

Weekly Exchange Cheat Sheet

Create a Saved Query

Save time generating an advanced search each week by creating a Saved Query.

In Enquiry select:

- Search Holdings
- Advanced Search

Enter details for the exchange criteria:

The screenshot shows the 'Enquiry' sidebar on the left with 'Advanced Search' selected. The main area is titled 'Search Holdings - Advanced Search' and contains several search criteria fields:

- Title: Enter search terms
- Author: Enter search terms
- Subject: Enter search terms
- Anywhere: Enter search terms
- Dewey Class: Enter search terms
- Year: e.g. 1995, < 1800, 1960-1970
- Location: All locations, Current Branch, Barraba Library, Barraba Self Checker
- Collection: All collections, Aboriginal Studies, Adult & Junior Literacy, Adult Fiction
- Material: All materials, ABS statistics, ...

Annotations with red arrows point to specific fields:

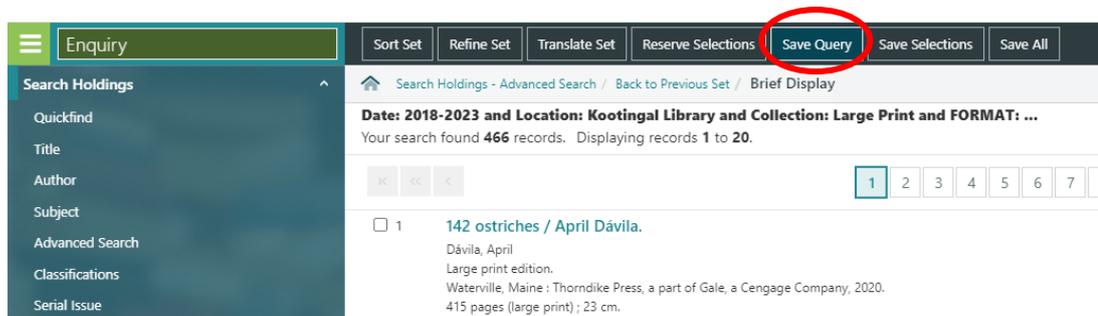
- 'Date range, e.g. 2018-2023' points to the Year field.
- 'Location' points to the Location dropdown.
- 'Collections; you can select multiple by holding down CTRL key' points to the Collection dropdown.

Refine the list that is generated to remove titles already at the branch you are exchanging with:

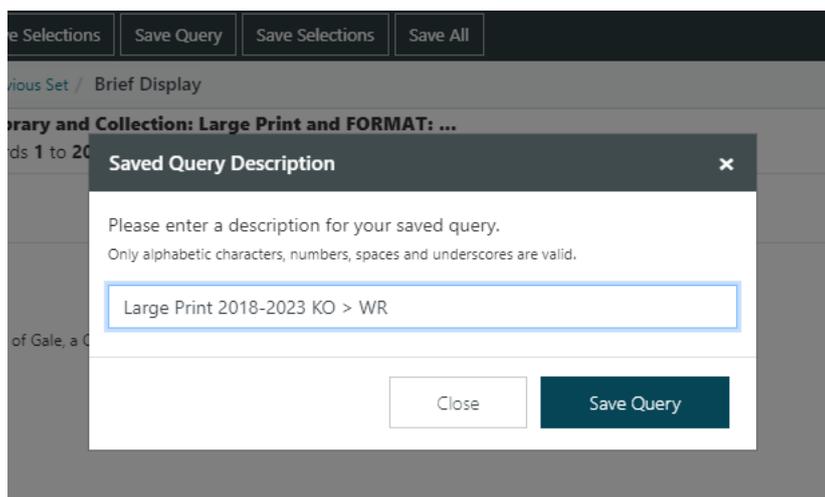
The screenshot shows the 'Enquiry' sidebar on the left. The main area is titled 'Search Holdings - Advanced Search / Brief Display'. At the top, there are buttons: 'Sort Set', 'Refine Set' (circled in red), 'Translate Set', 'Reserve Selections', 'Save Query', 'Save Selections', and 'Save All'. Below the buttons, the search criteria are displayed: 'Date: 2018-2023 and Location: Kootingal Library and Collection: Large Print and FORMAT: ...'. The results show 'Your search found 467 records. Displaying records 1 to 20.' and a list of records, including '142 ostriches / April Dávila.'.

The screenshot shows the 'Enquiry' sidebar on the left. The main area is titled 'Search Holdings - Advanced Search / Back to Brief Display / Refine Set'. The search criteria are the same as in the previous screenshot. Below the criteria, there is a section for refining the search: 'Your current set' followed by two radio buttons: 'AND the following' and 'NOT the following' (circled in red). Below this, there are search criteria fields for refining the search, including 'Location' (circled in red and pointed to by an arrow from the 'Location' annotation).

Now select *Save Query*



Give the Query a name so you can identify it, e.g. [Week 1], [Collection], [Date range], [from Branch] > [to Branch]



Click *Save Query*

Now repeat these steps for each of the searches required for your location's exchange. **You will only need to do this once a year when the exchange timetable is updated.**

Save Query Search

Save time selecting items by running your saved query.

In Enquiry select:

- Operations
- Saved Query Search

Enter [Week #] [from Branch] > [to Branch] into the Description field and click *Submit*

The screenshot shows the 'Enquiry' interface with the 'Operations - Saved Query Search' form. The 'Description' field is highlighted with a red arrow pointing to a callout box containing the text 'e.g. Week 1 KO > WR'. The 'Type' dropdown menu is open, showing options: 'Any type', 'Public', and 'Staff'. The 'Date Created' field contains the text 'e.g. 2 Jun 2014'. Below the form, there are 'Submit' and 'Clear' buttons. In the 'Options' section, 'Records per page' is set to 20 and 'Sort by' is set to Description.

You will be given a list of all Saved Query Searches for your exchange.

Select the appropriate search:

The screenshot shows the 'Enquiry' interface with the 'Operations - Saved Query Search / Brief Display' page. The 'Description' is 'KO > WR (Keywords)'. The search found 17 records, displaying records 1 to 17. The first two records are listed:

Record Number	Description	Type	Owner
1	Adult Fiction F, FA, FH 2013-2017 KO > WR	Staff	Sarah Dean (SJD)
2	Adult Fiction F, FA, FH 2018-2023 KO > WR	Staff	Sarah Dean (SJD)

Click *Run Saved Query*

The screenshot shows the library system's 'Enquiry' page. The 'Run Saved Query' button is circled in red. The page displays search results for a saved query. The description is 'KO > WR (Keywords)'. The record number is 15 of 17. The IRN is 582548 (Saved Query). The description is 'Large Print 2018-2023 KO > WR'. The record number is 420547. The type is Staff. The owner is Sarah Dean (SJD). The query list is 'PD: "2018-2023" + BIBLOC: 5290222 + BIBCOL: 5290306 + (FORMAT: BIB) - BIBLOC: 5291260'. The query list text is 'Date: 2018-2023 and Location: Kootingal Library and Collection: Large Print and FORMAT: ... not Location: Warialda Library'. The enquiry topic is BIBENQ. The sort by is SQL_LOANCOUNT_DESC. The created date is 17 Jan 2023 - 13:37 - SJD. The last updated date is 17 Jan 2023 - 13:37 - SJD.

You will now have a list of titles suitable for the exchange that are not already held at the other branch.

You can choose to sort this list based on publication date, or you might like to sort it based on number of loans, or you can just leave it in alphabetical order.

The screenshot shows the library system's 'Enquiry' page. The 'Sort Set' button is circled in red. The page displays search results for a saved query. The date is 2018-2023 and the location is Kootingal Library and Collection: Large Print and FORMAT: ... Your search found 466 records. Displaying records 1 to 20. The first record is 'A stranger in stirrup / Wayne C. Lee'. The author is Lee, Wayne C. It is a large print edition, ©1962, Thordike, ME : Center Point Large Print, 2019, 206 pages (large print) ; 23 cm. The record is available at Kootingal Library and Narrabri Library. The status is Available and Last Returned: 22 Jun 2023. The onloan date is Due: 21 Jul 2023 and Last Issued: 30 Jun 2023.

Location	Collection	Call Number	Accession No	Status/Desc
Kootingal Library	Large Print	LP LEE	307295156	<ul style="list-style-type: none">AvailableLast Returned: 22 Jun 2023
Narrabri Library	Large Print	LP LEE	307318103	<ul style="list-style-type: none">Onloan - Due: 21 Jul 2023Last Issued: 30 Jun 2023

Keep an eye on the *Last Returned* date and avoid anything that looks like it might have arrived in your last exchange for that same collection. Try to pick the ones that haven't moved in a while.

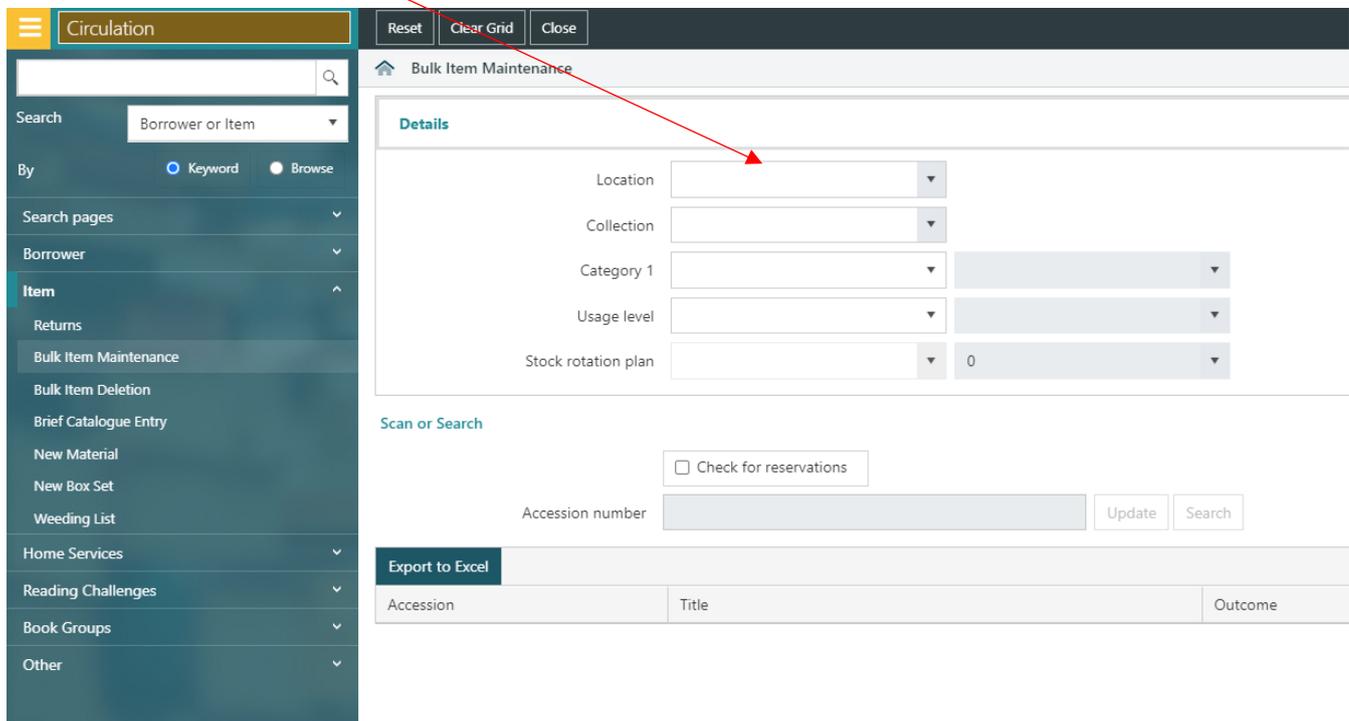
Batch Returns

Save time processing incoming exchanges by not double handling books to run them through returns.

In Circulation select:

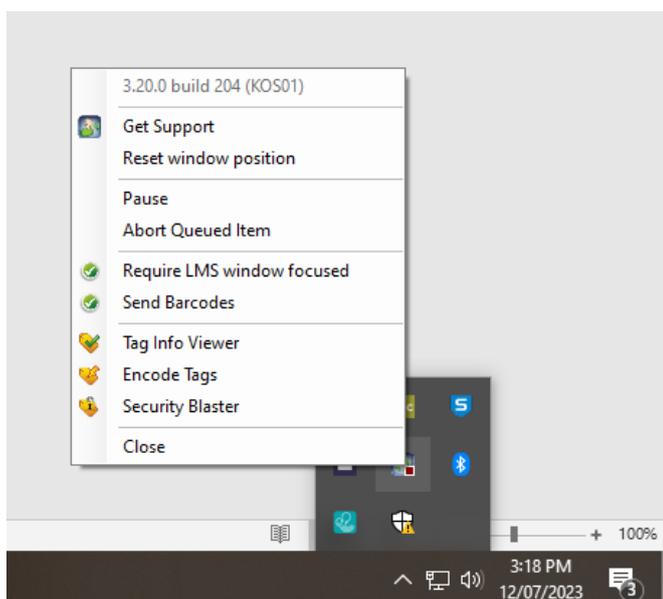
- Item
- Bulk Item Maintenance

Set *Location* to your branch

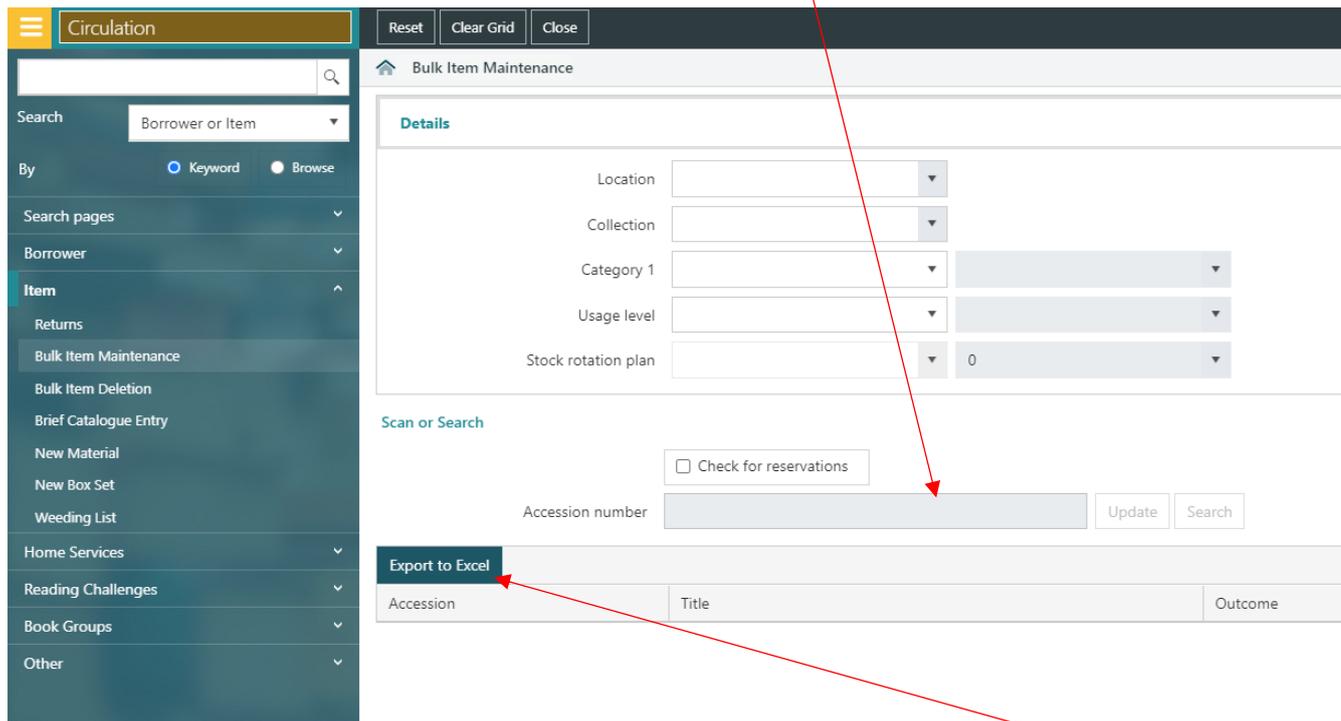


Change RFID pad settings to allow you to scan items with the pad:

- Click ↑ icon on toolbar
- Right click on Circulation Assistant icon
- Untick *Require LMS window focused*



Now you can start scanning your exchange items with the RFID pad

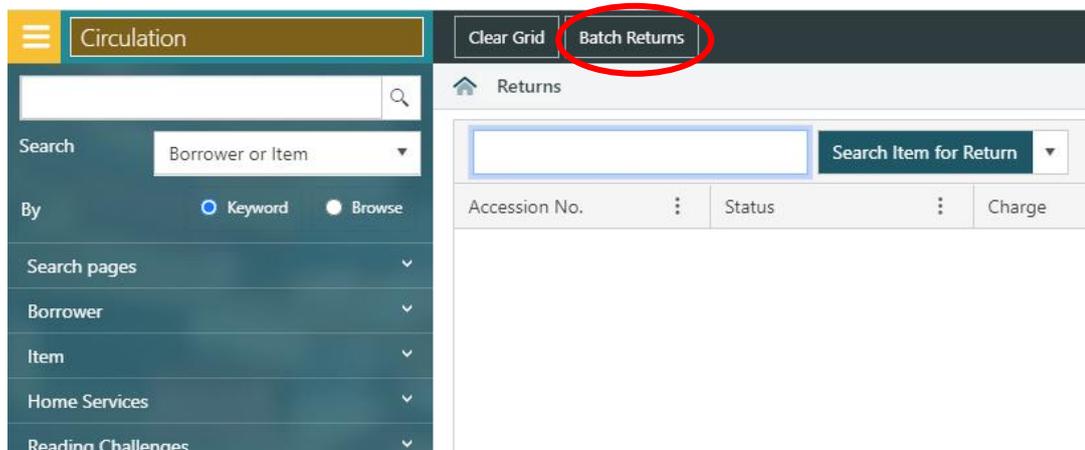


Once you have scanned all items to change their location to your branch, click *Export to Excel*

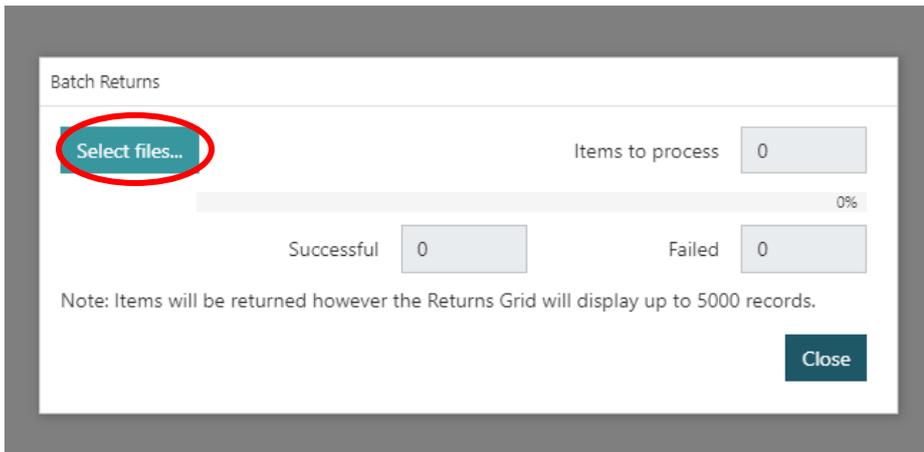
This will give you a spreadsheet with all the items scanned:

- Click on Column A to highlight the entire column of accession numbers
- Hold CTRL+C to copy the accession numbers
- Open a blank Notepad document
- Hold CTRL+P to paste the list of accession numbers
- Delete the heading at the top of the list
- Save document on your desktop

Click the *Home* icon in Circulation and select *Batch Returns*



Click *Select files...*

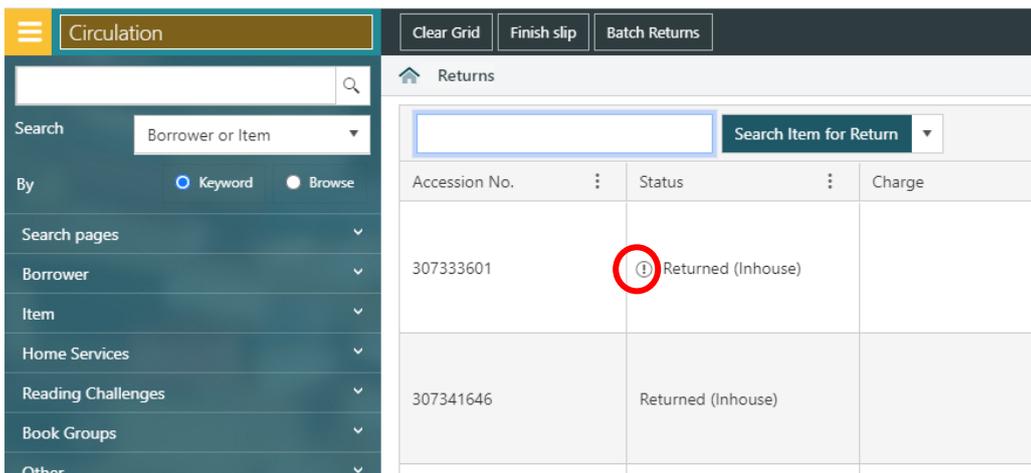


Find the file you just saved to the desktop and click *Open*

Click *Process*

Once it reaches 100% you can click *Close*

Scroll down the list of returns and **check any items that have the  icon** – they may be reserved.



The exchange is now complete.