

Office Maintenance

This section enables you to add and manage offices and their sub units (departments or divisions).

This page describes:

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To access Office Maintenance, select **System Management > Infrastructure Maintenance**.

In the list of countries, those which have got offices defined have a + symbol next to them. Click on the + to expand the country and list its offices:

Adding an office

To add a new Office, click on the country to select it, then click **Add new Office** in the Actions menu.

A new form opens up, above the list of countries and offices:

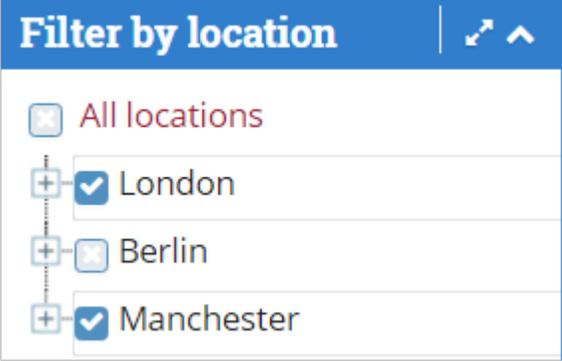
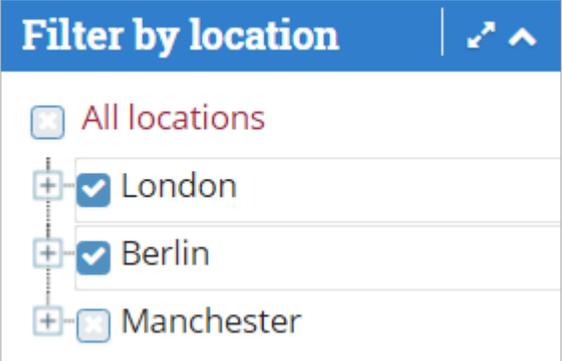
The screenshot shows the 'Infrastructure Maintenance' form with the following fields and values:

- Office Group: Default
- Short Code: LON
- Office Name: London
- Renewal Limit: 2
- Complete SC request in (days): 0
- Leaving Cut-Off Days: 5
- Expected Items last days: 365
- Expected Items next days: 90
- Librarian e-mail for claim notification: (empty)
- Default Portal: System Default Portal
- Currency: United Kingdom, Pounds
- Languages: German, English
- Library: Main Library
- Default Language: English
- Is Public:
- Local Priority:
- Email SC request notification:
- Supply copy notification recipient email: graham.partridge@soutron
- Office Logo: (empty)
- Is Default:
- Default Credit Card: [Select Credit Card]
- My Country Location Search:
- My Office Group Location Search:
- Location Search Office Group: Default

Enter information into the following fields (required fields have an asterisk next to the label). Note that none of the settings have a default value except for Complete SC request which has a default of 0.

Setting	Function
Office Group: *	From the drop-down list, select either "Default" or a predefined office group
Short Code: *	Unique short code. If you are displaying location field in catalogue records or search results, it is the short code that appears rather than the full Office name.
Office Name:	Unique office name - the maximum number of characters is 150
Renewal Limit:	The maximum number of times that an item from a particular office may be renewed. See Renewals for a description of the process. Set this to 0 if renewals are not to be allowed.
Complete SC request in (days):	If you process Supply a Copy requests outside the application (for example if they are dealt with by a different department), this setting allows you to define a number of days after which the request will automatically get closed in the Soutron Library Management System. See Requests and Reservations for an explanation of the types of request.

Leaving Cut-Off Days: *	This figure is used in calculating the Due Date, so that if this is set to 5 for example, the Due Date will be 5 days plus however many non-working days before the Leave Date.
Expected Items last days *	For the display of items on order that are expected, defines the number of days before today for which items are displayed. This is best set to a large number like 365 in order for all expected items to show by default.
Expected Items next days *	For the display of items on order that are expected, defines the number of days after today for which items are displayed. This is best set to a large number like 365 in order for all expected items to show by default.
Librarian e-mail for claim notification	If using claims for any outstanding Orders, you can specify here an internal email address i.e. the library email address, so that if a supplier does not have an email address defined, the claim will be sent to the library so that they can then manually deal with.
Default Portal	By Default is set to System Default Portal which ensures that anyone logging in to the Portal where a portal specific name is not specified will be taken to the Portal set as Default in the OPAC Maintenance. If you have a multi office environment and want to have different portals that load based on Office then this is achieved using this function. Select from the drop down and a list of all Portals created will be shown and select the one that you want to load when a user logs in from the office.
Currency	Select the currency that you want to assign to this office, this will then be used for showing the correct Currency code based when looking at fines in the Portal My Account
Library:	You can either select a pre-defined library from the drop-down list, or create a new library by clicking on the Create Library button.
Default Language:	From the drop-down list, select the default language for this office
Is Public:	
Local Priority:	This setting determines how notes appear in catalogue records. If selected, only local notes will appear, and you would need to click on a link to see the global notes. Otherwise, both local and global notes are displayed.
Email SC request notification	If you want a particular email address to be notified when a Supply a Copy request is received, tick this box; otherwise leave blank.
Supply copy notification recipient email	If you have ticked the box above, enter the email address here.
Office logo:	To upload an image of the logo: <ol style="list-style-type: none"> 1. Click on the red symbol 2. Click Browse to find the image file 3. Click Upload to bring it into the system 4. Click on Apply and the logo will replace the red symbol
Is Default:	Tick the box if this office is the default office for this country; otherwise leave blank.
Default Credit Card	If using Acquisitions and have setup to use Credit Cards, you can assign a credit card to an office so that when placing an order from a specific office and select Credit card as payment type, the default card specified here will be shown.

<p>My Country Location Search</p>	<p>Tick this box if you want the Portal to include this office i.e. London, if the user is using another office i.e. Manchester, that is in the same country then by default when a user is in London they will also search Manchester. The users access permission may provide access to other offices, it is just that they are not selected by default in the Portal - they have to select them manually should they wish to search them.</p> 
<p>My Office Group Location Search</p>	<p>Tick this box if you want the Portal to include all offices in the same office group. This function allows offices that are spread across different countries to be part of one group. For example, London and Berlin although in different countries are in the same group, so users in London will also want to search Berlin. For example:</p>  <p>This function allows this but also requires the Office Group to be assigned to both the office and the next setting below.</p>
<p>Location Search Office Group</p>	<p>Select from the drop down the office group you want to this office to be part of.</p>
<p>Languages:</p>	<p>This setting defines the languages that are to be used by this office, and the priority in which they are to be used.</p> <p>The left hand box displays the list of languages which have been enabled in the application. Select the languages you want for this office by clicking on them in the left hand box and then clicking the right arrow to move them into the right hand list.</p> <p>Then define the display priority by clicking the up or down arrows.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <p> Note that this must be defined if you are also creating sub-units (see below)</p> </div>

When you have finished, click **Save** in the Actions menu.

This returns you to the list of countries and offices, with the new office added to the list.

Creating a Sub Unit (department / division)

A Sub Unit is like a department within an office, and is assigned to users. It is not the same as the sublocations defined within a Library.

To create a new Sub Unit for an office:

1. Click on the Office to select it
2. Click **Add new Sub Unit** in the Actions menu.
3. A new line appears under the Office heading:
4. Enter the Sub Unit name and a unique short code
5. Click **Save** in the Actions menu

This returns you to the list of countries and offices, with the new sub unit added to the list.

Editing an Office or Sub Unit

To edit a Office or Sub Unit definition:

1. Click on the Office or Sub Unit to select it
2. Click **Edit** in the Actions menu.
3. The same form opens up as for adding a new Office or Sub Unit.
4. Make the required changes
5. Click **Save** in the Actions menu

Deleting an Office or Sub Unit

To delete a Office or Sub Unit definition:

1. Click on the Office or Sub Unit to select it
2. Click **Delete** in the Actions menu

This returns you to the list of countries and offices, with the deleted Office or Sub Unit removed from the list.

Deactivating a Sub Unit

To deactivate a Sub Unit:

1. Click on the Sub Unit to select it
2. Click **Deactivate** in the Actions menu

This returns you to the list of countries and offices, with the deactivated Sub Unit greyed out in the list.

Activating a Sub Unit

To activate a Sub Unit:

1. Click on the Sub Unit to select it
2. Click **Activate** in the Actions menu

This returns you to the list of countries and offices, with the activated Sub Unit no longer greyed out in the list.