Frequency Issues per
Supplier
Subscription number Number of subscriptions 1
Remarks
Distribution lists Do not print distribution list?

Create order letter? Serial ordered on 17-10-2008
Order number
Claim when first issue has not been received before 17-10-2008
Renew/cancel Before 17-10-2008
Renewed on 17-10-2008 Cancelled on 17-10-2008
Claim this serial when overdue
Grace period for claims in days
Purge policy for old issues
After how many months should old copies be purged?

- do not automatically purge
- move old issues to the holding
- remove old issues



2 Adlib Acquisitions

2.1 Introduction



The Adlib Acquisitions module has received a significant upgrade, of which the most important aspects are the following:

- From now on, every item to be ordered will get its own record in the new ORDITEMS database. Your order record (in the ORDERS database), which may contain multiple items as you would expect, can usually still be entered in the same way as was previously the case. When you save the order record, Adlib will automatically create a linked record in ORDITEMS. An ORDITEMS record is linked to ORDERS via the read-only field *Item ID* (previously called *Order line*); everything that you enter into an order line in the order record, will be written to the relevant item record, and vice versa – via zooming in on the linked field, you can view the item record.
- Previously, it was not possible to enter more than three cost centre allocations per order line; now that number is unlimited. In order lines in the order record, only one cost centre allocation will still be visible and editable though. You have to open the linked item record in a zoom screen from within the order record, to be able to insert or edit multiple occurrences of the cost centre allocations.
- From this version of the Acquisition module, letters to suppliers and requesters of orders will be printed to MS Word templates by

default, which allows you to professionally design your written communication. However, per supplier or requester you may indicate instead that all communication has to take place via e-mail. In this case, letters to be printed won't actually be printed yet sent by e-mail. Moreover, letters to suppliers will automatically be created in the language of the supplier.

- The address and personal details of requesters of orders can be registered more extensively.
- The program code of several adapls has been reviewed thoroughly, especially that of *ordcalc.ada* (the adapl which manages all procedures and calculations during the registering and processing of an order), and many bugs have been fixed.

2.2 ORDITEMS, a new database

Order records, which may contain multiple order lines, were always stored in their entirety in the ORDERS database. To allow for a variable number of cost centre allocations per ordered item in version 4.2 of the Acquisition module, a structural change has been implemented: a new ORDITEMS database has been added, which stores each order line (an item to be ordered) in its own record. For you as user, this new database and the structural change will usually be as good as invisible: this is because there's no access to the new database in the database menu in this application (*Step 1* of the *Search wizard*), and the structural change will only manifest itself if you want to enter more than one cost centre allocation for an order line (more about this later).

In the background, Adlib manages everything. To start with, you can still register an order with one or more order lines in the same way as you always did, provided you enter only one cost centre allocation per order line.

When you save the order record, the order lines will automatically be numbered uniquely in the *Item ID* field, and Adlib creates an ORDITEMS record using this number as a unique identifier. All data entered by you in this order line, will then be written to the new record. This item record will only be linked once: this means that you cannot lookup or link existing item records when you create an order line. In the order record in display mode, you can open the item record of the order line in a zoom screen. To do this, click the underlined number in the *Item ID* field. Working from within the *Orders* data source, in this zoom screen in edit mode you can apply all changes which would also be allowed in the order line in the order record, plus that here multiple cost centre allocations can be inserted (as new field group occurrences) and edited. As soon as you close this zoom screen

and save it, all data from this item record is retrieved again and displayed in the order record: however, of the cost centre allocations you will only see the first occurrence.

If you remove an order line from an order record, or remove an entire order record, the relevant linked item records will automatically be deleted as well. Previously used item ids will never be assigned again.

2.3 Changes in fields

2.3.1 Discount

After filling in and leaving the *Supplier* field, some supplier specific details are merged in, amongst which the discount which you usually receive from this supplier, if applicable. The discount is shown in the *Discount* field, but you are free to adjust the percentage: the new discount will then only apply to this order, and nothing changes in the supplier record.

2.3.2 Item ID

This is the unique identifier of the linked item record which is displayed in the current order line. In display mode, click the underlined number to open the linked record in a zoom screen.

2.3.3 Title (not in catalogue)

An item to be ordered may have a title which already appears in your catalogue or should be registered in there now. In that case, fill in the *Title* field, which is linked to the catalogue.

If, on the other hand, you order an item of which the title does not appear in the catalogue and shouldn't be registered in there either anytime soon, then fill in the *Title (not in catalogue)* field, not the *Title* field: this title will only be saved in the current item record, not in the catalogue.

2.3.4 Allocation

In the *Allocation* field of a cost centre allocation, your input will be checked. For example, in a new order record you are not allowed to enter a percentage other than 100, because the sum of all entered cost centre allocations must always be 100.

If you want to enter more than one cost centre allocation, you can leave the first allocation in the order line empty initially or fill in a percentage of 100.

Open, after saving the new order record, the equally new linked item record, put it in edit mode, add new cost centre occurrences and fill the allocations properly. The record can be saved if the sum of the percentages is 100. After saving, all commitments on the cost centres and the balances will be recalculated. In the order record you will still only see the first field group occurrence of the cost centre allocations, this time with a percentage different from 100, which you entered in the item record. You cannot change this number here, because that would change the sum as well: the allocations can only be changed in the item record.

2.3.5 Supplier details

If you are going to register a supplier in *Persons and institutions (contains suppliers)*, then in the new record first select *supplier* in the *Name type* drop-down list on the *Name information* tab. After making that choice and leaving the field, a number of default values is automatically entered on the *Supplier details* tab (so that you don't have to do that manually anymore).

The default *Delivery time* value is retrieved from *seracq#.txt* files, line number 26. If you wish to get a default delivery time different from 30 days, you may adjust this number in said text files. But you can adjust the entered delivery time manually (in the field) as well, of course. The other fields offer the same flexibility.

Adlib Acquisitions 4.1 - [Persons and institutions (suppliers)] (Version 6.5.0, build 28)

File Edit View Record Search Mark Combine Language switch Data language Options Screen tabs Help

Name information Supplier details Management details

Name and address

Other details

| | |
|-----------------|----------------------|
| Customer number | <input type="text"/> |
| Discount % | <input type="text"/> |
| Delivery time | 30 |
| Language | English |
| Currency | GBP |

Letters from within Adlib Acquisitions

| | |
|----------------------|----------------------|
| General order | order_letter_English |
| General cancellation | order_cancel_English |
| General claim | order_claim_English |

Letters from within Adlib Subscriptions

| | |
|---------------------------|----------------------------|
| Subscription order | serial_order_English |
| Subscription order claim | serial_order_claim_English |
| Subscription cancellation | serial_cancel_English |
| Subscription issue claim | serial_claim_English |
| Subscription renewal | serial_renew_English |

Processing of letters to suppliers

| | |
|--------|--------------------|
| Method | Print to documents |
|--------|--------------------|

The *Language* in which the supplier needs to be contacted, is set to the current interface language of your Adlib application, directly after selecting the *supplier* name type. This is a linked field to the *Languages* database, which means that you can only pick languages for which a *Languages* record exists; although you may create a new *Languages* record for a new language instantly. That record must hold translations of field labels which can be used in letters to suppliers. So it is important that a fully translated record is, or will be present in the *Languages* database, for the language of a supplier.

The names of the letter templates in the *Letters* box are automatically put together for you by adding the supplier language to a default partial name in English. If you select another language and leave the *Language* field, Adlib will ask you if you'd like Adlib to automatically re-adjust the names of the letter templates to be used. Choose *Yes* if you use the default templates present in your Adlib application: each language has its own templates because the fixed texts in it are in a different language.

Only if you've created your own templates with entirely different names, which is allowed too, you probably don't want your manually entered letter template names to be replaced by default names, if you happen to change the supplier language. Then choose *No* if Adlib asks for a confirmation of the replacement.

Adlib applications 4.2 release notes

Note that the standard templates can be found in the Adlib folder `\Worddoc\templates`. You may adjust their fixed texts and layout to your liking. Do make sure that you leave the special codes in the templates intact. Remember to save any adjusted templates with the `.dot` extension.

The new *Processing of letters* field is set to *Print to documents* by default. This means that the above entered templates will be used, and that the letters will be created in MS Word, from where you can print them. If you don't want or can't print letters via Word templates, then move the Word templates to another folder. Adlib won't be able to find the templates, and will search the *Letters* database for records with the names of the letter templates you entered or agreed with. By means of the fixed texts in those records, letters will be printed to the printer directly.

The other processing option is *Send by e-mail*. You can only set this option if you provide an e-mail address for the supplier on the *Name information* tab. Another requisite is that your sender address and the name of your SMTP server must have been set in line numbers 278, respectively 192, in *adlib#.txt* files. A copy of every e-mail is sent to your sender e-mail address, so that you have proof of sending the e-mail. Records from the *Letters* database provide the fixed texts in the e-mail letters: these records have the same names as the letter templates listed for the supplier. So check and customize all *Letters* records with the template names used by you, before you start e-mailing letters. Note that if you do not use the default template names, you must create *Letters* records with your custom names, if you want to be able to e-mail letters (or if you want to be able to print without Word templates).

2.3.6 Requester details

In the *Requesters* data source (the BORROWER database), a number of new fields is available and the working of some fields has changed. (A requester may be a requester, a borrower and/or a reader all at the same time, since this database is used in the Acquisitions module, as well as in the Loans module and the Serials module.)

Name is now a read-only field which is put together by Adlib at the moment you save a requester record. The composition is as follows: the preference is the format `Surname, Initials Insertion`, so for instance *Winkel, R. van*. If no initials are available and a first name is, then it becomes `Surname, First name Insertion`, so for example *Winkel, Rupert van*. If no first name is available either, then this requester is probably an institution and the *Surname* suffices as *Name*.

Adlib Acquisitions 4.1 - [Requesters : Name] (Version 6.5.0, build 28)

File Edit View Record Search Mark Combine Language switch Data language Options Screen tabs Help

Personal details | Addresses | Letters | Management details

Name and number

User number

Site

Name

Contact person

Term of address

Title

Surname

First name

Initials

Insertion

Maiden name

Date of birth

Sex

Class/department

Borrower category

Registered since

Image

Identification numbers

ID Number ID type

The department or class where a requester can be found daily, can be registered as well now.

In *ID-number* you can enter a passport or other identification number like that of a driving license or public transportation card for instance, should it be required.

Adlib Acquisitions 4.1 - [Requesters : Name] (Version 6.5.0, build 28)

File Edit View Record Search Mark Combine Language switch Data language Options Screen tabs Help

Personal details | Addresses | Letters | Management details

normal

Address

Address type Postal address

Address

House number Print house number in front of address

Postcode Print postcode behind city name

City

Country

Telephone

Telephone type Telephone number

E-mail address

E-mail address

Bank account

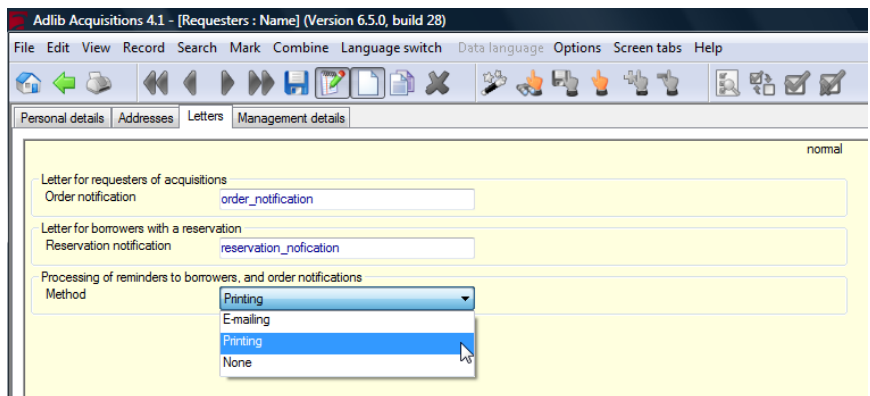
Bank account number

Adlib applications 4.2 release notes

In *Address type* you indicate whether the address is “home” or “workplace”. If it is a postal address as well (either with or without a P.O.Box number), then mark the *Postal address* checkbox. In *Address*, just enter the street name or “P.O.Box”. So, in *House number* a P.O.Box number may be entered as well. In some countries, on letters the house number must be printed in front of the street name and/or the postcode in front of the city name. Mark the relevant checkboxes if this is the case.

In the repeated field group *Telephone* you can enter multiple telephone numbers, and not necessarily just of telephones. In *Telephone type* you specify which device is linked to the number: you may choose from “landline”, “mobile phone” and “fax”.

On the *Letters* tab you set how this requester should receive order notifications and which template/letter record should be used. (For e-mailing, an e-mail address should be registered.) The *Method* setting also applies to reminders in case this requester is a borrower as well.



The new *Personal details* and *Addresses* screen are also present in Adlib Loans management and Adlib Serials, in the *Borrowers* and *Readers* data sources respectively.

2.4 Automatic procedures

2.4.1 Letters

All letters, order notifications for requesters and all other letters to suppliers, are now printed to Word templates by default (also see the two paragraphs above).

Per requester (in the data source *Requesters*), on the *Letters* tab, you can find the name of the letter which serves as order notification. The default name in there is the name of the Word template as well as the

name of the letter record (plain text) to be used alternatively. This name will be set dependent on the current interface language when opening a new record. If you've made a template with a different name, or wish to use a template in another language, then enter that name in the *Order notification* field.

If, on the same tab, you set *Method* to *E-mailing*, plain text from the letter record will be used for the e-mail.

The letters used by the Acquisitions module for written communication with a supplier, are registered in the supplier record on the *Supplier details* tab, and only concern the *General order*, *General cancellation*, and *General claim*. By default, names of letters are filled in in the language of the supplier.

If, on the same tab, you set the *Method* to *Send by e-mail*, plain text from the letter record will be used for the e-mail.

You will only be able to e-mail if you provide an e-mail address for the requester or supplier, and if your sender address and the name of your SMTP server have been set in line numbers 278, respectively 192, in *adlib#.txt* files.

If e-mailing fails, Adlib tries to print to Word templates, and if that fails too, plain text letters will be printed.

2.4.2 Orders list

The *Orders list* output format in the *Print wizard*, with which you can print a list of orders for all marked records in the *Orders* data source, has also been improved significantly for 4.2.

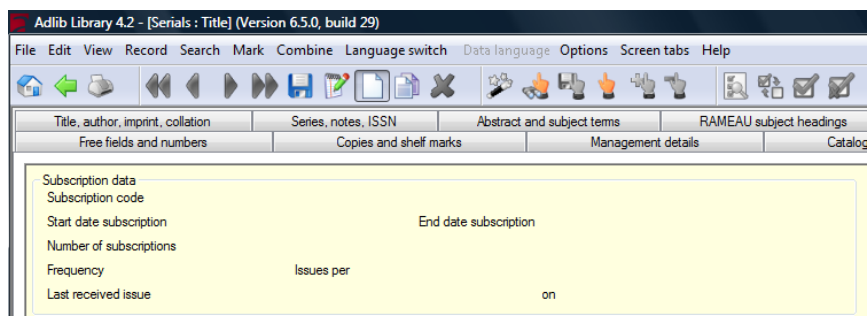
3 Adlib Library

3.1 The Loose-leaves data source

In Adlib Library, the *Loose-leaves* data source has been added. This data source is associated with the LOOSELEAF dataset in the DOCUMENT database, which was already present (but wasn't used yet). In the new data source you'll find the same access points, screens and output formats as in the *Serials* data source.

3.2 The Subscriptions screen tab

A read-only *Subscriptions* tab has been added to the *Serials* and *Loose-leaves* data sources. In a repeatable field group, all subscriptions to the current title are listed. This data is now no longer present on the *Catalogue card*.



If you would like to see more information about a certain subscription – editing is not possible here – then click the relevant underlined subscription code. The *zoom screen Subscription* opens, on which some bibliographical data is displayed, plus the most important subscription data, the cost allocation of the subscription, and an overview of received issues.

3.3 The Holding field

The *Holding* field can no longer be found in Adlib Serials, still only in the *Serials* data source in Adlib Library – the field definition was already present in the DOCUMENT database – and has also been moved from the *Series, notes, ISSN* tab to *Copies and shelfmarks*. This screen already held another *Holding* field, but that screen field name was incorrect so it has been renamed to *Issues in binding*: this usually concerns bound volumes with a copy number. On the *Catalogue card*

tab this field is also present, and its label has also been renamed to *Issues in binding*.

3.4 Series number added

Everywhere on screens which contain a *Series* field, a *Series no.* field has been added if that wasn't present yet, to be able to register the number of the document within the series.

3.5 New detail screen Advanced cataloguing

In the *Full catalogue* data source (in Adlib Library) and *Library catalogue* (in Adlib XPlus), the *Advanced cataloguing* (full_advanced.fmt) detail screen has been added, containing fields for print and distribution.

| Relations | Free fields and numbers | Copies and shelf marks | Management c |
|---|-------------------------|------------------------|-------------------------------|
| Title, author, imprint, collation | Advanced cataloguing | Series, notes, ISBN | Abstract and subject terms RA |
| De ondergang van Hyperion / Dan Simmons | | | |
| Censorship | Censor | Role | |
| Imprint / Colophon | | | |
| Imprint | | | |
| Colophon | | | |
| Print | | | |
| Place printed | | | |
| Printer | | | |
| Print year | | | |
| Distribution | | | |
| Place of distribution | | | |
| Distributor | | | |
| Distribution year | | | |
| Dedications | | | |
| Dedicator | | Dedicatee | |
| Fingerprint | | | |
| Fingerprint | | | |

3.6 New zoom screen Library catalogue

The *Zoom screen Library catalogue* (zm_doc.fmt) replaces the *Zoom screen Catalogue* (zm_cata.fmt). This zoom screen is used when you want to create, edit or view a linked catalogue title. The new screen is more extensive than the old one: more author data, source data, an ISSN field, digital references and more copy information.

Adlib applications 4.2 release notes

The image displays two screenshots of the Adlib Library catalogue application, showing a record form with various input fields. The top screenshot shows the 'Zoom screen' window with the title 'Zoom screen Library catalogue'. The form is divided into several sections:

- Material type:** A single input field for 'Material type'.
- Title and author:** Fields for 'Title', 'Statement of responsib.', 'Author', 'Corporate author', and 'Other author(s)'. 'Author' has sub-fields for 'Role' and 'Domain'.
- Edition:** A single input field for 'Edition'.
- Source:** Fields for 'Material type', 'Source title', 'Volume', 'Issue', 'Day', 'Month', 'Year', and 'Pagination'.
- Imprint, Collation:** Fields for 'Place', 'Publisher', 'Year', and 'Pagination'.
- ISBN / ISSN:** A single input field for 'ISBN / ISSN'.

The bottom screenshot shows a continuation of the form with the following sections:

- ISBN / ISSN:** Fields for 'ISBN' and 'ISSN'.
- Digital references:** Fields for 'Description' and 'Reference'.
- Default shelf mark:** A single input field for 'Shelf mark'.
- Copy information:** A table with columns for 'Copy number', 'Shelf mark', 'Availability', 'Loan category', and 'Site'. Below the table are fields for 'Notes', 'Location note', 'Missing', and 'Holding'.

3.7 New screens for copies

For the registration of copies, especially copies in a historical context, a number of fields has been added to the COPIES database, and a few new screens have been created and added to the *Copies* data source, namely *Acquisition | Insurance | History* (copyacqu.fmt), *Inscriptions | Markings* (copy_inscriptions.fmt), and *Physical characteristics* (copyphysical.fmt). See the context sensitive Help (F1) in Adlib for field-specific information.

| Copy details | Inscriptions Markings | Acquisition Insurance History | Physical characteristics | Location and counters | Serial details | Management det |
|---------------------|-------------------------|-----------------------------------|--------------------------|-----------------------|----------------------|----------------|
| | | | | | | book |
| Acquisition | | | | | | |
| Method | <input type="text"/> | Date | <input type="text"/> | Precision | <input type="text"/> | |
| From | <input type="text"/> | | | | | |
| Price | <input type="text"/> | Currency | <input type="text"/> | | | |
| Notes (price) | <input type="text"/> | | | | | |
| Reason | <input type="text"/> | | | | | |
| Conditions | <input type="text"/> | | | | | |
| Copyright | <input type="text"/> | | | | | |
| Credit line | <input type="text"/> | | | | | |
| Notes | <input type="text"/> | | | | | |
| Insurance | | | | | | |
| Insurance value | <input type="text"/> | Currency | <input type="text"/> | Insurance date | <input type="text"/> | |
| Notes | <input type="text"/> | | | | | |
| Object history | | | | | | |
| Object history note | <input type="text"/> | | | | | |
| Ownership history | | | | | | |
| Owner | <input type="text"/> | | | | | |

| Copy details | Inscriptions Markings | Acquisition Insurance History | Physical characteristics | Location and counters | Serial details | Management det |
|---------------------------|-------------------------|-----------------------------------|--------------------------|-----------------------|----------------|----------------|
| | | | | | | book |
| Inscriptions and markings | | | | | | |
| Type | <input type="text"/> | | | | | |
| Position | <input type="text"/> | | | | | |
| Method | <input type="text"/> | | | | | |
| Date | <input type="text"/> | | | | | |
| Creator | <input type="text"/> | Role | <input type="text"/> | | | |
| Content | <input type="text"/> | | | | | |
| Description | <input type="text"/> | | | | | |
| Interpretation | <input type="text"/> | | | | | |
| Language | <input type="text"/> | | | | | |
| Translation | <input type="text"/> | | | | | |
| Script | <input type="text"/> | | | | | |
| Transliteration | <input type="text"/> | | | | | |
| Notes | <input type="text"/> | | | | | |

Adlib applications 4.2 release notes

| Copy details | Inscriptions | Markings | Acquisition | Insurance | History | Physical characteristics | Location and counters | Serial details | Management det |
|------------------|----------------------|----------|-------------|-----------|---------|--------------------------|-----------------------|----------------|----------------|
| Copy | | | | | | | | | |
| Copy number | <input type="text"/> | | | | | | | | |
| Title | <input type="text"/> | | | | | | | | |
| Catalogue number | <input type="text"/> | | | | | | | | |
| Copy status | available ▾ | | | | | | | | |
| Loan category | book | | | | | | | | |
| Shelf mark | <input type="text"/> | | | | | | | | |
| Binding method | | | | | | | | | |
| Binding method | <input type="text"/> | | | | | | | | |
| Completeness | | | | | | | | | |
| Completeness | <input type="text"/> | | | | | | | | |
| Notes | <input type="text"/> | | | | | | | | |
| Condition | | | | | | | | | |
| Condition | <input type="text"/> | | | | | | | | |
| Notes | <input type="text"/> | | | | | | | | |
| Notes | | | | | | | | | |
| Notes | <input type="text"/> | | | | | | | | |

In the *Books* data source, under *Full catalogue*, the *Copies and shelf-marks* screen (copy.fmt) has been replaced by an extended version (copybook.fmt).

| Exhibitions, auctions, collections | Relations | Free fields and numbers | Copies and shelf marks |
|------------------------------------|----------------------|-------------------------|---|
| Default shelf mark | | | |
| <input type="text"/> | | | |
| Copy details | | | |
| Copy number | Shelf mark | Availability | Loan category Site |
| <input type="text"/> | <input type="text"/> | | <input type="text"/> <input type="text"/> |
| Binding method | | | |
| <input type="text"/> | | | |
| Completeness | | | |
| <input type="text"/> | | | |
| Condition | | | |
| <input type="text"/> | | | |
| Inscription | | | |
| Type | | | |
| <input type="text"/> | | | |
| Notes | | | |
| <input type="text"/> | | | |
| Location notes | | | |
| <input type="text"/> | | | |

4 Adlib Museum

4.1 Basis or Standard

Most of the changes described in this chapter are only applicable to the Museum Standard or XPlus application. Changes in screens which are being used in Standard as well as in Basis, are also visible in Basis. However, of the described changes, it is not indicated per change if it is present in Basis or not. Please contact our Sales department, for specific information about the possibilities of Museum Basis, Standard or XPlus.

4.2 Spectrum accreditation

Adlib Museum has been accredited as 'Spectrum compliant' by the British MDA. This approval means that Adlib fully complies to the Spectrum standard.

The Spectrum standard is controlled by the renowned MDA (<http://www.mda.org.uk/stand>) and is recognised both nationally and internationally as the industry standard for collections management. Now in its 3rd, revised edition, Spectrum was developed in partnership with over 100 museum professionals.

For the sake of completeness, the following overview lists the most important changes that have been made in Adlib Museum, to comply with Spectrum:

| .fmt/.inf/.pbk | tag | action |
|-----------------------|--------------------------------|---|
| conditn.fmt | Tp | added field 'Treatment priority' |
| collect.inf | FD | added field for 'environmental_condition.date' |
| collect.inf | H1, 1H, H2, H3 | added fields 'hazard', 'hazard.notes' and 'hazard.date' |
| thesau.inf | do | added value 'HAZARD' |
| collect.inf | Rs, Re, Rh, 1h, Rr, Rt, 1t, Ri | added fields for 'rights.start' (Rs), 'rights.end' (Re), 'rights.holder' (Rh), 'rights.holder.lref' (1h), 'rights.reference_number' (Rr), 'rights.type' (Rt), 'rights.type.lref' (1t), 'rights.in_out' (Ri) |

Adlib applications 4.2 release notes

| | | |
|--------------|------------------------------|---|
| collect.inf | Rc, Rd, Ra, Rb, Rq, lq | added fields for 'rights.consent_status' (Rc), 'rights.consent_status.date' (Rd), 'rights.out.authoriser' (Ra), 'rights.out.authorisation_date' (Rb), 'rights.out.requester' (Rq), 'rights.out.requester.lref' (lq) |
| thesau.inf | do | added value 'RIGHTS' |
| rights.fmt | | created new screen |
| adlib.pbk | | added detail screen 'Rights' to 'Objects', 'Internal object catalogue' and 'External object catalogue' |
| acquisit.fmt | RO | removed field and box 'Copyright' from screen |
| collect.inf | Tp | created new index 'ct_prio' |
| adlib.pbk | Tp | added new method for 'Conservation treatment priority' to 'Objects', 'Internal object catalogue' and 'External object catalogue' |
| conditn.fmt | FD | changed data type back to 'Text' |
| conserva.fmt | | changed several labels in order to use the conservation database more generally (also for condition checks/technical assessments) |
| zm_consv.fmt | | changed several labels in order to use the conservation database more generally (also for condition checks/technical assessments) |
| conserva.inf | RT | renamed to 'procedure_type', added value 'CHECKASSESSMENT' for 'check/assessment', enabled option 'Sort enumeration values' and made mandatory |
| conserva.fmt | RC, RE | field suppression if Rt = 'CHECKASSESSMENT' |
| collect.inf | AT | added field for 'treatment.type' |
| collect.inf | AM | added 'treatment.type' to list of linked fields |
| conditn.fmt | Lo, AW | replaced Lo (lref) with AT (treatment.type), made field repeatable, renamed 'Conservation treatment' box to 'Event log' and changed other labels in this box accordingly |
| conserva.fmt | RC | made field repeatable |
| adlib.pbk | | Renamed datasource 'Conservation treatments' to 'Assessments and treatments' |
| adlib.pbk | | Renamed some methods in order to use the conservation database more generally (also for condition checks/technical assessments) |
| collect.inf | Tp | added value 4 for 'urgent' |
| conserva.inf | RU | added field 'reason' |

Adlib applications 4.2 release notes

| | | |
|-------------------------------|-------------------------------------|---|
| conserva.fmt | RU | added field (with conditional suppression) |
| conserva.fmt | RO, RN | field suppression if Rt = 'CHECKASSESSMENT' |
| collect.inf | nc | new field for 'next_condition_check_date' |
| conditn.fmt | nc | added field |
| collect.inf | Vt | added enumerated field for 'insurance.type' |
| collect.inf | Vc | added field for 'insurance.confirmation_date' |
| value.fmt | Vt, Vc | added fields and re-arranged others |
| collect.inf | d1, d1, d2, d3, d4, d5, dL | added fields for loss/damage documentation |
| loss.fmt | | created new screen |
| adlib.pbk | | added detail screen 'Loss/damage' to 'Objects', 'Internal object catalogue', 'External object catalogue' and 'Archives (Catalogue)' |
| thesau.inf | do | added value 'LOSS' for 'loss/damage method' |
| adlib.pbk | | added ChangeLocationMethod to 'Internal object catalogue', 'External object catalogue' and 'Archives (Catalogue)' |
| exhibit.inf | RN | added field for 'reference_number' |
| exhibdet.fmt, zm_exhib.fmt | RN | added field |
| collect.inf | t3 | added field for 'exhibition.reference_number' |
| collect.inf | TN | added field mapping for reference number |
| thesau.inf | do | added value 'RESEARCH' for 'research/use method' |
| thesau.inf | do | added value 'RESEARCH_RESULT' for 're-research/use result' |
| research.inf | | created new database |
| collect.inf | rN, rL, r1, r2, rA, rR, rB | added fields for link to research database |
| collect.inf | rL | added index |
| exhibit.inf | RN | added unique index |
| collect.inf | Tr | new field for 'valuation.reference' |
| value.fmt | Tr | added field |
| collect.inf | rT | new enumerated field for 'record_type' |

Adlib applications 4.2 release notes

| | | |
|--|------------------------------|--|
| objid-in.fmt, objid-ex.fmt | rT | added field |
| requirem.fmt | F2 | added field |
| name.fmt | | created new screen |
| adlib.pbk | | added new detail screen 'name.fmt' to data source 'Persons and institutions' |
| people.inf | AN, VN, sg, HO, sf, AH | added fields for 'surname' (AN), 'forename' (VN), 'title' (sg), 'additions_to_name' (HO), 'initials' (sf) and 'salutation' (AH) |
| people.inf | br, tn | copied fields from thesau.inf and added group name 'Source' |
| people.inf | TV | added field for 'prefixes_to_surname' |
| people.inf | CN | added logical field for 'create_name' adapl function |
| peopstor.ada | | added create_name function |
| collect.inf | mC, mc, mT, mt, mR, mP | added fields for 'movement.contact' (mC), 'movement.contact.lref' (mc), 'movement.method' (mT), 'movement.method.lref' (mt), 'movement.reference' (mR), 'location.default.planned_removal_date' (mP) |
| thesau.inf | do | added value 'MOVEMENT' |
| location.fmt | mP, mT, mR, mC | added fields |
| collect.inf | sP, sD | added fields for 'salvage_priority' (sP) and 'salvage_priority.date' (sD) |
| collect.inf | sP | created new index 'salvprio' |
| requirem.fmt | sP, sD | added fields |
| adlib.pbk | sP | added new method for 'Salvage priority' to 'Objects', 'Internal object catalogue' and 'External object catalogue' |
| people.inf | l1, l2, l6 | added lref's to internal link fields us, uf and et |
| people.inf, thesau.inf | | added research.inf as feedback database |
| thesau.inf | do | added value 'CHECKREASON' |
| people.inf | RN | added field 'reference_number' |
| person.fmt, zm_organ.fmt, zm_pers.fmt, address_supplier.fmt, lnkst.fmt | RN | replaced BI with RN |

| | | |
|---|---------------|--|
| person.fmt, zm_organ.fmt, zm_pers.fmt, ad- dress_supplier.f mt | NP | field suppression if do <> 'PUBL' |
| name.fmt | BI | field suppression if do <> 'INST' |
| people.inf | us, uf, et | added link screen Inkaddr.fmt |
| people.inf | PN | added new field for index on BI and RN |
| people.inf | PN, RN, BI | changed BI index (new name: number) to combined index for BI and RN |
| adlib.pbk | PN | changed index for method 'Reference number' |

4.3 New Research/use data source

A new database (RESEARCH) and two new screens (researchdet.fmt and objlist.fmt) allow for the possibility to register, in the new *Research/use* data source, which objects from the collection are not available for display or loans during a certain period, because they are being researched or are in use otherwise. Per record you can link to multiple objects and register the method, the provisos, the names of the researchers and the final result.

Research/use details
Linked objects
Management details

Research/use

Reference number Result

Method

Provisos

Start date End date

Notes

Researcher/user

Name

Address

Postal code Place

Country

Telephone Fax

Research/use details
Linked objects
Management details

| Object number | Creator | Object name | Title |
|---|---------|-------------|-------|
| <input style="width: 50px;" type="text"/> | | | |

4.4 Packages and package types

New databases PACKAGING and PACKAGETYPE, *Packages* and *Package types* data sources which reference these databases, with the new detail screens *Package details* (packages.fmt), *Linked objects* (objlstloc.fmt) and respectively *Package type details* (packagetype.fmt) allow you to specify packages and link packages to objects, to register a move of objects to another location. A package may contain multiple objects, but it is not possible to add links to objects from within *Packages*: the other way around, from within object management, is allowed though. However, the intention is that in the near future this data will be managed via an Adlib relocation module (currently still a work in progress), with the aid of the Adlib Museum Tracker.

| Package details | | | Linked objects | Management details |
|-----------------|----------------------|------|----------------|--------------------|
| Package details | | | | |
| Package number | <input type="text"/> | | | |
| Purchase date | <input type="text"/> | | | |
| Expiry date | <input type="text"/> | | | |
| Type | <input type="text"/> | | | |
| Image | <input type="text"/> | | | |
| Dimension type | Value | Unit | | |
| Recommendations | <input type="text"/> | | | |
| Supplier | <input type="text"/> | | | |
| Condition | <input type="text"/> | | | |
| Notes | <input type="text"/> | | | |

| Package details | | | | Linked objects | Management details |
|-----------------|---------|-------------|----------|----------------|--------------------|
| Object number | Creator | Object name | Location | | |

| Package type details | | | Management details |
|----------------------|----------------------|----------------------|--------------------|
| Package details | | | |
| Package type | <input type="text"/> | | |
| Name | <input type="text"/> | | |
| Image | <input type="text"/> | | |
| Supplier | <input type="text"/> | | |
| Dimension type | Value | Unit | |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | |
| Recommendations | <input type="text"/> | | |

4.5 New Rights and Loss/damage screens

| | | | | | | |
|-------------------------|---------------|----------------------|---------------|---------------|--------------------------|----------------|
| Numbers Relationships | Documentation | Documentation (free) | Reproductions | Rights | Condition Conservation | Recommendation |
|-------------------------|---------------|----------------------|---------------|---------------|--------------------------|----------------|

Rights

| | | | | | |
|----------------|----------------------|---------------|---|----------|---|
| Type | <input type="text"/> | Reference no. | <input type="text"/> | Assigned | <input type="text"/> |
| Holder | <input type="text"/> | Start date | <input type="text"/> | End date | <input type="text"/> |
| Consent status | <input type="text"/> | Date | <input type="text" value="2008-11-04"/> | | |
| Requester | <input type="text"/> | Authoriser | <input type="text"/> | Date | <input type="text" value="2008-11-04"/> |
| Notes | <input type="text"/> | | | | |

To the *Internal object catalogue*, *External object catalogue* and *Objects* data sources, the *Rights* tab has been added, with new fields. Here, you can register the rights which third-parties have to the relevant object.

To the *Internal object catalogue*, *External object catalogue*, *Objects* and *Archives (catalogue)* data sources, the *Loss/damage* tab has been added, with new fields. If the object has been damaged or lost, you can register it as such here.

| | | | | | | |
|----------------------------|-------|------------------|--------------------|--------------------|-------|--------------------|
| Exhibitions Research/use | Loans | Entry Despatch | Loss/damage | Accompanying texts | Notes | Management details |
|----------------------------|-------|------------------|--------------------|--------------------|-------|--------------------|

Loss/damage

| | | | | | |
|----------|----------------------|------------------|----------------------|------|---|
| Method | <input type="text"/> | Reference number | <input type="text"/> | Date | <input type="text" value="2008-11-04"/> |
| Reporter | <input type="text"/> | | | | |
| Notes | <input type="text"/> | | | | |

4.6 Locations and movements

In model museum applications 4.2, you'll find the possibility for a new registration of locations and processing of movements. In the object catalogues, two new tabs are present: *Location | Movement* (location.fmt) and *Location history* (locationHistory.fmt).

The first screenshot shows the 'Location | Movement' tab. It contains three main sections: 'Current location', 'Next movement', and 'Location checks'. Each section has input fields for location, date, time, and other details, along with a 'Notes' field. The second screenshot shows the 'Location history' tab, which displays a table of previous location/movement details with columns for Location, Start date, Time, and Removal date. Below the table are fields for Location type, Suitability, Authoriser, Notes, Movement method, Reference no., and Contact.

The old *Location* tab offered a repeatable field group in which a new location simply had to be inserted at the top of the list, while the location history was apparent from the list below it.

To make the current location more explicit and to also allow for the planning and registering of future movements, the two new screens have been created. On these screens, the movement method, the time of the movement, packaging and authoriser can be entered as well. The fields previously present on the *Location* tab, have been moved to *Location history*. On *Location | Movement* you'll find new fields for the current and future location and movement.

4.6.1 Changing locations efficiently

To process the workflow of movements – meaning: functionality to automatically transfer the data of the current location to the location history on the date of movement, and to then replace the data of the current location by that of the new location, to subsequently empty the fields of the new location – *adlwin.exe* 6.5.1 and higher offers an altered *Change locations* procedure, which you need to start manually though.

With this procedure, you can change the current location of a set of

objects all at once. This is convenient if a part of, or the entire, collection changes location: with the *Change locations* option you can register such a change via one batch procedure, as follows:

1. Search for records in the *Internal object catalogue*, of which the location needs to be changed, and mark those records.
2. Choose *Edit > Change locations* in the menu bar, while the list screen is being shown. The *Change object locations* window opens.

With the core software upgrade to version 6.5.1, this existing functionality has changed somewhat: however, this is only apparent in the new model application 4.2 (and future versions). If you use an older application (3.5, 3.4 etc.), then the relevant functionality does not change for you (see the Adlib User guide for a description).

To start with, decide whether you want to process the movement as registered in the records – records should then already have data about the new location – or if you want to provide the new location in this window, for instance because some of the, or all, object records have no data about the new location (or state the wrong new location). In the first case you mark the *Start next movement (new location has been recorded)* option; in the second case you mark the *New location* option and enter the new location in the entry field behind it.

Change object locations

Object(s)
Object number = ...

Location

Start next movement (new location has been recorded)

New location

Ignore future movement data

Use and remove future movement data Confirm deletion

Date 2009-09-09 Time 13:20:22

Authoriser Click here to override

Notes Click here to override

Movement

Method Click here to override

Reference Click here to override

Contact Click here to override

Notes Click here to override

Progress

Summary

Apply Close Help

In case you select the *New location* option, you'll also have to choose between *Ignore future movement data* and *Use and remove future movement data*:

- *Ignore future movement data* ignores all data about the next movement in the record, including any registered new location in there (and also leaves that data intact), while the new location which you enter here in the window, becomes the new current location in the record. The other fields in the *Location* field group will be filled with the values that can be entered in the currently opened window.
- *Use and remove future movement data* uses all record data for the next movement, except any registered new location in there, and uses the new location entered in the current window instead. The new location you just entered, plus the existing record data

for the new location will then be copied to the fields for the current location, and the current field group occurrence for the next movement will be removed. However, if you mark the *Confirm deletion* checkbox, then during the procedure you may still decide per record whether or not the current field group occurrence for the next movement should be removed.

Optionally, you can fill in any of the other fields, if you won't use the record data. Click the *Apply* button to start the procedure. You can stop the procedure (changes up until then won't be undone), by clicking the *Cancel* button during execution of the procedure – *Apply* temporarily changes into *Cancel*. (When the procedure is done, the *Apply* button is greyed out for clarification – only if you make a change to the settings above it, the *Apply* button becomes active again.) Click the *Close* or *x* button to close the window. The marked records have been adjusted.

When writing new data to the *Location* field group, the old data will be moved to the *Location history* tab. If the new data is coming from the first occurrence of the *Next movement* field group and that field occurrence is subsequently removed, then any second occurrence of that field group (for a later follow up movement) will automatically become the first occurrence since it will be the new next movement.

■ **Confirmation of deletion**

If you chose to use the new location data from the records, and to also let the deletion of that data after use be confirmed by you, then for each record to be processed which contains data for a future movement, the *Confirm removal of future movement data* window appears; it won't appear if such data is not present, because then nothing can be removed either. The data which will be removed, is retrieved and displayed here, so that you know what you are keeping or removing. Empty fields in the *Future movement data* box remain grey, the fields with a value in them get a blue background. Click the *Keep* button to keep the data as it is, or click *Remove* to delete it.

Confirm removal of future movement data

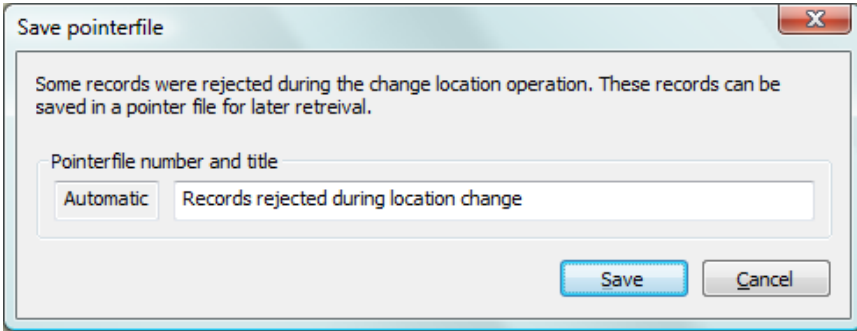
Information
You have selected to confirm the removal of the future movement data for each record processed during the change location operation. Confirm your choice by reviewing the record details below.

Record details
Record number: 40 Object number: 1106
Object name:

Future movement data
Date and time: 2009-09-10
Reference number: 789329KJI
Movement method: trolley
Contact: Carter, Pete
New location: Rembrandt room
Type:
Notes: Detach the door-closers in the hallways.

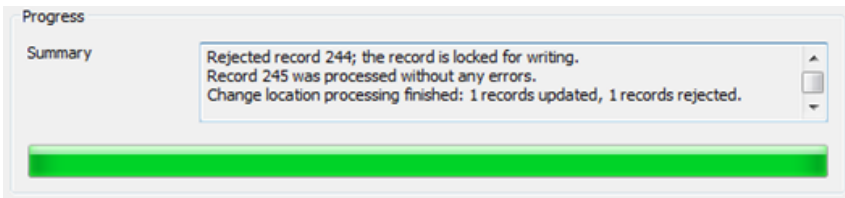
■ Records which cannot be edited

Records which cannot be edited by the procedure, due to some problem, can be saved in a pointer file so that you'll be able to check those records for errors afterwards and possibly adjust them manually. The *Save pointerfile* dialog appears automatically if problematic records have been found. Enter a name for the pointer file and click *Save*. (If you do not enter a name, Adlib will set a name automatically.) An available number will automatically be assigned to the new pointer file, but you may also enter a number yourself in the entry field which contains the word *Automatic*.



■ Progress report

In the *(Progress) Summary* box in the *Change object locations* window, the results of the procedure are displayed, such as rejected (un-processed) records, successfully processed records and the end result.



■ Limited validation of linked fields

Fields in the *Change object locations* window, which match linked fields in the application, are validated in a limited way after you leave the field. For example, if you fill in an *Authoriser* or *Contact* name which does not exist in the *Curator* domain in *Persons and institutions*, and you leave the field, then only a message appears. You must still enter a name which does occur in that domain in the linked database. Here, you can't open the *Linked record search screen* to look up the desired name or term in a list.

5 Adlib Loans Management

5.1 Extended reminder procedure

The new reminder procedure introduced in Adlib Loans Management 3.4, has been completed in 4.2.

In 3.4 there was no need to create links to templates to be used: if the templates were located in the proper folders, then Adlib could find them. Only when templates couldn't be located in the expected place, Adlib would use the plain text letters which you had already set per borrower. In 4.2, the location of templates and/or the names of letter records must explicitly be entered on the Reminder policy screen tab in the Borrower categories and limits data source. That's why on the Letters screen tab in the Borrower data source, the fields for reminder letter names have gone; here you do set whether a borrower should receive reminders by e-mail or by post. In the first case you must of course provide an e-mail address for that borrower and your Adlib system must be able to send e-mails.

5.1.1 Setting up a remind policy per borrower category

In 4.2 the remind policy has to be applied as follows:

1. Adlib Loans Management opens with *Step 1* in the *Search wizard*. Select the *Borrower categories and limits* file and click *Next*. You can now search for existing borrower categories or enter new ones (see the Adlib User Guide for standard Adlib functionality or the Loans Module Guide for related information).
2. On the *Remind policy* tab of an opened record in this database, for **every** existing and new borrower category for which the library wants to be able to send reminders, you have to indicate which letters are to be used for which reminders.

| Borrower categories / loan limits | | | |
|-----------------------------------|-------------------------------|-------------------------------|------------------------|
| Limits per loan category | | Remind policy | |
| Management details | | | |
| Reminders | | | |
| Remind letter/e-mail (plain text) | Remind letter (Word template) | Remind e-mail (Word template) | Reminder period (days) |
| reminder1 | | | 7 |
| reminder2 | | | 14 |
| reminder3 | | | 21 |

In the screenshot above you can see a simple example of a set up remind policy. In the first occurrence of the *Days overdue* field, you fill in the minimum number of days after the return date after which the first reminder must be sent. In the (optional) second

and following occurrences of this field group you set the minimum number of days after the return date after which the second and following reminders must be sent.

The repetitions of the *Reminders* field group will be sorted automatically by the contents of the *Days overdue* field. This ensures that the reminder letters are always in the correct order.

A remind policy consists of at least one filled in reminder term (*Days overdue*) with an accompanying *Reminder letter (plain text)*. You can add further occurrences of this field group via the following buttons:



- So, per field group occurrence you can fill in four fields in line, of which at least a reminder term and a plain-text letter (a record with plain text in the *Letters* database in this application). If you choose plain text only, like in the example of step 2 above, then first place the cursor in the first field of the line and type the name of the desired letter. (If you aren't sure about the name, press **Shift+F4** to open a list of available letter records, from which you can choose one or create a new one; existing letter records can be displayed in a zoom screen from the *Linked record search screen* by clicking the *Show* button. And if desired, you can click the *Edit record* button in the Adlib toolbar to immediately adjust the letter text.) If you do not provide Word templates in the same field group occurrence, then Adlib uses the text from the letter record to which you just linked, for sending reminders both per e-mail as for printing.

| Borrower categories / loan limits | | | | Limits per loan category | | | | Remind policy | | | | Management details | | | |
|-----------------------------------|--|-------------------------------|--|-------------------------------|--|------------------------|--|---------------|--|--|--|--------------------|--|--|--|
| Reminders | | | | | | | | | | | | | | | |
| Remind letter/e-mail (plain text) | | Remind letter (Word template) | | Remind e-mail (Word template) | | Reminder period (days) | | | | | | | | | |
| reminder1 | | ..\reminder_letter1.dot | | ..\reminder_e-mail1.dot | | 7 | | | | | | | | | |
| reminder2 | | ..\reminder_letter2.dot | | ..\reminder_e-mail2.dot | | 14 | | | | | | | | | |
| reminder3 | | ..\reminder_letter3.dot | | ..\reminder_e-mail3.dot | | 21 | | | | | | | | | |

But as soon as you also provide a Word template in a field group occurrence, Adlib will prefer this template over plain text. In contradiction to plain text, for which one record is used for both e-mail and printing, when using templates you have to use different templates for e-mail and printing. You probably have two example templates, which you can adjust to your liking. (For more information about creating templates for use in Adlib, see the

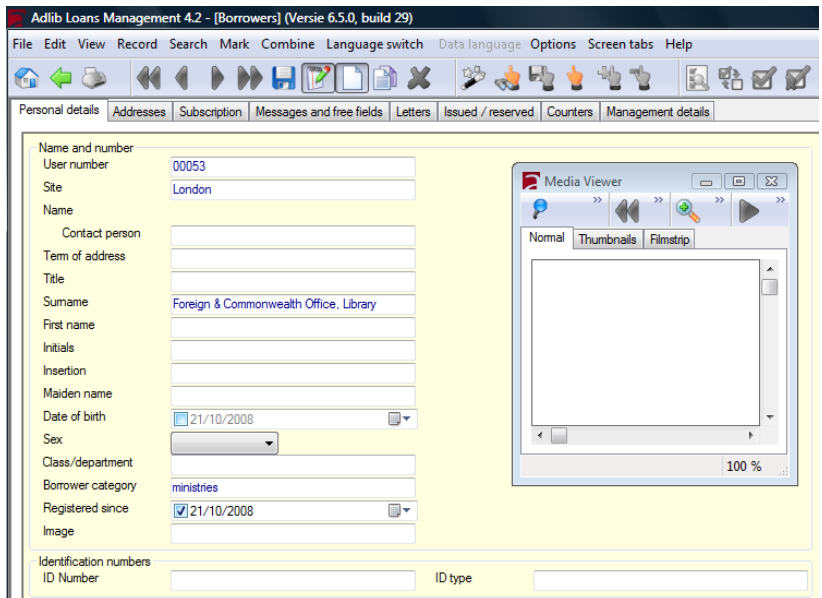
Adlib User Guide.)

The path to the templates may be relative (relative with respect to the folder with the application name), like in the example above. Save this borrower category record when you are finished with filling in the remind policy.

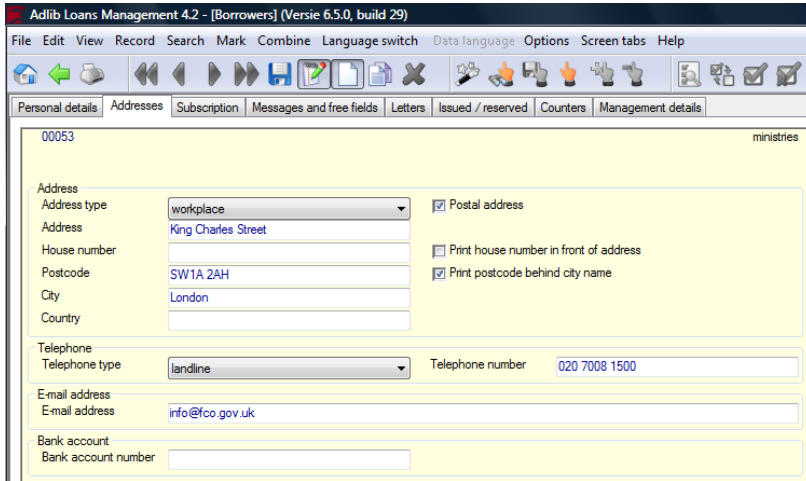
Note that for an international borrowers file, borrower categories provide the possibility to set up a multi-language remind policy. Suppose most of your borrowers are English speaking, but some are from France, and you wish you serve them in French. Then just create a separate borrower category for this group and link French reminder templates to it.

5.1.2 Linking borrowers to a remind policy

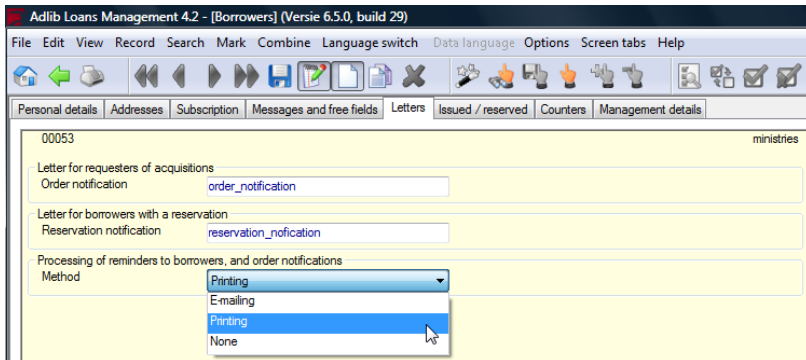
4. You have to fill in a borrower category for each borrower who must be able to receive reminders. You may want a different remind policy for students than for co-workers for example, etc. You can do this in the *Borrowers* data source that you can select in the first step of the *Search wizard*.
5. In the example below the (fictive) borrower category “ministries” has been assigned to this borrower.



- On the *Addresses* tab (see the screenshot below) you have the possibility to enter an e-mail address. Only if you entered an e-mail address here, you can choose to send reminders per e-mail to this borrower (to this e-mail address), otherwise you have to print reminders and send them by normal mail.



- Finally, on the *Letters* tab, you indicate how this borrower should receive reminders. (So for e-mail, an e-mail address must be registered.) This setting only applies to reminders, not to the notification letters present on this screen.



- Make settings 4 up to and including 6 for each borrower in the database.

5.1.3 If Adlib cannot process letters as instructed

If in 4.2 applications a reminder cannot be made in the way indicated in the remind policy (for instance because the templates are not in the right place), then Adlib will automatically check for other possibilities:

- If Adlib cannot send an e-mail with an e-mail template, it uses a plain text letter if specified. If no plain text letter has been specified, a default letter text from an *adlib.txt* file will be used.
- If Adlib cannot print a reminder with a reminder template, it uses a plain text letter if specified. If no plain text letter has been specified, a default letter text from an *adlib.txt* file will be used.

5.1.4 Other settings

To get your reminder procedure completely in working condition, you may have to make some additional settings, like providing an e-mail address and SMTP server, or editing and renaming example Adlib templates. But this functionality hasn't changed since 3.4. You can find information about all of this in the *Loans module guide* and in the *Applying new remind policy in Adlib Loans Management guide*.

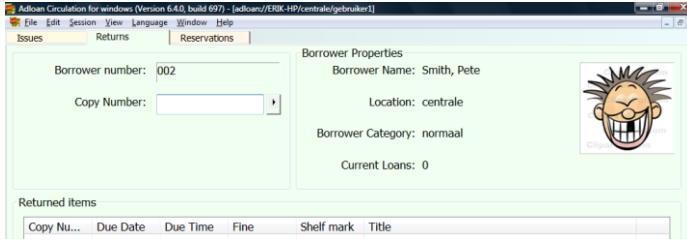
5.2 Loans history

In the new *Loans history* data source (LOANHIST database), the loans history of each copy is saved per issuing. A single, past loan transaction will be displayed on the read-only *Loan history* tab (loanhist.fmt). The *loanhist* adapl is executed for every loan transaction, which automatically creates new records in LOANHIST.

| Loan history | |
|-------------------|--------------------------|
| Loan transaction | |
| Issued on | 28/05/2008 |
| Title | Adlib Gebruikersgids 4.0 |
| Copy number | 20123 |
| Loan category | boek |
| Borrower number | 007 |
| Borrower name | Heuvel, R. van den |
| Borrower category | normaal |
| Catalogue record | 3 |
| Material type | boek |
| Keyword | |

5.3 Picture of borrower for loan transactions

A (passport) photo which you linked to a borrower in Adlib Loans management, will be shown on every tab in Adloan Circulation 4.2 when you select the relevant borrower.



6 All applications

6.1 Use software version 6.5 or higher

The Adlib model applications version 4.2 use functionality which has been introduced in software version 6.5. That is why you can only use the 4.2 applications with 6.5 software or higher.

6.2 Feedback links everywhere

Everywhere in the model application where it makes sense and is applicable, feedback links have now been implemented. This has the following two advantages:

- When you turn a preferred term (1) into a non-preferred term, and with it introduce a new preferred term (2), then Adlib will automatically replace the record number of preferred term 1 by the record number of preferred term 2 in all other databases in which fields link (on reference) to preferred term 1. The new preferred term will automatically appear in the catalogues.
- When you want to delete an authority record, while the term or name from that record is used in linked fields in other databases, then Adlib warns you that you are about to remove a record of which the value is being used elsewhere. You may then cancel the action, or still delete the authority record causing the record number of this authority record to be removed from all linked fields in other databases where it might appear.

So feedback links prevent any chance of corruption of your databases because of maintenance work on your authority files.

Do note that it not only concerns feedback database definitions in the *Thesaurus* and *Persons and institutions*, but in other databases as well.

Because of the feedback links, many indexes have been added, but this shouldn't lead to any noteworthy decrease in performance. Only when you adjust an authority record which appears in many records, it may occur that you'll have to wait a little until Adlib has updated all records and indexes.

6.3 All adapls in one folder

All compiled adapls (.bin) have been moved to the Adlib \adapls sub-folder. The source files of the adapls (.ada) reside in this folder as well. Because of this, the other subfolders have cleaned up nicely. Moreover, some compiled adapls now no longer appear in more than one place. In the Adlib structure files, all relative paths to adapls now point to the \adapls folder.

6.4 Registering more personal details

In the *Persons and institutions* data source in several applications, the *Name information* tab has been replaced by the two tabs *Identification* and *Address details*. With these two tabs and with the extended *Description (Person details)* tab, you can register many more personal or institutional details than previously, like a ISBN publisher prefix, the separate elements of the name, the gender, source data and metadata, and login name and password for a website. See the context-sensitive Help (F1) in Adlib for field specific information.

| Identification | Description | Address details | Relationships | Management details |
|---|-------------|-----------------|---------------|--------------------|
| Authorised form of name Name <input type="text"/> Name type <input type="text"/> Reference number <input type="text"/> Institution code <input type="text"/> ISBN publisher prefix <input type="text"/> Name note <input type="text"/> | | | | |
| Other forms of name Use <input type="text"/> Used for <input type="text"/> Equivalent <input type="text"/> Category <input type="text"/> | | | | |
| Person's name elements Title <input type="text"/> Gender <input type="text"/> Surname <input type="text"/> Forename(s) <input type="text"/> Prefix(es) to surname <input type="text"/> Addition(s) to name <input type="text"/> Initials <input type="text"/> Salutation <input type="text"/> | | | | |
| Source(s) and other information about the record Source <input type="text"/> Number <input type="text"/> Rule/convention <input type="text"/> Status <input type="text"/> Level of detail <input type="text"/> Language/script <input type="text"/> Documentation <input type="text"/> | | | | |

Adlib applications 4.2 release notes

| Identification | Description | Address details | Relationships | Management details |
|--|-------------|-----------------|---------------|--------------------|
| <p>Birth details</p> <p>Date (start) <input type="text"/> Date (end) <input type="text"/> Precision <input type="text"/></p> <p>Place <input type="text"/></p> <p>Notes <input type="text"/></p> | | | | |
| <p>Death details</p> <p>Date (start) <input type="text"/> Date (end) <input type="text"/> Precision <input type="text"/></p> <p>Place <input type="text"/></p> <p>Notes <input type="text"/></p> | | | | |
| <p>Nationality <input type="text"/></p> <p>Language <input type="text"/></p> | | | | |
| <p>Occupation <input type="text"/></p> <p>School/style <input type="text"/></p> <p>Legal status <input type="text"/></p> | | | | |
| <p>Activities/Events</p> <p>Type <input type="text"/> Place <input type="text"/></p> <p>Start date <input type="text"/> End date <input type="text"/></p> <p>Institution <input type="text"/></p> <p>Notes <input type="text"/></p> | | | | |
| <p>Other information</p> <p>History/Biography <input type="text"/></p> <p>Structures/Genealogy <input type="text"/></p> <p>General context <input type="text"/></p> | | | | |

| Identification | Description | Address details | Relationships | Management details |
|---|-------------|-----------------|---------------|--------------------|
| <p>Address details</p> <p>Address type <input type="text"/></p> <p>Address <input type="text"/></p> <p>Postal code <input type="text"/></p> <p>Place <input type="text"/></p> <p>Country <input type="text"/></p> | | | | |
| <p>Telephone/fax/e-mail</p> <p>Telephone <input type="text"/></p> <p>Fax <input type="text"/></p> <p>E-mail <input type="text"/></p> | | | | |
| <p>Internet</p> <p>Internet address <input type="text"/></p> <p>Login <input type="text"/> Password <input type="text"/></p> | | | | |
| <p>Contacts</p> <p>Name <input type="text"/></p> <p>Job title <input type="text"/> Phone <input type="text"/></p> <p>Surname <input type="text"/> Forename(s) <input type="text"/></p> <p>Prefix(es) to surname <input type="text"/> Title <input type="text"/></p> <p>Salutation <input type="text"/></p> | | | | |
| <p>Miscellaneous</p> <p>Group <input type="text"/></p> <p>Notes <input type="text"/></p> | | | | |

6.5 Pointer file methods for all data sources

A pointer file method has been added to all data sources so that it is easier for you to assign access rights to pointer files.

Note that for the availability of pointer file functionality it doesn't matter whether the relevant method is present explicitly or not: only by assigning rights to explicit pointer file methods, you can shield this functionality from certain users.

6.6 Status field for terms and names

From Adlib 6.5.0, you may apply status management of your thesaurus terms and names in *Persons and institutions*. For example, Adlib automatically assigns the *candidate* status to each term that is forced from within a linked field. The other statuses which you may assign to terms and names via the new enumerative *Status* field, working from within the *Thesaurus* or *Persons and institutions*, are: *approved preferred term*, *approved non-preferred term*, *obsolete*, *rejected*.

In the *Thesaurus* and *Persons and institutions*, a *Status* access point has been added, to allow fast searching on the status of terms or names.

See the Adlib 6.5.0 release-notes for more information about status management of terms and names.

6.7 Searching for terms on the source of entry or edit

In the *Thesaurus*, two access points have been added: *Input from* and *Edit from*. You can use these to search for terms on the name of the database and dataset from where the term has been entered or changed. It concerns the data dictionary name of the database here, possibly followed by the greater-than sign and the dataset.

Data dictionary names are not identical to the names of the matching data sources which you encounter in your running application. For example: the *Internal object catalogue* data source has been defined in the data dictionary as the *intern* dataset in the *collect* database, in short indicated as *collect>intern*.

Example: suppose you register a museum object in the *Internal object catalogue* data source. In the *Object name* field, you enter the not yet existing term *Table*. This field is linked to the *Thesaurus*, so the term is validated when you leave the field. After validation (and storage of

the record), you have actually added a record for the term *Table* to the *Thesaurus*, and linked that record to the current object record. So, from within *collect>intern* you have now entered the *Table* record into the *Thesaurus*. If you subsequently leave the *Internal object catalogue*, open the *Thesaurus* and use the *Input from* access point to search (automatically truncated) on e.g. *coll*, or *collect*, or *collect>int*, then Adlib will search for all term records which have been entered from within the *collect* database or from *collect>intern*. Note that if you would search on *collect*, you may also find records entered from within the *External object catalogue* data source (the *extern* dataset in *collect*).

The data dictionary names of database and datasets from which a record was or is being entered or edited, can be found on the *Management details* tab of any record once saved. (In Adlib Designer you could look up all names simultaneously.)

The *Edit from* access point can be used in the same way to search for terms which were **edited** from within another database.

6.8 Record owner and access rights per record

On the *Management details* tab of the *Objects*, *Library catalogue* and *Visual documentation* data sources in 4.2 model applications, you'll find the (repeated) field group *Record access*. The name of the person who enters and saves the record first, will be filled in automatically on saving, unless another name has been entered manually. From then on, only the owner can fill in the other two fields, to assign specific access rights to certain users for this record. All users who are not mentioned, have full access. Repeat (**Ctrl+Enter**) the field group for each user or group to whom you want to assign access rights.

| Record access | |
|----------------------|----------------------|
| User / group | Rights |
| <input type="text"/> | <input type="text"/> |
| Owner | <input type="text"/> |

The field group has the following three fields:

- *User / group*: enter the user name of the person or group to whom you want to assign access rights. You may repeat this field group to specify access rights for multiple users. Users who are not listed, have *Full* access implicitly.
- *Rights*: enter the desired access rights for this user or group. You can choose from:
 - None** - The user can never access this record.
 - Read only** - The user can view, but not edit, delete or copy this record.

Read and write - The user can view, edit and copy but not delete this record.

Full - The user can view, edit, copy and delete this record.

- **Owner:** the user name of the person who has ownership of this record. Only the user named in this field can edit the fields in this field group. The owner always has full access rights to the record. If no owner is entered, then ownership defaults to the user who created the record.

6.9 Other changes

- The French translations have been improved.
- Here and there, Help texts have been added and/or improved. For instance, see the *Conservation treatments*, *Despatch*, *Entry* and *Copies* data sources.
- Here and everywhere, fields have been added, some existing fields have been assigned a more specific data type, and several fields have been given clearer names.