Learn how to create master/subsidiary items (kit loans) in Amlib.

Creating master/subsidiary items (kit loans)

It is possible to link stock items to one (Master) item. All the linked (or Subsidiary items) show as on loan when the Master is on loan. This is useful for sites that want to set up kits or videos (with programs catalogued separately) and do not wish to loan out the separate items independently.

### EXAMPLE

**Title: ABC for Kids**

<table>
<thead>
<tr>
<th>Videos with multiple programs</th>
<th>SUBSIDIARY ITEMS</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Big red car (20 mins)</td>
<td>• Teacher’s Guide Book</td>
</tr>
<tr>
<td>• Wiggle time (30 mins)</td>
<td>• Video</td>
</tr>
</tbody>
</table>

**Master**

<table>
<thead>
<tr>
<th>Kits</th>
</tr>
</thead>
<tbody>
<tr>
<td>• 24 plastic animals</td>
</tr>
<tr>
<td>• Sound cassette</td>
</tr>
<tr>
<td>• Worksheets</td>
</tr>
<tr>
<td>• Game</td>
</tr>
</tbody>
</table>

Kits can be added as a Master with Subsidiary items, or alternatively as a single item. Use the former for those instances where you would like the ancillary items to be searchable on the catalogue.

Otherwise a Memo on the stock item which lists the ancillary items would suffice.

### Creating a master record

1. Launch the *Amlib* client
2. Go to **Main > StockItems > Stockitem** – the Stockitem module will display

3. If you are creating a new stockitem: Enter the barcode that you wish to use for circulating the loan. If the item is a kit or box, scan the barcode into the **Item No** field. Otherwise, just do a **F5 Search** in the Stockitem module to locate the item which you would like to be the Master Item

   **HINT:** A description relating to the item as a Master can be added to assist in listing Master Items.

4. From the menu, select **XReferences > SelectAsMaster**:

   ![Image of Stockitem module with XReferences menu and SelectAsMaster option selected]

5. The following prompt will then display: **The Item has been selected as Master.**

   ![Image of Select As Master dialog box]

6. Once the item has been selected as a Master, the **ITEM TYPE:** will change from **N** (Normal) to **M** (Master):
Note: If an item is ON LOAN, the stockitem will not be able to be linked to the master Record, and the Create Link will remain greyed out, until item has been returned. Once returned the item can then be linked to this master record.

7. Click the F1 Clear button – the system will remember the last item to be made a Master Item
8. It is then possible to link other items to this Master Item. You can either create a new Stockitem record (attached to the same catalogue record), or use F5 Search to locate the Stockitem in question (which can be linked to the same Catalogue record – or a separate record if you would like it to be searchable as a unique entity).
9. Once the Stockitem to be linked is displayed on the screen, from the menu, select XReferences > CreateLink – a prompt will then display, asking you to confirm the Link this Item with the Current Master:

10. Click the Yes button to create the link – the following prompt will then display: The item has now been Linked.

11. The Stockitem will now have an ITEM TYPE: of S (Subsidiary):
Circulating linked items

- When borrowing out linked items, only the Master Item will display in the Issues module:
Subsidiary items can be circulated independently of the Master – the following Alert will display if a Subsidiary item is circulated: **This is a Subsidiary item. It is not usually issued using its own barcode – normally the Master record must be issued. Do you want to issue just this item?**

- When the item is returned another Alert notice will display (see below for more details)
- Once the Master Item is out on loan, all linked items also show that they are out on loan to that borrower. In the **Borrower** module, from the menu, select **XReferences > ShowItemsOnLoan** to see the full list of items on issue to that borrower (including linked items):
• To check the Master of any Stockitem with an ITEM TYPE of S, from the Stockitem module menu, select XReferences > CurrentMaster – the following prompt will display denoting the current Master record:

![Image of Current Master]

• To check a listing of linked items, from the Stockitem module menu, select XReferences > RelatedItems – a Stockitem List of Related Items will display:

![Image of Stockitem List - 3 rows]

Returning Master/Subsidiary Items

Return the Master Item:

This procedure applies to checking in or scanning through the returns module any items that have been set up with a Master-Subsidiary relationship (for example, kits with several parts or boxes of books and other library items).

1. Launch the Amlib client
2. Go to Main > Circulation > Returns – the Returns screen will display
3. Check in the box or Master item – a prompt will display with the following message: This is the Master Item. Return All Parts
4. If you are sure that all items are present, click the Yes button (otherwise click the No button).

5. If you clicked the Yes button, the returned item will display in the Returns screen:

6. To return only some parts of the box or set, click the No button – the Subsidiary Return Check screen will display:
7. Use the list to check if all contents are present. If not, use the options on the screen (pictured below) to process these items according to your library procedures:

<table>
<thead>
<tr>
<th>FIELD</th>
<th>EXPLANATION/OPTIONS</th>
<th>EXAMPLE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Process Code</td>
<td>A process code can be entered in this field to be automatically added to items with a Y in the Add Process? column.</td>
<td></td>
</tr>
<tr>
<td>Alert</td>
<td>If set to Y a message will display at issues if the item is checked out to another borrower, to alert the operator to the Process Code on the item.</td>
<td>A message will appear at the issues screen to indicate that the item has a process code (see screen shot below). Click the OK button to proceed with the issue.</td>
</tr>
<tr>
<td>FIELD</td>
<td>EXPLANATION/OPTIONS</td>
<td>EXAMPLE</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>OPAC</td>
<td>If set to Y, the item will show on the OPAC.</td>
<td>If the item is missing, setting the OPAC to N will mean that library users will not see the item displayed and this will prevent them from asking for an item that is not available.</td>
</tr>
<tr>
<td>For Loan</td>
<td>If set to Y, this will allow the item to be borrowed if presented at the circulation counter.</td>
<td>For missing items or parts of a set, this may be set to N to stop the item from being borrowed until the process code is removed or the item is returned to its set.</td>
</tr>
<tr>
<td>Memo Type</td>
<td>Information contained in these fields will determine the memo placed on selected items. A Memo Type can be selected from the list of Memo Types. Additional or alternative text can be added in the Text field.</td>
<td>A Memo Type of <strong>BULK LOAN</strong> may have been created and selected in this screen. The Text may include the details of the set that was originally loaned out.</td>
</tr>
<tr>
<td>Text</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Return?</td>
<td>The system will check in/return any items with a Y in this column</td>
<td>If items are present, they can be checked in and those not present are marked with an N so they remain checked out and undergo normal overdue processes. Alternatively, all items may be checked in (mark items with a Y in this column) and a Process Code may be used instead.</td>
</tr>
<tr>
<td>Add Memo?</td>
<td>A memo will be added to those items marked with a Y in this column</td>
<td>A standard memo for bulk loans may be added to those items that are not present — to indicate what set they were originally loaned in, and that the parts had not been returned.</td>
</tr>
<tr>
<td>Add Process?</td>
<td>A Process Code (see above) will be added to any items with a Y in this column</td>
<td>Items may have a process of ‘missing part’ to indicate on the catalogue that they are part of set that is now incomplete.</td>
</tr>
</tbody>
</table>

8. Click the green **OK** button at the bottom of the screen to process the items as indicated
9. Items that were marked as Y for return will display on the returns screen:

https://help.oclc.org/Library_Management/Amlib/Stockitem/Master_Subsidary_items_kit_loans

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10. If some items were marked as N for return, these will display as on loan to the original borrower:

11. Items that were marked with a Y for Process Code, will contain the corresponding Process in the Stockitem record:

12. If items were marked with a Y for Memo, the memo will display on the Stockitem record:
When returning a linked item, if you attempt to return the Subsidiary Item rather than the Master Item, the following prompt will display: **This is a Subsidiary item. It cannot be returned using its own barcode – the Master record must be returned.**

Supervisor settings

It is possible to change the System settings so that when a Master Item is checked in via the Returns module, it automatically shows Subsidiary Return Check list of the Subsidiary Items:

1. Go to **Main > Supervisor > Installation** – the Installation (DEFAULT) screen will display
2. Select the Circulation tab
3. Scroll down and adjust the following setting: Show subsidiary items when returning a master item (Y/N) = Y
4. Click the **F3 Save** button
5. Exit and restart *Amlib* client for the settings to take effect

**Alternate method**

**HINT:** Alternatively, you can attach a memo to the Master Item, so that a message displays with an indication of how many items are attached so that this can be checked:

- **Delinking items**
  - To break the link: from the *Stockitem* module menu, select **XReferences > BreakLink** – a prompt with the following message will display: *The Item has been unlinked from 'XXXX'*

Note: You will be unable to delete a Master Stockitem record if it has linked items. The Master cannot be removed as a Master until the items are first disconnected.