

Axis 360 Administrator User Manual

July 2015

Release 5.2

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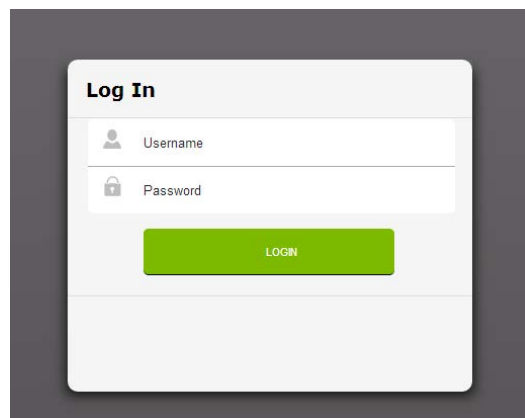
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1. Introduction

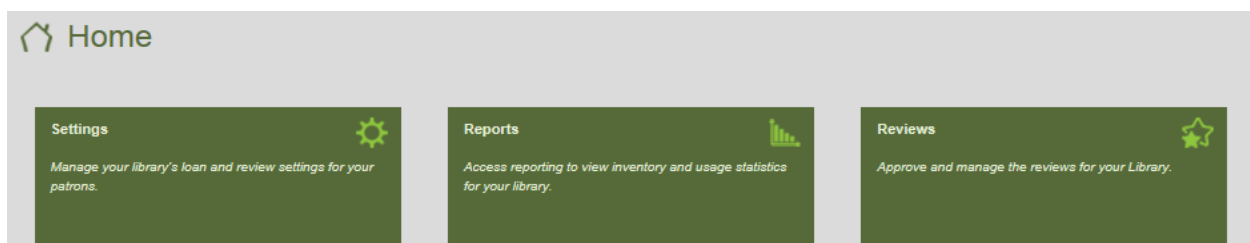
Welcome to Axis 360! As an administrator, you have access to the Library Administration portal, where you can edit and customize your Axis 360 site, run reports, manage user reviews, and more. This user manual will teach you to navigate and master the system's administration tools.

1.1 Site Access and Home Page

To access the Library Administration portal, enter **http://[your Axis 360 site URL]/admin**, then enter your **Username** and **Password** and click **LOGIN**.

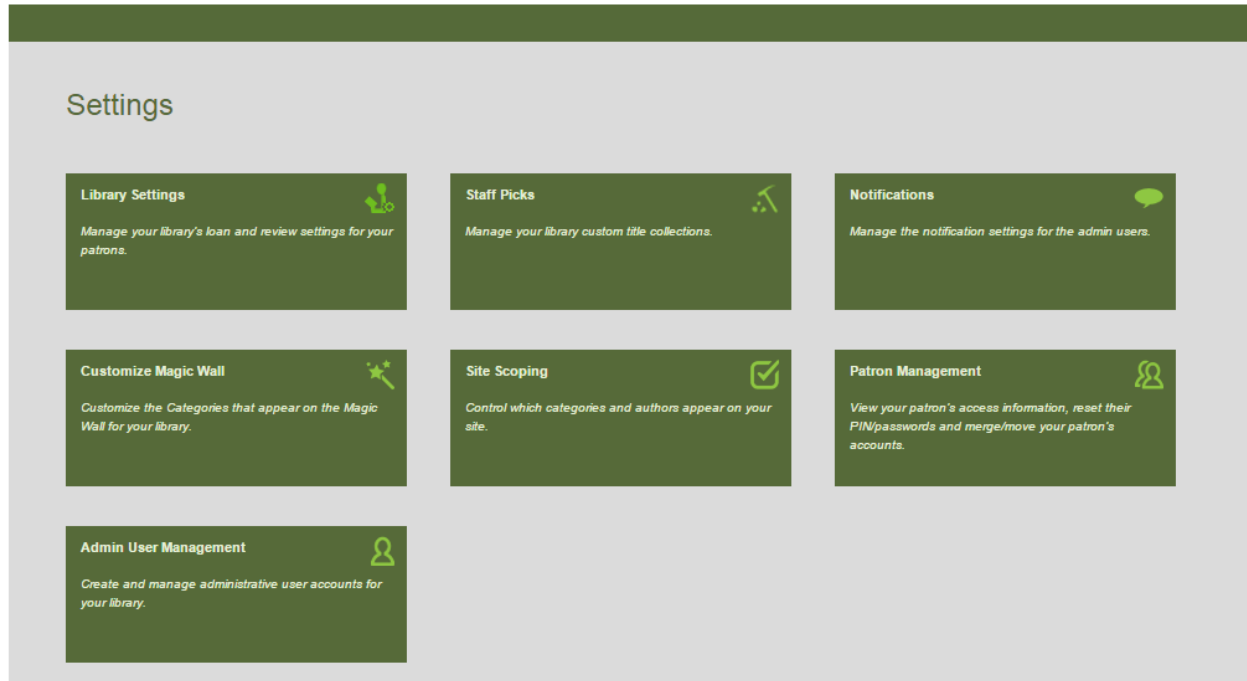


Once logged in, you will be directed to the Home page, where you can adjust your settings, run reports, approve or delete reviews, and access the Desktop site with administrator rights.



2. Settings


Here you can access and adjust your library settings; edit your logo; and manage users, notifications, and staff picks.



2.1 Library Settings

Manage and edit settings associated with your Desktop site under Library Settings. Click **Save** to confirm any changes, **Reset** to clear any information already entered, or **Cancel** to discard any information you have already entered on the screen.



To view a description of each field, hover over the question mark  next to the desired field.

2.1.1 Library Site Settings

Predetermine how the page displays for your users.

- **Landing Page** – The default page that displays when a user accesses the site. Options include *Desktop site* or *Staff Picks*.
 - **Note:** Selecting **Staff Picks** removes the *Category*, *Sub-Category*, and *View Layout* options.
- **Category** – The main category your users will see when they visit the desktop site. Displays on the left side of the Desktop site.
- **Sub-Category** - Displays at the top of the Desktop site and lets the user filter titles by making additional selections.
 - *Just Added*
 - *Most Popular*
 - *Hidden Gems*
 - *New Releases*
- **View Layout** - Sets the default view your users will see on the Desktop site.
 - *Two Row* – Displays two rows of cover images per page on the Desktop site. When you select this option, partial title and author information displays above each cover image.
 - *Three Row* – Displays three rows of cover images per page on the Desktop site.
 - *Four Row* – Displays four rows of cover images per page on the Desktop site.
 - *List View* – Displays an infinitely scrolling list of titles on the Desktop site. Complete information for the title displays next to each cover image.

Note: When new titles are purchased, an email will be sent to the email address associated with the Axis 360 account setup when the titles are in your repository. New titles are discoverable by browsing or searching; however, new titles will not display in their respective category on the Desktop site until the next day.

2.1.2 Lending Settings

Administrators may set limits regarding check out, holds, and lending limits.

Note: For consortia member libraries, lending settings are set by the consortia administrator. Contact your consortia administrator to request any changes to these parameters.

Lending Settings

Checkout Limit ? <input style="width: 50px;" type="text" value="20"/>	Hold Limit ? <input style="width: 50px;" type="text" value="Limited"/> <input style="width: 50px;" type="text" value="10"/>	Hold Period ? <input style="width: 50px;" type="text" value="2"/>
Minimum Lending Period ? <input style="width: 50px;" type="text" value="1"/>	Maximum Lending Period ? <input style="width: 50px;" type="text" value="2"/>	Default Lending Period ? <input style="width: 50px;" type="text" value="1"/>

- **Checkout Limit** - Maximum number of titles your users can check out at once.
- **Hold Limit** - Maximum number of titles users can have on hold at one time (setting the limit to 0 allows for unlimited holds).
- **Hold Period** - Length of time users have to check out a title after the title is reserved.
- **Minimum Lending Period** - Minimum number of days users can have a title checked out.
- **Maximum Lending Period** - Maximum number of days users can have a title checked out.
- **Default Lending Period** - Default number of days a title is checked out when users select **Checkout** on the Desktop site.

2.1.3 Patron Recommendations

Patron Recommendations lets your patrons recommend titles that are not part of your Axis 360 collection. The library can then choose to purchase the item or not.

Patron Recommendations will be checked if your library has been enabled for patron recommendation. If this field it is not checked, contact your Digital Account Manager to learn more or to activate Patron Recommendations.

Enable Patron Recommendations

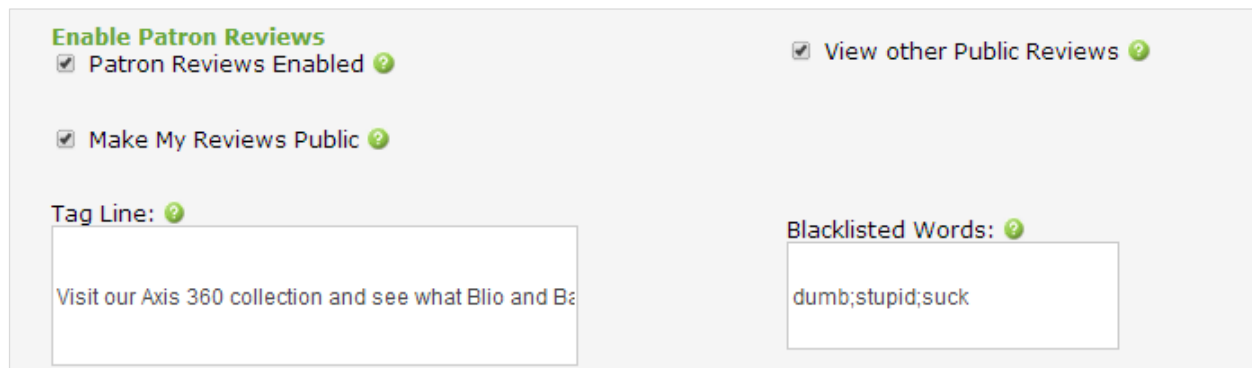
<input checked="" type="checkbox"/> Allow Patron Recommendation ?	Recommendation Limit ? <input style="width: 50px;" type="text" value="3"/>
---	---

The **Recommendation Limit** is the number of titles a patron can recommend in a seven-day period.

2.1.4 Enable Patron Reviews

Enable Patron Reviews lets you display user reviews of library titles on your Desktop site. If reviews are enabled, you are responsible for reviewing and either approving or deleting them. If a review contains any blacklisted words – a list of terms that you establish as potential “red flags” when you set up your Axis 360 site – it is categorized under the Blacklisted Reviews heading, away from other pending reviews.

When you set up your Blacklisted Words list, use a semicolon (;) to separate each term.



The screenshot shows a settings panel with the following elements:

- Enable Patron Reviews** (header)
- Patron Reviews Enabled
- Make My Reviews Public
- View other Public Reviews
- Tag Line:** [Text input field containing: Visit our Axis 360 collection and see what Blio and Ba]
- Blacklisted Words:** [Text input field containing: dumb;stupid;suck]

- **Patron Reviews Enabled** – Lets your users write reviews.
- **Make My Reviews Public** – Your end-user reviews are visible to other libraries using Axis 360.
- **View other Public Reviews** – Your end users can see reviews from other libraries that have made their reviews public.

Tag Line: The welcome message that appears in the top right corner of every page of your Axis 360 site. You may enter a new tagline welcome message at any time, but you are limited to 150 characters.

2.1.5 Theming

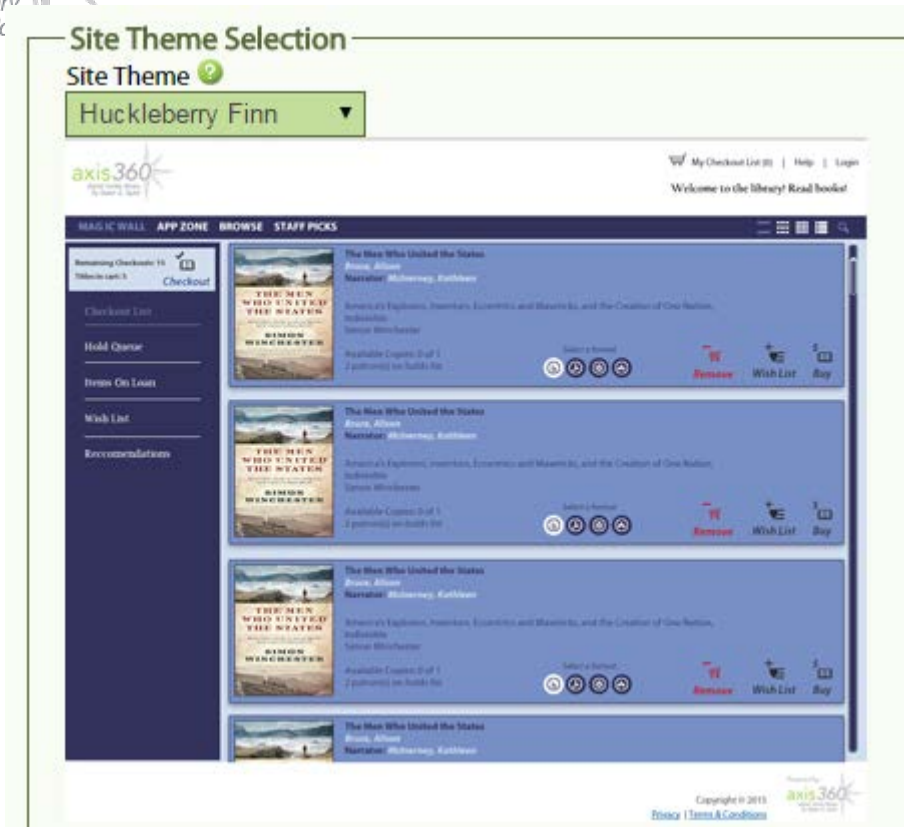
With themes, you can choose from several different skins to change the look of your Desktop site. These themes provide a greater degree of customization.

Note: At this time, themes selected for the Desktop site do not carry over to the Axis 360 mobile site.

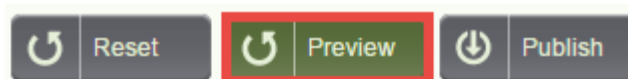
1. Click on the **Branding** tab within settings.



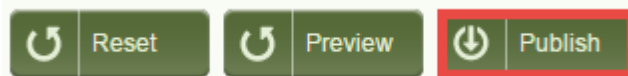
2. In the Site Theme Selection section, use the **Site Theme** drop-down menu to preview what each theme looks like. You can select from the following themes:
 - **Original** – The current desktop theme.
 - **Huckleberry Finn** – Gray-blue and navy theme.
 - **A Clockwork Orange** – Orange and yellow theme.
 - **Green Eggs and Ham** – Green and yellow theme.
 - **Encyclopedia Brown** – Brown and beige theme.



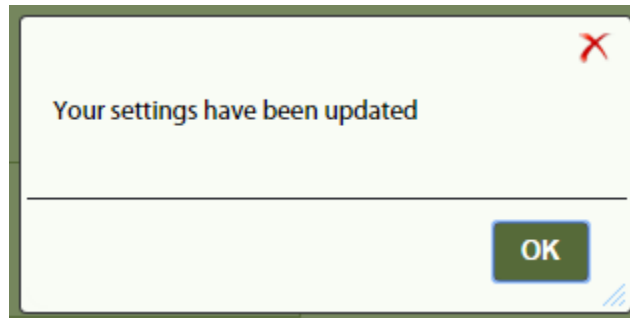
- Once you have selected a theme, click **Preview** to see what it looks like on your own Desktop site. You must preview your Desktop site before you can publish a new theme.



- If you are happy with your theme, click **Publish**.



- Click **OK** to confirm your changes and publish them immediately to your Desktop site.



2.1.6 Consortia Transfer

You can automatically transfer a purchased title that has been owned for a specified period of time to the rest of the fellow consortia Member libraries under the Automatic Consortia Transfer Settings section. Only Member libraries with an assigned Parent can use this functionality.

Select **Allow Automatic Consortia Transfer**, and then enter the **number of days** you wish to have pass before the title is shared with other consortia libraries in the **Transfer Titles** field. Click **Save**.

Automatic Consortia Transfer Settings

Allow Automatic Consortia Transfer ?

Parent Library ?
fpl ▼

Transfer Titles after 5 days. ?

2.2 Library Branding

The options available under Library Branding allow an Administrator to manage and edit the Library Logo, Tag Line, and Footers associated with the site.

2.2.1 Header Image, Tag Line and Footer

1. You can upload a Header Image by click on the **Choose File** button, and selecting the file that contains the image that you want to upload.
2. After selecting the file, click on the **Upload A File** button.
3. Enter a **Tag Line**
4. Enter a **Footer**
5. **Preview** the Site
6. If the site is the way you want it to look, click the **Publish** button. This will make your changes visible on the website.

Settings - Library Settings

Library Branding

Header Image:

axis360 digital media library by Baker & Taylor

Choose File No file chosen Upload A File

Tag Line: My Axis 360 Library

Footer Text: Welcome to Axis 360!

Reset Publish Cancel

You must use the preview button below before publishing your changes.

Preview

2.3 Admin User Management

Admin User Management enables the library to add, update or activate/inactivate users. An Admin User will also have the ability to decide which permissions the user will have access to.

2.3.1 Create a New User

1. You can create a new user by clicking on the **Add User** icon.

Actions	Create Date	User Name	Display Name	Department	Notes	Status
	09/09/2014	demoadmin	Admin			Active
	10/08/2014	demo	Liv	Collection Development		Active

2. Enter, at a minimum, the three required fields User Name, Password, and Confirm password.

* indicates Required fields

User Name

Password

Confirm Password

Display Name

Department

Notes

Active

Permissions:

Access to Library Settings

Access Staff Picks

Access to Notifications

Access to Edit Logo

Access to Customize Magicwall

Access to Patron/Student Management

Admin Management

Access to Reports

Access to Reviews

Access to File Upload

Cancel Save

3. Check the box to activate the user



4. Select the permissions the user will have access to.

5. Click on Save

2.3.2 Edit a User

Settings - Admin User Management

Show only Active users Add User

Actions	Create Date	User Name	Display Name	Department	Notes	Status
	09/09/2014	demoadmin	Admin			Active
	10/08/2014	LRBitner	Liv	Collection Development		Active

Now showing 1 - 2 of 2 5 per page

1. To edit a user, click on the Edit Icon.

Settings - My Account

Account Information

User Name: demoadmin
Display Name: Admin
Department:
Notes:

Active: 2

Permissions:

- Access to Library Settings 3
- Access to Staff Picks
- Access to Notifications
- Access to Edit Logo
- Access to Reservations
- Access to Patron/Student Management
- Admin Management
- Access to Reports
- Access to Reviews
- Access to File Upload
- Access to Customize Magicwall

[Change Password](#) 4

2. Flag a user as Inactive by unchecking the **Active** box.

3. Adjust **Permissions** as necessary. Note: The Master Admin ID can't adjust their own permissions. They can only change the password. However, the Master Admin ID can adjust any other user setup.

4. Click on **Change Password** link to change the password for the associated user.

2.3.3 Consortia Parents Can Manage Hold Queue

Consortia Parent libraries can now manage the Hold Queue for their Member libraries. BT Admin will assign this function for consortia Parents. You can also set this option under the new **Access to Manage Hold Queue** section under Library Settings.

Settings - Admin User Management - Update User

User Name	newbethadmin
Password	<input type="password"/>
Confirm Password	<input type="password"/>
Email Address	<input type="text"/>
Display Name	Admin
Department	<input type="text"/>
Notes	<input type="text"/>


Active

Permissions

<input checked="" type="checkbox"/> Access to Library Settings	<input checked="" type="checkbox"/> Access to Patron/Student Management
<input checked="" type="checkbox"/> Admin Management	
<input checked="" type="checkbox"/> Access to Notifications	<input checked="" type="checkbox"/> Access to Reports
<input checked="" type="checkbox"/> Access to Customize Magic Wall	
<input checked="" type="checkbox"/> Access to Reviews	
<input type="checkbox"/> Access to ManageHoldQueue	

The functionality for the Manage Hold Queue section remains the same. You can still search for titles within libraries, including those that are currently available, and move Patrons in the Hold Queue up or down.

Title Details
✕



Hold Queue - Curious George / Jorge El Curioso

Actions	Last Name	First Name	User Name
↑ ↓			BTanily
↑ ↓			BTVinay1

⏪
⏩
1
⏪
⏩

1 - 2 of 2 items

2.4 Patron Management

For libraries using Prefix authentication, User Management enables the library to search for users and reset passwords. All authentication methods allow you to change a user's barcode or merge barcodes.

2.4.1 Reset a User's Password

You can reset a user's password. The user will then be notified of the new password.

⏪ ⚙ Settings - Patron Management

Number of Rows 25

Total patrons in the library: 133

1

Search By
Barcode
Barcode
Email Address

Actions	Barcode	Name	Email Address	Checkouts	Holds	Create Date
↻ ⚙	08978746546	John Smith	smithi@anvlibrary.org	0	0	09/15/2014
↻ ⚙	08978456654	Milton James	james@testing.com	5	1	09/10/2014
↻ ⚙	08978545651	Mark Johnson	MJ@myemail.com	0	0	06/09/2014


1. After selecting Settings and Patron Management, search for a user by barcode or email address. Click the **Search By** drop-down arrow and select **Barcode** or **Email Address**. Enter the barcode or email address in the textbox.

- Once the barcode or email address has been entered, click **Search** or press Enter.

Settings - Patron Management

Number of Rows Search By

Total patrons in the library: 133

Actions	Barcode	Name	Email Address	Checkouts	Holds	Create Date
	08978746546	John Smith	smithi@anylibrary.org	0	0	09/15/2014

- Click the **Reset** icon.

Reset Password

User name:

Email Address:

New Password:

Confirm Password:

Email user

- Enter the new password in the **New Password** and **Confirm Password** fields.
- The Email user checkbox is selected by default. After you click OK, the user will receive an email containing the new password.
- Click **OK**. You will be returned to the User Management page and a confirmation message displays.

2.4.2 Change a User's Barcode

When changing a user's barcode, the user does not lose any titles currently checked out or current holds. These are transferred from the old barcode to the new barcode.

Settings - Patron Management

Number of Rows Total patrons in the library: 133

Search By

Actions	Barcode	Name	Email Address	Checkouts	Holds	Create Date
	08978746546	John Smith	smithi@anylibrary.org	0	0	09/15/2014
	08978456654	Milton James	james@testing.com	5	1	09/10/2014
	08978545651	Mark Johnson	MJ@myemail.com	0	0	06/09/2014

1. After selecting Settings and Patron Management, you may search for a user by barcode or email address. Click the **Search By** drop-down arrow and select **Barcode** or **Email Address**. Enter the barcode or email address in the textbox.
2. Once the barcode or email address has been entered, click **Search** or press Enter.

Settings - Patron Management

Number of Rows Total patrons in the library: 133

Search By

Actions	Barcode	Name	Email Address	Checkouts	Holds	Create Date
	08978746546	John Smith	smithi@anylibrary.org	0	0	09/15/2014

3. Click **Change Barcode** icon.

Settings - Patron Management - Change Patron Barcode

Current Patron

Current Barcode	08978746546		
User Name	John Smith	Email Address	smithj@anylibrary.org
Blio User Name		Acoustik User Name	
Active Checkouts	0	Active Holds	0

New Barcode

No existing users found. New user will be created with this Barcode.

4. Enter the **New Barcode** and click **Search** to see if it already exists. If the

barcode does not already exist, a message will indicate that a new user will be created.

5. Click **Change**.

6. To view a list of the **Active Check outs** and **Active Holds** for the user, click the corresponding link.

7. Click **Finish**. The current user's information has been updated with the new barcode and the old barcode has been removed from the system.

2.4.3 Merge a User's Barcodes

When merging barcodes, the user does not lose any currently checked out titles or current holds. For example, if both accounts have the same title checked out, the one with the longer loan period is kept. In the case of active holds, the older hold is kept so the patron can get the title as soon as possible.

Actions	Barcode	Name	Email Address	Checkouts	Holds	Create Date
	08978746546	John Smith	smithi@anylibrary.org	0	0	09/15/2014
	08978456654	Milton James	james@testing.com	5	1	09/10/2014
	08978545651	Mark Johnson	MJ@myemail.com	0	0	06/09/2014




1. After selecting Settings and Patron Management, you may search for a user by barcode or email address. Click the **Search By** drop-down arrow and select **Barcode** or **Email Address**. Enter the barcode or email address in the textbox.

2. After entering the barcode or email address, click **Search** or press Enter.

Settings - Patron Management

Number of Rows Search By Barcode Search

Patrons matching your search: 3


Change Barcode	Barcode	Name	Email Address	Checkouts	Holds	Create Date
	1001			0	0	05/06/2013
	1001000070166			0	0	05/06/2013
	21261001439002			0	0	05/06/2013

3. Click **Change Barcode** icon.

Settings - Patron Management - Change Patron Barcode


Current Patron

Current Barcode	1001
User Name	Email Address
Blio User Name	Acoustik User Name
Active Checkouts	0
Active Holds	0

New Barcode 

Existing Patron

Barcode	1001000070166
User Name	Email Address
Blio User Name	Acoustik User Name
Active Checkouts	0
Active Holds	0

4. To change the barcode, enter the **New Barcode** and click the search icon. This will check to see if this Barcode already exists. If the barcode is new the message “No existing users found. New user will be created with this barcode.” Click “**Change**” This will change the users barcode to the newly created barcode. If a patron has two barcodes and you need to merge them into an existing account, enter the **New Barcode** (existing user’s barcode) and click **Search**  .

5. Click **Merge Accounts**

Settings - Patron Management - Patron Barcode Change Confirmation

Patron Information

Barcode	mdindira		
User Name	mdindira	Email Address	indra.vundavalli@baker-taylor.com
Blio User Name	Acoustik User Name		
Active Checkouts	1	Active Holds	1

Active Checkouts

ISBN	Title	Author	Expire Date
9780763659936	Shadows on the Moon	Marriott, Zoe	10/11/2014

[Finish](#)

6. The barcodes have been merged. To view a list of the **Active Check outs** and **Active Holds** for the user, click the corresponding link.

7. Click **Finish**.

2.4.4 Disable Patrons Using Prefix Authentication

You can now disable individual patron logins if you use Prefix Authentication.

1. A new **Edit Details** option has been added to the User Management page.

Sales/QA Demo Library - User Management

First Name Last Name

Email

Actions	Barcode	Email
	PJGR0003789...	
	24120000033...	
	2000021366	

2. The Edit Details page displays. Uncheck **Active** to deactivate login for the associated patron. Additionally, you can edit the user's **Display Name** or **Email** address on file if you wish.

Edit Details ×

Display Name
[Text Input Field]

Email
[Text Input Field]

Active

Cancel Save

3. Click **Save**.
4. Patrons who have a disabled account will receive an error message when they attempt to log in to the Desktop site, indicating that their account has been disabled and to contact the library for more information.

2.5 User Notifications

There are two types of notifications: Holds Ratio Notifications and Expiring Content (circ or time). When set, email notifications are sent when the holds ratio is hit.

2.5.1 Setting up Notifications

1. To set up **Holds Notifications**, enter the **Holds Ratio**. To set up **Expiring Content Notifications** enter the **Remaining Circ's Trigger** and **Remaining Time Trigger**.
2. Click **Save**.
3. Add the contacts who will receive the notifications. Click **Add** to expose the the Create Contact box.



Tip

There is no limit to the number of contacts that may be created and receive notifications. A contact may be edited at any time by clicking the name of the contact, editing the desired information and clicking the Update Contact button.

4. Enter the contact's **Name** and **Department**.
5. Notifications may be sent to a contact in the form of a Title Source 360 cart, an email or both. Select the checkbox next to the **Notification** method. If TS360 is selected, enter the TS360 user name and user email.
6. Click **Create Contact**.

Settings - Notifications

Holds Notification	Expiring Content Notifications
Set Holds Ratio ? 1	Remaining Circ's Trigger ? 5
	Remaining Time Trigger ? Month

Save

Contacts

Name	Department	Hold Notification ?	Title Removal ?	Title Recommendation ?
Sara Johnson	Library Administration	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tom Smith	Operations	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Add Reset Cancel Save

7. The contact has been successfully added. Next, select the checkbox for the preferred type of notification the new contact is to receive: **Hold Notification, Title Removal, Title Recommendation** or a combination of the three.

8. Click **Save**.



For expiring content, notifications are sent on the trigger period and again when content has expired and has been deleted from the repository.

2.6 Staff Picks

With Staff Picks, you can showcase selected titles from your collection. Your patrons will see this section when they first log onto Axis 360 if you set it as the Landing Page under Settings > Library Site Settings.

You may create an unlimited amount of Staff Picks collections. These collections can also be enabled, disabled, renamed or saved.

2.6.1 Adding a Collection to Staff Picks

Action	Order	Name	Description	Status	No. of Titles
	1	Self Help	This Month's Top Picks	Disabled	2
	2	Halloween Titles	Top Halloween Reads	Disabled	0

1. After selecting Settings and Staff Picks, click **Create Staff Picks**.

2. Enter the **Name**, **Description**, **Layout**, **Start Date**, **End Date**.

3. Click **Create**. A confirmation message will appear.















Once the Staff Pick has been created you will need to enable it for viewing by clicking on the Edit icon

Settings - Staff Picks

Hide disabled Staff Picks

Relabel Staff Picks Create Staff Picks

Action	Order	Name	Description	Status	No. of Titles
  	1	 Self Help	This Month's Top Picks	Disabled	3
  	2	 Halloween Titles	Top Halloween Reads	Disabled	0
  	3	 Top Titles		Disabled	0

Drag and Drop for re-ordering.













- To order the collections on the Staff Picks page, hover over your selection. Using the mouse, left-click and hold down the mouse button. Drag the collection to the desired location. Release the left mouse button to drop the collection. Click on Edit to enable or disable a Staff Pick.

2.6.2 Adding Titles to a Collection


Settings - Staff Picks

Hide disabled Staff Picks

Relabel Staff Picks Create Staff Picks

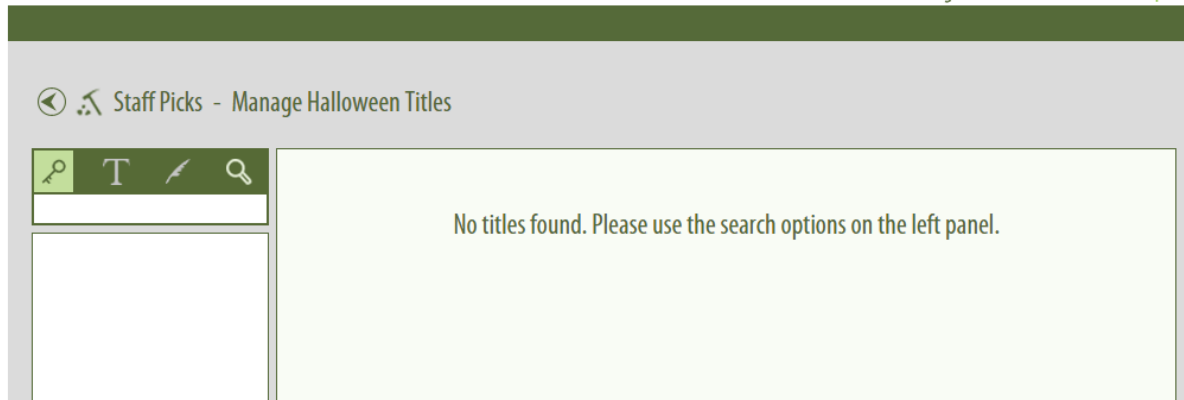
Action	Order	Name	Description	Status	No. of Titles
  	1	 Self Help	This Month's Top Picks	Disabled	3
  	2	 Halloween Titles	Top Halloween Reads	Disabled	0
  	3	 Top Titles		Disabled	0

View/Manage Staff Picks

- In the Action column next to the desired collection, click the  icon for **View/Manage Staff Picks**.

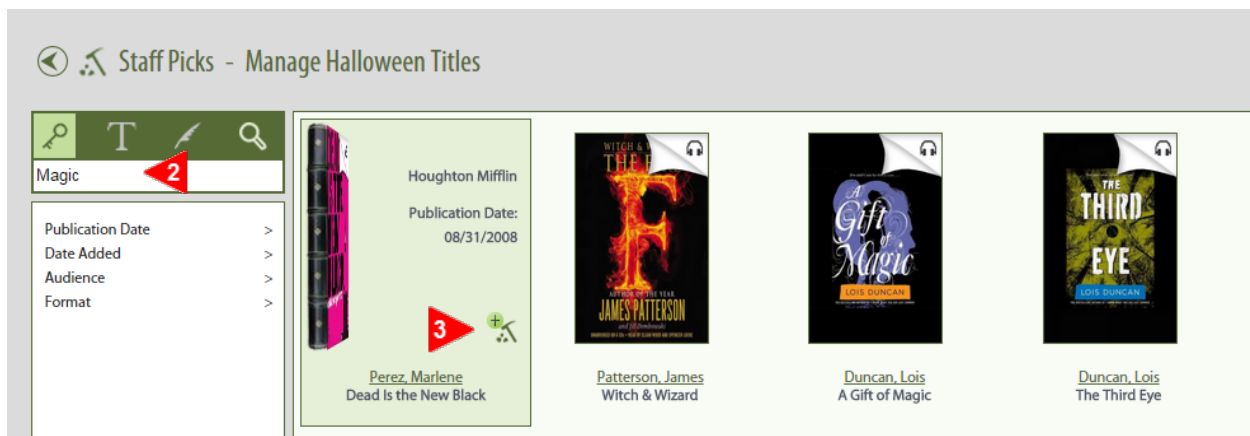


To remove a collection, click the name of the collection and the Remove button.

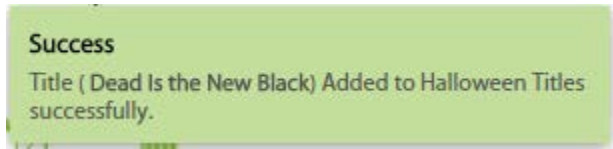


You will be taken to your library's **Staff Picks Manage** page. From here, search or browse your Axis 360 repository by Keyword, Title or Author using the Search icon to identify and select titles for your new Staff Picks collection. You can choose an unlimited amount of titles to add to your collection.

2. Within the Staff Picks Manage view, after doing a search, you will see the titles that match your criteria. To add a title to the collection, click the drop-down arrow, select the **Collection** you would like to add the title to and click **Add**.



3. To add a title to the collection, move your mouse over the jacket image. This will make the jacket swing open to review additional options. Click on the "Add to Staff Picks" option.



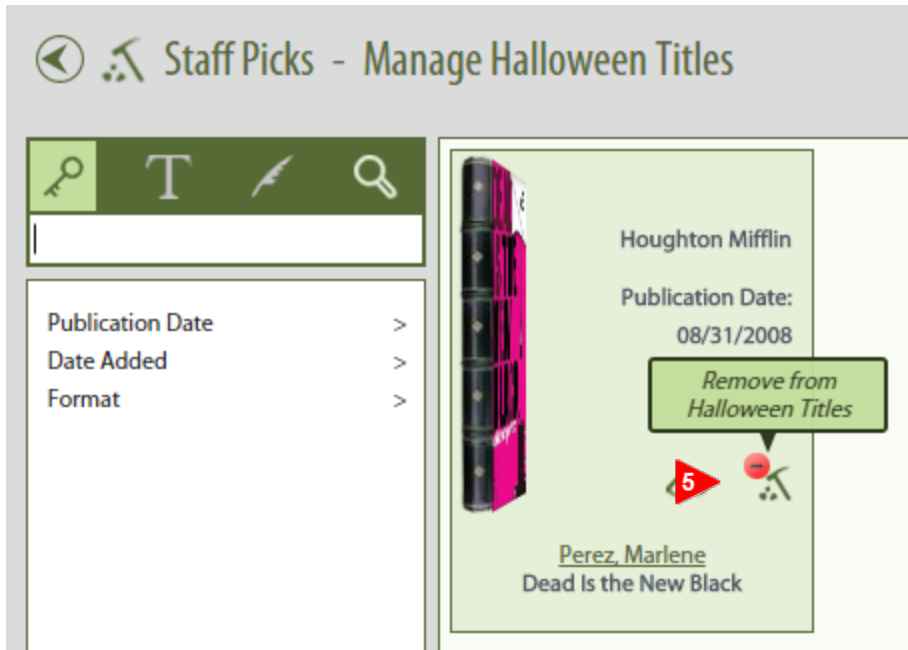
A confirmation message displays after each title is selected. Continue searching and selecting titles until you have completed your collection.



4. After all the titles are selected, click the Back icon to return to the Staff Picks menu.

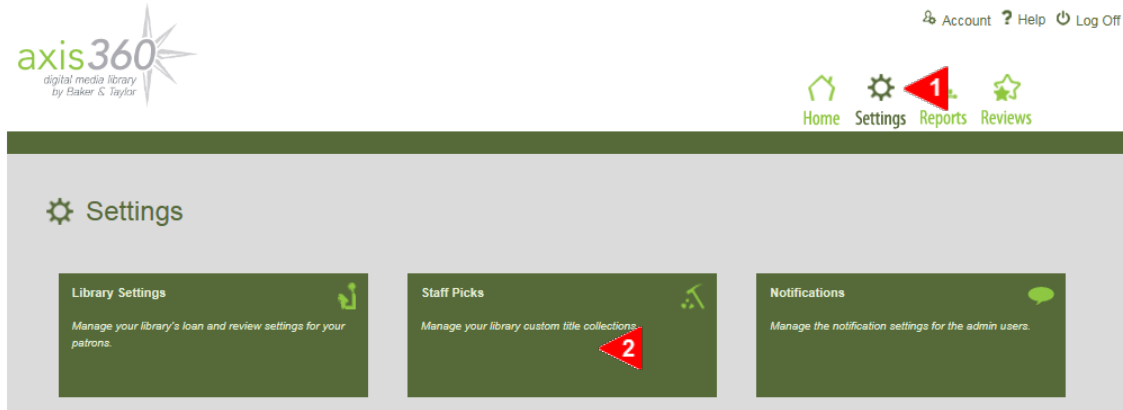


The screen layout may be changed at any time by clicking the desired option to the left of the Search icon located in the top right corner of the screen.

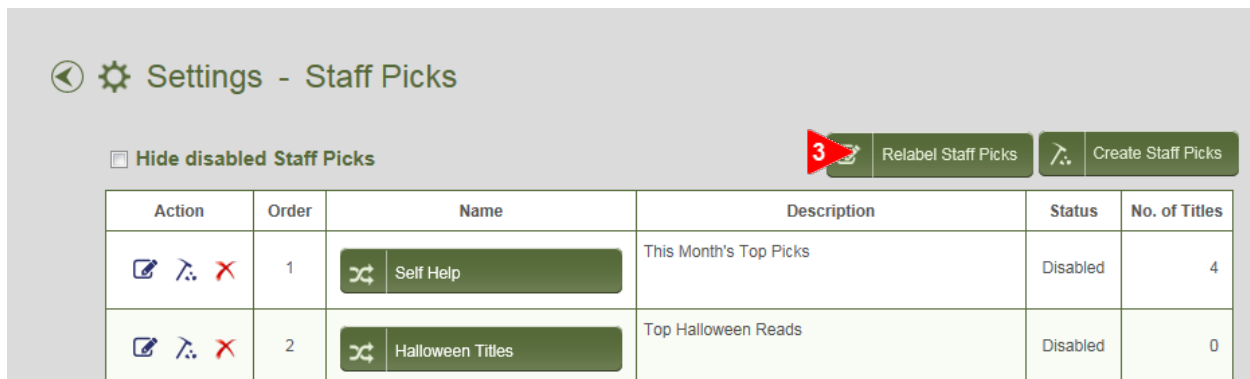


5. If a title was added by mistake, click the **Remove** icon. The title will be removed from the Staff Pick collection.


2.6.3 Relabel Staff Picks

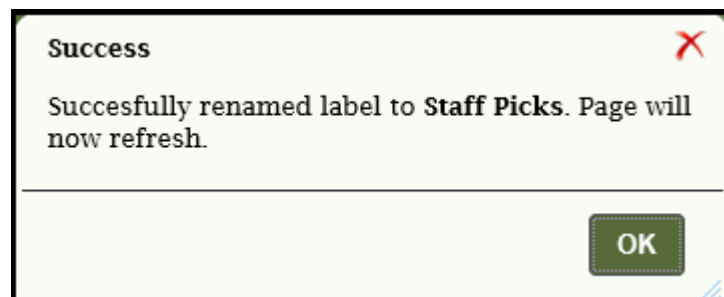


1. Click **Settings**.
2. Click **Staff Picks**.



3. Click **Relabel Staff Picks** and enter the new name for Staff Picks in the textbox.

After the new label has been entered, click the  button and a confirmation message will appear. Close the confirmation message.



The label has been changed on the site.

2.7 Customize Desktop site

With Customize Desktop site, you can select the categories you want to display in the Left navigation area of the Desktop site. You may also create, edit, enable, disable and order categories in the sequence you prefer. You may also rename categories.



2.7.1 Adding a Category to the Desktop site

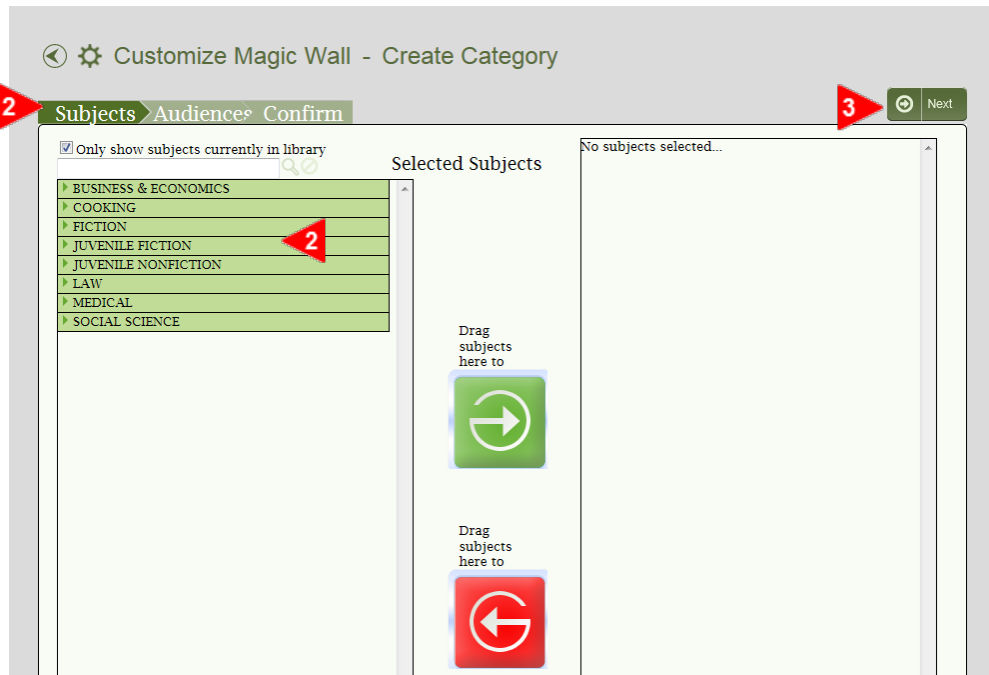
1. After selecting Settings and Customize Desktop site, click **Create Category**.

⚙️ Settings - Customize Magic Wall

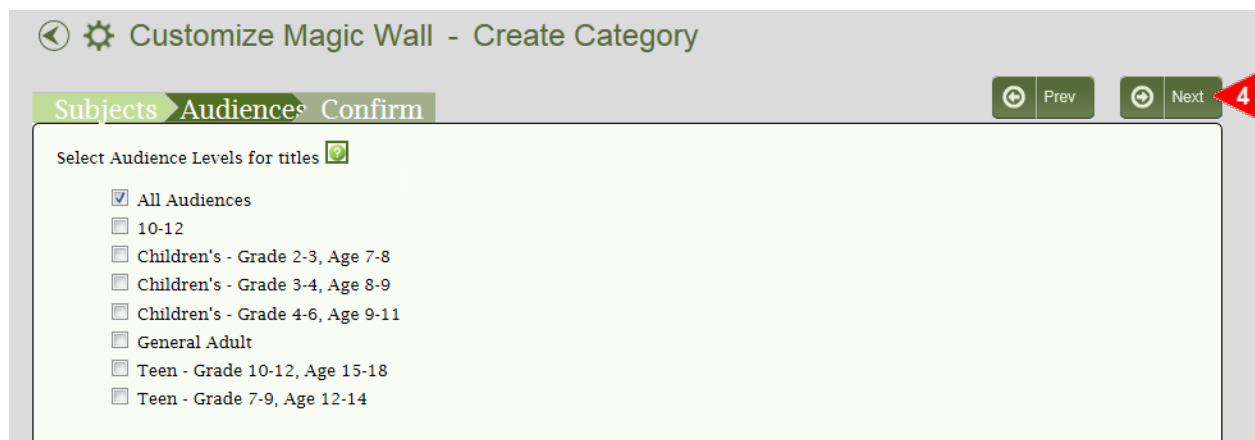
Hide disabled Category

[Create Category](#)

Action	Order	Name	Status	# of Titles	Default Category?
	1	Teens	Disabled	272	Yes
	2	Children	Enabled	95	Yes
	3	Featured	Disabled	1597	Yes
	4	Fiction	Disabled	709	Yes
	5	Non-Fiction	Disabled	521	Yes










2. Under the **Subjects** tab, select the subjects you want to include in the category you are creating and drag and drop them into the right hand column. You may also use the Green Right Arrow icon to select highlighted subjects. To delete, simply drag and drop into the left hand column or highlight and click on the Red Left Arrow.
3. Click next to move to the **Audience** Tab (you may also click on a tab at any time to jump to that section). Select from the list of Audiences to be included in the category.



4. Click next to move to the **Confirm** tab.

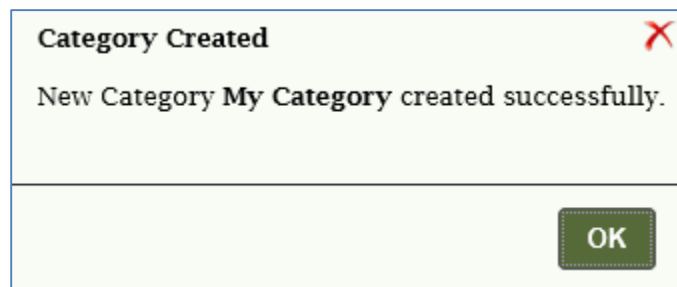
⏪ ⚙️ Customize Magic Wall - Create Category

Subjects > Audience > Confirm

Category Name 	<input type="text" value="My Category"/> (*) 	 Cancel	 Create
Access Key 	<input type="text" value="a"/>		
Titles in Category 	<input type="text" value="1"/>		
Display Category to Patrons	<input type="checkbox"/> 		

5. Enter a Category Name and Access Key (This key allows a user using a screen reading software to directly access this content. This key must be unique to each category list.)
6. The system will display the number of titles in the category (based on selections at **Subjects** and **Audience**). Click the checkbox if you want the category to be visible to Patrons.

After the new category has been entered, click the create button and a confirmation message will appear. Close the confirmation message.



























Tip

To disable/enable a category go directly to the confirm tab and either check or uncheck the "Display Category to Patrons" box.

⏪ ⚙️ Settings - Customize Magic Wall

➕ Create Category

Hide disabled Category

Action	Order	Name	Status	# of Titles	Default Category?
  	1	 Social Awareness	Enabled	2	No
 	2	 Featured	Disabled	32	Yes
 	3	 Fiction	Disabled	12	Yes
 	4	 Non-Fiction	Enabled	5	Yes
 	5	 Children	Enabled	7	Yes
 	6	 Teens	Enabled	8	Yes
  	7 	 My Category	Disabled	1	No

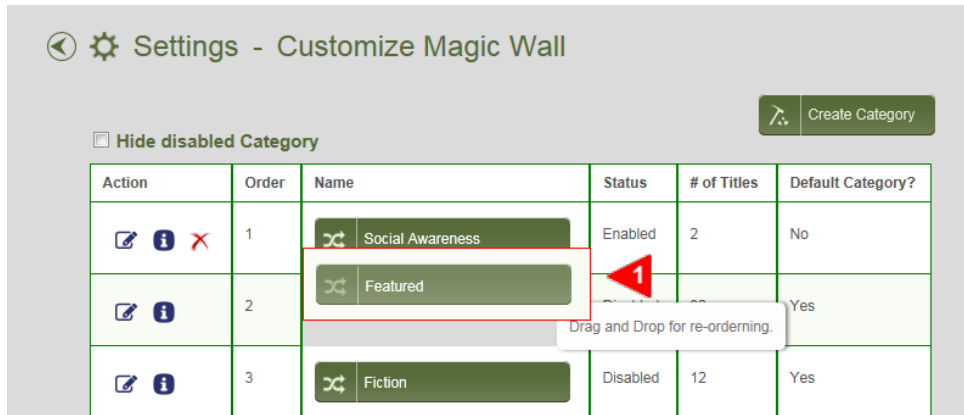
The screen will refresh and the category you have created will display in the list and on the Desktop site (if the checkbox has been selected to “Display to Patrons”).



Tip

A default category of “Yes” can’t be deleted or changed (only disabled)

2.7.2 Change the Category display order on the Desktop site.



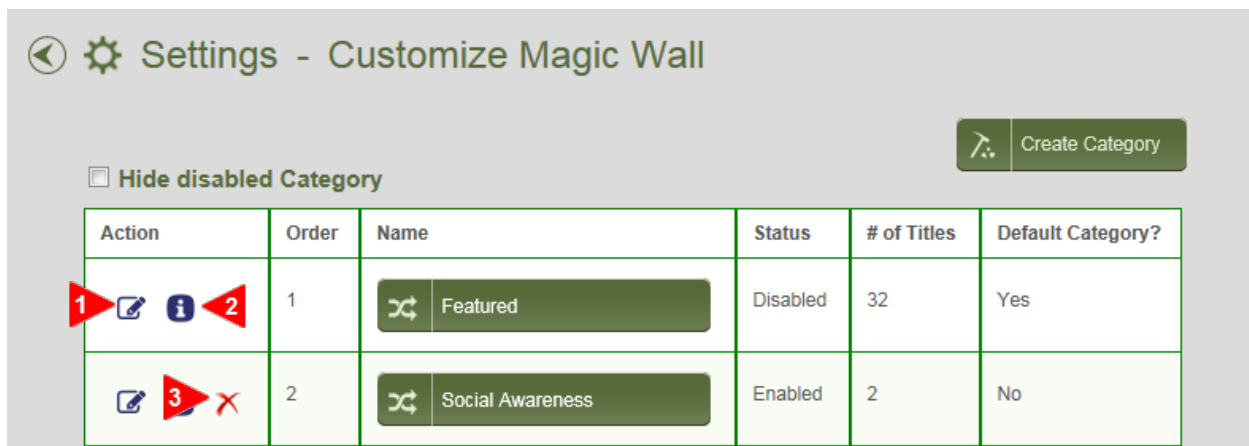
Settings - Customize Magic Wall

Hide disabled Category Create Category

Action	Order	Name	Status	# of Titles	Default Category?
	1	Social Awareness	Enabled	2	No
	2	Featured	Enabled	32	Yes
	3	Fiction	Disabled	12	Yes

1. To change the category display order, simply click, drag and drop in the order you want them to display.

2.7.3 Edit a Category



Settings - Customize Magic Wall

Hide disabled Category Create Category

Action	Order	Name	Status	# of Titles	Default Category?
	1	Featured	Disabled	32	Yes
	2	Social Awareness	Enabled	2	No

1. To edit a category, click on the “Edit Category” icon. You may then make changes and save.
2. To manage/view a category, click on the “Manage/View” icon. This will open the Category on the Desktop site in a new browser window.
3. To delete a non “Default” category, click on the delete icon.

2.7.4 Disable a Category

Settings - Customize Magic Wall

Hide disabled Category Create Category

Action	Order	Name	Status	# of Titles	Default Category?
	1	Teens	Enabled	1320	Yes
	2	Featured	Enabled	17101	Yes
	3	Fiction	Enabled	3535	Yes

1. To disable a category, click on the “Edit Category” button.

axis360 digital media library by Baker & Taylor

Home Settings Reports Reviews

Customize Magic Wall - Edit Category

Subjects > Audience > Confirm Next

Only show subjects currently in library

Selected Subjects

- ANTIQUE & COLLECTIBLES
- ARCHITECTURE
- ART
- BIBLES
- BIOGRAPHY & AUTOBIOGRAPHY
- BODY, MIND & SPIRIT
- BUSINESS & ECONOMICS

- FICTION
- JUVENILE FICTION

2. This will open the “Edit Category” option. Click on the last tab “Confirm”.

Customize Magic Wall - Edit Category

Subjects > Audience > Confirm

Category Name (*)

Access Key

Titles in Category 3535

Display Category to Patrons

Cancel Apply

3. Uncheck the box next to “Display Category to Patrons”.
4. Click Apply.

3 Reports

Create and download inventory, circulation, holds and user reports. Each report is described on the page and a sample of the report format displays when you hover over the report name.

The screenshot shows the Axis360 Reports page. At the top left is the Axis360 logo. At the top right are links for Account, Help, and Log Off. Below these are navigation icons for Home, Settings, Reports, Reviews, and Reservations. The main content area is titled 'Reports' and contains a grid of nine report cards, each with a title, a brief description, and a small bar chart icon.

Report Name	Description
Inventory List Report	Gives the details of your current inventory & current number of holds/checkouts on the titles.
Circulation List Report	Gives the details of current circulation of titles in your inventory.
Hold Report	Gives the details of titles currently on hold.
Inventory Circulation By Month	Gives the details of circulation of titles in the given month.
Top 10 Circulating Subjects	Graphical presentation of top 10 subjects circulated in the given time.
User Review Report	Gives the details of reviews of the users for the titles.
New Users By Month	Gives the details of new users in the particular month.
Total Users By Month	Gives the details of total users in the particular month.
New Users By Month Graph	Graphical presentation of new users in the particular month.

3.1 Available Reports

When running reports, select the button for the desired report and select the parameters. Note: Consortia Parent Libraries will have an additional filter on each report which allows them to filter by member libraries.

3.1.1 Inventory List Report

Subject: All | Format: Audio Book, eBook
 Audience: All | Purchase Date From: 6/3/2013 12:00:00 AM | NULL
 To: 6/15/2014 12:00:00 AM | NULL | Summary: Yes No

View Report

1 of 1 | Find | Next

Inventory List Report

Library Name	Total Quantity	On Order Quantity	Member Quantity	Parent Quantity	Total Checkouts	Turns	Holdings	Hold Ratio
Sales Demo Library	1092	4	1091	1	2325	2.13	5	0.00
Grand Total	1092	4	1091	1	2325	2.13	5	0.00

Select the desired parameters including: **Subject**, **Format** (Audio/eBooks), **Audience**, **Purchase Date From** and **To** ranges and **Summary**. Click **View Report**.



Tip

Subject and Audience default setting is "All". Users will have to manually uncheck "All" if this is not the desired selection.

3.1.2 Circulation List Report

Subject: All | Audience: All
 Format: Audio Book, eBook | Circulation Date From: 6/3/2013 12:00:00 AM | NULL
 To: 6/15/2014 12:00:00 AM | NULL | Publisher: All
 Summary: Yes No

View Report

1 of 1 | Find | Next

Circulation List Report

Library Name	Total Quantity	Total Checkouts	Blio Checkouts	ePub Checkouts	PDF Checkouts	Acoustik Checkouts	Turns	New Holds	Total Holds	Reser
Sales Demo Library	3503	5203	2200	1678	293	1032	1.485	240	252	1
Grand Total	3503	5203	2200	1678	293	1032	1.485	240	252	1

Select the desired parameters including: **Subject**, **Audience**, **Format** (Audio/eBooks), **Circulation Date From** and **To**, **Publisher** and **Summary**. Click **View Report**.

3.1.3 Hold List Report

Subject: All Format: Audio Book, eBook
Audience: All Summary: Yes No

1 of 1 Find | Next

Hold List Report

Library Name	Total Quantity	On Order Quantity	Member Quantity	Parent Quantity	Current Circulation	Reserves	Current Holds	Hold Ratio
Sales Demo Library	3	1	3	0	3	0	5	1.25
Grand Total	3	1	3	0	3	0	5	1.25

Select the desired parameters including: **Subject**, **Format** (Audio/eBooks), **Audience** and **Summary**. Click **View Report**.



Tip

Subject and Audience default setting is “All”. Users will have to manually uncheck “All” if this is not the desired selection.

3.1.4 Inventory Circulation by Month

Report For Year: 2014 Format: Blio, ePub, PDF, Acoustik

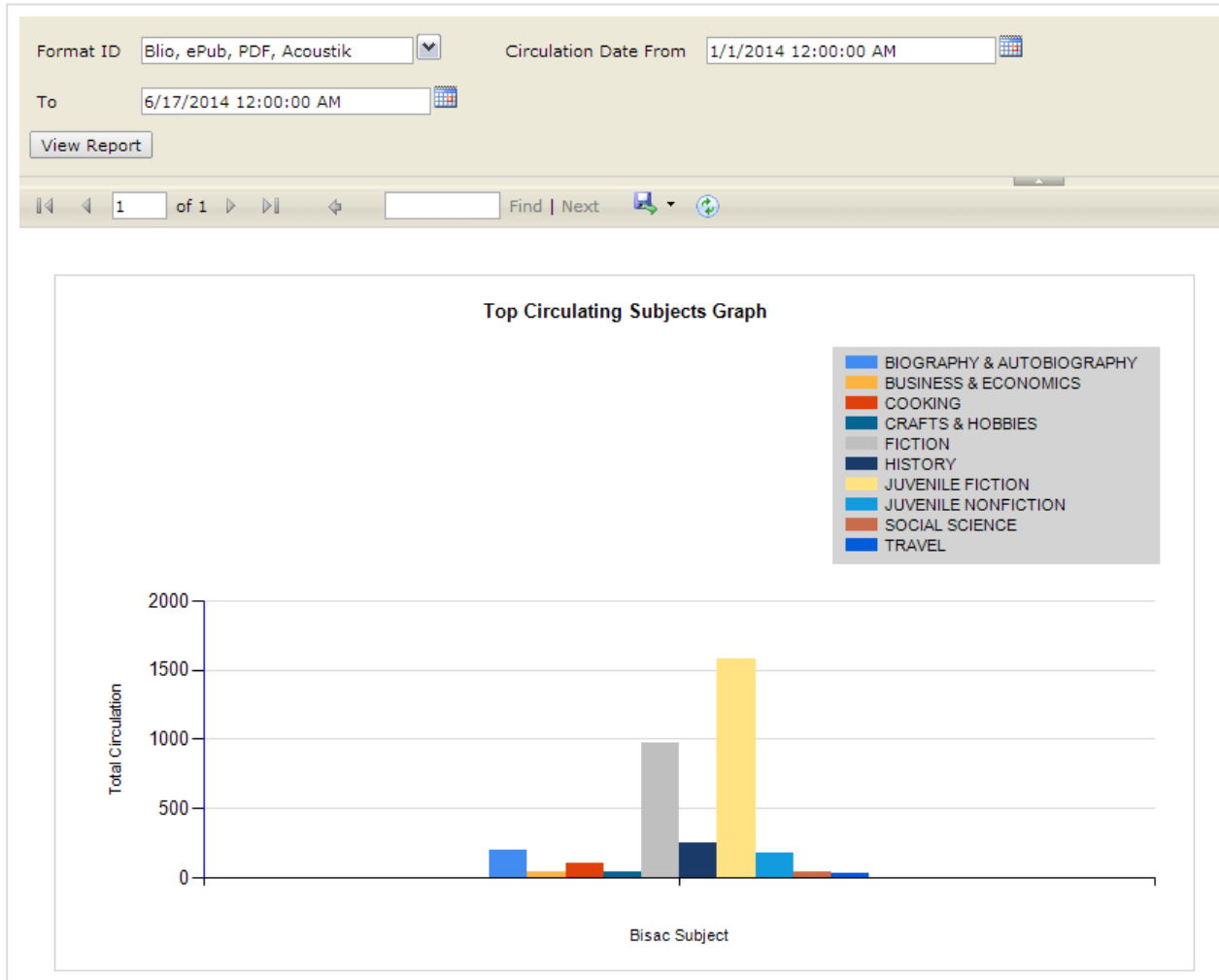
1 of 1 Find | Next

Circulation Report Graph

Month	Total Circulation Count
Jun	171
May	439
Apr	355
Mar	306
Feb	381
Jan	295

Select the desired parameters including: **Report for Year** and **Format** (All, Blio, ePub, PDF, Acoustik). Click **View Report**.

3.1.5 Top 10 Circulating Subjects



Select the desired parameters including: **Format ID**, **Circulation Date From** and **To**. Click **View Report**.

3.1.6 User Review Report

Format: Review Date From: To: [View Report](#)

14 1 of 1 Find | Next

User Review Report

Library Name	Bisac Subject	ISBN	Item ID	Title	Author	Publisher Date	Publisher	Added Date	Format	Total Quantity
Sales Demo Library	JUVENILE FICTION / Classics	9781467610537	0012077279	Secret Garden	Burnett, Frances Hodgson	1/1/2012	Inaudio	1/15/2013	Audio Book	5
Sales Demo Library	BIOGRAPHY & AUTOBIOGRAPHY / Cultural Heritage, SOCIAL SCIENCE / Ethnic Studies / African American Studies; HISTORY / United States / State & Local / General	9781400129751	0012098700	Heningses of Monticello An American Family	Gordon-Reed, Annette	1/1/2012	Tantor Media Inc	1/23/2013	Audio Book	3
Sales Demo Library	FICTION / General	9781427224750	0012232357	Middlesex	Eugenides, Jeffrey	8/5/2012	Macmillan	1/23/2013	Audio Book	3
Sales Demo Library	FICTION / Fantasy / General	9781427243041	0014115090	47 Ronin	Vinge, Joan D.	11/26/2013	Macmillan	12/4/2013	Audio Book	1
Sales Demo Library	BIOGRAPHY & AUTOBIOGRAPHY / Entertainment & Performing Arts; BIOGRAPHY & AUTOBIOGRAPHY / Personal Memoirs	9781478982555	0014271661	Everybody's Got Something	Roberts, Robin	4/22/2014	Blackstone Audio Inc	4/24/2014	Audio Book	1

Page 1 of 1

Select the desired parameters including: **Format**, **Review Date From** and **To**. Click **View Report**.

3.1.7 New Users by Month

From Date: To Date: [View Report](#)

14 1 of 25 Find | Next

New Users Per Month

Date Range: From 6/3/2013 To 6/15/2014
Created Date: 6/15/2014 5:55:30 PM

Document Map

- [-] NewUsersByMonth.rdl
- [-] Sales Demo Library
 - June 2014
 - May 2014
 - April 2014
 - March 2014
 - February 2014
 - January 2014
 - December 2013
 - November 2013
 - October 2013
 - September 2013
 - August 2013
 - July 2013
 - June 2013
 - Grand Total

SUMMARY REPORT								
Library Name	Month Of Year	Bar Code	Life Time Checkouts	Life Time Ebook Checkouts	Life Time Audio Checkouts	Life Time Hold	Active Holds	Created
[-] Sales Demo Library	Total by Library	554	1544	1173	371	80	2	6/13
Grand Total		554	1544	1173	371	80	2	6/13

Page 1/25

Select the desired parameters including: **From Date** and **To Date**. Click **View Report**.

The report defaults to a summary for the date range entered (Page 1 of 25). Click the **Expand** icon to the left of library name to show additional filtering options. To view a summary for a specific month, click the month.

From Date: 6/3/2013 12:00:00 AM To Date: 6/15/2014 12:00:00 AM

View Report

Document Map

- NewUsersByMonth.rdl
 - Sales Demo Library
 - June 2014
 - May 2014
 - April 2014
 - March 2014
 - February 2014
 - January 2014
 - December 2013
 - November 2013
 - October 2013
 - September 2013
 - August 2013
 - July 2013
 - June 2013
 - Grand Total

Date Range: From 6/3/2013 To 6/15/2014
Created Date: 6/15/2014 5:57:09 PM

New Users Per Month

Sales Demo Library

Month Of Year	Bar Code	LifeTime EBook Checkouts	LifeTime Audio Checkouts	Life Time Checkouts	Life Time Holds	Active Holds	Create Date	Last Checkout Date	Last Hold
June 2014	WW6166650	11	1	12	0	0	6/1/2014	6/8/2014	
	WW269400	6	2	8	0	0	6/8/2014	6/12/2014	
	MLS7463318	5	0	5	0	0	6/11/2014	6/11/2014	
	WW99423723	4	0	4	0	0	6/2/2014	6/5/2014	
	WW8807011	3	0	3	1	0	6/4/2014	6/11/2014	6/4/2014
	BT4232702	2	0	2	0	0	6/9/2014	6/12/2014	
	WW0408696184	2	0	2	0	0	6/9/2014	6/10/2014	

To view additional pages of the report, click the **Next Page** arrow.

3.1.8 Total Users by Month

From Date: 4/1/2014 12:00:00 AM To Date: 6/15/2014 12:00:00 AM

View Report

Document Map

- TotalUsersByMonth.rdl
 - Sales Demo Library
 - Grand Total

Date Range: From 4/1/2014 To 6/15/2014
Create Date: 6/15/2014 6:09:00 PM

Total Users per Month

SUMMARY REPORT

Library Name	Month Of Year	Bar Code	Is New User	Total Checkouts	Total EBook Checkouts	Total Audio Checkouts	Holds	Review	Cr
Sales Demo Library	Total by Library			67	965	809	156	69	5
Grand Total				67	965	809	156	69	5

Page 1/114

Select the desired parameters including: **From Date** and **To Date**. Click **View Report**.

The report defaults to a summary for the date range entered (Page 1 of 114). Click the **Expand** icon to the left of the library name to show additional filtering options. To view a summary for a specific month, click the month.

From Date: 4/1/2014 12:00:00 AM To Date: 6/15/2014 12:00:00 AM

View Report

Document Map

- TotalUsersByMonth.rdl
 - Sales Demo Library
 - 2014 June
 - 2014 May
 - 2014 April
 - Grand Total

Date Range: From 4/1/2014 To 6/15/2014
Create Date: 6/15/2014 6:09:00 PM

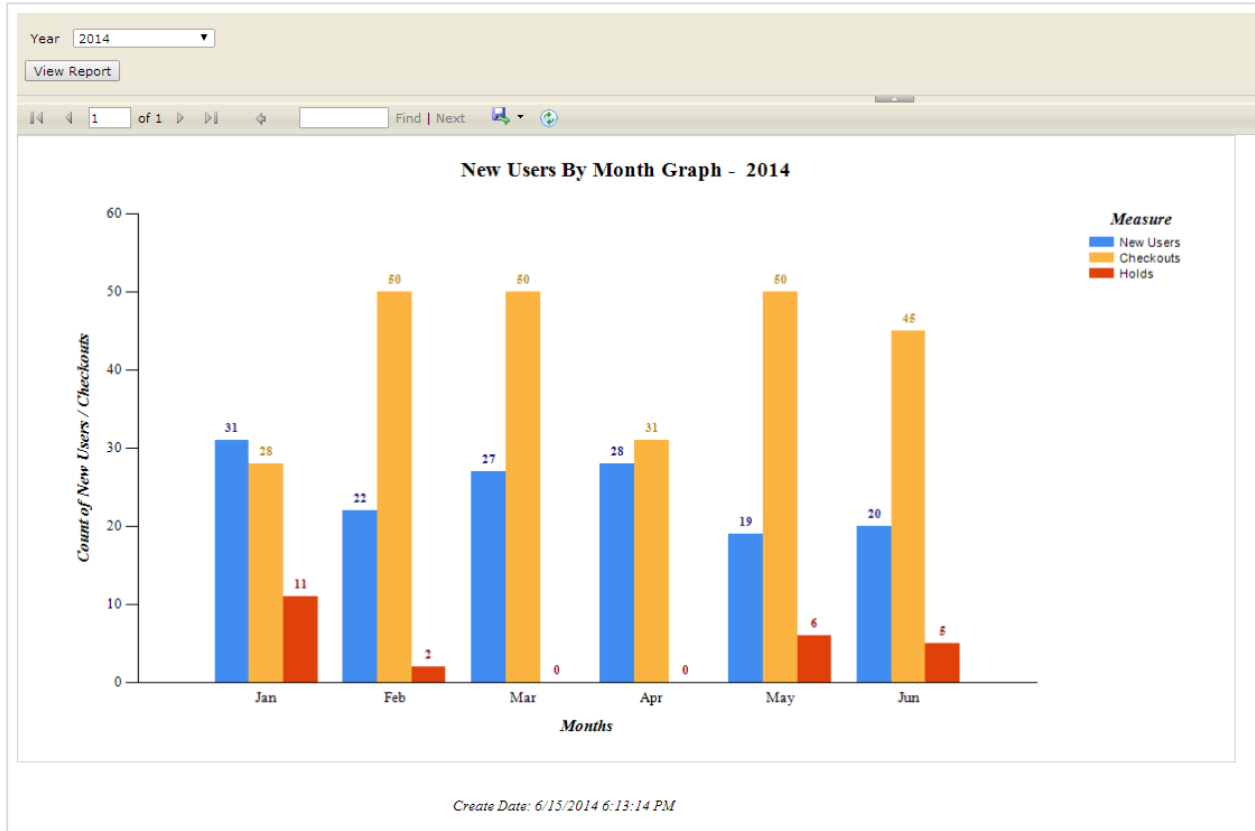
Total Users per Month

Sales Demo Library

Month Of Year	Bar Code	Is New User	Total Checkouts	Total EBook Checkouts	Total Audio Checkouts	Holds	Review	Create Date	Last Checkout Date
2014 June	BT6421459	No	25	12	13	2	2	3/26/2012	6/13/2014
	BT9983116	No	23	20	3	3	0	8/6/2011	6/13/2014
	BT99983377	No	22	16	6	1	1	4/28/2014	6/11/2014
	WW6166650	Yes	12	11	1	0	0	6/1/2014	6/8/2014

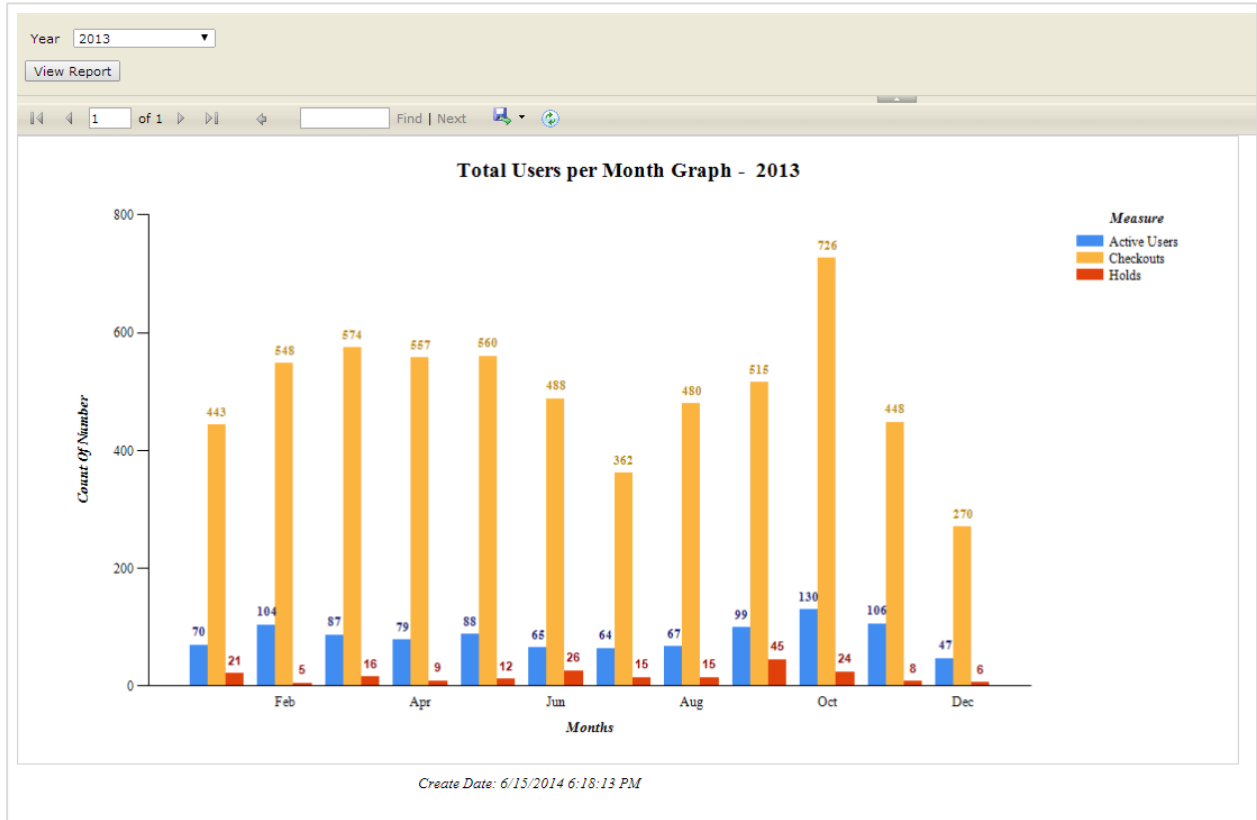
To view additional pages of the report, click the **Next Page** arrow.

3.1.9 New Users by Month Graph



Select the desired **Year**. Click **View Report**.

3.1.10 Total Users by Month Graph



Select the desired **Year**. Click **View Report**.

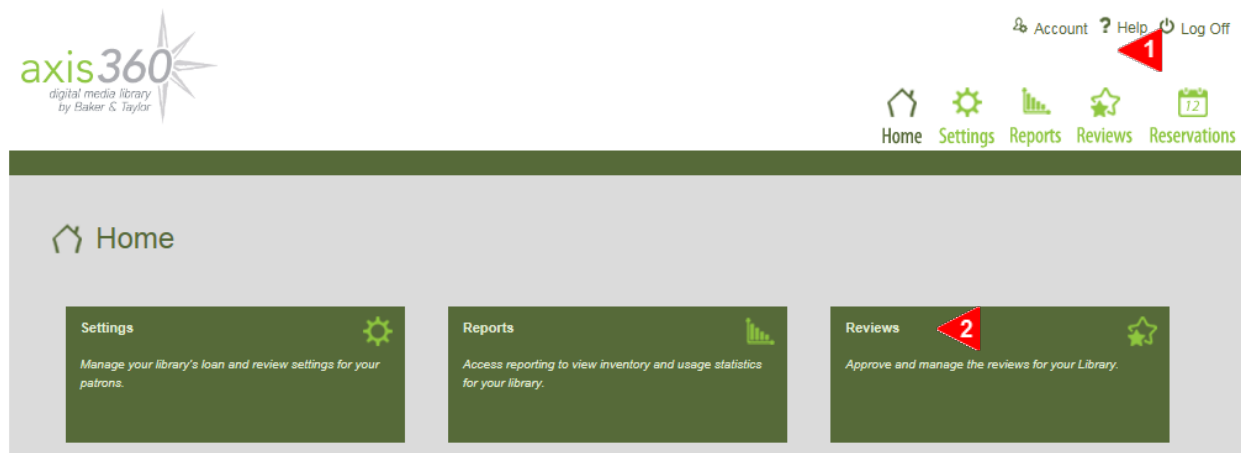
4 Reviews

Using the options under Settings > Library Settings, you can control the site display which includes if reviews are enabled on your site. If your reviews are enabled, the functionality below is available.

4.1 Reviews

You have access to user title reviews, which must be approved before they are visible on the site. The text cannot be edited; reviews are either approved or rejected in full.

4.1.1 Approve or Delete Reviews



1. Reviews may be accessed by clicking **Reviews** or **Home** from the main menu.
2. Click **Reviews**.

Reviews - Reviews

Reject All Approve All

Actions	Review Date	Title	User Name	Review	Rating
4	10/17/2014	Robe of Skulls		A great Halloween Read!	4
	5	Toby Alone	3	This was a good and fast read. It was a little ha ...Read More	4

Now showing 1 - 2 of 2 5 per page

All pending reviews submitted by users will display. Reviews can be approved or deleted. If a review is approved, it will then display on the site.

- To read a complete review, click the **Read More** hyperlink to open the complete review.
- To approve a review, click the **Approve** icon.
- To reject a review, click the **Reject** icon.



To approve all reviews at once, click the **Approve All** button.

Magic Wall App Zone Browse By Subject Staff Picks Switch Library

Overview Details **Reviews**

Average Reader Rating: ★★★★★ (1 Review)

Reader Reviews:

Mary Miles

This is a great book that helped us plan our trip this summer.

[Read Full Review](#)

Fodor's

MADRID
AND SIDE TRIPS

Copies

Owned 2

Available 2

Subjects

Travel

Select a format

Add

Checkout

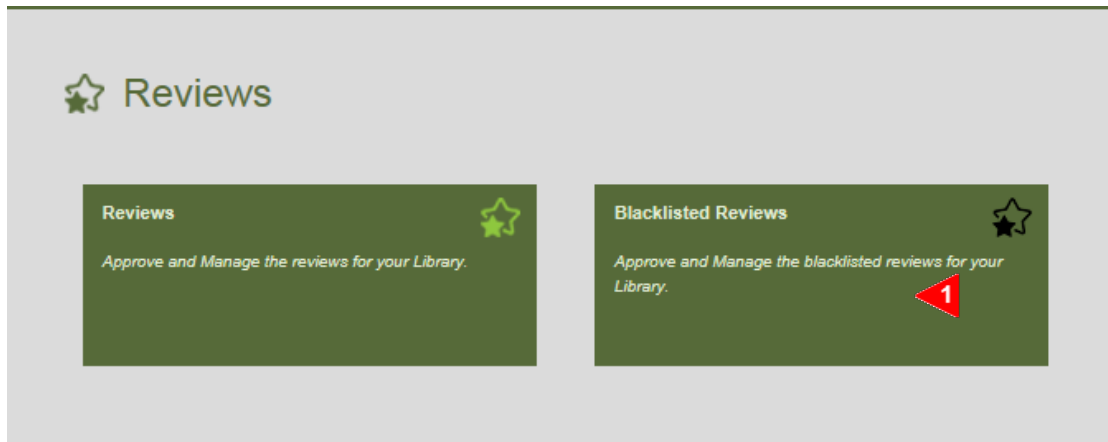
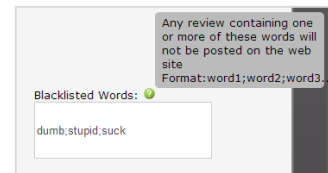
Wish List

Buy

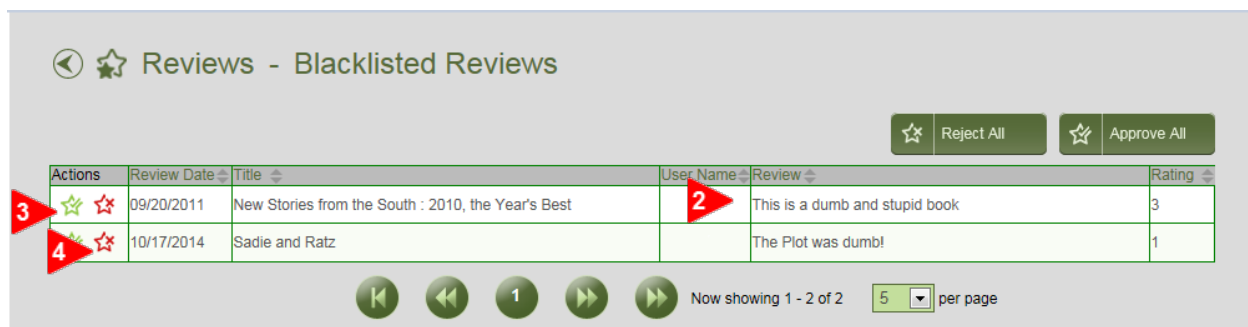
Approved reviews are posted to the site immediately and display on the Reviews tab for the title.

4.1.2 Blacklisted Reviews

Reviews submitted by users that contain any of the words entered in the Blacklisted Words field under Library Settings will display under Blacklisted Reviews. Blacklisted Reviews can be approved (and will display on the site immediately) or deleted.



1. After selecting Reviews, click **Blacklisted Reviews**.



This will display all pending reviews that contain words matching any of the Blacklisted Words.

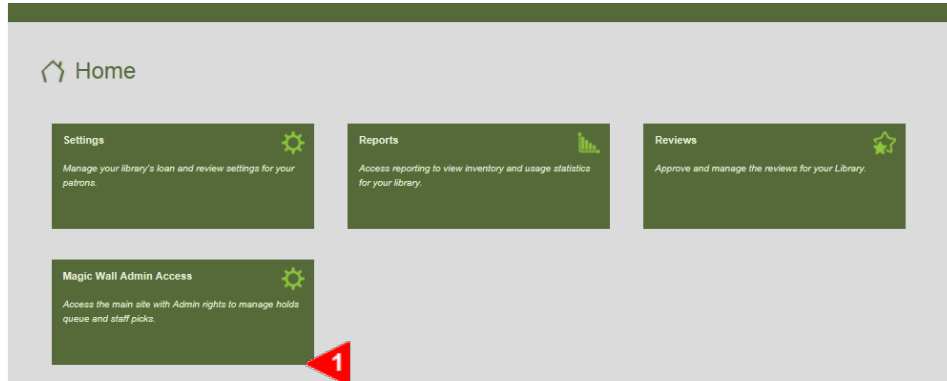
2. If the entire review does not display, a hyperlink appears. To read the complete review, click the hyperlink. In this example, the entire review fits in the space provided.
3. To approve a review, click the **Approve** icon.
4. To delete a review, click **Delete** icon.

5 Appendix

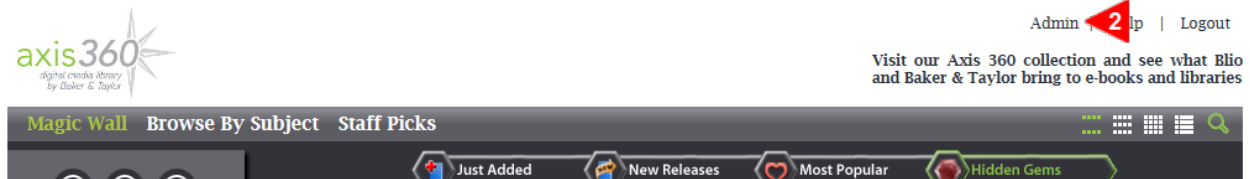
5.1 Hold Queue Management

You may move users up and down in the Hold Queue.

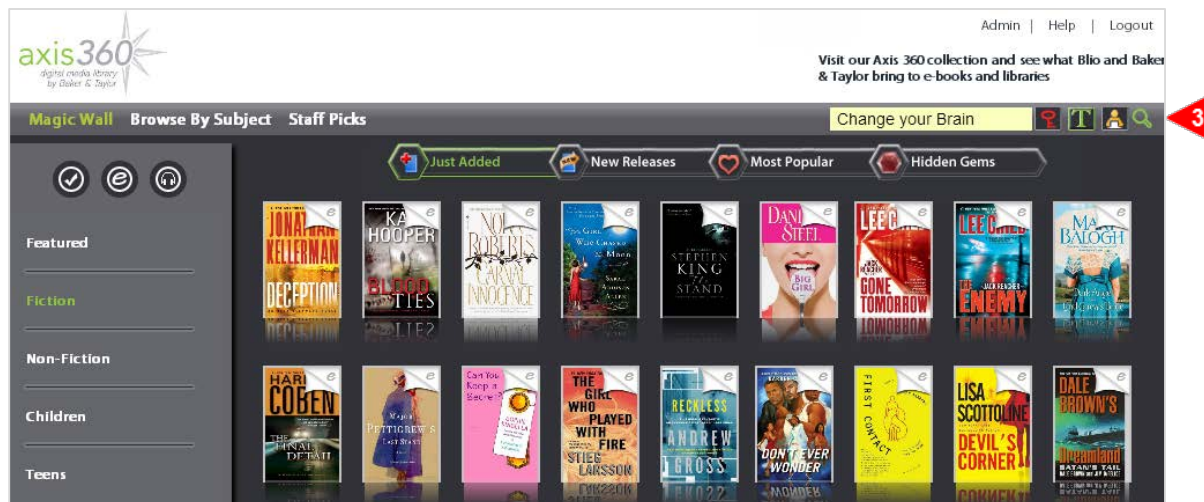
5.1.1 Move Users in the Hold Queue



1. From the Home screen, click on “Desktop site Admin Access”



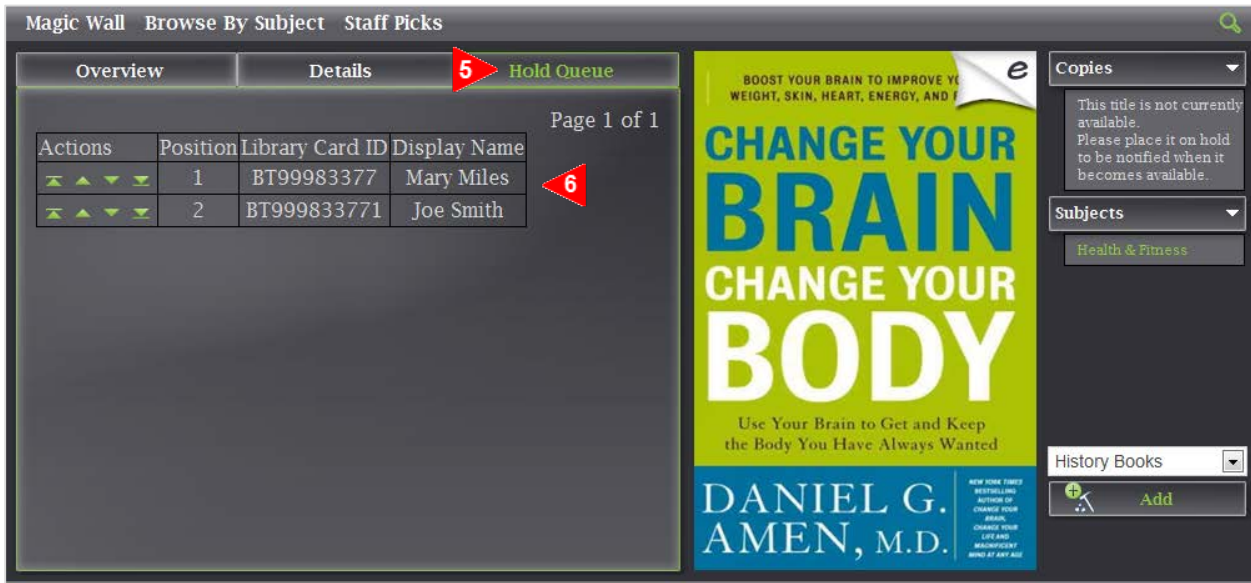
2. The Desktop site will open and you will notice that you are logged in as an Admin User.



3. Click the **Search** icon and enter the title. Click the **Title** icon and click **Search**, or press Enter.



4. Click the on the Cover Image.



5. Click on the **Hold Queue** tab.

6. To move users in the Hold Queue, click the **up** or **down arrow** in the Actions column next to the desired user. The changes in position are automatically saved.