

Athenaeum Newsletter

SumWare Consulting

February 2015

A quick newsletter following up on some back to school queries this week!

Consolidating Borrowers

From time to time, particularly when importing data from other sources, you might end up with two entries in the borrower lists for the one borrower.

If you delete one of the borrowers, the history and other details for that deleted record will not move across to the other entry automatically.

Athenaeum Pro 2014 introduced a “consolidate” feature, which allows you to correctly assign one borrower’s issues, history, reserves, reviews, correspondence and fees to another borrower entry. The process is not hard. Find the two borrowers you want to consolidate. From the list view, click Utility (ninja shortcut: just press the “u” key). On the audit tab, you will see a button “Consolidate”. This takes you to a list view of your 2 borrowers. The screen shot



here shows you the two borrowers, with the first borrower highlighted. The yellow button on the right will move the other borrower’s issues, history, etc., to the first borrower.

If you want to consolidate to the second borrower, then make that borrower active in the list. The yellow button is now next to that borrower and you can move the first borrower’s transactions to the second.

This is harder to explain than to do.

You can use this feature to find a groups of borrowers, sort them by name and quickly consolidate alternate records.

Issue to a list of Borrowers

Are you issuing text books to a particular home room of students? Don't forget Athenaeum Pro has a handy “Issue All” feature.



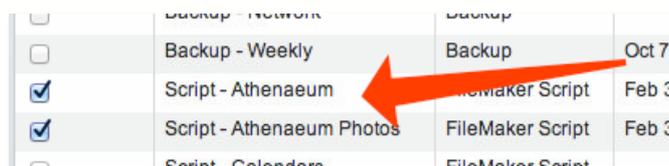
- Find the group of students in the borrower list
- Have your piles of text books handy
- Click Issue All. Athenaeum will start issuing to the first borrower in the list.
- Scan the items for that borrower.

When you are done with that borrower, hit the enter key on your keyboard without scanning an item. Athenaeum will automatically move to the next borrower in the list.

Rinse and repeat.

Reminder: Import from SMS

Student Management Systems (such as eTap, Musac or KAMAR) can export their data and this can easily be imported into Athenaeum borrower lists.



With KAMAR, it's automatic. If the KAMAR updates are not happening, then contact your server administrator and have them enable the two synchronisation schedules (if we have access and you have a support agreement, we can activate it ourselves).

eTap has an export to Athenaeum feature and we are happy to assist you with that. Other packages can export CSV data.

The minimum fields we normally need are: School Code (bar code), first name, last name, year or vertical class, and room. Other fields are gender, ethnicity, home contact details, email, etc. These are not critical, but are very helpful.

Closing off from End of Year

Quite a few have asked what to do to the catalogue before they start issuing this year.

The answer is probably “nothing, just tweak your borrowers and start issuing”.

The end of year reports, such as the annual summary are always calculated “on the fly” and can be reproduced for earlier years, if desired. The other reports—such as

statistics and depreciation reports—are generated from the “found set” of catalogue records. That means you can re-generate those reports simply by re-finding the records you need and choosing the desired report.