

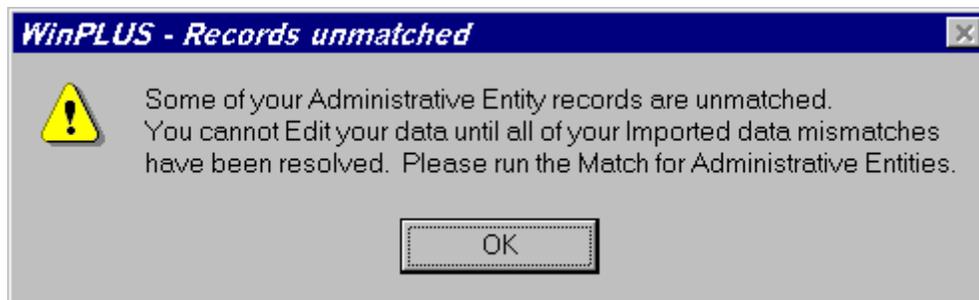
### 5.3 Match (Used with Imported Data Only)

The 'Match' option, which follows the 'Read and Validate' import routine, attempts to match records from the current-year import file against records from the prior-year file. The 'Match' option is used with imported data only. If you did not run the Matching Routine at the completion of importing your data, you must run it via the 'Match' option on the Main Menu. Please note the following:

- The 'Match' option on the Main Menu will not run if: (1) you did not import your data (i.e., you performed direct data entry), or (2) your data were not imported successfully. In either case, you will receive the following message if you select the 'Match' option on the Main Menu:



- The 'Edit Checks (Current Year and Historical)' option on the Main Menu will not run if you imported data but did not run the matching routine. If you try to run the edit checks, you will receive a message prompting you to run the "Match" feature:



- If you select the 'Match' option from the Main Menu, you will be prompted to begin matching on administrative entities (A) or outlets (O). **To complete the matching process, you must match on administrative entities (A) and on outlets (O).**
- You do not need to complete the Matching Routine in one session, but you must complete it before proceeding with any other WinPLUS operations.

### 5.3.1 Matching Routine

This routine attempts to match records from the current-year import file against records from the prior-year file. The 'Match' feature consists of the following steps:

1. Key information (e.g., NAME, LIB ID#, etc.) from the prior-year data is compared to the import data to *automatically* or *conditionally* match as many records as possible;
2. WinPLUS records official name and address changes;
3. WinPLUS runs the 'Structure Change' routine. This allows the user to resolve any records on the import file that have not been matched to the prior-year file and any records on the prior-year file that have not been matched to the import file; and
4. Matched records are moved to the administrative entity or outlet database.

The Matching Routine for Administrative Entity import files and Outlet import files are discussed separately in the next two sections.

#### 5.3.1.1 Matching Routine for the Administrative Entity File

1. The following conditions constitute an **automatic match** of administrative entity records on the import file and the prior-year file:
  - WinPLUS checks records to see if the LIB ID# and NAME (of library) on the import file exactly match the data on the prior-year file. If *both match*, the records are considered an automatic match, and the FSCS ID# is used.
  - If WinPLUS can match *only one* of these data elements on the import file and the prior-year file, the matching routine also attempts to match *any two* of the following data elements: ADDRESS, CITY, ZIP, or PHONE. If this condition is met, the record is considered an automatic match.
2. A match on *only one* of the six data elements described above constitutes a **conditional match**.

The criteria for automatic and conditional matches are summarized below:

DATA MATCHING ACTION	LIB ID#	NAME (of Library)	ADDRESS, CITY, ZIP, PHONE
Automatic Match	Yes	Yes	None
	Yes	No	Any 2 of the 4
	No	Yes	Any 2 of the 4
Conditional Match (i.e., prompts user for match)	Yes	No	None or any 1 of the 4
	No	Yes	None or any 1 of the 4
	No	No	Any 1 of the 4

In a conditional match, WinPLUS displays both administrative entity records on a 'split-screen' and prompts the user to confirm whether there is a specific library record match. In the following example, the LIB ID# and only one of the other four variables match, so this is a conditional match. (Note: The FSCS ID# is not displayed on the current-year side of the data matching screen, as it is considered premature to include it on the current-year record at this point.)

WinPLUS 2.5 - Match Alabama FY-2003

DATA MATCHING - ADMINISTRATIVE ENTITY

Prior Year Data

LIB ID #: 501-001 FSCS ID #: AL0090

Name: ADAMSVILLE LIBRARY

Address: 4826 MAIN STREET

City: ABBEVILLE

ZIP: 36310 ZIP+4: 2419

Phone: 205-674-3399

Current Year Data

LIB ID #: 501-001

Name: ADAMSVILLE PUBLIC LIBRARY

Address: 4825 MAIN STREET

City: ADAMSVILLE

ZIP: 35005 ZIP+4: 0241

Phone: 205-674-3399

Import Conditional Match

Matched on field: LIBID

Are these two records for the same library (Y/N)?

Choose 'Cancel' to quit Match.

Y  N

OK Cancel

After a conditional match is found, the user types 'Y' to accept the match or 'N' to reject it. The record is then updated with the new information and WinPLUS moves on to the next record. Select 'Cancel' to return to the WinPLUS Main Menu.

Note: Be especially careful when importing data for new libraries that are really structure changes. For example, if two library systems merge and the administrative entity keeps the address of one of the old systems, WinPLUS may read this as a conditional match between the new entity on the import file and the old entity on the prior-year record.

The matching routine is **not** case sensitive. A library name entered in upper-case letters (e.g., 'MAIN LIBRARY') will be successfully matched with a library name entered in lower-case letters (e.g., 'Main Library').

Before continuing to the next record, WinPLUS checks for name and address changes from the prior-year record to the import record just matched (whether an automatic or conditional match).

**5.3.1.2 Matching Routine for the Outlet File**

1. The following conditions constitute an **automatic match** of outlet records on the import file and the prior-year file:
  - WinPLUS checks records to see if the LIB ID#, NAME (of library), and Outlet Type Code on the import file exactly match the data on the prior-year file. If *all three match*, the records are considered an automatic match and the prior-year FSCS ID# is used.
  - If WinPLUS can match *only two* of these data elements (the LIB ID# and Outlet Type Code), the matching routine also attempts to match *any two* of the following data elements: ADDRESS, CITY, ZIP or PHONE. If this condition is met, the record is considered an automatic match.
  - If WinPLUS can *only match* the NAME (of library) and Outlet Type Code, the matching routine also attempts to match *any two* of the following data elements: ADDRESS, CITY, ZIP or PHONE. If this condition is met, the record is considered an automatic match.
  
2. A match on *only one* of the six data elements described above constitutes a **conditional match**. The Outlet Type Code is not used for a conditional match.

The criteria for an automatic and conditional matches are summarized below:

<b>DATA MATCHING ACTION</b>	<b>LIB ID#</b>	<b>NAME (of Library)</b>	<b>OUTLET TYPE</b>	<b>ADDRESS, CITY, ZIP, PHONE</b>
Automatic Match	Yes	Yes	Yes	None
	Yes	No	Yes	Any 2 of the 4
	No	Yes	Yes	Any 2 of the 4
Conditional Match (i.e., prompts user for match)	Yes	No	N/A	None or any 1 of the 4
	No	Yes	N/A	None or any 1 of the 4
	No	No	N/A	Any 1 of the 4

In a conditional match, WinPLUS displays both outlet records on a 'split-screen' and prompts the user to confirm whether there is a specific library record match. In the following example, the LIB ID# matches, so this is a conditional match. (Note: The FSCS ID# is not displayed on the current-year side of the data matching screen, as it is considered premature to include it on the current-year record at this point.)

WinPLUS - Match      Alabama      FY-2003

**DATA MATCHING - OUTLETS**

Prior Year Data		Current Year Data	
LIB ID #:	100-002	FSCS ID #:	AL0003
Name:	CORDOVA LIBRARY	Name:	CORDOVA PUBLIC LIBRARY
Address:	130 N MAIN STREET	Address:	130 MAIN STREET
City:	DOVA	City:	CORDOVA
Zip:	35551	Zip4:	1616
Phone:	205-483-9579	Phone:	205-483-9578
Outlet Type:	CE	Outlet Type:	CE

**Import Conditional Match** [X]

Matched on field: LIBID  
Are these two records for the same outlet (Y/N)?

Choose 'Cancel' to quit Match.

OK      Cancel

After a conditional match is found, the user types 'Y' to accept the match or 'N' to reject it. The record is then updated with the new information and WinPLUS moves on to the next record. Select 'Cancel' to return to the WinPLUS Main Menu.

Be especially careful when importing data for new libraries that are really structure changes. For example, if two library systems merge and the administrative entity keeps the address of one of the old systems, WinPLUS may read this as a conditional match between the new entity on the import file and the old entity on the prior-year record.

Note: The data matching routine is **not** case sensitive. For example, a library name entered in upper-case letters (e.g., 'MAIN LIBRARY') will be successfully matched with a library name entered in lower-case letters (e.g., 'Main Library').

Before continuing to the next record, WinPLUS checks for name and address changes from the prior-year record to the import record just matched (whether an automatic or conditional match).

### 5.3.2 Checking for Name and Address Changes

While in the data Matching Routine, WinPLUS automatically checks for name and/or address changes so that the change can be tracked in the historical file if appropriate.

**Name (of library) Change.** When a user updates a name in an import record, the 'Import Name Change' window is automatically displayed below the split screen showing the import and prior-year data.

- Type '1', then select 'OK' to select "This Administrative Entity has officially changed its name" when the library name was officially changed.
- The user is prompted "Is this a Structure Change (Y/N)? ". (The types of administrative entity structure changes are listed in the WinPLUS screen on page 28. Outlet structure changes are listed in the screen on page 39.) Type 'N' to simply track the name change in the historical changes database. Type 'Y' to confirm that the record will need a structure change.
- Type '2', then select 'OK' to select "This is now the preferred spelling of the Name" when a correction was made to the library name because of a data entry error.
- Type '3', then select 'OK' to select "Last year's Name should be used instead of this year's." if you want to keep the prior-year name.

WinPLUS then automatically checks for address changes for the same record.

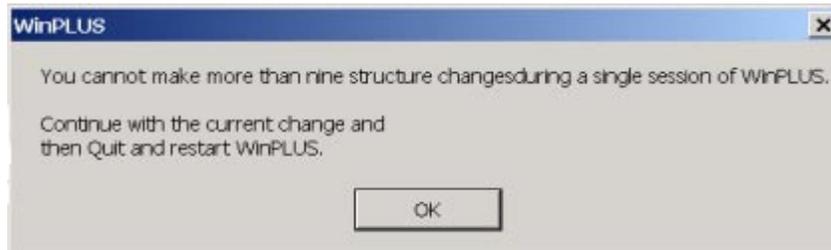
**Address Change.** When the user updates an address in an import record, the 'Import Address Change' window is automatically displayed below the split screen showing the import and prior-year data. Select one of the three options displayed.

- Type '1', then select 'OK' to select "This Administrative Entity has moved to a new location" when the library moves its physical location.
- The user is prompted "Is this a Structure Change (Y/N)?". (The types of administrative entity structure changes are listed in screen on page 28. Outlet structure changes are listed on page 39.) Type 'N' to simply track the address change in the historical changes database. Type 'Y' to confirm that the record will need a structure change.
- Type '2', then select 'OK' to select "This is now the preferred Street Address (same location)" when a correction was made to the library address because of a data entry error.
- Type '3', then select 'OK' to select "Last year's Street Address should be used instead of this year's." if you want to keep the original address.

After all matches are complete and name and address changes checked, WinPLUS begins the structure change routine.

### 5.3.3 Structure Change Routine

After all matches are complete and official name and address changes recorded, if one or more records from the administrative entity or outlet import file still is not matched to the previous year's file, WinPLUS automatically begins the structure change routine. **Note: You cannot make more than nine structure changes during a single WinPLUS session. To make more than nine structure changes, 'Quit' and restart WinPLUS.**

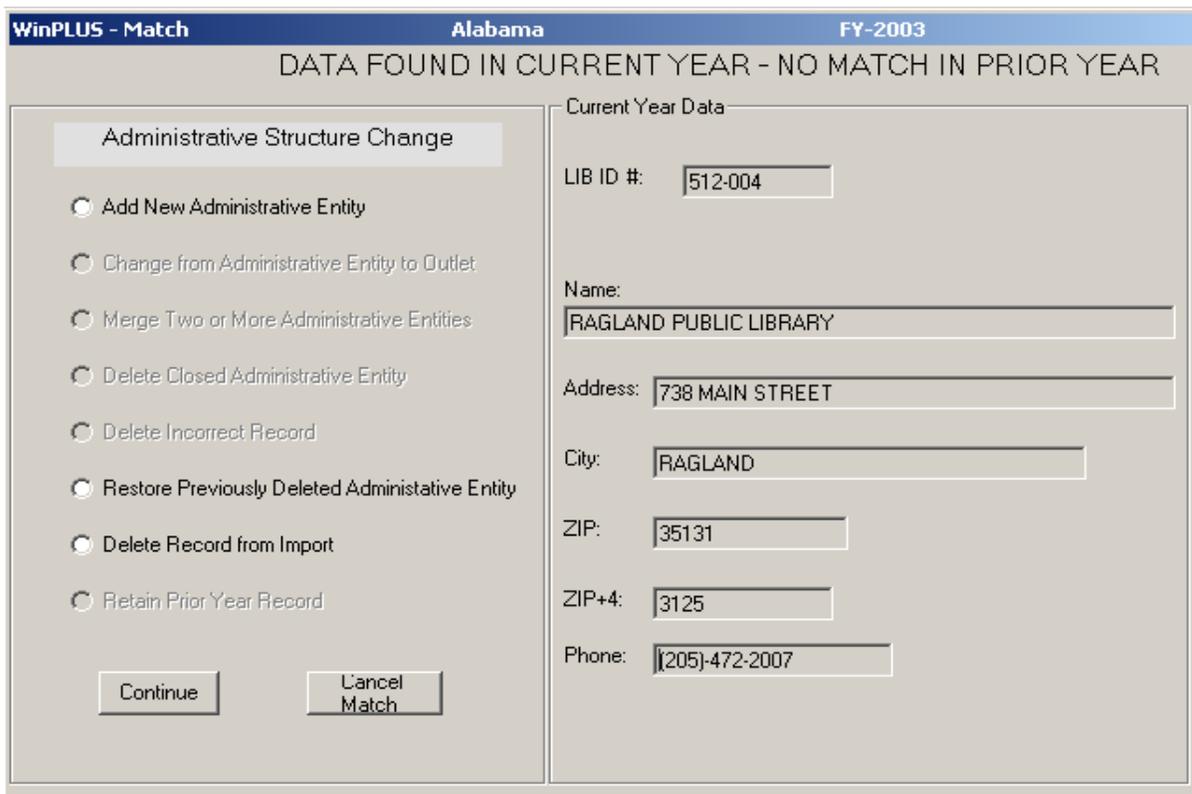


#### ADMINISTRATIVE ENTITY STRUCTURE CHANGES DURING MATCHING ROUTINE

A structure changes menu with several options is automatically displayed if one or more records from the administrative entity import file is not matched to the prior-year file. These options will vary depending on the type of match found. The options are described below.

##### 1. Data Found in Current Year – No Match in Prior Year

When data are found in the administrative entity import file, but no match is found in the prior-year file, three types of structure changes are available: Add a new administrative entity, restore a previously deleted administrative entity, or delete the record from import.



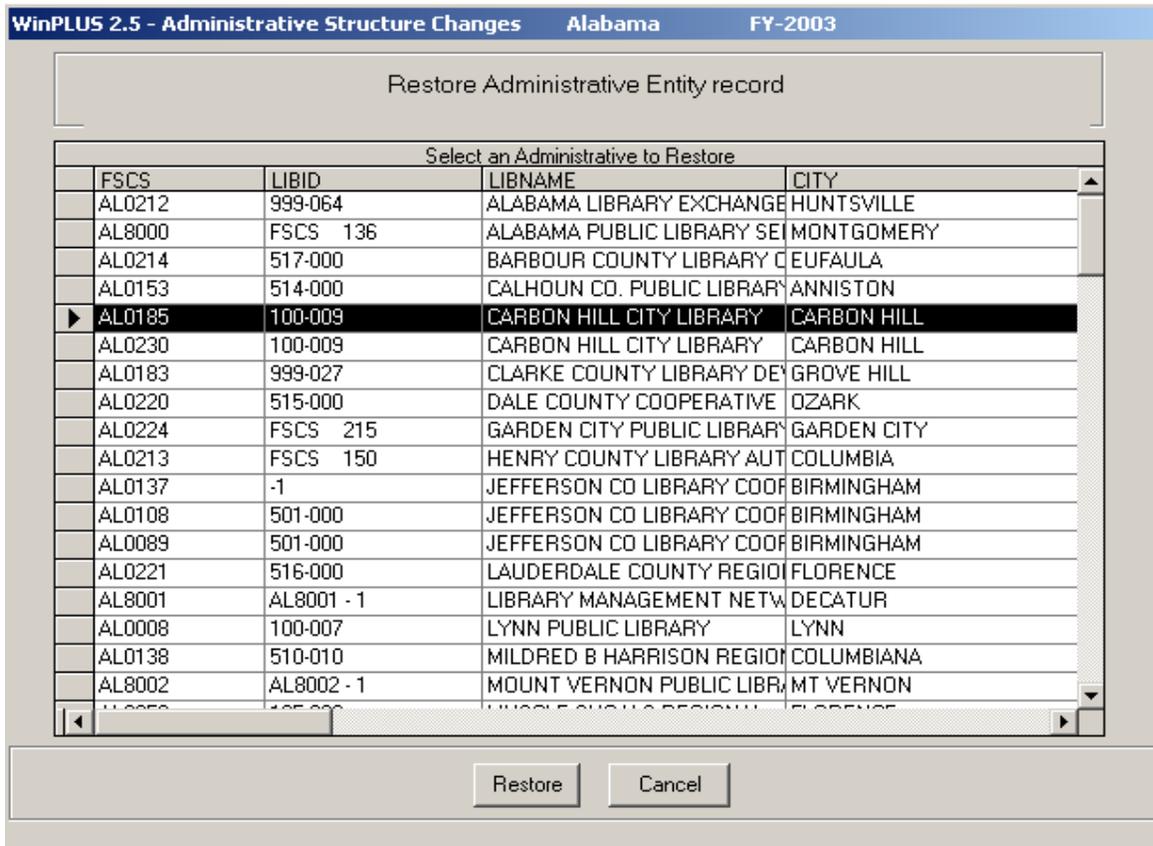
➤ **Add New Administrative Entity**

To add a completely new administrative entity record, select 'Add New Administrative Entity' from the 'Administrative Entity Structure Changes' menu and then select 'Continue'. The program assigns the new entity a new FSCS ID#. Click 'OK' to continue to the next structure change.



➤ **Restore Previously Deleted Administrative Entity**

To restore an administrative entity record, choose 'Restore Previously Deleted Administrative Entity' from the 'Administrative Entity Structure Changes' menu. (Note: The deleted record is restored from the historical database and becomes a current record under its original FSCS ID#.)



Choose the administrative entity to restore from the list of administrative entities by clicking on the gray box to the left of the name. *The entire row must be highlighted.* Please be sure to pick the administrative entity that you have been working with in the match. Choose 'Restore'.

WinPLUS 2.5 - Administrative Structure Changes				Alabama	FY-2003
Restore Administrative Entity record					
1A FSCS: AL0185					
Identification					
01 LIBID:	100-009	02 Name:	CARBON HILL CITY LIBRARY		
Street Address			Mailing Address		
03 Address:	414 NW 5TH AVENUE	07 Address:	-2		
04 City:	CARBON HILL	08 City:	-2		
05 ZIP:	35549	06 ZIP+4:	0116	09 ZIP:	-2
				10 ZIP+4:	-1
11 County:	WALKER				
12 Phone:	205-924-4254	13 Web Address:	http:// -2		
14 Interlib. Rel.:	NO	17 FSCS PL:	N		
15 Legal Basis:	CI	18 Geo.:	-1		
16 Admin.:	SO	19 Boundary Change:	N		
Cancel Restore		Save Now		Cancel Changes	
					Exit

The historical database only restores data for data elements 1 through 18. Enter the data for the remaining items now or later via the WinPLUS Main Menu option 'View/Update Administrative Entity or Outlet Records'. Select 'Save Now' or 'Exit' to save the changes or 'Cancel Restore' to cancel the procedure.

➤ **Delete Record from Import**

This option allows the user to 'bail out' of importing a record that does not match the user's current-year template file. Canceling a record from import allows the import to proceed, but the original record is still in the import file. The user must edit the record, make a structure change, or correct an error. Otherwise the user will have to cancel the same record each time an import is performed. Select 'Delete Record from Import' from the 'Administrative Structure Change' menu and then choose 'Continue' to 'bail out' of importing a record. The program will automatically resume processing the next import file structure change.

**2. Data Found in Prior Year – No Match in Current Year**

When data are found in the prior-year file, but a match is not found in the administrative entity import file, five types of structure changes are available: Change from an administrative entity to an outlet, merge two or more administrative entities, deleted a closed administrative entity, delete an incorrect record, or retain the prior-year record.

WinPLUS 2.5 - Match	Alabama	FY-2003
<b>DATA FOUND IN PRIOR YEAR - NO MATCH IN CURRENT YEAR</b>		
<p style="text-align: center;"><b>Administrative Structure Change</b></p> <p><input type="radio"/> Add New Administrative Entity</p> <p><input type="radio"/> Change from Administrative Entity to Outlet</p> <p><input type="radio"/> Merge Two or More Administrative Entities</p> <p><input type="radio"/> Delete Closed Administrative Entity</p> <p><input type="radio"/> Delete Incorrect Record</p> <p><input type="radio"/> Restore Previously Deleted Administrative Entity</p> <p><input type="radio"/> Delete Record from Import</p> <p><input type="radio"/> Retain Prior Year Record</p> <p style="text-align: center;"><input type="button" value="Continue"/>      <input type="button" value="Cancel Match"/></p>	<p>Prior Year Data</p> <p>LIB ID #: <input type="text" value="100-001"/></p> <p>FSCS ID #: <input type="text" value="AL0002"/></p> <p>NAME: <input type="text" value="ARLEY PUBLIC LIBRARY"/></p> <p>ADDRESS: <input type="text" value="P.O. BOX 146"/></p> <p>CITY: <input type="text" value="ARLEY"/></p> <p>ZIP: <input type="text" value="35541"/></p> <p>ZIP+4: <input type="text" value="0146"/></p> <p>PHONE: <input type="text" value="(205)-387-0129"/></p>	

➤ **Change from Administrative Entity to Outlet**

To change an administrative entity record to an outlet record, select 'Change from Administrative Entity to Outlet' from the 'Administrative Entity Structure Changes' menu. The administrative entity that changed to an outlet is tracked in the historical database under its original FSCS ID# and the new outlet's FSCS ID#.

WinPLUS 2.5 - Administrative Structure Changes Alabama FY-2003

Change Administrative Entity to an Outlet

Identification

01 LIBID: 501-001 02 Name: ADAMSVILLE LIBRARY

Street Address Mailing Address

03 Address: 4826 MAIN STREET 07 Address: PO BOX 309

04 City: ABBEVILLE 08 City: ADAMSVILLE

05 ZIP: 36310 06 ZIP: 09 ZIP: 10 ZIP+4: 0241

11 County: JEFFERSON

12 Phone: 205-221-2568 13 V

14 Interlib. Rel.: ME 17 FSCS PL: Y

15 Legal Basis: CI 18 Geo.: CI1

16 Admin. SO 19 Boundary Change:

WinPLUS

Change this Administrative Entity to an Outlet?

Yes No

You will receive the message 'Change this Administrative Entity to an Outlet?' If you select 'No', the structure change is canceled.

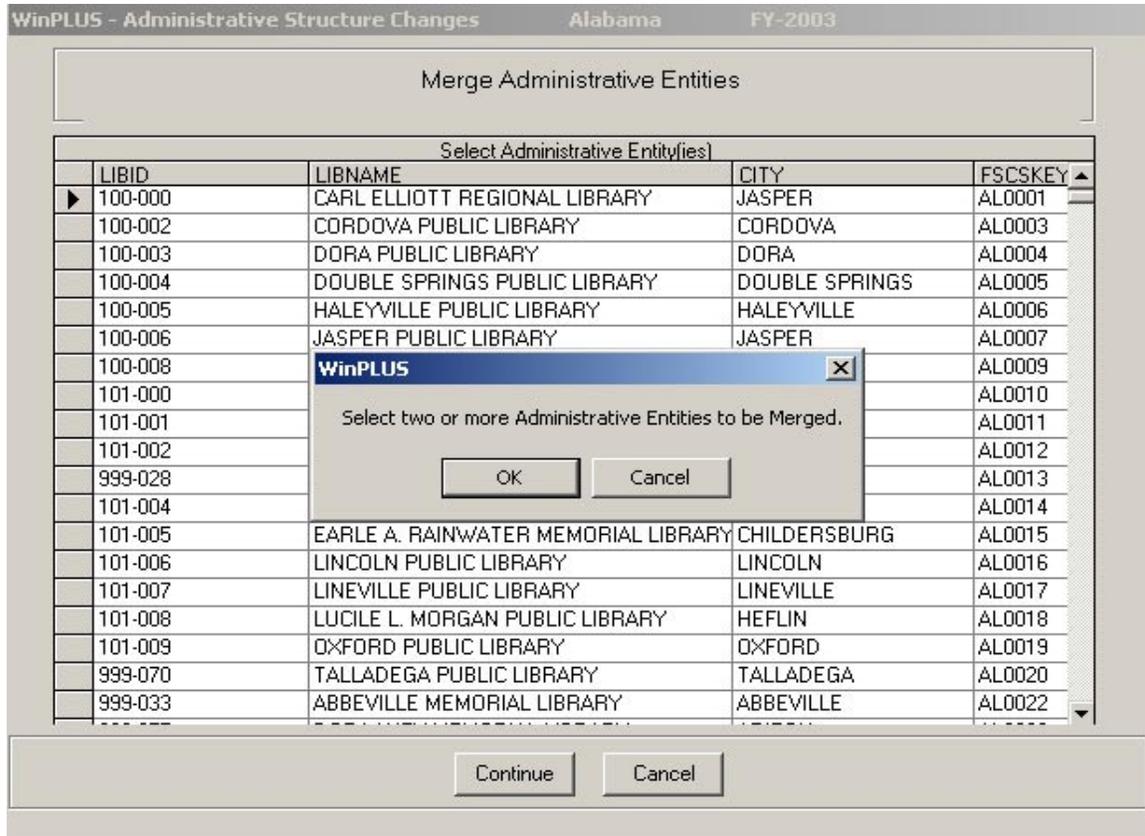
If you select 'Yes' and outlets exist for the administrative entity selected to change to an outlet, you are prompted with the message 'Outlets exist. You must first delete all outlets associated with this Entity'. The structure change is canceled. You must reconcile the outlets before the administrative entity can be changed to an outlet. This is because outlets must be attached to an administrative entity. To reconcile the outlets, return to the WinPLUS Main Menu and then select option 'Outlet Structure Changes' and follow instructions in section 5.7—Outlet Structure Changes. After all outlets have been reconciled, return to WinPLUS Main Menu option 'Administrative Entity Structure Changes'. Follow the instructions for 'Change from Administrative Entity to Outlet'.

If you select 'Yes' and all outlets are reconciled, you will be asked, 'Select an Administrative Entity to be the parent record for this Administrative Entity that you are changing to an Outlet'. Select the administrative entity that will become the parent record by clicking on the gray box to the left of the names. *The entire row must be highlighted.* Select 'Continue' to complete the structure change.

You must enter data for the new outlet for data elements #9-Outlet Type Code, #10-Metropolitan Status Code, #11-Square Footage (if the outlet type code is CE or BR), and #12-Number of Bookmobiles. Use WinPLUS Main Menu option 'View/Update Administrative Entity and Outlet Records' for data entry.

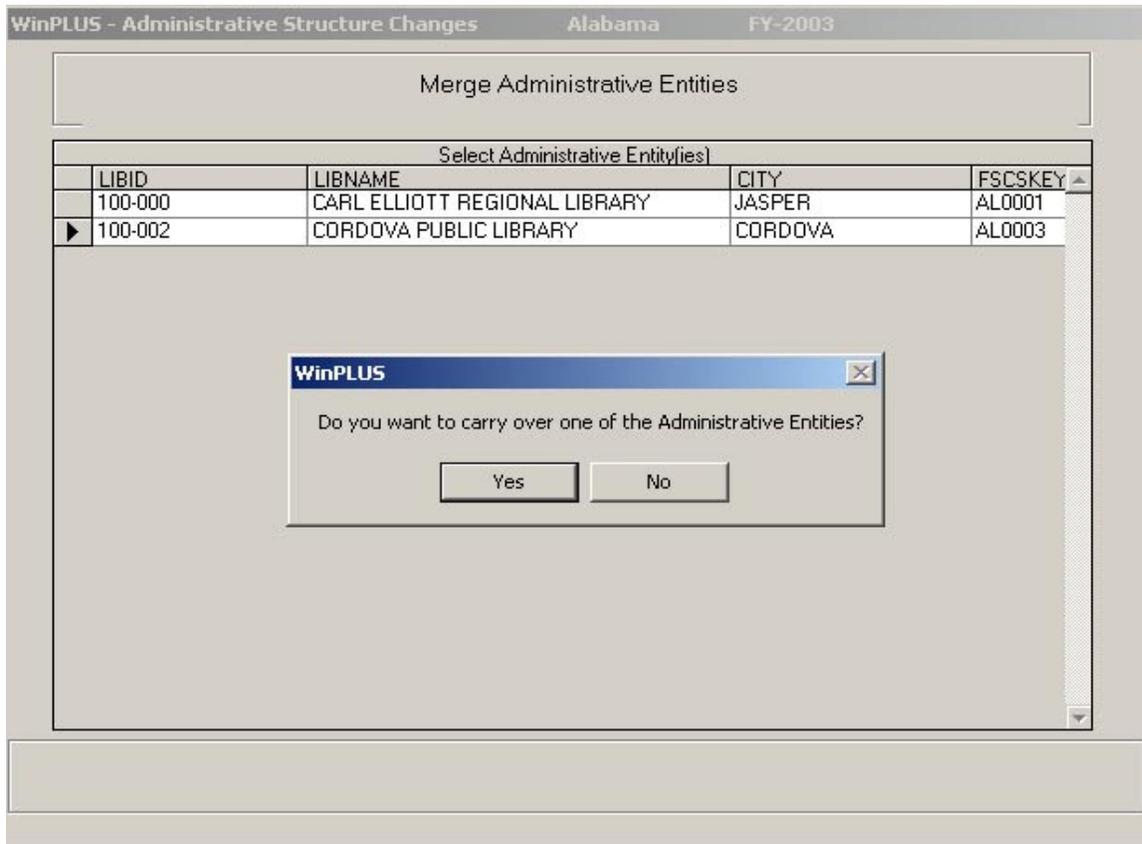
➤ **Merge Two or more Administrative Entities**

To merge administrative entity records, select 'Merge Two or More Administrative Entities' from the 'Administrative Entity Structure Changes' menu, and select 'OK' to continue. (Note: WinPLUS automatically assigns the new administrative entity a new FSCS ID#. The number assigned is the next highest FSCS ID# from the one previously assigned. All branches, bookmobiles and centrals are carried over to the new administrative entity record. The old administrative entities that merged are tracked in the historical database under their old and new FSCS ID #s.)



Next, select the administrative entities to be merged by clicking on the gray box to the left of the names. *The entire row must be highlighted.* Please be sure that the record with no match in the current year (that you are working on) is one of you selections.

You will then receive the message 'Do you want to carry over one of the Administrative Entities?' If you select 'Yes', you are prompted to 'Select Administrative Entity to carry over'. Select the administrative entity to carry over by clicking on the gray box to the left of the name. *The entire row must be highlighted.*



The name and address information for the entity you selected will carry over to the new entity. If you select 'No', these items are left blank for you to fill in the new information.

➤ **Delete Closed Administrative Entity**

To delete an administrative entity that has closed, choose 'Delete Closed Administrative Entity' from the 'Administrative Entity Structure Changes' menu and select 'Continue'. (Note: The closed administrative entity record is deleted from the administrative entity file, but is automatically tracked in the historical database under its original FSCS ID# and can later be restored).

The next screen asks 'Do you want to delete this Administrative Entity and all of its Outlets?'

Choose 'No' to cancel, or 'Yes' to delete the closed administrative entity.

**Note:** If an administrative entity did not report any data this year but did not close or merge with another entity, please retain it on the file and enter -1 for the data elements.

➤ **Delete Incorrect Record**

To delete an incorrect administrative entity, choose 'Delete Incorrect Record' from the 'Administrative Entity Structure Changes' and choose 'Continue'. (Note: The deleted administrative entity is tracked in the historical database under its original FSCS ID# and can later be restored).

Choose 'Yes' to delete, 'No' to cancel. If you choose 'Yes', you will receive the message 'Delete completed'.

**Note: If an administrative entity did not report any data this year but did not close or merge with another entity, please retain it on the file and enter -1 for the data elements.**

➤ **Retain Prior-Year Record**

This option allows the user to retain the prior-year data when a prior-year record is not matched on the current-year import file. Select 'Retain Prior Year Record' from the 'Administrative Structure Change' menu and then choose 'Continue' to retain the prior-year record. The program will automatically resume processing the next import file structure change.

## OUTLET STRUCTURE CHANGES DURING MATCHING ROUTINE

A structure changes menu with several options is automatically displayed if one or more records from the outlet import file is not matched to the prior-year file. These options will vary depending on the type of match found. The options are described below.

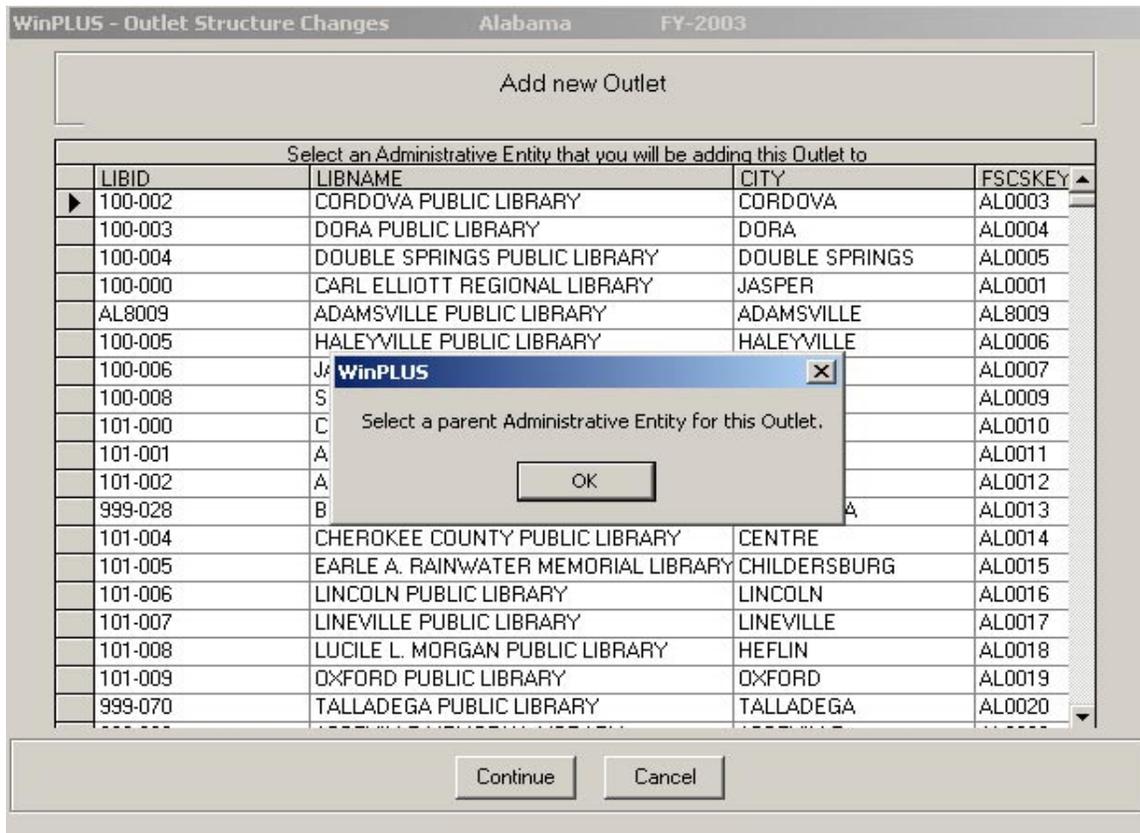
### 1. Data Found in Current Year – No Match in Prior Year

When data are found in the outlet import file, but no match is found in the prior-year file, three types of structure changes are available: add a new outlet, restore a previously deleted outlet, or delete the record from import.

WinPLUS - Match	Alabama	FY-2003
<b>DATA FOUND IN CURRENT YEAR - NO MATCH IN PRIOR YEAR</b>		
<p style="text-align: center;">Outlet Structure Change</p> <p><input type="radio"/> Add New Outlet</p> <p><input type="radio"/> Move Outlet to its own (Newly Created) Administrative Entity</p> <p><input type="radio"/> Merge Two or More Outlets</p> <p><input type="radio"/> Delete Closed Outlet</p> <p><input type="radio"/> Delete Incorrect Record</p> <p><input checked="" type="radio"/> Restore Previously Deleted Outlet</p> <p><input type="radio"/> Delete Record from Import</p> <p><input type="radio"/> Retain Prior Year Record</p> <p style="text-align: center;"> <input type="button" value="Continue"/> <input type="button" value="Cancel Match"/> </p>	<p>Current Year Data</p> <p>LIB ID #: <input type="text" value="999-080"/></p> <p>Name: <input type="text" value="WEST BLOCTON PUBLIC LIBRARY"/></p> <p>Address: <input type="text" value="PO BOX 292"/></p> <p>City: <input type="text" value="WEST BLOCTON"/></p> <p>ZIP: <input type="text" value="35184"/></p> <p>ZIP+4: <input type="text" value="5184"/></p> <p>Phone: <input type="text" value="(205)-938-3570"/></p>	

➤ **Add New Outlet**

To add a completely new outlet record, select 'Add new outlet' from the 'Outlet Structure Changes Menu'. A window prompts the user to 'Select a parent Administrative Entity for this Outlet'.



Select the administrative entity that will be the parent to the outlet by clicking on the gray box to the left of the names. *The entire row must be highlighted.* Select 'Continue' to proceed. Next, the 'Add New Outlet' data entry screen window is displayed with the pop-up message 'Add Complete'.

WinPLUS assigns the new outlet an FSCS ID#. The number assigned is the same as the administrative entity to which the outlet was added, with the addition of a three-digit suffix to uniquely identify the new outlet.

➤ **Restore Previously Deleted Outlet**

To restore a previously deleted outlet, select 'Restore Previous Deletion' from the 'Outlet Structure Changes Menu'. (Note: The deleted record is restored from the historical database and becomes a current record in the outlet database. The outlet's old FSCS ID# is retained.) A list of outlets that may be restored is displayed.

WinPLUS - Outlet Structure Changes      Alabama      FY-2003

Restore Outlet record

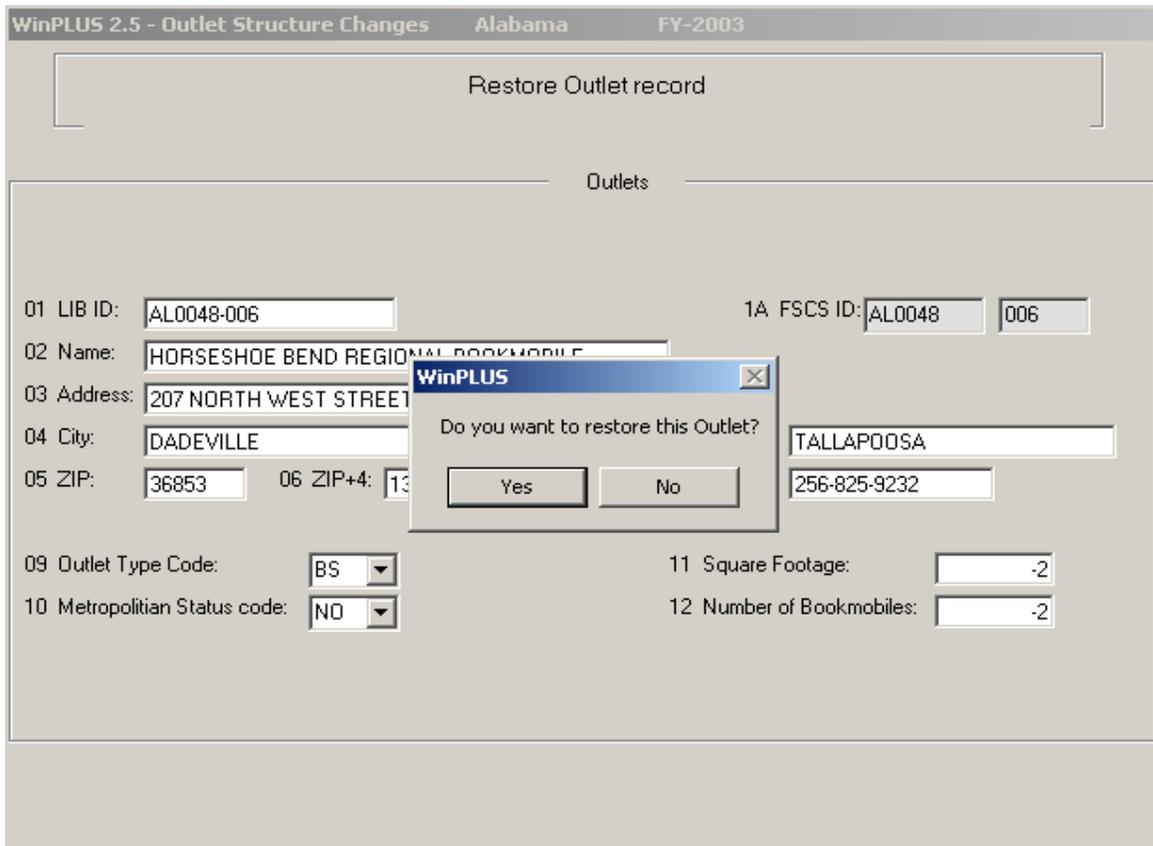
Select an Outlet to Restore

	FSCS	LIBID	LIBNAME	CITY
	AL0048	104-000	HORSESHOE BEND REGIONAL	DADEVILLE
▶	AL0048	AL0048-006	HORSESHOE BEND REGIONAL	DADEVILLE
	AL0048	104000	HORSESHOE BEND REGIONAL	DADEVILLE
	AL0048	104-000	HORSESHOE BEND REGIONAL	DADEVILLE
	AL0048	AL0048-007	HORSESHOE BEND REGIONAL	DADEVILLE
	AL0158	999-002	HOUSTON-LOVE MEMORIAL LI	DOTHAN
	AL0158	AL0158-002	HOUSTON-LOVE MEMORIAL LI	DOTHAN
	AL0158	999002	HOUSTON-LOVE MEMORIAL LI	DOTHAN
	AL0158	999002	HOUSTON-LOVE MEMORIAL LI	DOTHAN
	AL0158	999-002	HOUSTON-LOVE MEMORIAL LI	DOTHAN
	AL0099	-1	HUEYTOWN PUBLIC LIBRARY	HUEYTOWN
	AL0166	999-010	HUNTSVILLE-MADISON CO. PU	HUNTSVILLE
	AL0166	999-010	HUNTSVILLE-MADISON CO. PU	HUNTSVILLE
	AL0166	AL0166-024	HUNTSVILLE-MADISON CO. PU	HUNTSVILLE
	AL0208	-1	IDER PUBLIC LIBRARY	IDER
	AL0170	-1	INA PULLEN SMALLWOOD MEN	CHICKASAW
	AL0100	-1	IRONDALE PUBLIC LIBRARY	IRONDALE
	AL0171	-1	JACKSON PUBLIC LIBRARY	JACKSON
	AL0155	-1	JACKSONVILLE PUBLIC LIBR	JACKSONVILLE

Restore      Cancel

Select the outlet that will be restored by clicking on the gray box to the left of the names. *The entire row must be highlighted.* Please select the outlet record that you have been working with in the match. Select 'Restore' to proceed with the structure change.

Next, a window showing the outlet is displayed. The user will be asked 'Do you want to restore this Outlet?'



Select 'Yes' to continue with the restore. Select 'No' to cancel the restore and return to the 'Outlet Structure Changes Menu'. When the user selects 'Yes', the outlet record is restored from the historical database and again becomes a part of the outlet database under its original FSCS ID#. The 'Outlet Structure Changes Menu' is then displayed.

➤ **Delete Record from Import**

This option allows the user to 'bail out' of importing a record that does not match the user's current-year template file. When 'Delete Record from Import' is selected, the record is not imported into the file, but the original record is still in the import file. Select 'Delete Record from Import' from the 'Outlet Structure Change Menu' and then choose 'Continue' to 'bail out' of importing a record. The program will automatically resume processing the next import file structure change.

**2. Data Found in Prior Year – No Match in Current Year**

When data are found in the prior-year file, but a match is not found in the outlet import file, five types of structure changes are available: move outlet to its own (newly created) administrative entity, merge two or more outlets, delete a closed outlet, delete an incorrect record, or retain the prior-year record.

WinPLUS 2.5 - Match	Alabama	FY-2003
<b>DATA FOUND IN PRIOR YEAR - NO MATCH IN CURRENT YEAR</b>		
<p style="text-align: center;"><b>Outlet Structure Change</b></p> <p><input type="radio"/> Add New Outlet</p> <p><input type="radio"/> Move Outlet to its own (Newly Created) Administrative Entity</p> <p><input type="radio"/> Merge Two or more Outlets</p> <p><input type="radio"/> Delete Closed Outlet</p> <p><input type="radio"/> Delete Incorrect Record</p> <p><input type="radio"/> Restore Previously Deleted Outlet</p> <p><input type="radio"/> Delete Record from Import</p> <p><input type="radio"/> Retain Prior Year Record</p> <p style="text-align: center;"> <input type="button" value="Continue"/> <input type="button" value="Cancel Match"/> </p>	<p>Prior Year Data</p> <p>LIB ID #: <input type="text" value="AL0108-022"/></p> <p>FSCS ID #: <input type="text" value="AL0108"/></p> <p>NAME: <input type="text" value="WYLAM BRANCH"/></p> <p>ADDRESS: <input type="text" value="4300 7TH AVENUE WYLAM"/></p> <p>CITY: <input type="text" value="BIRMINGHAM"/></p> <p>ZIP: <input type="text" value="35224"/></p> <p>ZIP+4: <input type="text" value="2624"/></p> <p>PHONE: <input type="text" value="(205)-785-0349"/></p>	

➤ **Move Outlet to its Own (Newly Created) Administrative Entity**

To move an outlet record to a newly created administrative entity, select 'Move to its Own (Newly Created) Administrative Entity' from the 'Outlet Structure Changes' menu. The outlet that changed to an administrative entity is tracked in the historical database under its old FSCS ID# and the new FSCS ID#.

WinPLUS 2.5 - Outlet Structure Changes   Alabama   FY-2003

Change Outlet to an Administrative Entity

Outlets

01 LIB ID: AL0108-022      1A FSCS ID: AL0108   022

02 Name: WYLAM BRANCH

03 Address: 4300 7TH A

04 City: BIRMINGHAM

05 ZIP: 35224

09 Outlet Type Code: BR

10 Metropolitan Status code: CC

11 Square Footage: -1

12 Number of Bookmobiles: 0

WinPLUS

Change This Outlet to an Administrative Entity with a new FSCS ID#?

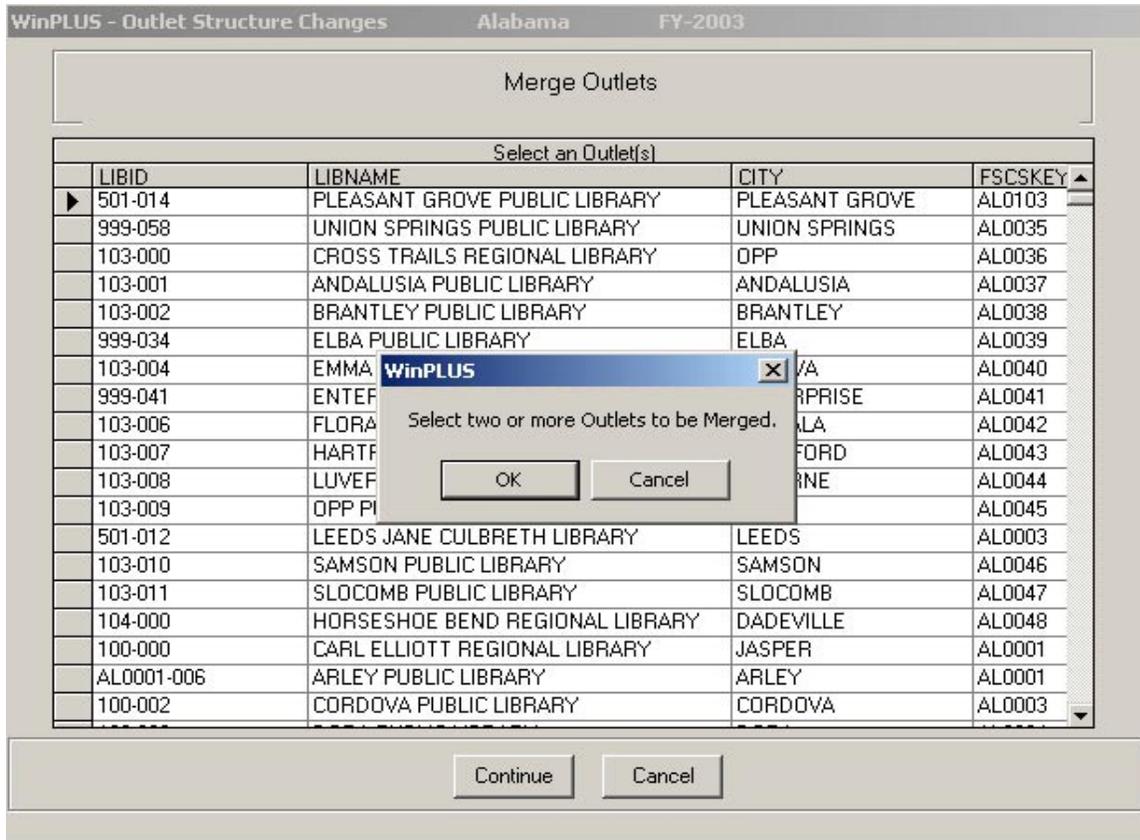
Yes   No

If you select 'Yes', the 'Move Outlet to Newly Created Administrative Entity' data entry screen is displayed. Please enter data for the newly created administrative entity. Select 'Save Now' or 'Exit' to save the new administrative entity record, or select 'Cancel Outlet to Entity' to cancel the structure change.

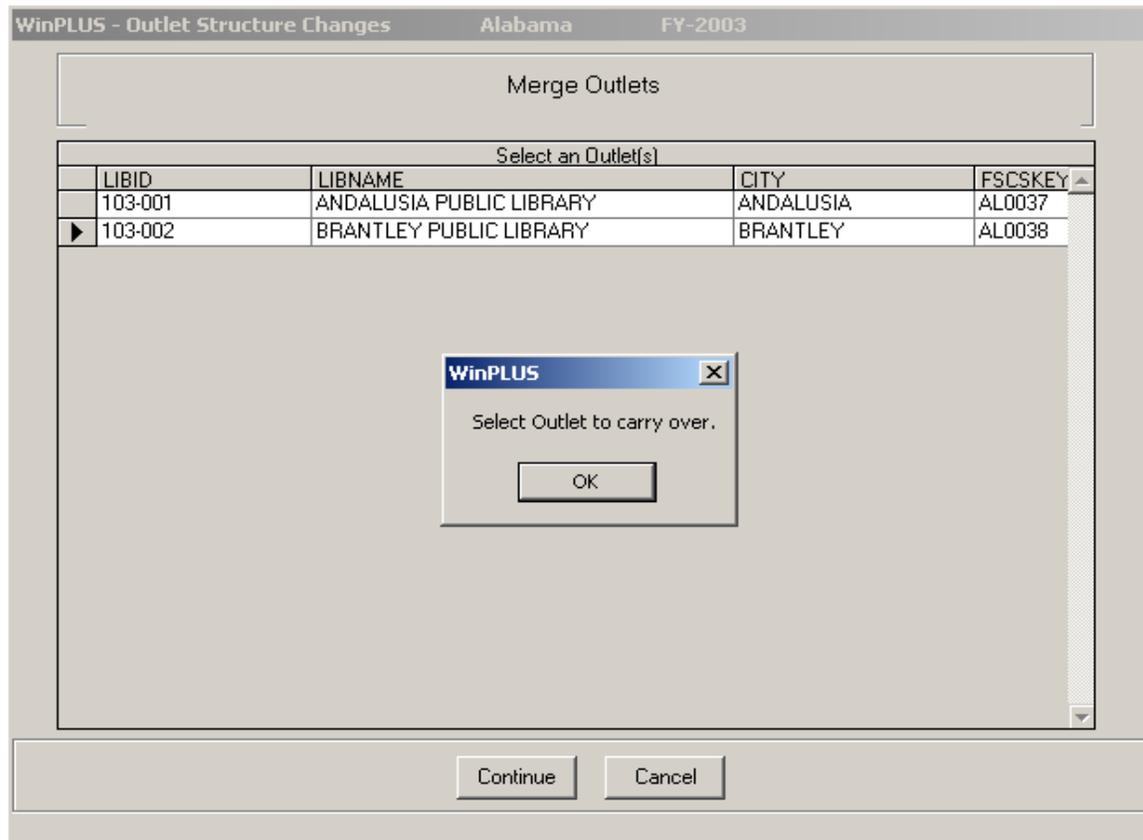
WinPLUS - Outlet Structure Changes				Alabama		FY-2003	
Move Outlet to Newly Created Administrative Entity							
1A FSCS: AL8011							
Identification							
01 LIBID:	AL8011	02 Name:	ALABAMA CITY PUBLIC LIBRARY				
Street Address				Mailing Address			
03 Address:	2700 WEST MEIGHAN			07 Address:	-2		
04 City:	GADSDEN			08 City:	-2		
05 ZIP:	35902	06 ZIP+4:	1716	09 ZIP:	-2	10 ZIP+4:	-1
11 County:	ETOWAH						
12 Phone:	256-549-4688		13 Web Address:	http:// -2			
14 Interlib. Rel.:	-2	17 FSCS PL:	?				
15 Legal Basis:	-2	18 Geo.:	-2				
16 Admin.:	-2	19 Boundary Change:	?				
Cancel Outlet Move		Save Now		Cancel Changes		Exit	

➤ **Merge Two or more Outlets**

To merge two or more outlets, select 'Merge Two or More Outlets' from the 'Outlet Structure Changes Menu' and select 'Continue'. (Note: WinPLUS automatically assigns the new outlet a new FSCS ID#. The old outlets that merged are tracked in the historical database under their old and new FSCS ID#s.) Next, you will be prompted to 'Select two or more Outlets to be Merged' from a list of all outlets.



Select the outlet records to be merged by clicking on the gray box to the left of the names. *The entire row must be highlighted.* Please be sure that one of your selections is the outlet record that has no match in the current year. If you select 'Continue' to proceed with the merge, a message will ask 'Do you want to carryover one of the outlets?'



If you choose 'Yes', you will be prompted to 'Select Outlet to carry over'. (Note: Information from this outlet will be inserted in the newly merged outlet.)

After you select the outlet to carry over, a list of all administrative entities is displayed with the message 'Select a parent Administrative Entity for this Outlet.' Select the administrative entity for the new outlet by clicking on the gray box to the left of the names. *The entire row must be highlighted.*

The 'Merge Outlet' data entry screen will be displayed for the newly merged outlet. Please enter any missing data for the newly merged outlet, and then select 'Save Now' or 'Exit' to save the new outlet record, or select 'Cancel Merge' to cancel the structure change and return to the 'Outlet Structure Changes Menu'.

## ➤ Delete Closed Outlet

To delete a closed outlet, select 'Delete Closed Outlet' from the 'Outlet Structure Changes Menu' and select 'Continue'. Select 'Yes' to delete the closed outlet, or 'No' to return to the 'Outlet Structure Changes Menu'. If you choose 'Yes', the closed outlet record is deleted, tracked in the historical database under its original FSCS ID#, and can later be restored.)

WinPLUS 2.5 - Outlet Structure Changes Alabama FY-2003

Close Outlet

Outlets

01 LIB ID: 999-033 1A FSCS ID: AL0022 002

02 Name: ABBEVILLE MEMORIAL LIBRARY

03 Address: 301 KIRKLAND STREET

04 City: ABBEVILLE

05 ZIP: 36310 06 ZIP+4: 24

09 Outlet Type Code: CE 11 Square Footage: -1

10 Metropolitan Status code: NO 12 Number of Bookmobiles: 0

Do you want to delete this Outlet?

Yes No

HENRY

334-585-2818

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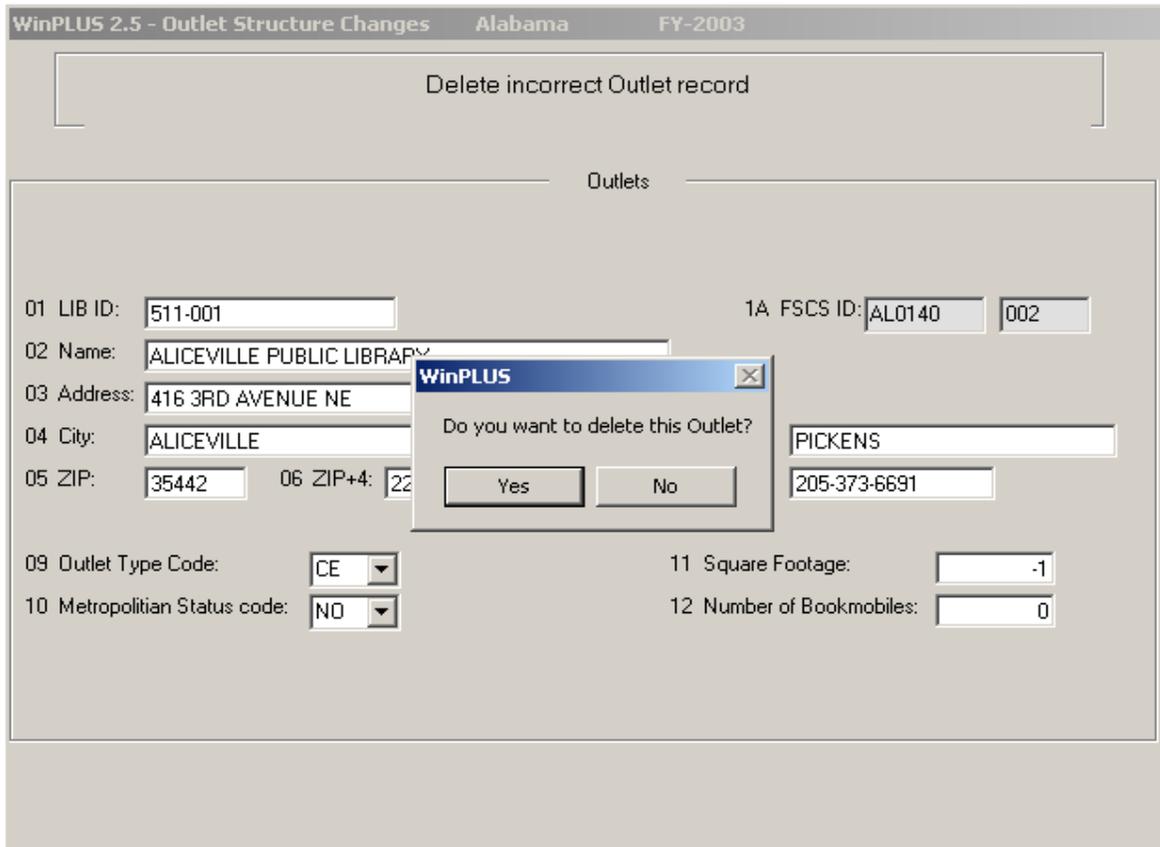
Note: If an outlet closes temporarily, the user should:

1. Delete the closed outlet from the file using the 'Delete Closed Outlet' option from the 'Outlet Structure Change Menu'.
  2. When the outlet reopens, restore it using the 'Restore Previous Deletion' option from the 'Outlet Structure Change Menu'.
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**Note: If an outlet did not report any data this year but did not close or merge with another outlet, please retain it on the file and enter -1 for the data elements.**

➤ **Delete Incorrect Record**

To delete an incorrect outlet record, select 'Delete Incorrect Record' from the 'Outlet Structure Changes Menu'. Next, a 'Delete incorrect Outlet record' data entry screen is displayed with the message 'Do you want to delete this Outlet?'



Select 'Yes' to confirm the deletion, or select 'No' to cancel the structure change.

**Note: If an outlet did not report any data this year but did not close or merge with another outlet, please retain it on the file and enter -1 for the data elements.**

➤ **Retain Prior Year Record**

This option allows the user to keep the prior-year data for a record that is not matched on the current-year import file. Select 'Retain Prior Year Record' from the 'Outlet Structure Change Menu' and then choose 'Continue' to retain the prior-year record.

