Supervisor settings

Learn how to setup supervisor parameters, enter email server details for individual locations, setup the VDX location, set group permissions, and check digit setup for Amlib VDX ILL Email.

**Note:** Configuration of the *Amlib VDX ILL Email* application/service requires the creation of Location-specific POP3 email user accounts (mailboxes) within the *Amlib* client. Once set-up, these location-specific *Amlib* mailbox addresses **MUST** be added into the *State Library of WA (SLWA) VDX* system against the specific user locations. After entering their email settings in the *Amlib* client, users should contact Sandra Jones ([sandra.jones@slwa.wa.gov.au](mailto:sandra.jones@slwa.wa.gov.au)) at *SLWA* providing the email addresses to be added to their *VDX* configuration. *SLWA* will arrange for these configuration changes on their behalf (which will also include testing).

**Supervisor Parameters**

1. Launch the *Amlib* client
2. Go to **Main > Supervisor > Installation** – the Installation (DEFAULT) table will display
3. From the menu, select **Installation > Choose Location** – the Installation screen will display
4. Highlight your main location and then click the **OK** button
5. Select the **Other** tab
6. Scroll down and enter the following VDX POP3 settings:

a. VDX Alert email level - None (N), Error (E), Success (S), Both - Error and Success (B)\(^1\) – enter N, E, S or B

b. VDX CC Email address for alerts\(^2\) – for example: firstname.lastname@mylib.com

c. VDX Email address for alerts\(^3\) – for example: firstname.lastname@mylib.com

d. VDX POP3 server address\(^4\) – for example: myemailserver.com.au

e. VDX POP3 server login\(^5\) – enter the POP3 Server login

f. VDX POP3 server password\(^6\) – enter the POP3 server password

Note: Please refer to the detailed notes overleaf before completing these settings.

**Important Information about Entering Your POP3 Settings:**

- When the VDX email data is processed by the Amlib VDX/ILL Email client from the nominated POP3 mailbox (see 5 and 6 below), it is possible for the Amlib client to generate a **user alert email** which is sent to selected library staff email addresses informing them that the incoming requests have been processed. This setting is used to determine when these user alerts are sent. The following choices are available: None (N), Error (E), Success (S), Both - Error and Success (B). If you intend to send out user alerts, then you will also need to configure your SMTP settings (see step 7).

- The CC email address to be used for **user alert emails** to library staff (see 1 above). This is **NOT**
same as the POP3 account/email address that is being the used by VDX to send ILL request emails and (if used) it **MUST** be configured to use an entirely different email account/email address. If VDX Alert email level - None (N), Error (E), Success (S), Both - Error and Success (B) = N, then there is no need to enter a CC email address.

- The primary email address to be used for **user alert emails** to *library staff* (see 1 above). This is **NOT** the same as the POP3 account/email address that is being the used by VDX to send ILL request emails and (if used) it **MUST** be configured to use an entirely different email account/email address. If VDX Alert email level - None (N), Error (E), Success (S), Both - Error and Success (B) = N, then there is no need to enter a primary email address.

- The hostname or IP address of the mail server hosting the POP3 mailbox that has been set up to receive VDX emails for this location

- The user login name for the POP3 mailbox that has been set up to receive VDX emails for this location, which will then be processed by the *Amlib VDX/ILL Email client*

- The password for the POP3 mailbox that has been set up to receive VDX emails for this location, which will then be processed by the *Amlib VDX/ILL Email client* – a password is required

7. Scroll down and enter the following SMTP settings:

**Important Information about Entering Your SMTP Settings:**

- Your SMTP server settings are used to **push user alert emails** out of the *Amlib* client to *library staff*

- If you do not intend to setup **user alert emails** for library staff (VDX Alert email level - None (N), Error (E), Success (S), Both - Error and Success (B) = N), then there is no need to configure your SMTP settings

- If you already have your SMTP settings defined (for email notifications to users, etc) either on the DEFAULT screen or on the individual location screen, then there is no need to change them

  a. SMTP server name or IP address – for example: libraryserver.com.au

  b. SMTP sender email address – for example: library.staff@mylib.com

  c. SMTP server requires a login Y/N – for example: Y

  d. SMTP server login (only if required) – for example: serverlogin

  e. SMTP server password (only if required) – for example: serverpassword

8. Click the **F3 Save** button when complete

9. Exit and restart the *Amlib* client for changes to take effect

**Enter Email Server Details for Individual Locations**

**Please Note:** The VDX POP3 Email server settings **should not** be entered on the Installation (DEFAULT) screen as they are required to be entered against a *specific* location (even if you only have one circulating location). Libraries operating multiple circulating locations should simply repeat steps 2-9 above to enter the POP3 server and user alert
email details for each circulating location.

**Please Note:** When communicating details of these email addresses to SLWA, please ensure that you specify which locations they are to be configured against.

## Setup the VDX Location

A new location of **VDX** needs to be created as this will be the Permanent Location used by the temporary StockItem records created for incoming the **VDX** ILL items.

1. Launch the *Amlib* client
2. Go to **Main > Supervisor > Locations** - the Locations screen will display
3. Click the **F1 New** button and enter a new location as below:
   a. Library Group Code – use the same Library Group Code as your main location
   b. Locn Code must be **VDX**
   c. Location Description can be whatever you choose – for example: **VDX ILLS**
4. Click the **F3 Save** button

![Locations Screen](https://help.oclc.org/Library_Management/Amlib/VDX_ILL_Email/020Supervisor_settings)

5. Go to **Menu > Supervisor > Installation** – the Installation (DEFAULT) screen will display
6. From the menu, select **Installation > Choose Location** – the Installation screen will display:
7. Highlight the **VDX** location and click the **OK** button – the Installation (VDX) table will display:

8. Select the **Other** tab and enter the settings:
   - Location is Valid For Holdings: **Y**
   - Location is Valid for OPAC enquiries: **N**
   - Location is Valid For Registration and Circulation: **N**

9. Click the **F3 Save** button when complete
10. Exit and restart the Amlib client for the new settings to take effect

Group Permissions

Sites that are employing Group Security will need to add extra Supervisor permissions. Non Super Groups will require these permissions to be able to select a processing location:

- **View** permission on another Group's Parameters
- **View** permissions on another Group's Locations
- **Insert** permission on another Group's Items
- **Hold** permission on another Group's Items
- **Hold** permission on another Group's Borrowers

1. Launch the Amlib client
2. Go to **Main > Supervisor > Locations** – the Locations screen will display:

3. Select **LibraryMenu > LibraryGroupPermits** – the Library Group Permits screen will display:
4. Click the **F1 New** button to enter the above settings so the operator is able to process the VDX emails for all other locations.

5. Click the **F3 Save** button when complete.

6. Exit and restart the *Amlib* client for the new settings to take effect.

### Check Digit Setup

A 14-digit ILLS-related check digit code will need to be setup.

1. Launch the *Amlib* client.

2. Go to **Main > Supervisor > CheckDigits** – the Check-digit Calculations screen will display:

3. Click the **F1 New** button – a new entry will appear in the table.

4. Enter the following information to construct a 14-digit check barcode:
   a. (Item) (B)orr: I
   b. Leading Chars: **ILLS**
   c. Trailing Chars: #######

   **(Please Note:** The above setting is composed of a string of 10 #.)
5. Click the F3 Save button – a prompt with the following message will display:
   A new OFFLINE.INI file has been created for use with Offline Issues, Offline Returns and Offline Stocktake.

6. Click the OK button

7. You will then see a barcode of 14 digits in length:
8. Exit and restart the Amlib client for the new settings to take effect