

BOOK RETRIEVAL MANUAL

A. INTRODUCTION

- Physical Resources consists of three functions:
 - **Learner Support Materials**
 - **Fixed Assets**
 - **Infrastructure Register**
- We will be focusing only on Learner Support Materials for this manual.

There are 5 main functions for which you may want to use the Learner Support Materials Module:

- You may want to add a book to your master register list
- When you receive books you will want to add this quantity to your stock (either new stock or existing stock)
- When you have books you will want to distribute these learning materials through the educators and on to the learners. You will want to keep a record of where they are for retrieval at a later date
- When these books are being returned, you will want to book them back into stock so that they are available again
- When books are lost or damaged you will need to permanently remove these books out of stock

B. HOW TO CAPTURE

1. Click on **Physical Resources**

The screenshot shows the SA-SAMS Main Menu interface. At the top, there is a header with the Department of Basic Education logo and the text "basic education Department: Basic Education REPUBLIC OF SOUTH AFRICA". Below this, the text "SA-SAMS : School Administration and Management System MAIN MENU" is displayed. The main menu consists of two columns of buttons. The left column contains: General School Information, Human Resource Information, Learner and Parent Information, Learner Listing, Governance Information, Standard Letters and Forms, Export Data, and Annual National Assessment. The right column contains: Financial Assistant, Curriculum Related Data, Timetabling Assistant, Physical Resources (circled in red), Library Module, Security and Database Functions, and Lurits Approval Module. An arrow points to the "Physical Resources" button.

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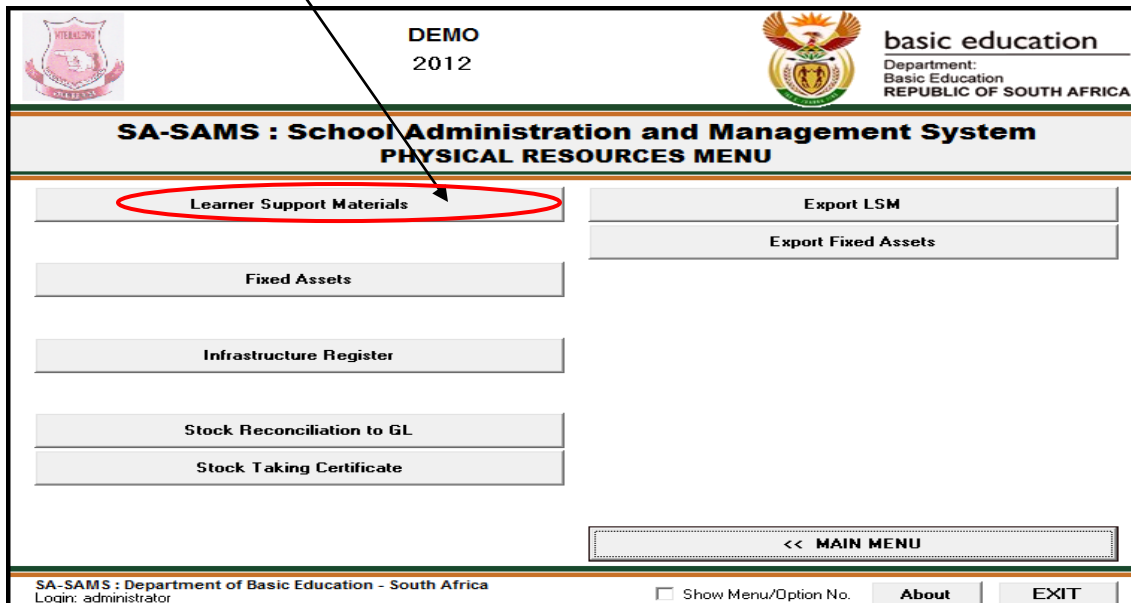
**SA-SAMS : School Administration and Management System
MAIN MENU**

General School Information	Financial Assistant
Human Resource Information	Curriculum Related Data
Learner and Parent Information	Timetabling Assistant
Learner Listing	Physical Resources
Governance Information	Library Module
Standard Letters and Forms	Security and Database Functions
Export Data	Lurits Approval Module
Annual National Assessment	

SA-SAMS : Department of Basic Education - South Africa
Login: administrator

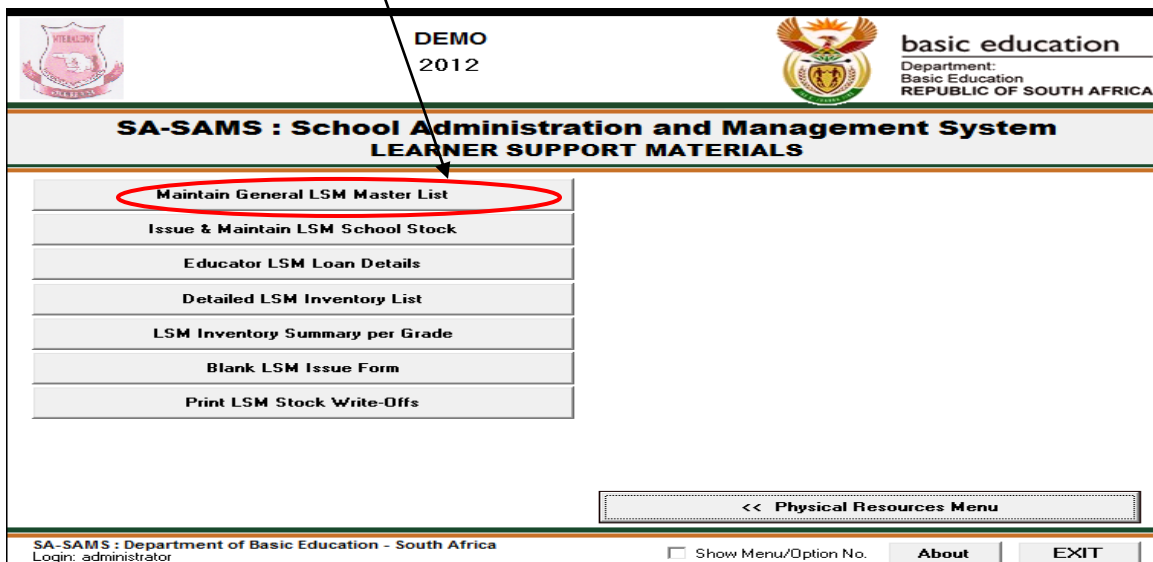
Show Menu/Option No. | About | EXIT

2. Click on **Learner Support Materials**.



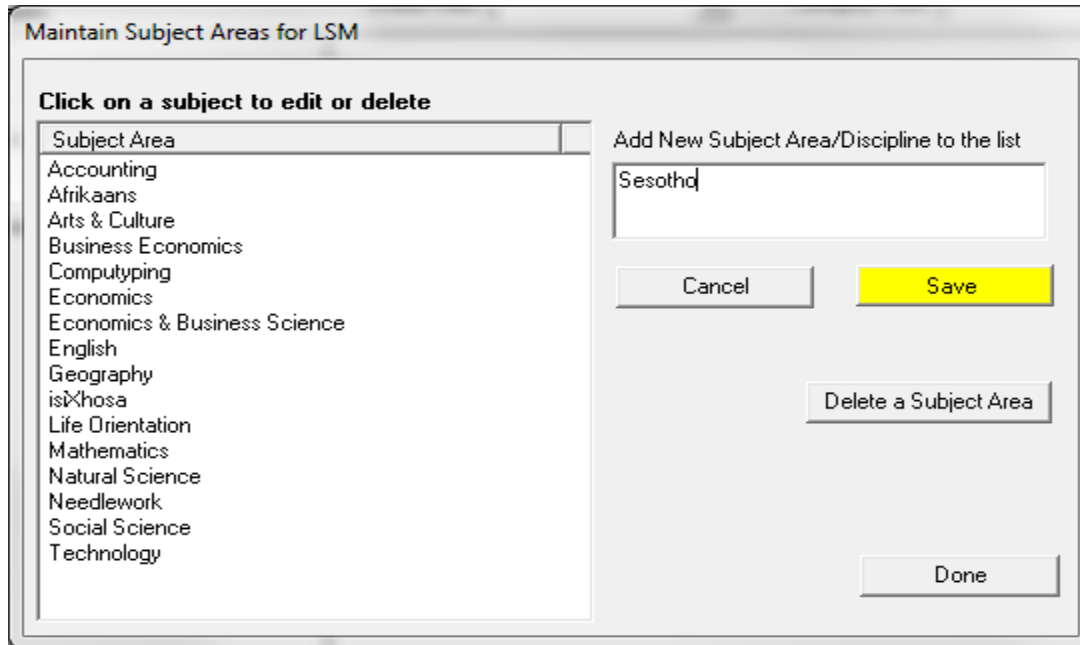
The screenshot shows the SA-SAMS interface. At the top left is the Nelson Mandela logo. In the center, it says 'DEMO 2012'. On the right is the South African coat of arms and the text 'basic education Department: Basic Education REPUBLIC OF SOUTH AFRICA'. Below this is a header bar with 'SA-SAMS : School Administration and Management System PHYSICAL RESOURCES MENU'. The main area contains several buttons: 'Learner Support Materials' (circled in red), 'Export LSM', 'Export Fixed Assets', 'Fixed Assets', 'Infrastructure Register', 'Stock Reconciliation to GL', and 'Stock Taking Certificate'. At the bottom right is a button '<< MAIN MENU'. The footer contains 'SA-SAMS : Department of Basic Education - South Africa Login: administrator', a checkbox for 'Show Menu/Option No.', and 'About' and 'EXIT' buttons.

3. Click on **Maintain General LSM Master List**. There are already subjects or learning areas added on this list for your convenience. **NB: If there are subjects or learning areas that are being taught at your school but is not on the list , do Step 4, if not skip to step 5.**



The screenshot shows the SA-SAMS interface. At the top left is the Nelson Mandela logo. In the center, it says 'DEMO 2012'. On the right is the South African coat of arms and the text 'basic education Department: Basic Education REPUBLIC OF SOUTH AFRICA'. Below this is a header bar with 'SA-SAMS : School Administration and Management System LEARNER SUPPORT MATERIALS'. The main area contains several buttons: 'Maintain General LSM Master List' (circled in red), 'Issue & Maintain LSM School Stock', 'Educator LSM Loan Details', 'Detailed LSM Inventory List', 'LSM Inventory Summary per Grade', 'Blank LSM Issue Form', and 'Print LSM Stock Write-Offs'. At the bottom right is a button '<< Physical Resources Menu'. The footer contains 'SA-SAMS : Department of Basic Education - South Africa Login: administrator', a checkbox for 'Show Menu/Option No.', and 'About' and 'EXIT' buttons.

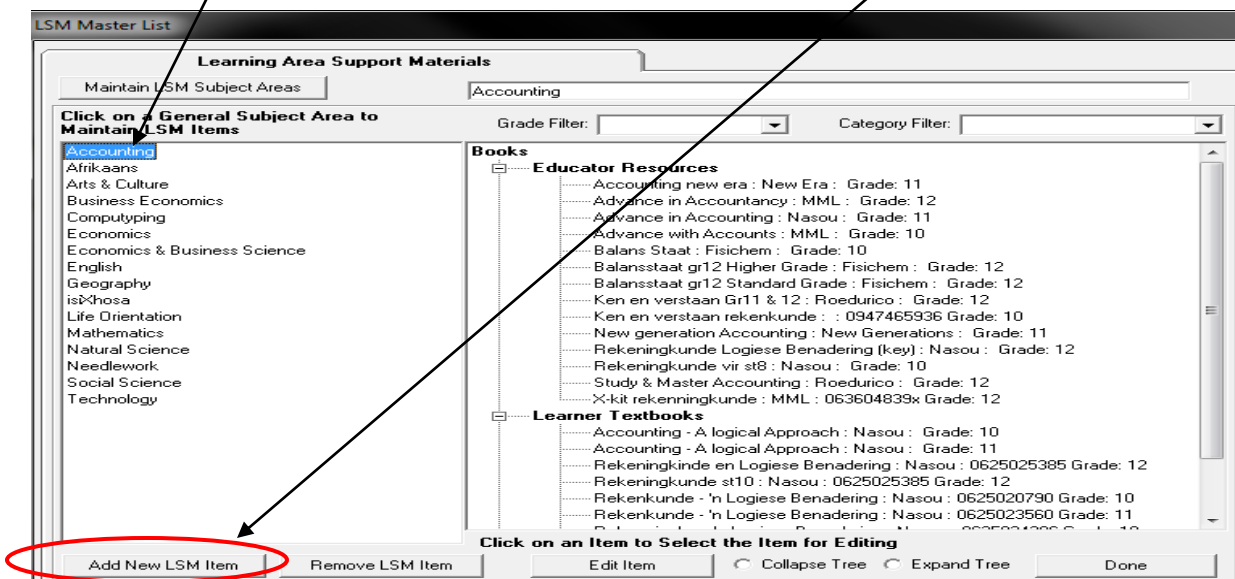
4. Click on **Maintain LSM Subject areas button** (top left hand of screen)



- The cursor of the mouse is already set, type the name of the subject you wish to add.
- Click on the **Save** button
- Click on the **Delete a Subject Area** button to delete a subject which does not apply to your school

Adding Resources to the Main Inventory Master List

5. Click on the **subject** to add a book. Each main subject area has a list of books already captured on the system. **NB: If the book you want to add is not already captured, do Step6, if not skip to Step7.**



6. Click on **Add New LSM Item**. **NB: If it is already on the list do not re-enter but you can click on the Edit Item button to edit the Item if required or you can remove the Item.**

The screenshot shows the 'LSM Master List' window with the 'Maintain Support Materials' tab selected. The 'Subject' field is set to 'Accounting'. Under 'Select type of Item to Add', the 'Book' radio button is selected. The 'Book Details' section includes fields for 'Title of Book', 'Year Published', 'Publisher', 'ISBN Number', and 'Authors'. A dropdown menu for 'Select a Category of Support Material' is visible. The 'Item Details' section has fields for 'Item Description', 'Manufacturer', and 'Year Manufactured'. Below this, there are dropdowns for 'Language of Item' and 'Grade Relevance' (From and To). At the bottom, there are 'Next Item', 'Save', and 'Done' buttons.

- Select type of item to add – Book / Other (other learning support material)
 - Title of Book –enter details
 - Year Published – enter year
 - Publisher – enter details
 - Author/s – enter details
 - ISBN –enter details (e.g. 0 623 00980 3)
- Select **Category of Support Material** (there are 6 categories)
 - E.g. Learner Textbook
 - Language of item (optional) – enter
 - Grade relevance - Grade to Grade – enter details
- Click on **Save**

7. Click on **Issue & Maintain LSM School Stock**. Now that you have the Subject items or resources under each subject captured you are now ready to stock to these resources.



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SA-SAMS : School Administration and Management System LEARNER SUPPORT MATERIALS

Maintain General LSM Master List
Issue & Maintain LSM School Stock
Educator LSM Loan Details
Detailed LSM Inventory List
LSM Inventory Summary per Grade
Blank LSM Issue Form
Print LSM Stock Write-Offs

<< Physical Resources Menu

SA-SAMS : Department of Basic Education - South Africa
Login: administrator

Show Menu/Option No.

About

EXIT

- There are 4 pages (tabs) at the top of the screen:
 - View School LSM Stock
 - Add LSM Stock Quantities
 - View Loans & Return Items
 - Issue/Remove (write-off) LSM Item

Adding Stock to the Resources

- Select the Category Filter (7 selections)
- Select the Grade
- Click on the Subject Area: e.g. Accounting

Learner Support Materials

View School LSM Stock Add LSM Stock Quantities View Loans & Return Items Issue/Remove LSM Item

Category Filter: **Learner Textbooks**

Grade Filter: **Learner Textbooks**
(Start grade field only)

Click on a Get
Accounting

Only Items where stock has been added are displayed

Description	Publisher	Grades	Authors
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Click on an item to see available stock

Add Stock Quantities Done

- At the bottom of the page click on tab Add Stock Quantities or click on the second tab ‘**Add LSM Stock Quantities**’
- Select **Subject Area**: enter details (e.g. Accounting)
- Select **Grade**
- Select **LSM Category** – dropdown box – (e.g. learner textbooks)
- Click on **Ok**
- Select **item to be added** from the **Select item to add** drop down list
- Click on drop down box Or **Add Stock Item to Master List** (this will only show if you have already added it to the master list)
- Select **Stock Register**: e.g. 750/002 Textbooks and LSM
- Select **Date**: enter
- Click on **Add New Quantity**:

Learner Support Materials

View School LSM Stock **Add LSM Stock Quantities** View Loans & Return Items Issue/Remove LSM Item

To add school stock , you must first locate the item in the MASTER stock list. You can use the Filter or Search option.

Filter Options for Loading Master stock Items:

Select Subject Area: Accounting

Select Grade: Grade 10 (Optional - start grade field only)

Select LSM Category: Learner Textbooks (Optional)

OK

Search for a specific Item to add Stock

Partial/Full Title of Item: _____

ISBN number of Item: _____

Search

Now select the item from the list below and then add the quantity and price of the stock.

Select a Stock Item from the Master List

Select Item to Add: Accounting - A logical Approach : Nasou : Add Stock Item to Master List

Select Stock Register: 750/002 Text Books and LSM Select Date: 2012/08/28 2012/08/28 **Add New Quantity**

Stock Details for : Accounting - A logical Approach : Nasou :

Date Added	Register	Qty Added	Item Cost	Qty WriteOff	WriteOff Cost	Total Cost	Total Item Value

Line: _____ Remove Line Save Stock Data Done

- Go to cell **Quantity Added** and enter amount of stock received e.g. 50
- **Item cost:** enter e.g. R55
- Press **Tab** button – it automatically calculates the amount of total purchase of this item e.g. R2750
- Click on **Save Stock Data** button. **NB: If a mistake has been made it can be removed by entering a Line number to be removed and click on Remove Line button.**

Learner Support Materials

View School LSM Stock **Add LSM Stock Quantities** View Loans & Return Items Issue/Remove LSM Item

To add school stock , you must first locate the item in the MASTER stock list. You can use the Filter or Search option.

Filter Options for Loading Master stock Items:

Select Subject Area: Accounting

Select Grade: Grade 10 (Optional - start grade field only)

Select LSM Category: Learner Textbooks (Optional)

OK

Search for a specific Item to add Stock:

Partial/Full Title of Item: _____

ISBN number of Item: _____

Search

Now select the item from the list below and then add the quantity and price of the stock.

Select a Stock Item from the Master List

Select Item to Add: Accounting - A logical Approach : Nasou : Add Stock Item to Master List

Select Stock Register: 750/002 Text Books and LSM Select Date: 2012/08/28 2012/08/28 Add New Quantity

Stock Details for : Accounting - A logical Approach : Nasou :

	Date Added	Register	Qty Added	Item Cost	Qty WriteOff	WriteOff Cost	Total Cost	Total Item Value
1	2012/08/28	750/002	50	55.00			2750.00	2750.00

Line: _____ Remove Line **Save Stock Data** Done

- Click on **Ok**, and **Done** buttons

To View the Current LSM Stock

- Once you have added stock to a resource it is advisable to go back and check that it has been correctly entered. This can also be done at any time to check stock records.
- To do this go back to **View School LSM Stock**
- Choose the category filter – learner textbooks
- Click on **Subject** – e.g. Accounting
- Click on **Resource**
- A small screen on the top right hand corner of the screen will highlight
- Stock: quantity/ On Loan : quantity / Available : quantity

The screenshot shows the 'Learner Support Materials' application window. The 'View School LSM Stock' tab is active. On the left, the 'Category Filter' is set to 'Learner Textbooks' and the 'Grade Filter' is set to 'Grade 10'. Below these filters is a list of subject areas, with 'Accounting' highlighted. The main area displays a table of stock items for 'Accounting Grade 10'. A small summary box in the top right corner of the window displays 'Stock : 50 : On Loan : 0 : Available : 50'. An arrow points to this summary box.

Description	Publisher	Grades	Authors
Accounting - A logical Approach	Nasou	10 to 10	

To Issue Books Out Of Stock to the Educators

- Go to **View School LSM Stock**
- Choose the **Category** Filter – e.g. Learner Textbooks
- Select the **Grade** – e.g. Grade 10
- Click on the **General Subject Area** – e.g. Accounting
- Click on the resource in the right hand screen
- Click on **Issue / Remove Maintain LSM School Stock**

Learner Support Materials

View School LSM Stock Add LSM Stock Quantities View Loans & Return Items **Issue/Remove LSM Item**

Stock Item: Accounting - A logical Approach

Issue Stock Total Stock: 50
 Remove Stock permanently Quantity Available for Issue: 50

Issue Stock

Issued To: FINGER Kelebogile Veronica
 Loan Venue:
 Quantity Issued: 5 Add New Venue
 Date Issued: 2012/08/28 2012/08/28
 Expected Return Date: 2012/09/13 2012/09/13
 Average Condition of Items Issued: Excellent

Remove from Stock

Removal Authorised by:
 Reason for Removal from Stock:
 Removal Date: 2012/08/28
 Purchase History of Item:
 (please select against which purchase date and price you are writing off the item)
 Quantity Removed: Cost to Write Off:

Save Stock Issue Save Write Off Done

- Stock Item will be already displayed
- Click on **Issue Stock**, it will display **Total Stock** and **Quantity Available for Issue**
- select the educator on **Issued To**
- **Quantity issued** – enter amount issued
- **Date issued:** select the date issued to educator
- **Expected return date:** select the date that the educator should return the book
- **Average Condition:** select
- **Save Stock Item**
- Click on the **Ok** button

Remove LSM Item

You can also Remove LSM Item on this page.

- Click on **View School LSM Stock**
- Click on **Subject** – e.g. Accounting
- Click on **Resource**
- Click on **Issue / remove LSM Items**

Learner Support Materials

View School LSM Stock Add LSM Stock Quantities View Loans & Return Items **Issue/Remove LSM Item**

Stock Item: Accounting - A logical Approach

Issue Stock Total Stock: 50
 Remove Stock permanently Quantity Available for Issue: 45

Issue Stock

Issued To:
 Loan Venue:
 Quantity Issued:
 Date Issued: 2012/08/28
 Expected Return Date: 2012/08/28
 Average Condition of Items Issued:

Remove from Stock

Removal Authorised by: MANTORO Motanyane Jonase
 Reason for Removal from Stock: Lost
 Removal Date: 2012/08/28 2012/08/28
 Purchase History of Item
 50 items added on 2012/08/28 at R55
 (please select against which purchase date and price you are writing off the item)
 Quantity Removed: 5 Cost to Write Off: 275.00

- Click on **Remove Stock Permanently**
 - Complete the following information: Authorized By ,Reason for Removal, Removal Date, Purchase History of Item, Quantity Removed, Cost to Write Off – cost of purchase
 - Click on **Save Write Off**

Return Items Received From Educators Back Into Stock

As soon as an educator brings back resources they should be entered immediately back into the stock records.

- Click on **View School LSM Stock**
- Click on **Subject** Area – e.g. Accounting
- Click on **Resource** on right hand screen
- Click on **View Loans and Return Items**

Learner Support Materials

View School LSM Stock Add LSM Stock Quantities **View Loans & Return Items** Issue/Remove LSM Item

Item to be returned:

Outstanding Loans for this Item Click in the check box of a line item to return stock

* Item	* Date Loaned	* Loaned To	Quantity	Returned	Outstanding
<input checked="" type="checkbox"/> Accounting - A logical Approach	2012/08/28	FINGER, Kelebogile Veronica	5	0	5

Date of Return/Write Off: Items have been counted and checked for RETURN

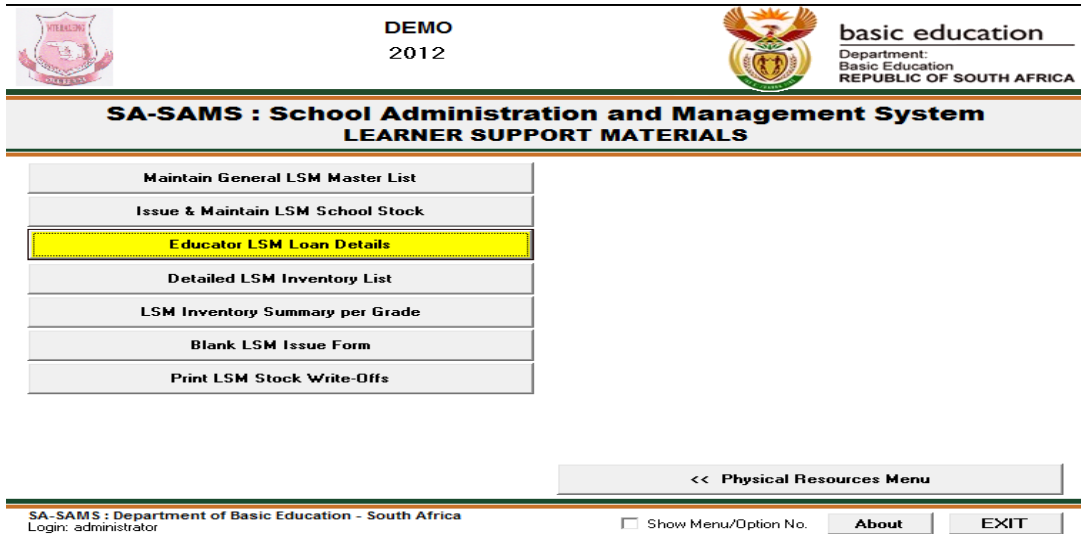
Number of items being returned:

If an item has been lost or damaged, please include it in the return quantity and then go to the write off section and remove the item from the system.

- Items to be returned will automatically be displayed
- Tick in the applicable educator box
- **Date of write-off:** select date
- Number of items being returned: e.g. 5
- (if there are still books outstanding as they have been lost by learners but you have to log it as all books as having been returned and then go to 'remove LSM' tab to remove it from stock)

C.PRINTOUTS

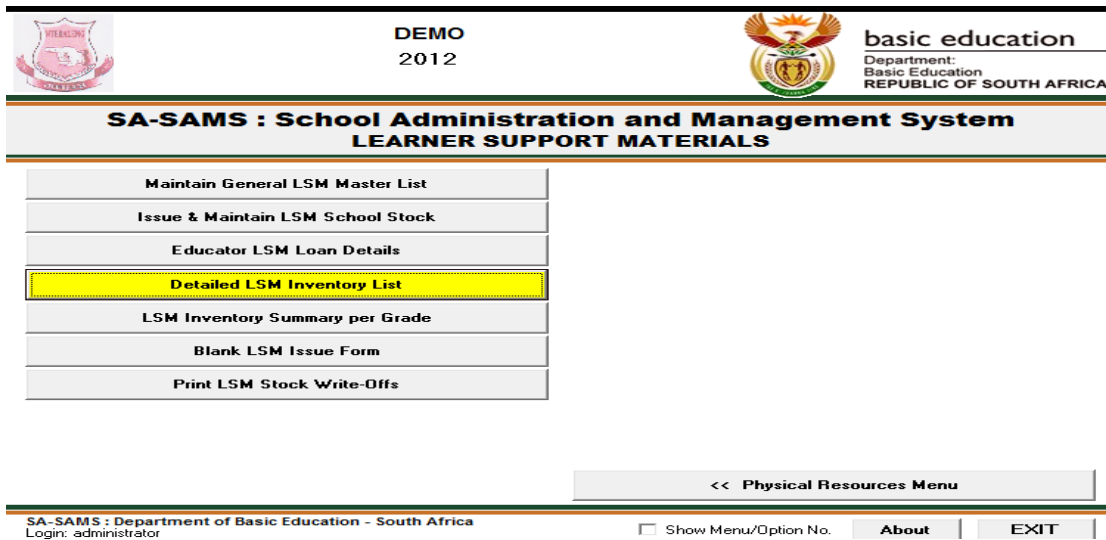
1. Click on **Educator LSM Loan Details** to view details of all educators or select an educator that have loaned books.



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2. Click on **Detailed LSM Inventory List** to view a report on captured LSM details. Printouts available are:

- Inventory List Per Grade
- Inventory List Per Subject.



This screenshot is identical to the one above, but with the "Detailed LSM Inventory List" option in the left-hand menu highlighted in yellow instead of "Educator LSM Loan Details". All other elements, including the header, footer, and navigation buttons, remain the same.