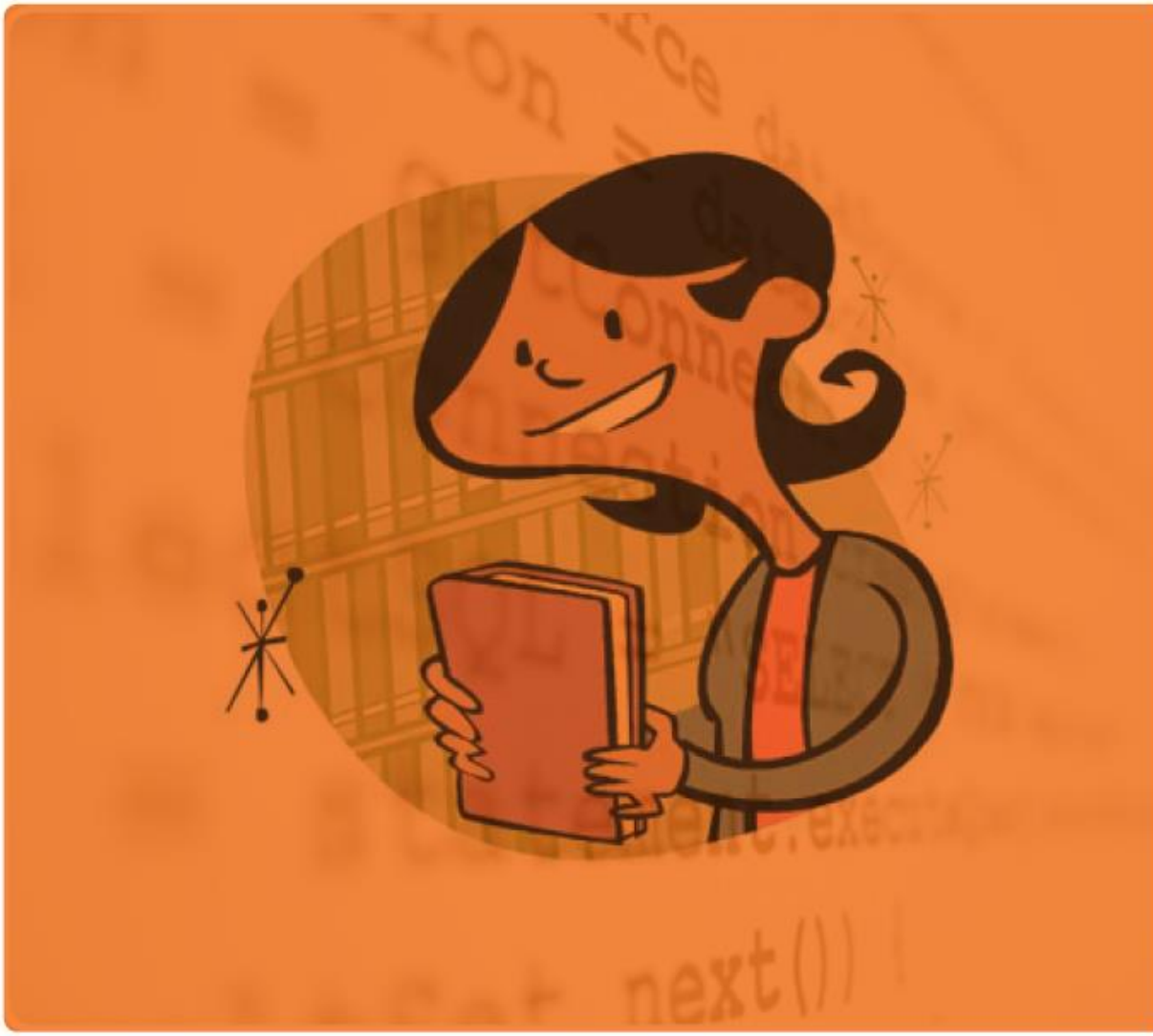
EVERY CHILD IS A NATIONAL ASSET

SA SAMS
South African School and Administration Management System

MODULE 15

# ABC OF ...
# LIBRARY



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## 1. Introduction

The library module in SA-SAMS was developed to ensure that Librarians or Library Administrators at all schools can administer the day to day running of a school library facility. This document serves to assist Librarians on how to use the library module. In more detail the document will explain how to:

- create and manage a school item catalogue
- manage library users
- issue, return and renew library items
- manage fines
- manage reservations
- manage history records for library users
- search items and view reports

## 2. Library Module Main Menu

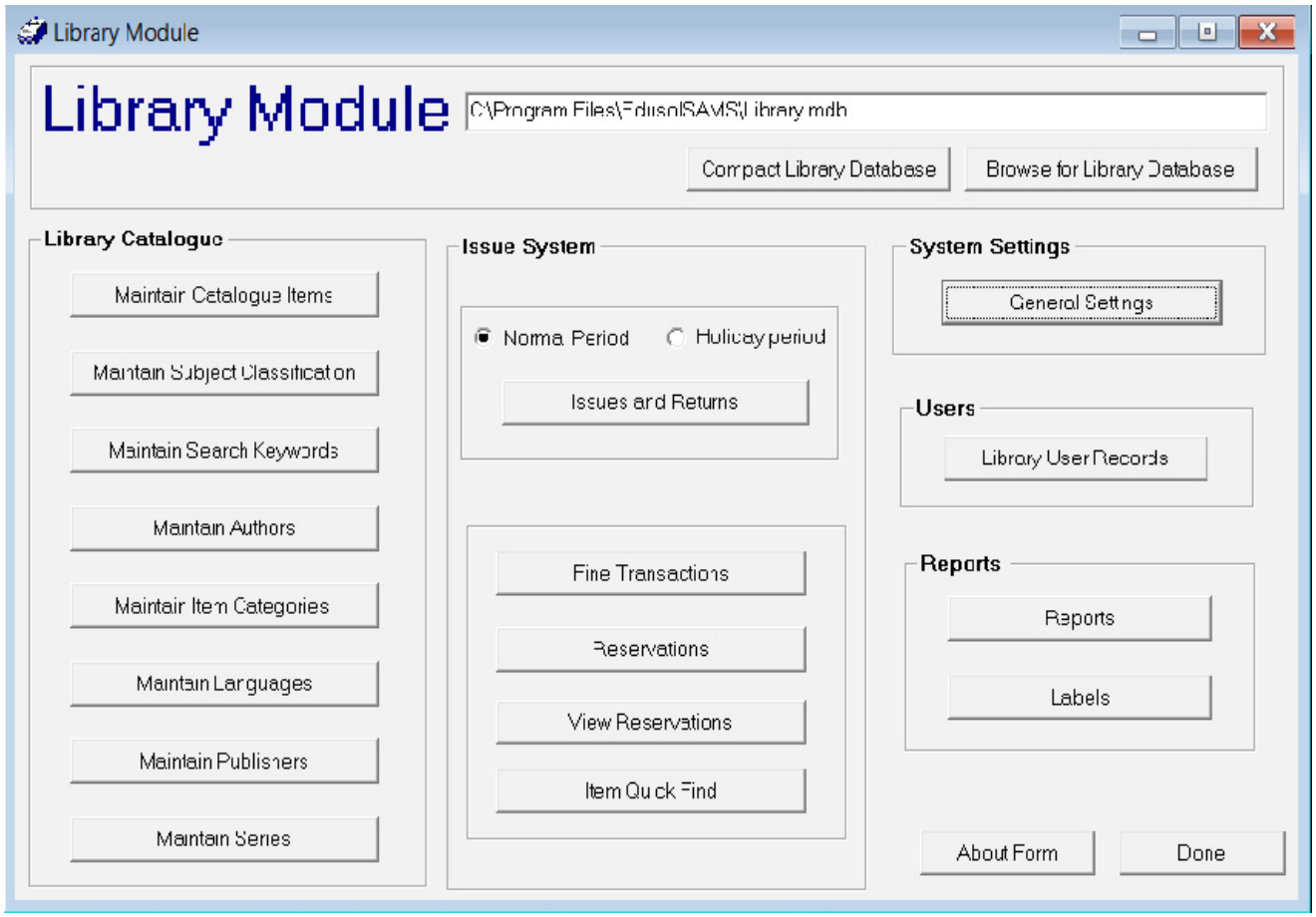



Figure 15.1: library module main menu page

## 3. General Settings

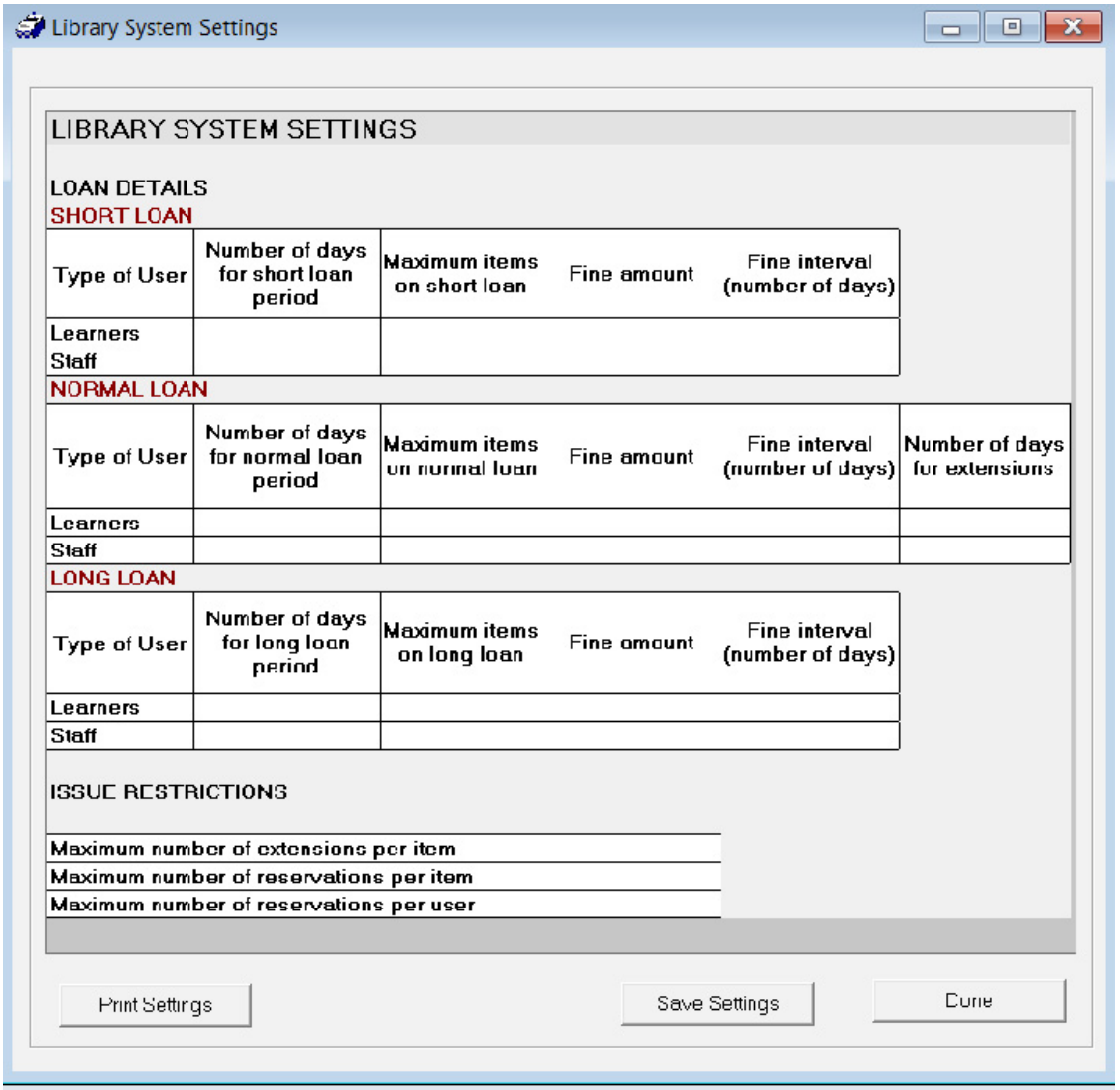



Figure 15.2: Library System Settings page

This section provides an interface to capture general loan details for learners and staff (both educators and general staff members). The library administrator must set-up the number of loan days, maximum loan items, fine amount and fine interval on the general settings page to get started with the Library module.

1. **Short Loans:** Shortest periods an item can be loaned out to Library users (short loan periods are determined by the school library loan policies).
2. **Normal Loans:** Schools must determine an average number of days a user can loan an item out. The period must then be captured as normal loans on the library system.
3. **Number of days for extensions**: Maximum days allowed for a loan extension.
4. **Long Loans**: Extended period (of normal loans) for item loans. It is normally during school holidays that long loans apply.
5. **Fine Amount:** The amount of money which a user will be entitled to pay in case of exceeding the number of days allocated for a loan.
6. **Fine Interval**: A number of days after which a fine will be repeated if an item which is due for return remains unreturned.

7. **Issue Restrictions**: Captures all restrictions attached to the issue of an item. An item will not be issued if all restriction values are not met. There are 3 restrictions for issuing an item on this library system:

   - **Number of extensions per item** : Number of times a loan can be extended for an item
   - **Number of reservations per item**: Number of times an item can be reserved, e.g. one book can be reserved by 2 learners at a time.
   - **Number of reservations per user:** Number of items a user can reserve, e.g. one user can reserve 2 items at one time.

8. When all values have been captured, click **save settings** button and then **done** button to return to the main menu.

***Note: If above settings are not captured then fine amounts, return dates, user and item restrictions will not apply.***

9. To print settings, click on **print settings** button**.**

## 4. Maintain Library Items

### 4.1 Search for Library Items

1. To maintain the library items, click on **maintain library items** button

Figure 15.3: Search Criteria

2. To search for an item on the catalogue a user must at least enter one criteria

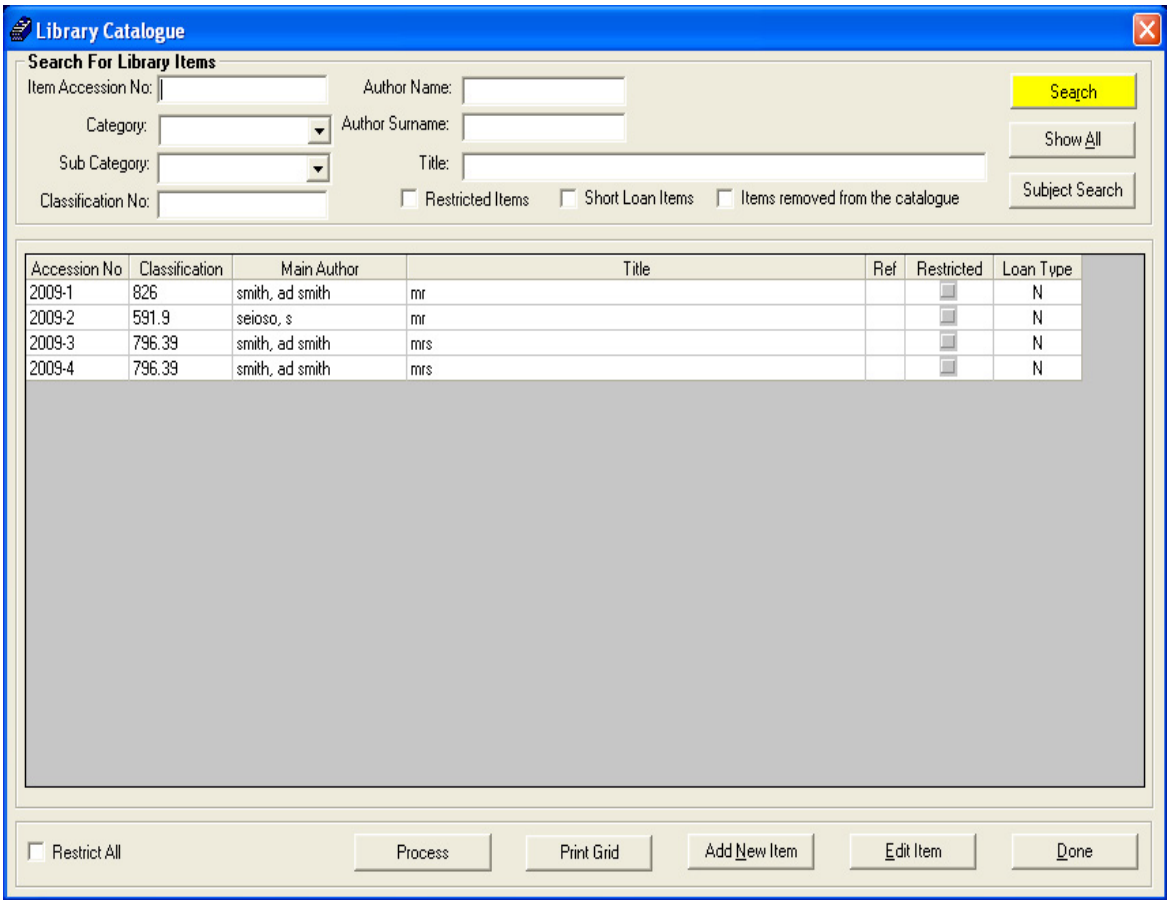



Figure 15.4: Search and Maintain Item page

3. User can search for an item by a using combination of the following search criterions :

- **Accession number**: A unique number that is allocated to an item when it is added to the catalogue. The number consists of the year of capture stroke (-) a number that is incremented per new item. e.g. 2009-1 for the first item that was captured in the year 2009. Accession numbers are automatically allocated by the system.
- **Category**: An item category can be a magazine, book, etc
- **Sub category**: A sub category can represent a sports, family, woman, etc.magazine within a magazine category
- **Classification no:** Subjects are classified according to their area of study. A classifications number is allocated to all subjects of study. The system will automatically allocate a classification number to each item when it is added to the catalogue.
- **Author name**: The author's first name.
- **Author surname:** the author's last name
- **Title**: the item name.
- **Restricted items, Short loan items and Items removed**
- **Subject search** : user can search by subject (i.e. Bonds)

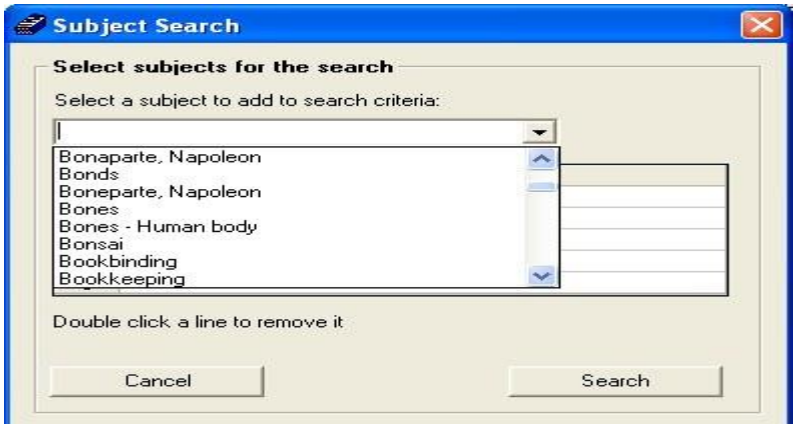



Figure 15.5: Subject Search

4. Click **Show All** button to view all the available items in the catalogue.

## 4.2 Maintain Library Items

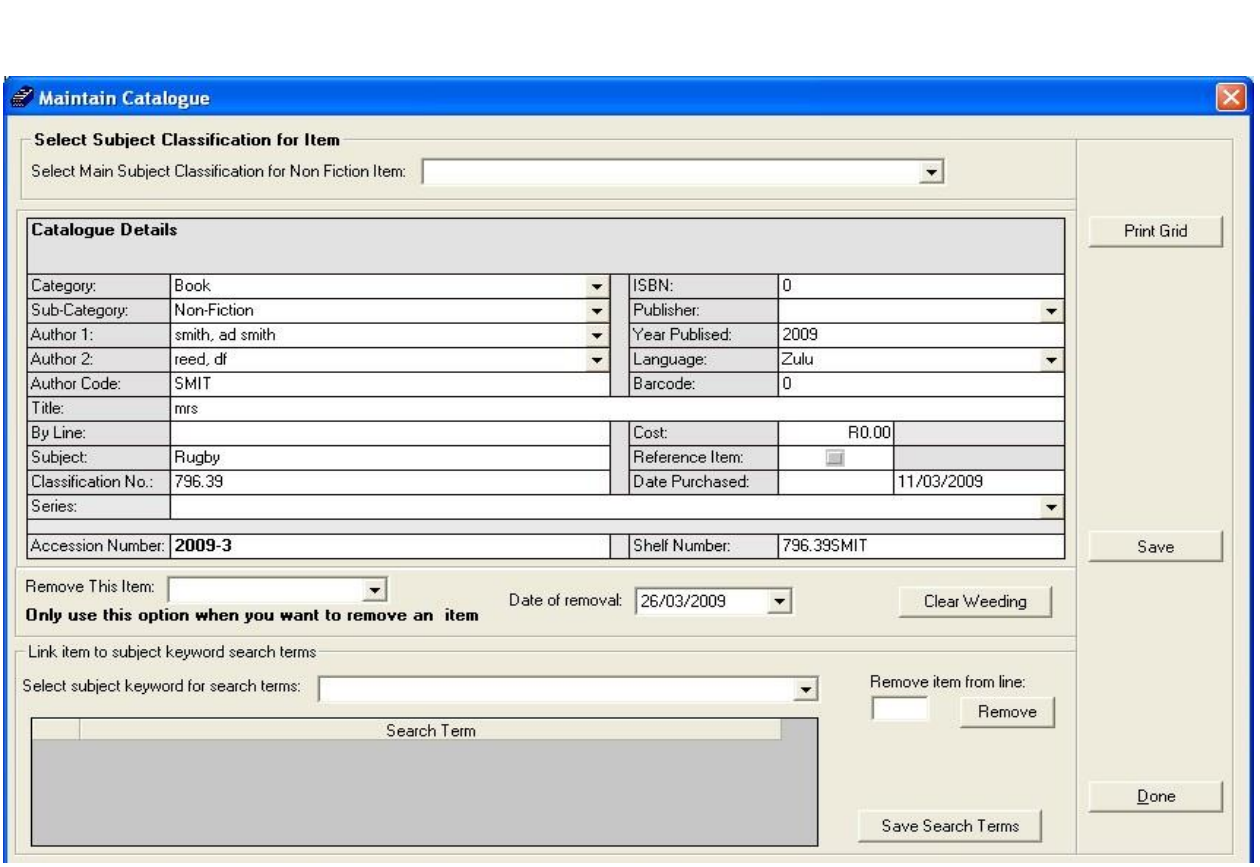



Figure 15.6: Maintain library Item

- As illustrated on figure 4: to maintain an item, select an Item and click on **edit item.**
- Figure 6 (above) will appear showing more details of the item.
- Capture all necessary fields and click on **save**.
- Click on **done** to exit the library item maintenance page.

## 5. Maintain Languages Function

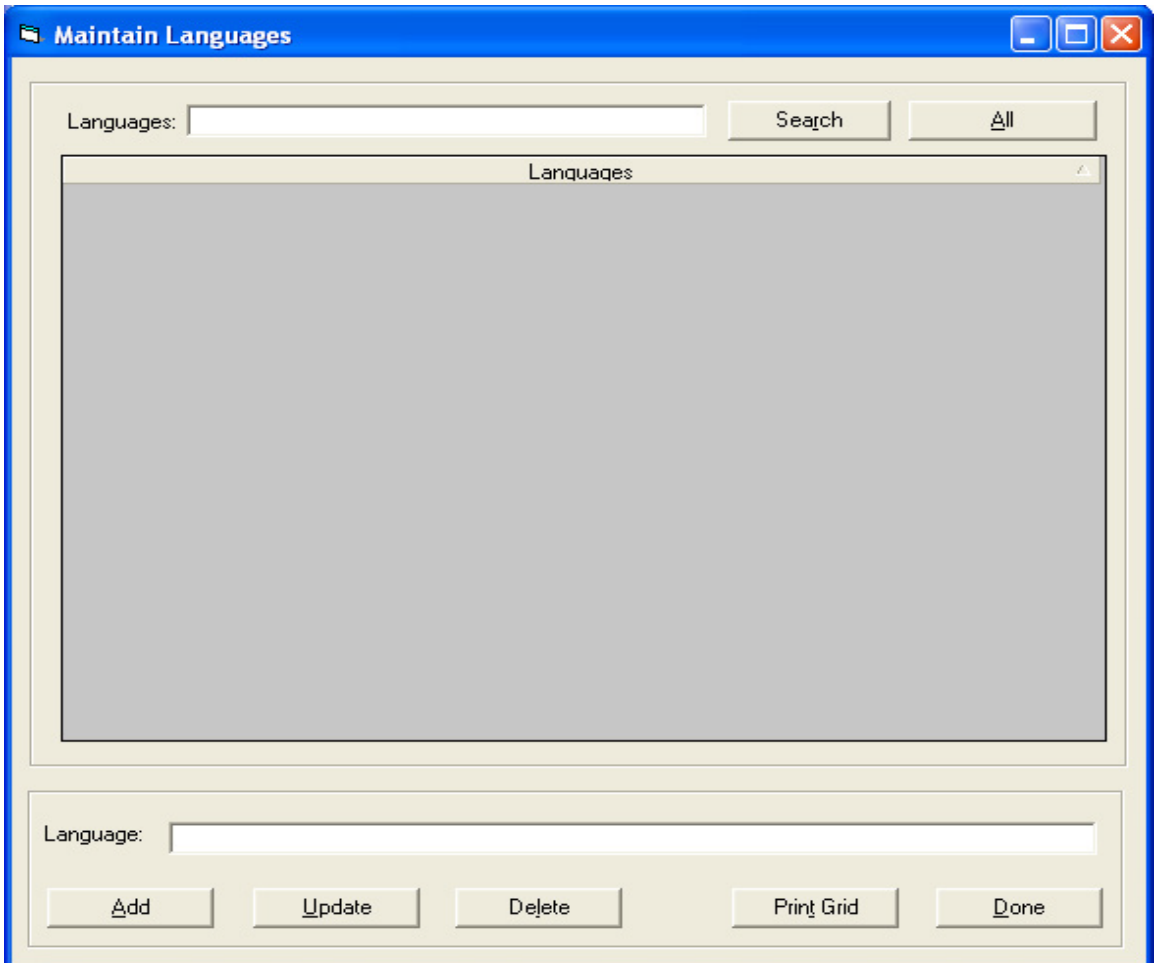



Figure 15.7: Maintain languages page

1. In maintain languages section, user can **add, update or delete** a language.
2. Type the language you wish to maintain on the textbox provided and select the functions to be performed (**add, update or delete**).
3. User can search for available languages by using the search function provided. To search for available languages, type a phrase of the language on the top textbox and click on **search**.
4. Use **print grid** button to print the list of available languages.
5. Click **all** button to list all the available languages.
6. Click **done** button to exit the language window.

## 6. Maintain Authors

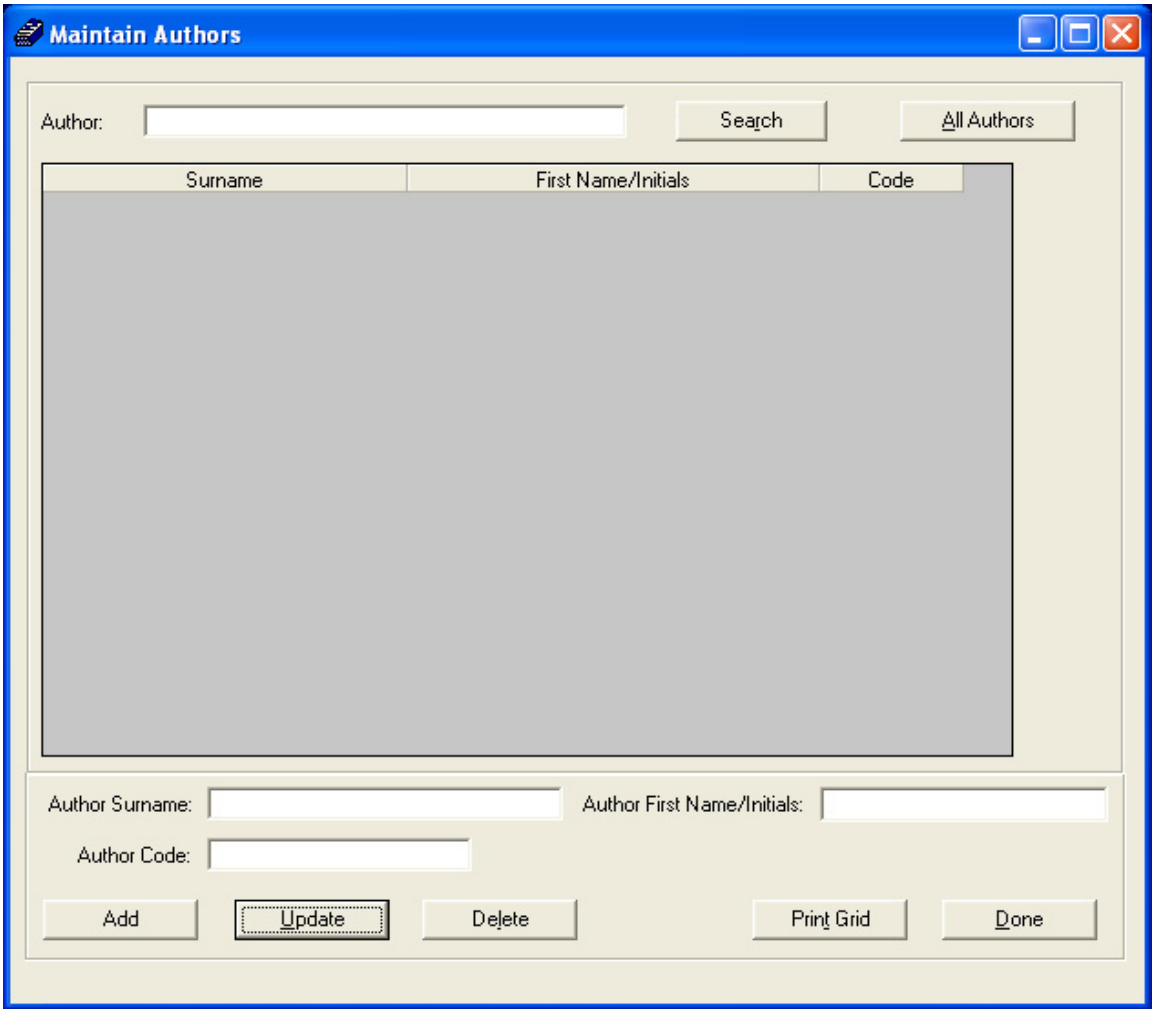



Figure 15.8: maintain authors page

1. In maintain authors section, user can **add, update or delete** authors.
2. Type the **author surname** and/or **author first name/initials** and/or **author code** you wish to maintain on the textboxes provided and select the function to be performed(i.e. **add, update** or **delete**)
3. User can search for available authors by using the search function provided. To search for an author, type a phrase of the author's name and click on **search** button.
4. Click **all authors** button to list all the available authors on the catalogue.
5. Use **print grid** button to print the list of available authors.
6. Click **done** button to exit the maintain author page.

## 7. Maintain Publishers

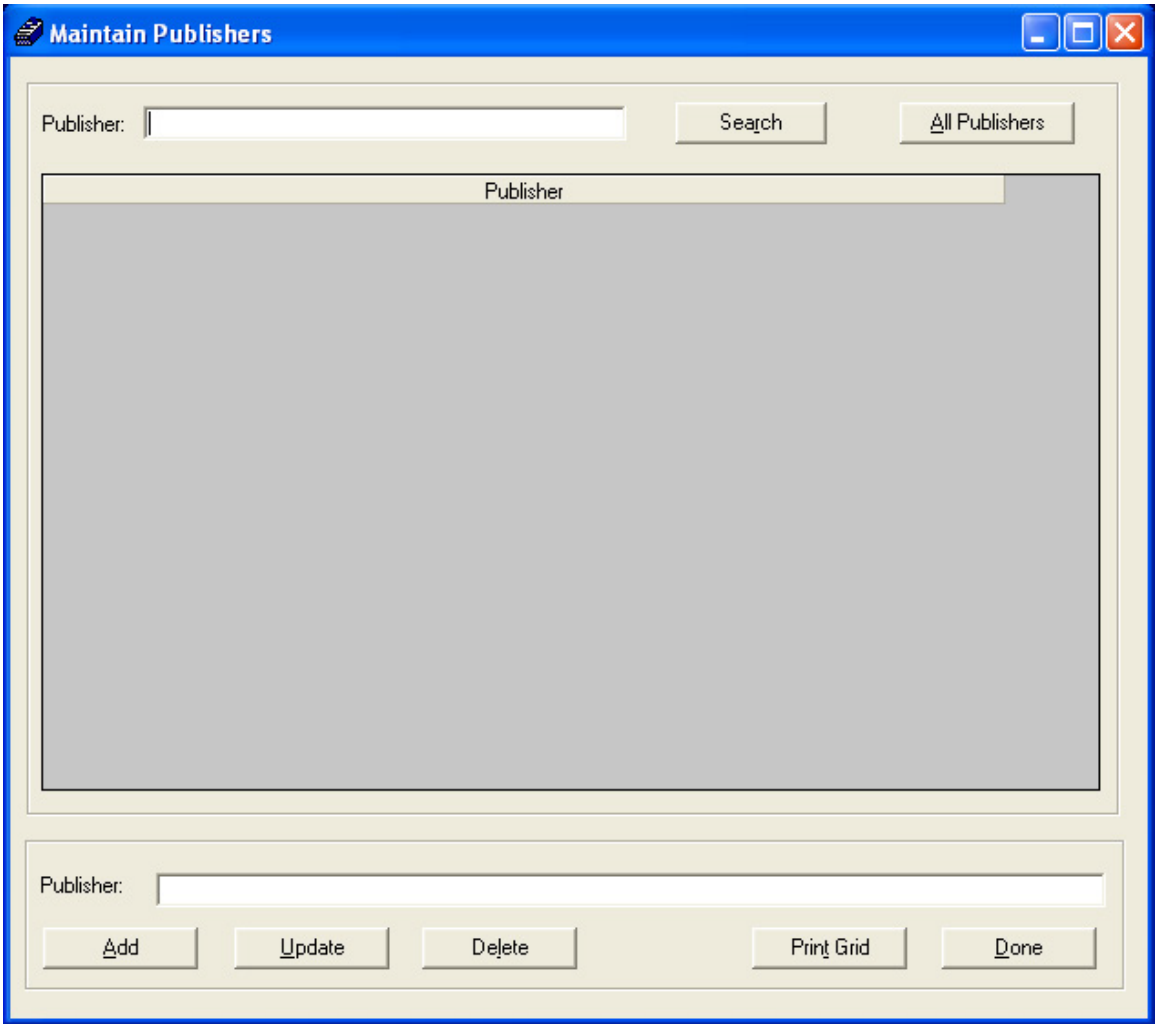



Figure 15.9: Maintain publisher page

1. In maintain publishers section, user can **add, update or delete** a publisher.
2. Type the publisher you wish to maintain on the textbox provided and select the functions to be performed (**add, update or delete**).
3. User can search for available publishers by using the search function provided. To search for available publisher, type a phrase of the publisher's name and click on **search** button.
4. Click **all publishers** to list all the available publishers.
5. Use **print grid** button to print the list of available publishers.
6. Click **done** to exit maintain publisher page.

## 8. Maintain Series

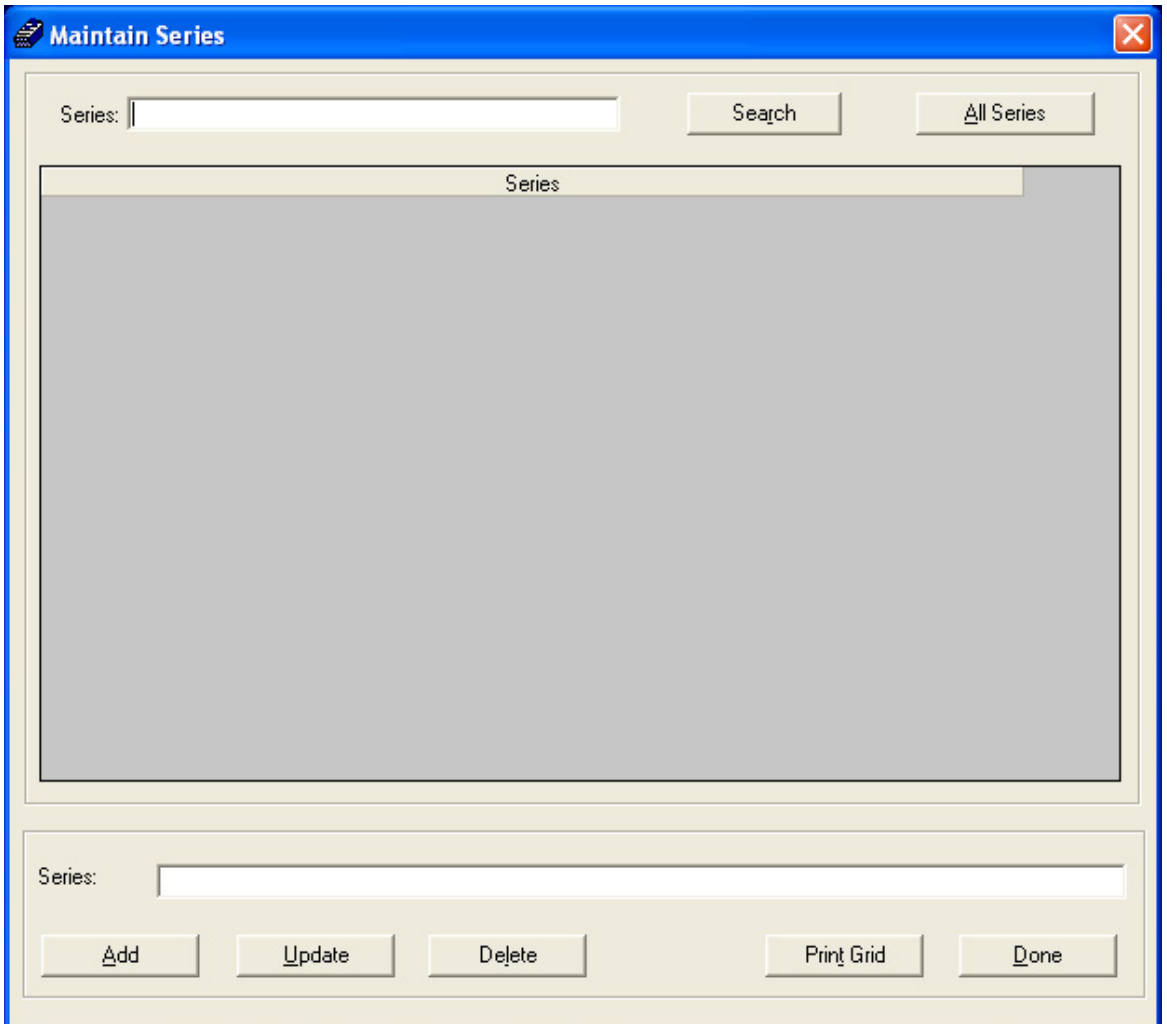



Figure 15.10: Maintain series page

1. In maintain series section, user can **add, update or delete** a series.
2. Type the series you wish to maintain on the textbox provided and select the function to be performed. (**add, update or delete**)
3. User can search for available series by using the search function provided.
4. To search for a series, type a phrase of the series and click on **search** button.
5. Click **all series** to list all the available series.
6. Use **print grid** button to print the list of available series.
7. Click **done** to exit the maintain series page.

## 9. Maintain Subject Codes

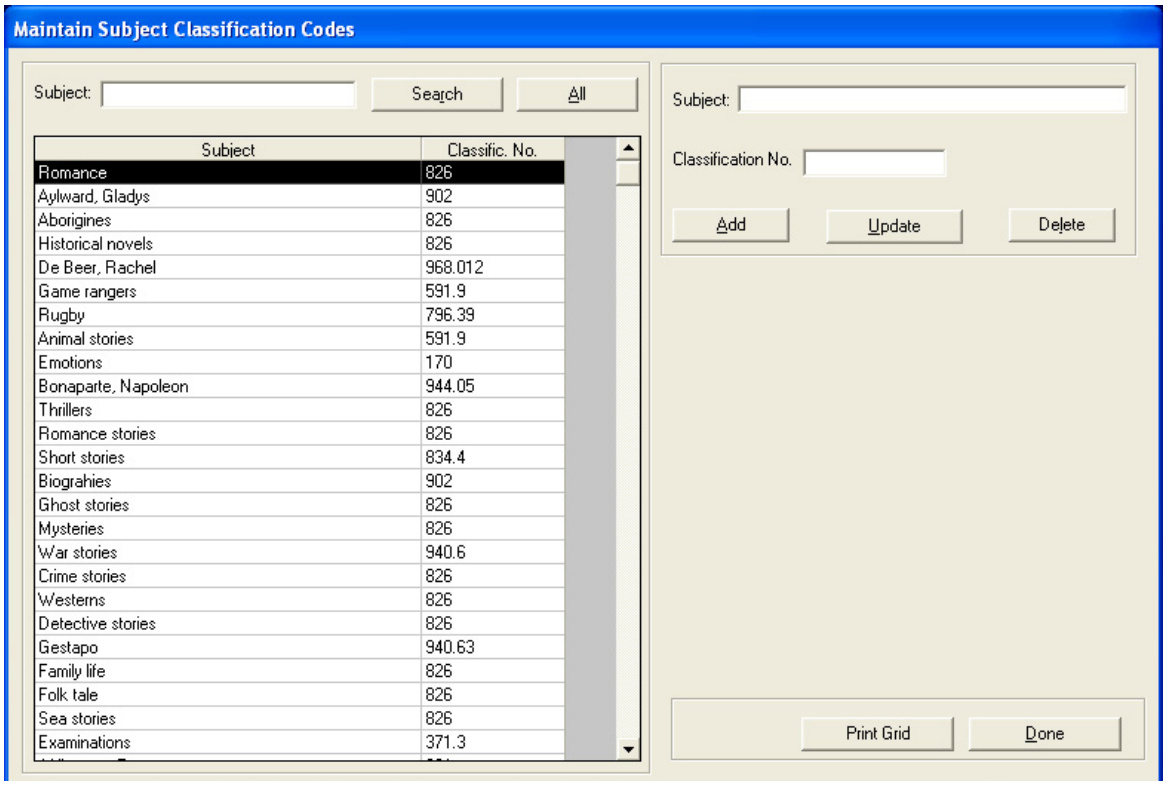



Figure 15.11: Maintain subject classification codes

1. In maintain subject codes section, user can **add, update** or **delete** a subject code.
2. Type or select the subject and classification number for the subject you wish to maintain on the textbox provided and select the function to be performed **(add update or delete**).
3. User can search for available subject code by using the search function provided. To search for available subject codes, type a phrase of the subject code and click on **search** button.
4. Click **all subject code** to list all the available subject code.
5. Use **print grid** button to print the list of available subject code.
6. Click **done** button to exit the maintain subject classification codes page.

## 10. Maintain Categories

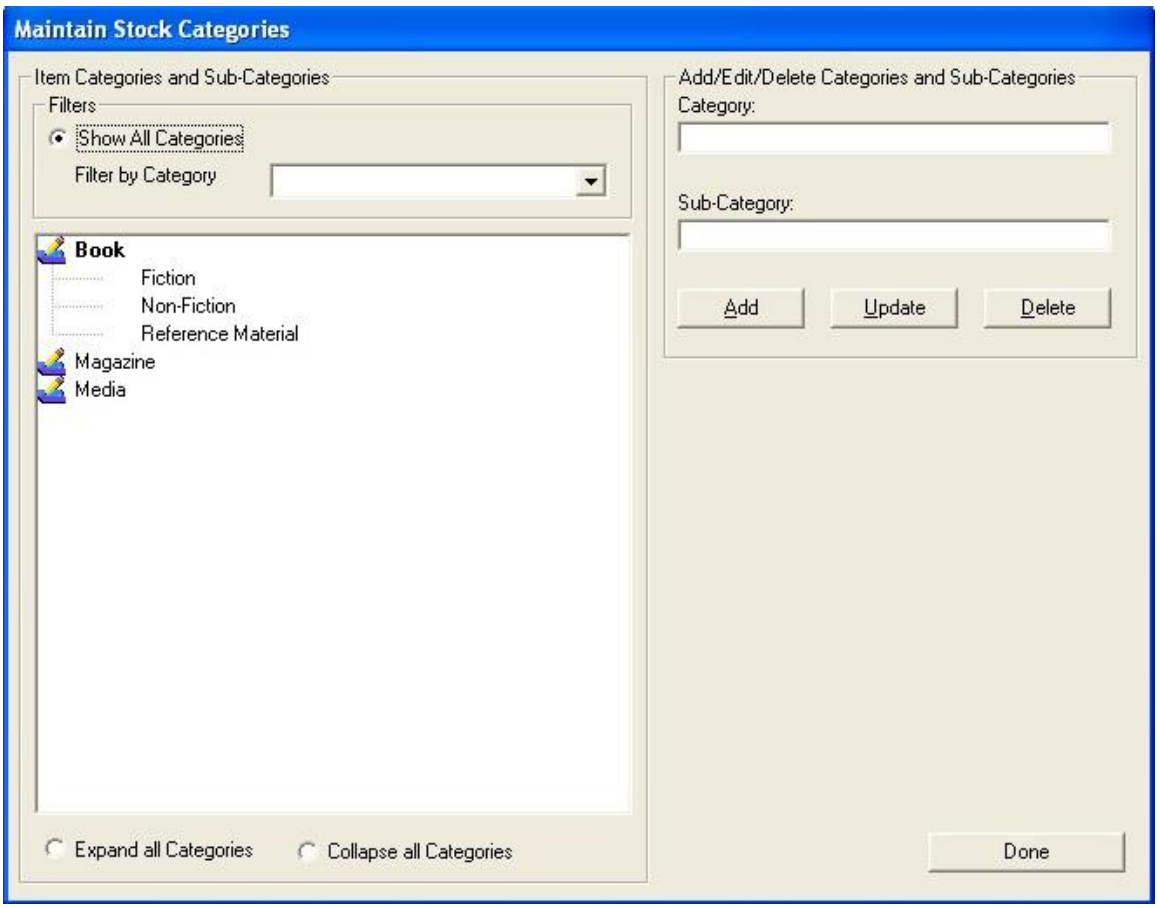



Figure 15.12: Maintain stock categories page

1. In maintain subject categories, user can **add, update or delete** categories and sub-categories.
2. Type or select the category or/and subcategory and for the category or/and subcategory you wish to maintain on the textbox provided and select the function to be performed (**add update or delete).**
3. Select show all categories to view a full list of available categories.
4. Use **filter by** drop list to select a specific category of items.
5. Use **expand all categories** to view sub-categories
6. Use **collapse all categories** to view only main categories
7. Click on **done** to exit maintain stock category page.

## 11. Issue System

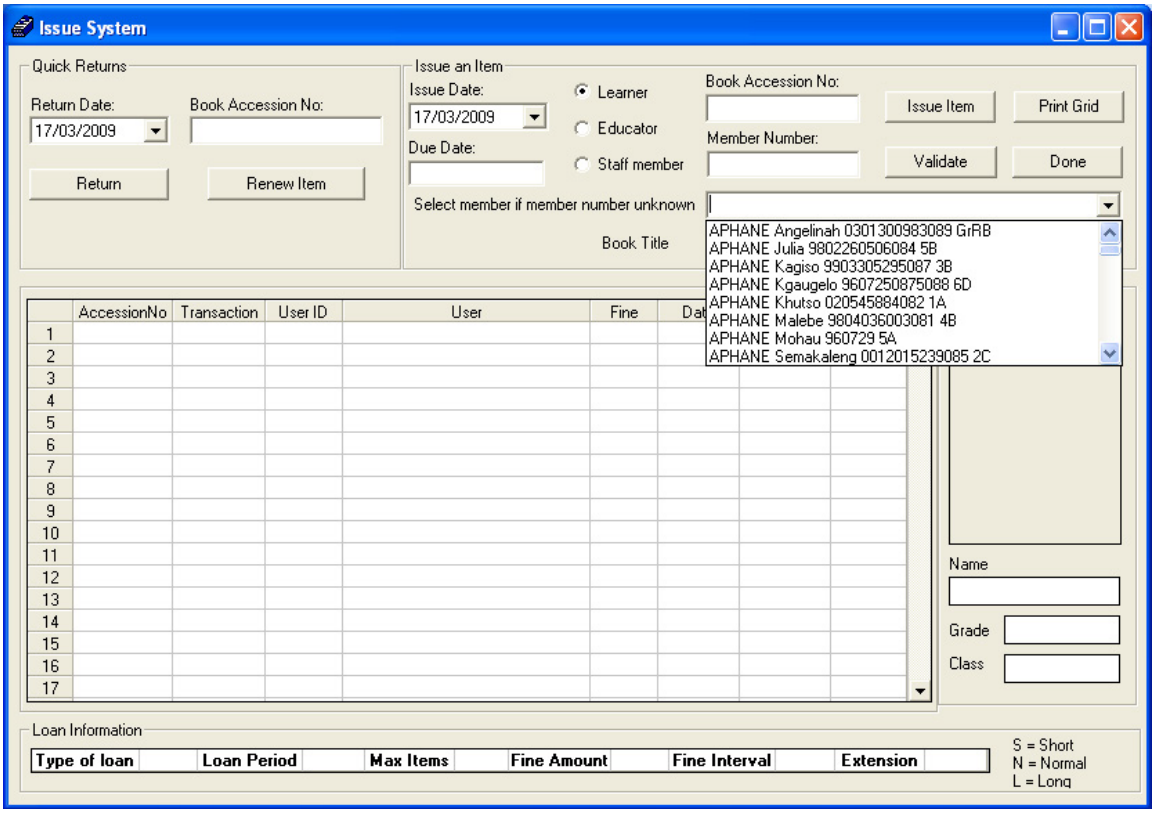



Figure 15.13: Issue system page

1. To issue an item to a learner, click on the **learner radio** button and select the learner from select **member if member numbers unknown drop** down list. Type the learner number on **member number** text box if you know the number.
2. Type **book accession number** on the space provided.

Note : *The return due date is calculated according to short loan, long loan and normal loan settings as they appear under **general settings**.*

If **validation** (see 11.1) is successful, click **issue item** to loan the item out to user.

### 11.1 User and Item Validation

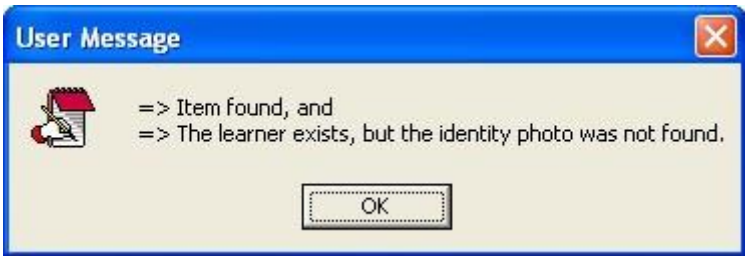



Figure15.13.1: Validation

The validation button is used to checks for:

- Leaner existence
- The grade and class of the learner.
- Availability of Item accession number requested in the catalogue
- Learner Identity Photograph

***Note: Validation does not apply for educator and staff users and the validate button will not be active in that case. Issue date is automatically extracted from the system date but it can also be manually captured.***

## 11.2 Return Item

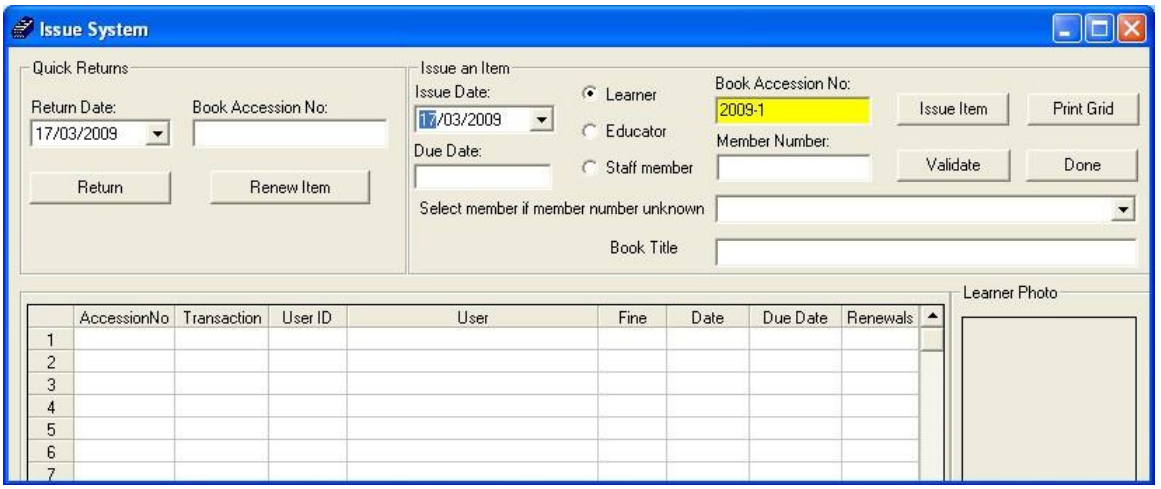



Figure 15.14: Issue System Page

1. To return Items, type the book accession number on allocated text box under **quick returns** and click on **return** button.

## 11.3 Fine Accumulation.

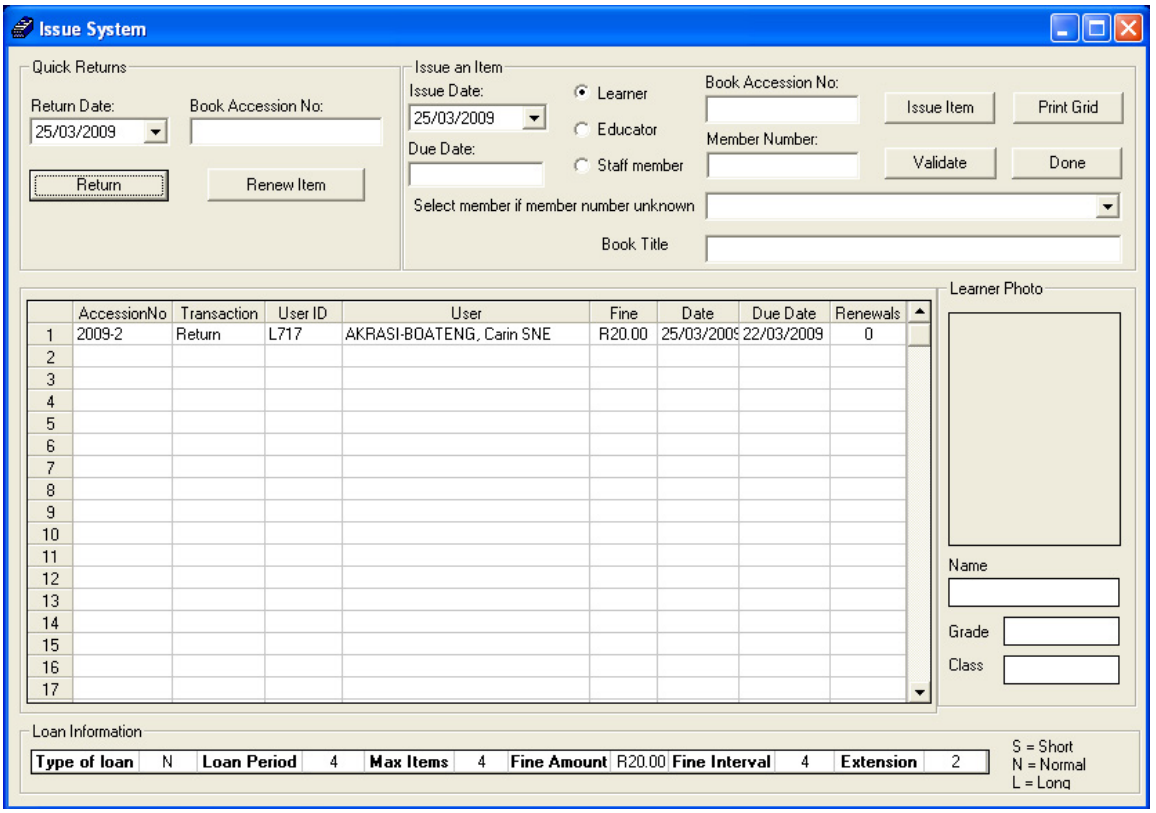



Figure 15.15: Calculate Fine

- Fine amount is calculated and charged to user when maximum loan days are exceeded.
- When an item is returned, the system checks the recorded return due date for the item. If due date has expired, then a fine is calculated according to the **loan period, fine amount** and **fine interval** that were captured on the **general settings** section.

## 12. FINE TRANSACTIONS

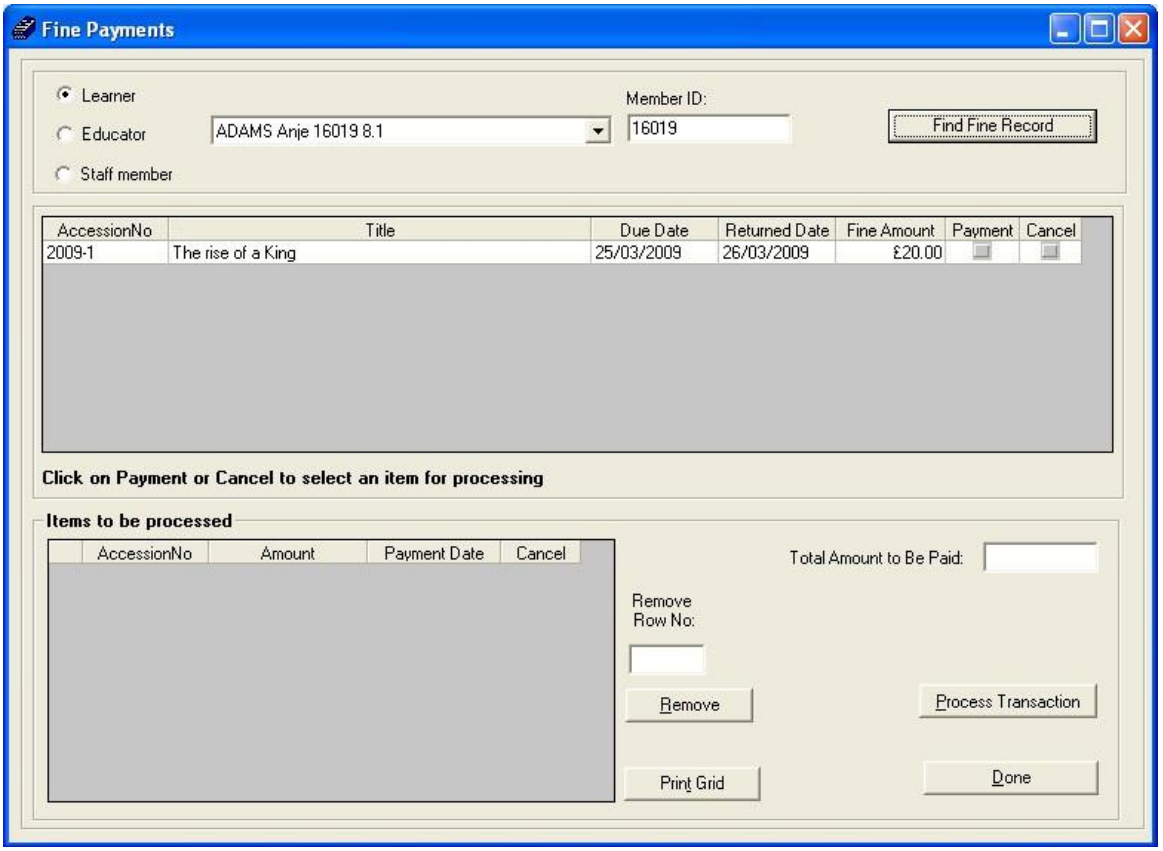



Figure 15.16: Fine Transaction Page

1. To view current fines for learners, educators or staff members, select a member from the drop down list or type **member id** on text box provided and click on **find fine record** button.

2. To pay fine click on **payment**. The fine will move to items to be processed (see figure 17)

## 12.1 Process Payment

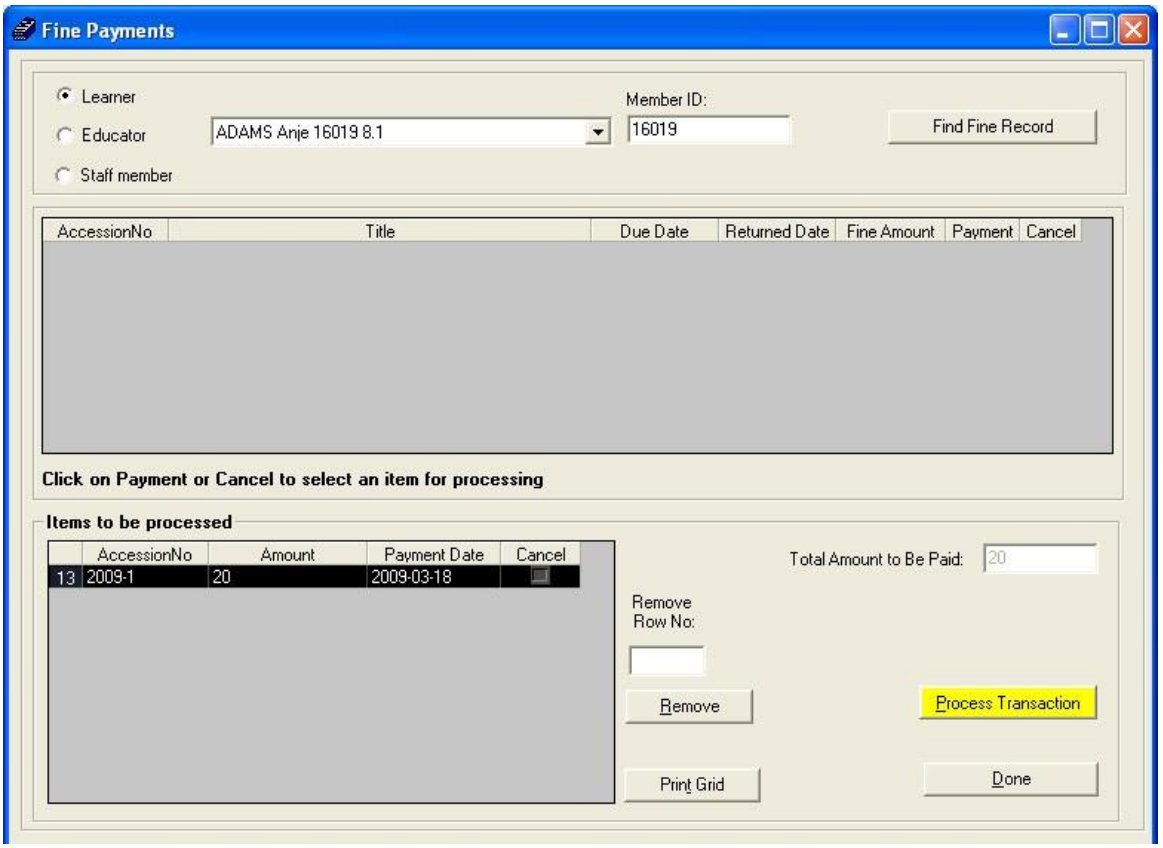



Figure 15.17: Process Payment Page

- Total fine amount will show on **total amount to be paid** text box
- To complete the payment, click on **process transactions** button.
- To remove the fine from **items to be processed**, click on the fine to select it and click **remove** button**.** The fine will move back to the fine list.

## 12.2 Cancel Fine

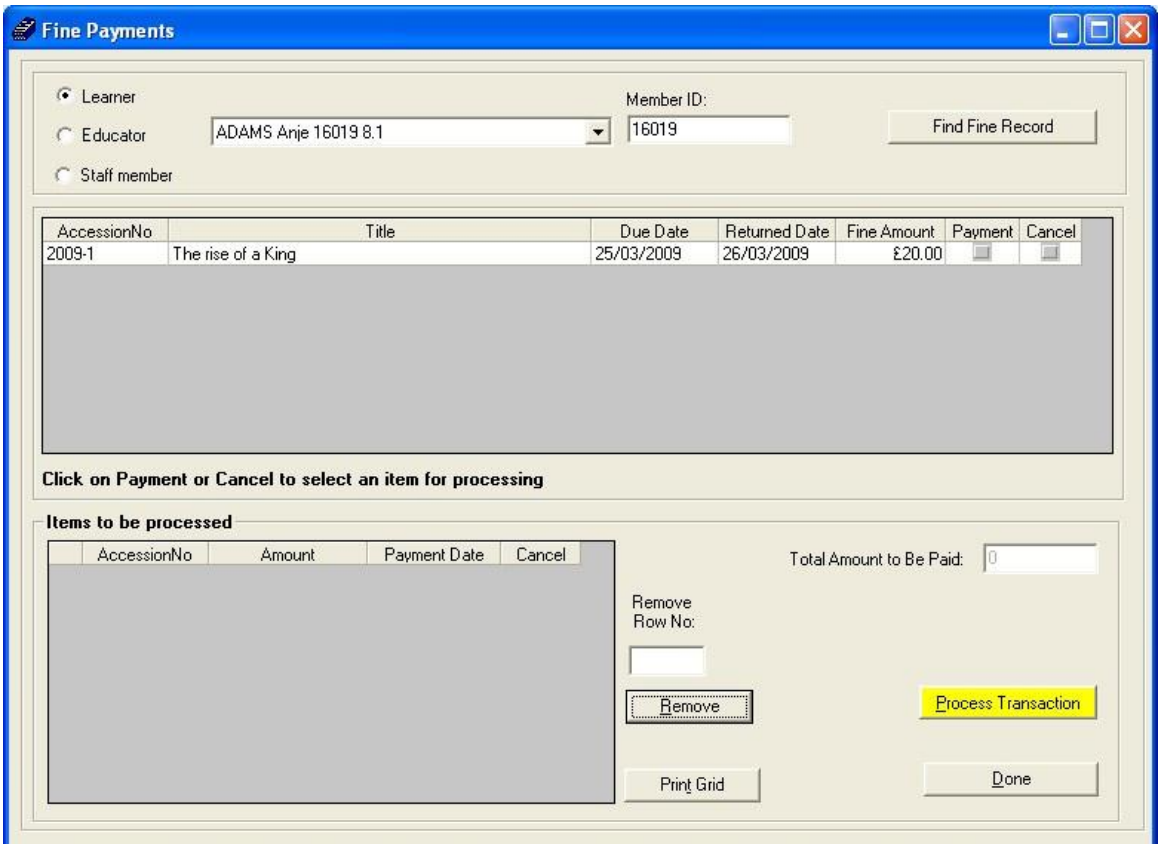



Figure 15.18: Cancel Fine Page

- To cancel the fine, click on cancel. The fine will move to **items to be processed.**
- Click on **process transaction** to cancel the fine
- To remove the fine from **items to be processed**, select a fine and click on **remove** button**.** The fine will move back to the fine list.
- Click **done** button to exit the cancel fine page.

## 13. RESERVATIONS

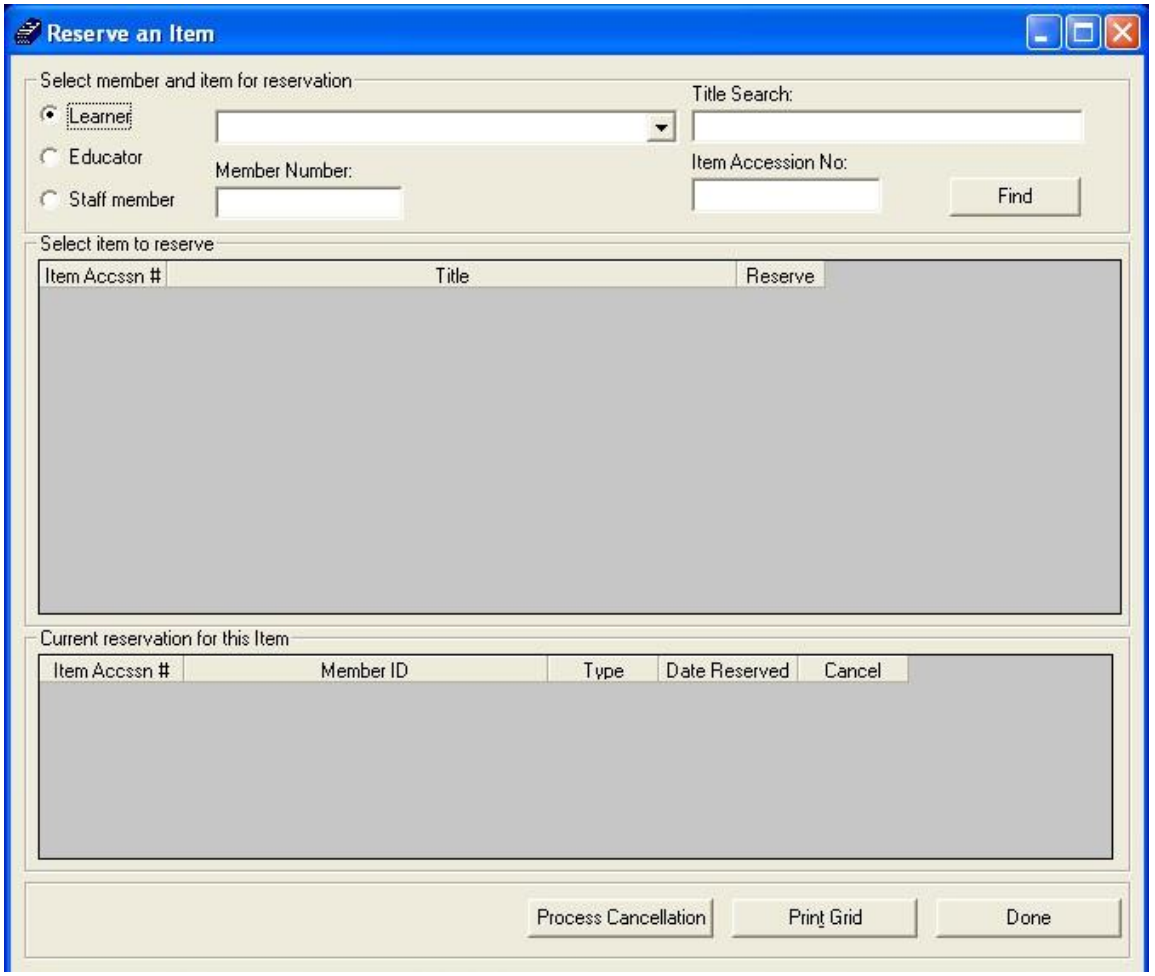



Figure 15.19: Reserve an Item Page

- To reserve items for learners, educators or staff members, select a member from drop down list or type **member id** on text box provided.
- Type the **title or item accession number** and click on **find** button to locate the item to be reserved.

## 13.1 Process Reservations

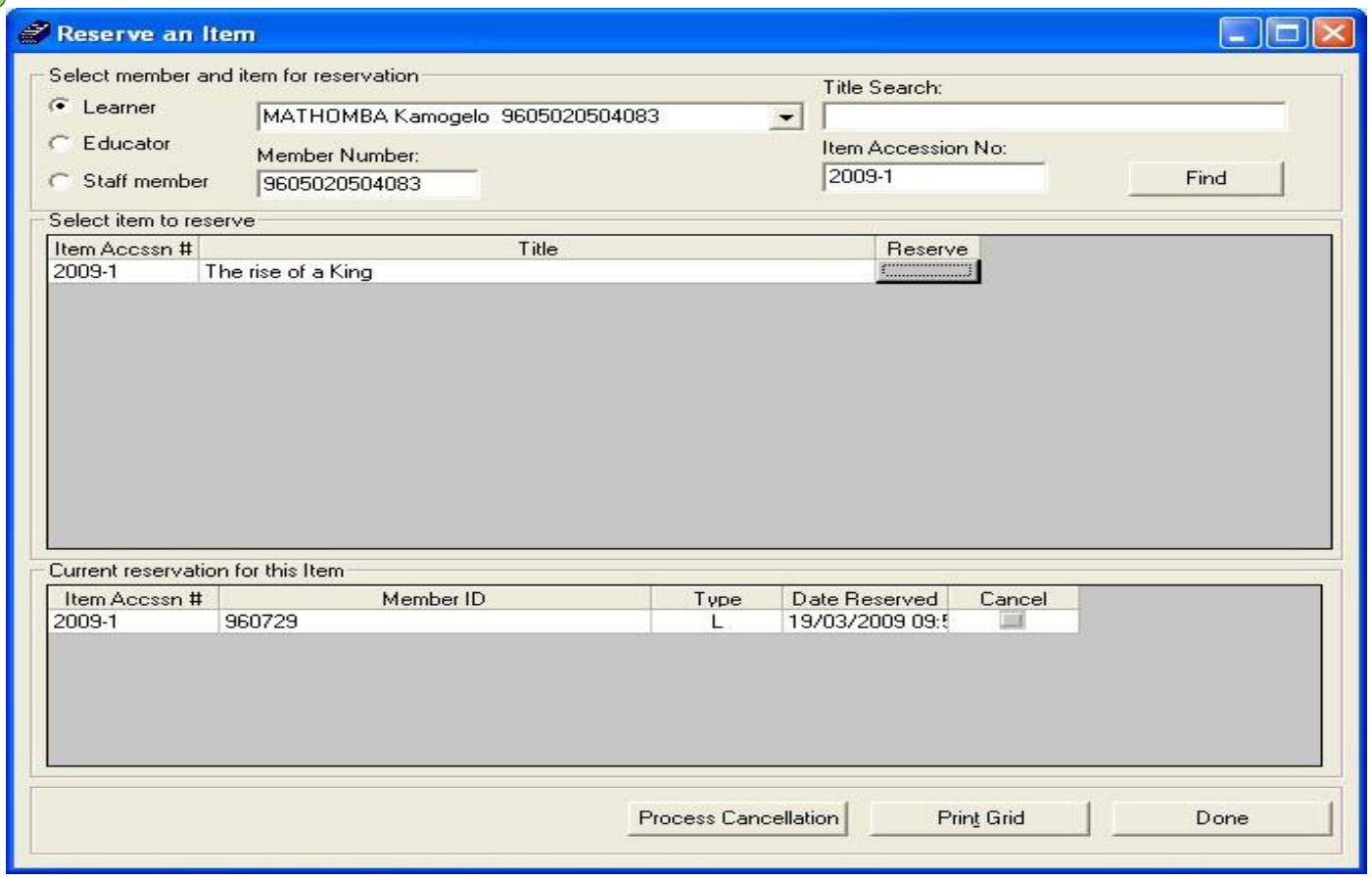



Figure 15.20: Item Reservation Page

- When item is found on the catalogue, it will be displayed under **select item to reserve.**
- To reserve the item for user , click on the **reserve** button

***Note: If item has already been booked, a list of current reservations will appear under current reservations for this item. Item cannot be reserved if it is available on the shelf.***

Figure 15.21: (Can't reserve: Available on shelve)

- To cancel a reservation, click on cancel check box next to the reservation you wish to cancel and click on **process cancellation**.
- Click **print grid** button to print reservations.
- Click **done** to exit the reservations page.

## 13.2 View

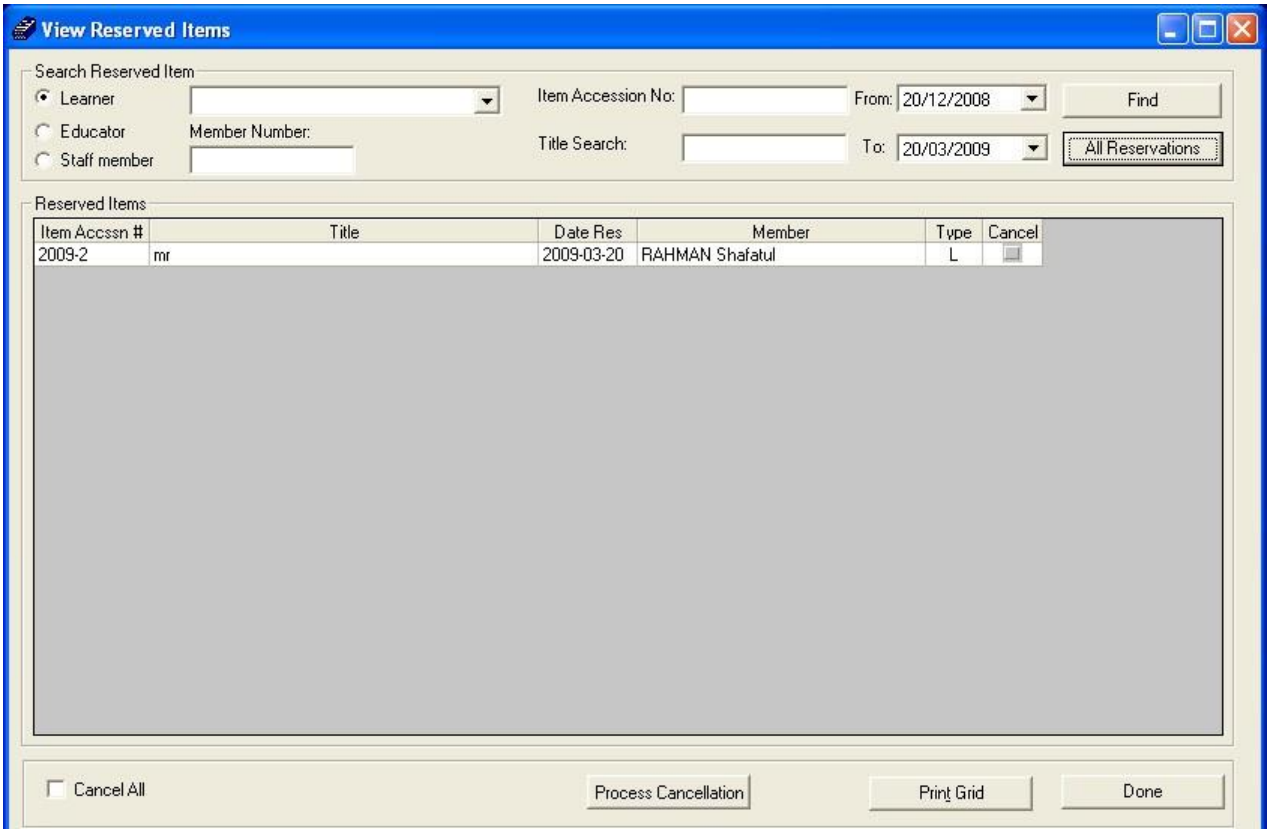



Figure 15.21: View Reserved Item Page

- To view all reservations, click on **all reservations** button**.**
- To view reserved items for learners, educators or staff members, select a member from drop down list or type member id on text box provided.
- To view reservations for a specific item, type **accession no** on the text box provided and click on **find** button.
- To search for a specific item, type title on **title search** and click on **find** button.
- To search for reservations made within a specific period, select a date **from** and date **to** and click on **find**.
- To cancel a reservation, click on **cancel** button next to the reservation on the list and click on **process cancellation.**
- To cancel all reservations, check **cancel all** check box and click on **process cancellation**
- To print reservations list, click on **print grid** button**.**
- To exit, click on **done** to exit the reservations page.

## 14. QUICK FIND

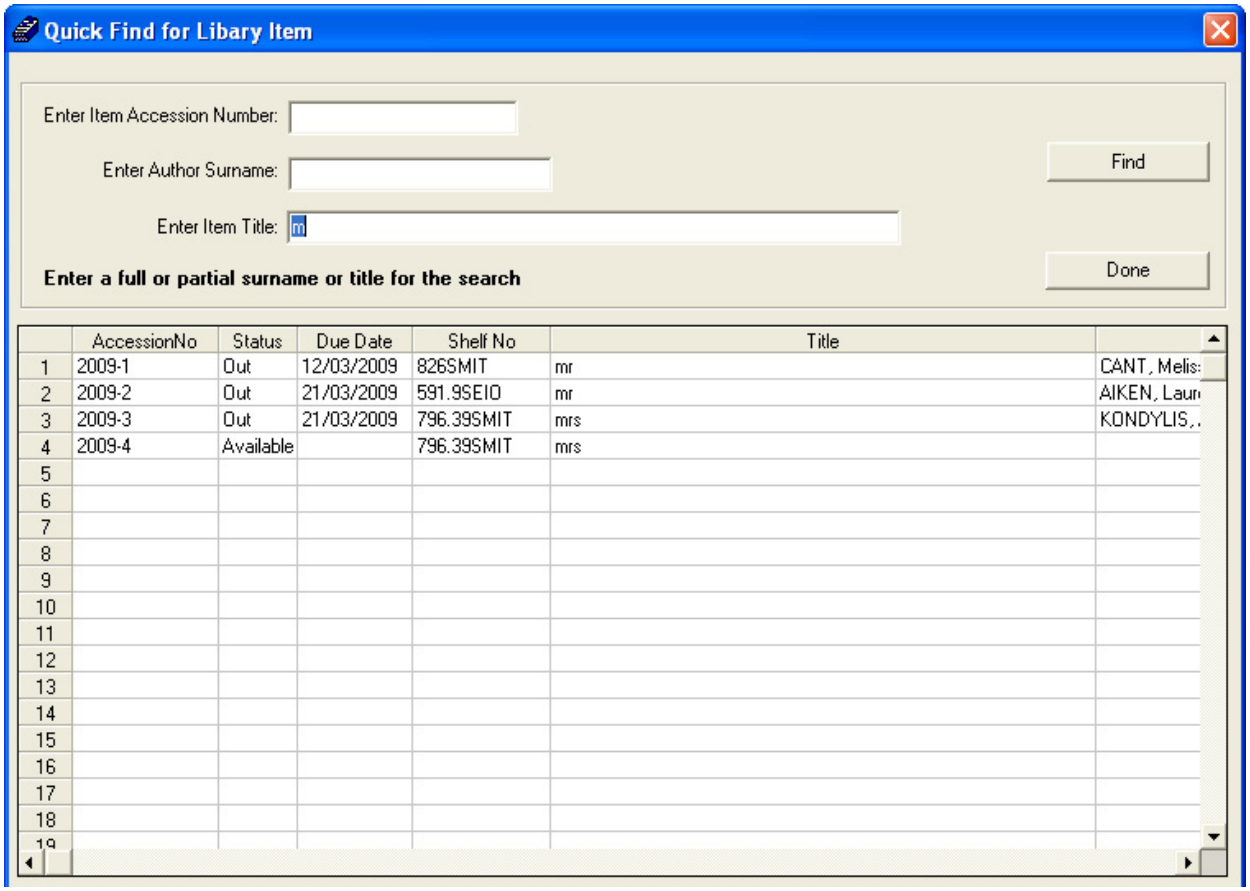
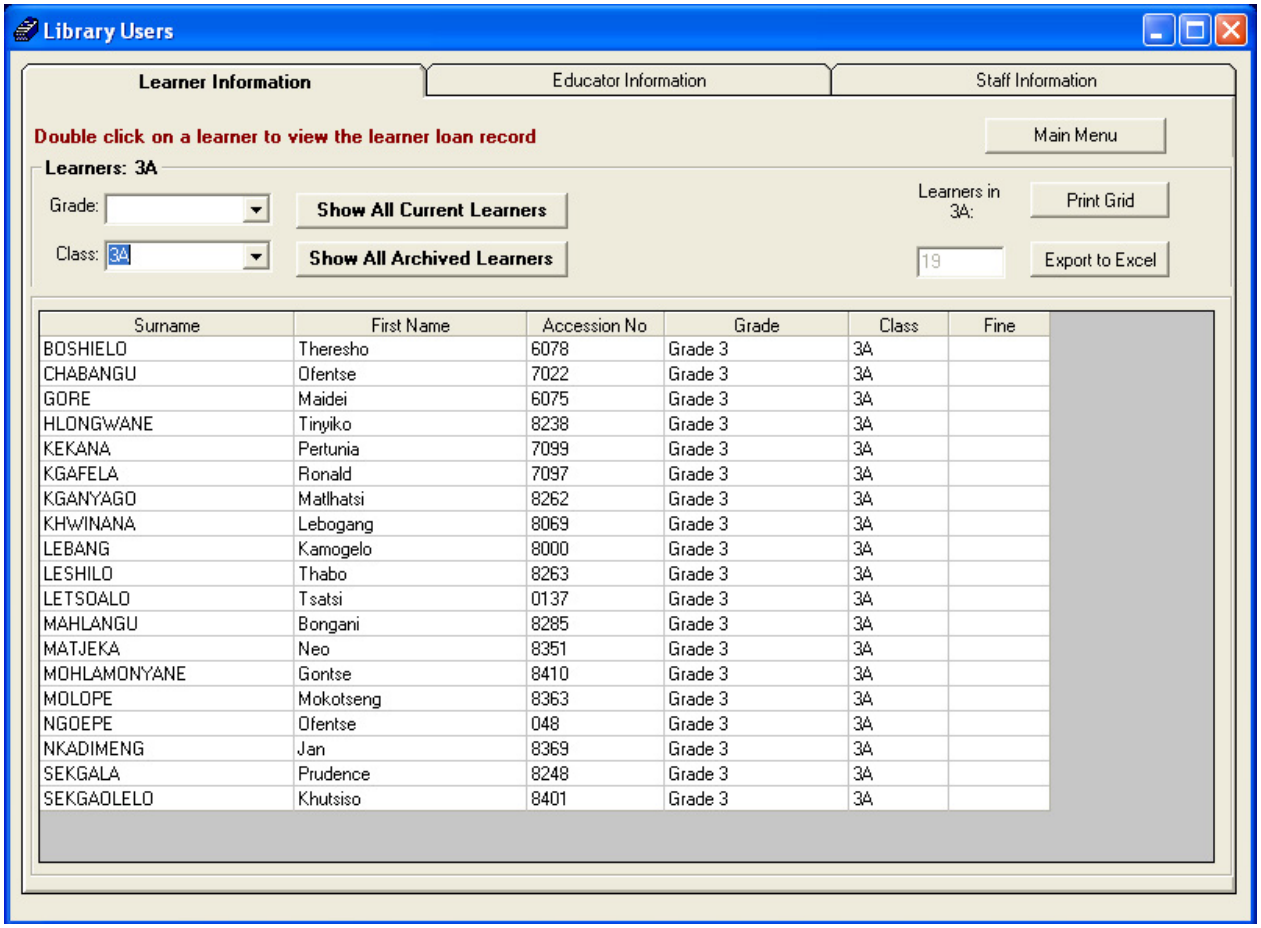



Figure 15.22: Quick Find Page

- Users can search for items using the **quick find for library item** function.
- Users can search by entering item **accession number** and/or **author surname** and/or **item title** and then clicking on **find**.
- A phrase of the item's name can be used to search for items e.g. user may enter letter "m" and click on **find** to list all the items starting with letter "m" as on figure 22 above.

# 15. LIBRARY USERS

## 15.1 Library Learner Users




| Surname | First Name | Accession No | Grade | Class | Fine |
|---|---|---|---|---|---|
| BOSHIELO | Theresho | 6078 | Grade 3 | 3A | |
| CHABANGU | Ofentse | 7022 | Grade 3 | 3A | |
| GORE | Maidei | 6075 | Grade 3 | 3A | |
| HLONGWANE | Tinyiko | 8238 | Grade 3 | 3A | |
| KEKANA | Pertunia | 7099 | Grade 3 | 3A | |
| KGAFELA | Ronald | 7097 | Grade 3 | 3A | |
| KGANYAGO | Matlhatsi | 8262 | Grade 3 | 3A | |
| KHWINANA | Lebogang | 8069 | Grade 3 | 3A | |
| LEBANG | Kamogelo | 8000 | Grade 3 | 3A | |
| LESHILO | Thabo | 8263 | Grade 3 | 3A | |
| LETSOALO | Tsatsi | 0137 | Grade 3 | 3A | |
| MAHLANGU | Bongani | 8285 | Grade 3 | 3A | |
| MATJEKA | Neo | 8351 | Grade 3 | 3A | |
| MOHLAMONYANE | Gontse | 8410 | Grade 3 | 3A | |
| MOLOPE | Mokotseng | 8363 | Grade 3 | 3A | |
| NGOEPE | Ofentse | 048 | Grade 3 | 3A | |
| NKADIMENG | Jan | 8369 | Grade 3 | 3A | |
| SEKGALA | Prudence | 8248 | Grade 3 | 3A | |
| SEKGAOLELO | Khutsiso | 8401 | Grade 3 | 3A | |

Figure 15.23: Learner Library Users Page

- To view a list of library users, select **library users** from library main menu.
- Select learner **information** tab to view information for learner users.
- Click **show all current learners** to view a complete list of current learner library users.
- Click **show all archived learners** to view a complete list of archived learner library users.
- Use drop list for **grade** and **class** to filter down the learner list.
- Use **export to excel** to create an excel file of the list of users showing on the grid.
- Use **print grid** to print the user list.

## 15.2 Library Educator Users

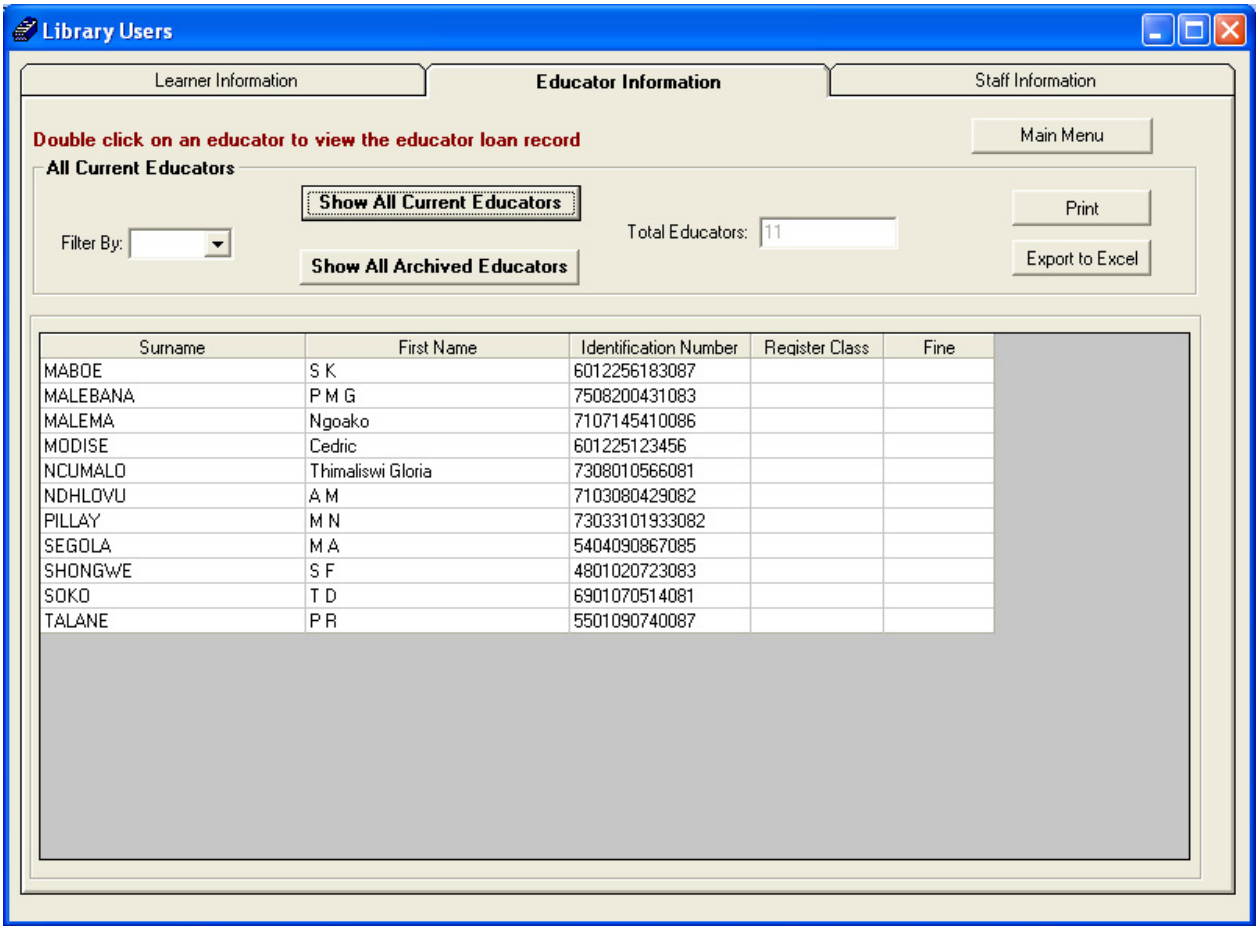



Figure 15.24: Educator library Users Page

- Select **educator information** to view information for educator users.
- Click **show all current educators** to view a complete list of current educator library users.
- Click **show all archived educators** to view a complete list of archived educator library users.
- Use filter by drop list of a – z to filter down the educator's surnames.
- Use **export to excel** to create an excel file of the list of users showing on the grid.
- Use **print grid** to print the user list.

## 15.3 Library Staff Users

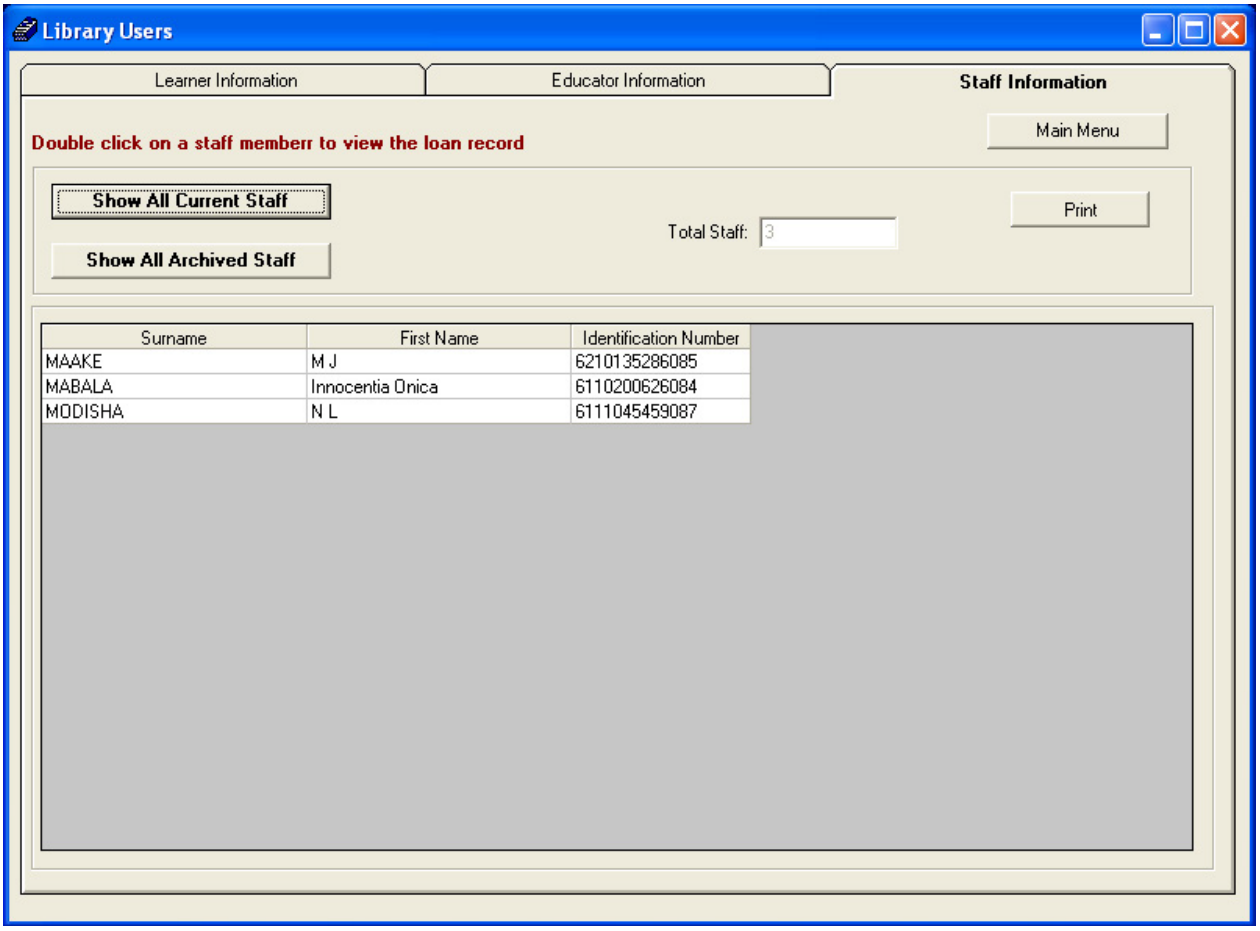



Figure 15.25: Staff Library Users Page

- To view a list of library users, select **library users** from library main menu.
- Select staff **information** to view information for staff users.
- Click show **all current staff** to view a complete list of current staff library users.
- Click **show all archived staff** to view a complete list of archived staff member library users.
- Use **print grid** to print the user list.

## 16. LIBRARY REPORTS

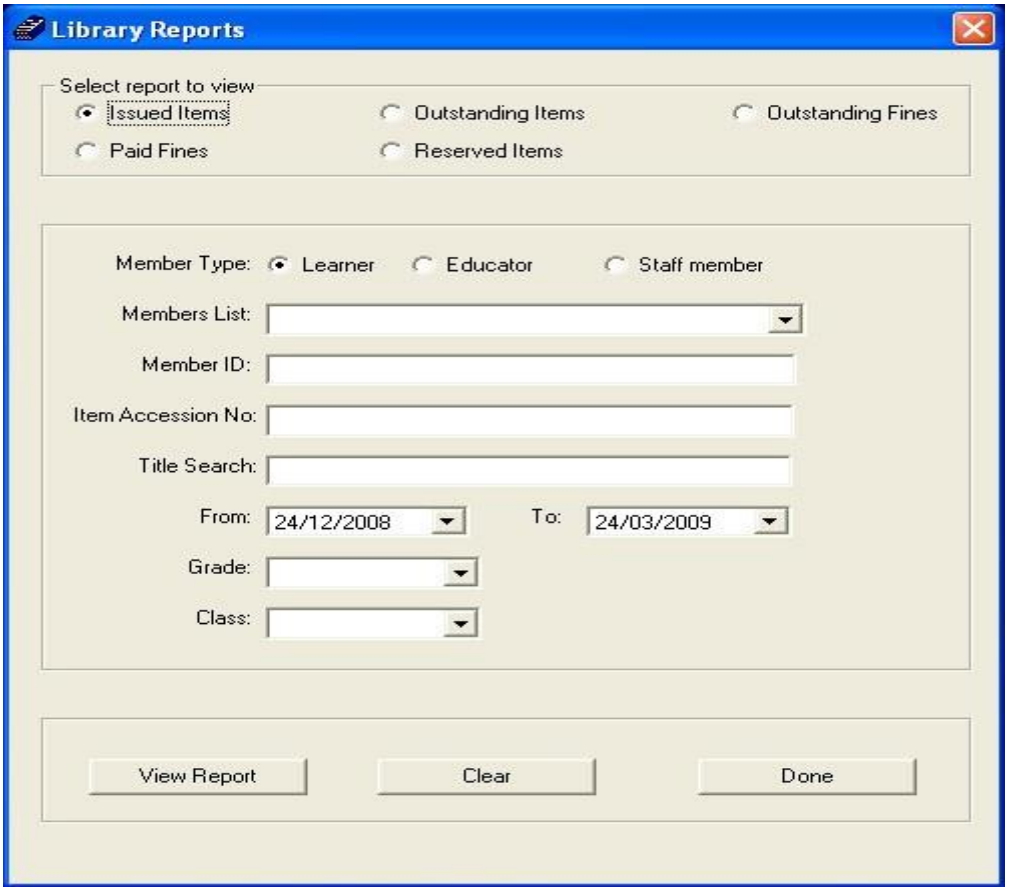



Figure 15.26: Library Reports Page

- To extract reports from the library module, select **reports** from main menu.
- User can request a report for **issued items, outstanding items, outstanding fines, paid fines** and **reserved items**.
- To search for a report:
  - Select **member type : learner, educator or staff member**
  - Select **member list** Drop down list. Type the **member ID** number on text box provided if it is known.
  - Type **item accession no** on the provided text box if it is known.
  - Type the title on **title search** text box if you know the name of the item you are searching for.
  - Select the start date and end date on **from drop down list** and **to dropdown list**.
  - Select the **grade** on which u you like to conduct the search.
  - Select the **class** on which u you like to conduct the search.

***Note: Grade and class search do not apply for educators and staff.***

## Notes

# Feedback/Contact Form

Your feedback is important to us. Please leave any comment that you want. If you are struggling with anything in this module, please send us an email and remember to also give us a number or email to contact you back with.

**Contact Name:**

**Email Address:**

**Cellphone Number:**

**Version of SA-SAMS:**

**Operating System:**

**District / Province:**

**Comments / Problem Details:**

Send Email

| Contact Person | Telephone | Email |
|---|---|---|
| Carinne van der Westhuizen | 0123573832 | vanderwesthuizen@dbe.gov.za |
| Pauline Ramphele | 0123573287 | ramphele.m@dbe.gov.za |
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