



Staff Training

You should have the Icon for the SAM's PC Activity Manager on your Staff Desktop. From here, you can manage your SAM workstations and Patron accounts.



Begin a session by clicking on the Icon.

Familiarize staff with the regions of the screen. This screen can be left open and minimized, while staff perform other functions on their PCs.

Functions

Control →
workstations

Manage →
Patron
Accounts

Reports →

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Patrons waiting will appear on the left side of the screen, if you use the reserve feature. The buttons below are also used with reservations.

On the right side, your stations will display. If in use the patrons ID will show along with the time their session ends.

Ticket #	Patron Name	Patron #

PC ID	Patron ID	Now up / End:
CR		
Public-		
Public-		
Public-		
public1		
Public-		
Public-		
Public-		
Public-		
Public-		

Time: ← Time of next available PC

Make a Visitor Card Exit

Begin by having someone log into a SAM workstation, so that you can demo the display. Try not to let that session timeout.

Create a visitor card-

1. Click the Make a Visitor Card button.
2. View the display
3. Click Finish to Print
4. Press the form feed button on the printer to feed out more paper. Tear off and give to patron. **THIS CARD EXPIRES AT THE END OF THE DAY.**

**Functions-
Control Workstation**

1. Click on the desired function
2. Double click on the computer you wish to control.
3. Follow through on the action by saying "OK" in the pop up box.
4. Close the screen by clicking done.

The screenshot shows the SAM interface with a sidebar menu on the left containing options like 'Computers', 'Shut Down', 'Restart', 'Power Off', 'Log Off', 'Send Message', 'Close Browser', 'Login Computer', 'Patrons', 'Log Off', 'Patron Record', 'Make a Payment', 'Refresh Time', 'Reservations', 'Make a Reservation', 'Reports', 'Patron Reconciliation', 'Daily Location', and 'Cash Reconciliation'. The main area displays a list of computers: CR, Public-2, Public-3, Public-1, and public10. A 'Done' button is at the bottom right. A 'Send Message' pop-up box is open, asking for a message to be sent to the selected computer. A 'Do you want to continue with this operation?' dialog box is also shown, with 'OK' and 'Cancel' buttons.

1. Single click on any function to begin.
Sometimes this is a bit slow to respond. You may have to click a couple of times to get the window up.

2. Double Click on the computer you wish to control. You can do the same thing to more than one computer. If sending a message, type the text before double clicking.

3. If asked, Click OK to continue. Sending a message does not include this box.

4. Click Done to close the box.

Functions-

Shut Down- Closes all processes and powers off the PC

Restart - Powers off then Powers on the PC. Sam will be initiated upon restart.

Power off - Powers down the PC.

Log off – Logs patron off of SAM

Send Message – Sends message to the patron, in the form of a pop-up box.

Close Browser – Closes the any open internet windows. A message is displayed.

Login Computer – Remotely logs in a patron to the PC of your choice. You will need patron barcode and pin. The patron must still accept the use agreement.

Managing Patron Accounts

Retrieving a SAM Patron Record

1. Click "Patron Record".
2. A new search window will open.
3. Select a Search method and fill in the data.
4. Click Search.



SAM™
Library Internet Access Program
Staff Manager

- Manage Patron's passwords. - Manage Patron's reservations.
- Manage Patron's session timer. - Manage Patron's print jobs.

Logout

SAM INTERFACE

Please select/enter the requested information and click Search

2. By Account/ID Number Account/ID Number type a barcode here
By Name Last Name type last name
By DBCN ignore this field

3. First Name type 1st name

4. Search Help

Modify User
Please Enter a Account/ID Number, User Name, or DBCN

5. If there is a match it will be displayed. If there are multiple matches, select the correct record by double clicking on the patron's name or marking the select radio button and clicking submit.

Modify User Submit Clear

Select The User to Modify and Click Submit

Name	Account/ID Number	Date Of Birth	Select
Smith, Stuart	22394000101882	01/01/2005	<input checked="" type="radio"/>
Smith, Rose	28675001682277		<input type="radio"/>

The SAM Patron Record

Modify User Save Clear Help

After making changes, click Save.

Fields in this color are required

Account/ID Number 22394000101000

Last Name Smith First Name Sue Middle Name (Cannot contain an apostrophe)

Date Of Birth 01/01/2005 (MM/DD/YYYY) Pin / Password dog Change Pin / Password Next time

User Status Active Internet Access Restricted Group Standard User

Issue Date (MM/DD/YYYY) Expiration Date 03-25-2007 (MM/DD/YYYY) Guardian's Name

Time Used Today 00:00:00 Update Patron's Time N/A

User is logged on Reset User's Logs

Address 77 Vast Road Poughkeepsie, NY 12553 County Dist Library

City State Zip Code

Home Phone Office Phone SSN

Accepted Use Policy Acceptance Date Way Accepted

DBCN

Reservations The User has

You must click "Save" after making ANY changes to the patron's record.

If "active", Patron can log into Sam. If "inactive", use is blocked.

Can be reset to give patron more time for future sessions

If patron cannot log on, check to make sure this is unchecked.

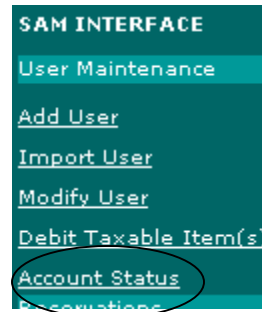
Unlike Millennium, you can view the PIN. If patron wants to change pin, click "Change PIN / Password Next time"

Add more time to the patron's session in increments.

Reset the "users logs" to give patrons more daily log ins.

Adjust Patron's account

1. Enter the patron record by Clicking "Make a payment" and search for patron. You can also click "Account Status" from the patron record screen.
2. Enter the amount of \$ the patron has given you.
3. Click Save

A green background form with three input fields. The first field is labeled "The User has this Amount in their Account" with a value of "5.00". The second field is labeled "The User owes this Amount" with a value of "0.00". The third field is labeled "Enter Amount Paid" with a value of "1.00". A red arrow points to the "Enter Amount Paid" field. Above the fields are buttons for "Save", "Reset", and "Help".

You cannot refund money in PC manager. Only the Administrator mode allows a negative number to be entered. Money remains on patron's record for future use. It is good at all SAM Libraries.

Money added to "visitor cards" will be lost at the end of the day. Only enter what will be used that day.

Creating Patron Records

The easiest way to create a patron record is to log in to SAM. A record will be pulled down from the Millennium database.

You can also **Import** a record by clicking "Import".

1. Select Patron Record
2. Select "Import User"
3. Enter a valid Millennium barcode and click "Submit".

NOTE: A patron must have a SAM account prior to reserving a PC.

A green background form titled "Import User". It has a "Submit Query" button and a "Help" button. Below the buttons is a text input field labeled "Account/ID Number". A black arrow points from the "Submit Query" button to the text box, which contains the text "Enter barcode and then submit".

Refreshing Patron time

1. Select Refresh Patron time
2. In the drop down menu, add the increment of time that you wish to add
3. Double click on the PC, you wish to add the time to.
4. Click "OK" to accept the action.

A dialog box titled "SAM PC Activity Manager". It has a "New Time" dropdown menu set to "10 Minutes". Below it is a list of computers: "CR", "Public-2", "Public-3", "Public-1", "public10", "Public-5", "Public-6", "Public-7", and "Public-8". At the bottom is a "Done" button. The text "After you finished, please select Done to return to the main screen." is visible.