



# BOOK RETRIEVAL MANUAL (version 2)

## A. INTRODUCTION

**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, learners and staff. 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 be wanting 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**

DEMOI/S  
2016

basic education  
Department:  
Basic Education  
REPUBLIC OF SOUTH AFRICA

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

1. General School Information	11. Financial Assistant
2. Human Resource Information	12. Curriculum Related Data
3. Learner and Parent Information	13. Timetabling Assistant
4. Learner Listing	14. Physical Resources
5. Governance Information	15. Library Module
6. Standard Letters and Forms	16. Security and Database Functions
7. Export Data	17. Lurits Approval Module
8. Annual National Assessment	
User Preferences	



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

DEMOI/S  
2016

basic education  
Department:  
Basic Education  
REPUBLIC OF SOUTH AFRICA

**SA-SAMS : School Administration and Management System**  
**14. PHYSICAL RESOURCES MENU**

<b>14.1. Learner Support Materials</b>	<b>14.11. Export LSM</b>
	<b>14.12. Export Fixed Assets</b>
<b>14.3. Fixed Assets</b>	
<b>14.5. Infrastructure Register</b>	
<b>14.7. Stock Reconciliation to GL</b>	
<b>14.8. Stock Taking Certificate</b>	

<< MAIN MENU

### Maintain Subject Areas(14.1.1)

3. Click on **LSM Subject Areas: Maintain**.





4. Click on **school subjects** to view the school's official subjects. **NB: Make sure that your school subject appears under School areas, if not, do step 5.**
5. Click on the **Add New** button. You can also **View/Edit** or **Delete** the subject.

6. Type in the **Area** field, to add a School Area. **NB: There are no linked Subject Grade to this School Area.**

7. Click on the **Add** button to add the School Area.

8. Click on the **Add Subject** button to link a School Subject to the School Area.



Delete Subject Add Subject Update Done

9. Add all the **Grades and Subject Grade** to the School Area. **NB: The Subject Grade are now linked to this School Area.**

Add Subject  
Grade: Subject: Save Done

LSM Subject Area: View/Edit (14.1.1)

Group: School Areas  
Area: Mathematics

Linked Subjects: 8  School Subjects

Subject	Grade	Code
Mathematics (Gr R)	R	19331462
Mathematics (Gr 01)	01	19331312
Mathematics (Gr 02)	02	19331322
Mathematics (Gr 03)	03	19331332
Mathematics (Gr 04)	04	19331342
Mathematics (Gr 05)	05	19331352
Mathematics (Gr 06)	06	19331362
Mathematics (Gr 07)	07	19331432

10. Please do **step 5** to **step 9** for all the subjects offered by your school. Each School Area must be linked to Subject grades.

### Maintain LSM Items (14.1.2)

**NB. You need to search for the ISBN before adding an Item to avoid capturing an existing item.**

11. By searching for the LSM Item there are different options, namely:



11.1 Select "All" on all options, click on **Search Fields**.

LSM Items: Maintain (14.1.2)

**School Subjects** Group: All Area: All Grade & Subject: All All Type:  Books  Others Category: All Language of Item: All Search Fields:  **GO**

Click on an Item to Select the Item. Items: 0 + - Add New

11.2 Search the **ISBN** of the Item with **School Subjects** on the upper left **ticked**.

LSM Items: Maintain (14.1.2)

**School Subjects** Group: All Area: All Grade & Subject: All All Type:  Books  Others Category: All Language of Item: All Incl. Archived Items:  Search Fields:

**Search Fields**  
Partial/Full Title of Item: Clear  
ISBN number of Item: 9780636141089  Full  Partial  
Publishers: All  
Authors: All **GO**

Click on an Item to Select the Item. Items: 0 + - Add New View / Edit

... **Books**

11.2.1 Click on the **GO** button.

11.2.2 If the item does not show under Books, Search the **same ISBN** of the Item with **School Subjects** on the upper left **unticked**.



LSM Items: Maintain (14.1.2)

School Subjects Group: All Area: All Grade & Subject: All All Type: Books Others Category: All Language of Item: All Incl. Archived Items: Search Fields:

**Search Fields**  
Partial/Full Title of Item: Clear  
ISBN number of Item: 9780636141087 Full Partial  
Publishers: All  
Authors: All

GO

Click on an Item to Select the Item. Items: 1 + -

Books  
Text Book (1)  
Platinum Creative Arts Grade 7 Learner's Book : Pub: Maskew Miller Longman (Pty) Ltd : ISBN: 9780636141087

Add New  
View / Edit

11.2.2.1 Click on the **GO** button.

11.2.2.2 If the item exists, click on the **View/Edit** button to make sure that the item:

11.2.2.2.1 Is linked to the correct **subject** and **area**.

11.2.2.2.2 **Title, Publisher, Author, Category** and **Language of Item** are correct

LSM Item: View/Edit (14.1.2) **Official Record.**

Group: Other Subjects  
Area: Arts & Culture  
Type: Book

ISBN No.: 9780636141087  
Title of Book: Platinum Creative Arts Grade 7 Learner's Book  
Publishers: Maskew Miller Longman (Pty) Ltd Year Published:  
Authors: Unknown  
Category: Text Book

Language of Item: English

Linked Subjects: 1 School Subjects **Records in Green are School Subjects.**

Subject	Grade	Code
Creative Arts (Gr 07)	07	11351152



11.2.2.2.3 Click on the **Done** button.

11.2.2.2.4 Immediately go to the **14.1.4 (Maintain Stock Quantities)** button to add stock quantities. **(Page 9)**

11.2.3 If the item does not show under Books when **School Subjects** on the upper left is **ticked** and **unticked**. It means that the item does not exist on the system.

### Add the Item Information (14.1.2)

12. Click on the **Add New** button to add the Item Information.

Click on an Item to Select the Item. Items: 0 + -

... Books

Add New

View / Edit

12.1 The following must be captured to add information.



LSM Item: Add New (14.1.2)

Group: **School Areas**

Area: NS & Technology

Type:  Book  Other

ISBN No.: 9780636141089

Title of Book: EXAMPLE

Publishers: Bronte Year Published:

Authors: A. MacDonald, A. Stimie

Category: Text Book

Language of Item: English

Linked Subjects: 0  School Subjects

Subject	Grade	Code
---------	-------	------

Delete Subject Add Subject **Add** Done

12.2 Click on the **Add** button to save information.

12.3 Click on the **Add Subject** button to link a subject to the Item. Select **Grade and Subject**. Click on the **Save** button.

**Add Subject**

Grade: Grade 04 Subject: Natural Sciences and Technology (Gr 04) **Save** Done

And now we have a linked subject.

Linked Subjects: 1  School Subjects

Subject	Grade	Code
Natural Sciences and Technology (Gr 04)	04	19351372

12.4 Click on the **Done** button.



### Add Stock to the Item (14.1.4)

13. Select "All" on all options, click on **Search Fields**.

LSM Items: Maintain Stock Quantities (14.1.4)  Filters  Max View

**School Subjects** Group: All ▼

Area: All ▼

Grade & Subject: All ▼ All ▼

Type:  Books  Others Category: All ▼

Language of Item: All ▼ Search Fields:

14. Search the **ISBN** of the Item. Click on the **GO** button.

15. Select the item and click on the **Stock Quantities** button.

Click on an Item to Select the Item. Items: 1 + -

Books

- Text Book (1)
  - Platinum Creative Arts Grade 7 Learner's Book : Pub: Maskew Miller Longman (Pty) Ltd : ISBN: 978063614106

View Item

Stock Quantities

Write Off Stock

15.1 The following screen will display: **NB. There is no stock that is captured for this book.**

LSM Items: Maintain Stock Quantities (14.1.4)  Filters  Max View

Item: Platinum Creative Arts Grade 7 Learner's Book : Pub: Maskew Miller Longman (Pty) Ltd : ISBN:

Total Stock: 0 Loans: 0 Write Off: 0 Available: 0

Stock Details: Lines: 0

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

**\*Check the total stock. If the stock is not correct, you can either delete the stock or top up the stock on the system.**

15.2 Click on the **Add Stock Data** button. Capture the required information and click on the **Add** button. **NB.**

*The cost is optional.*





**Add Stock Quantity**

Stock Register: 750/002 Text Books and LSM Date Added: 2024/09/06 2024/09/06 Add

Qty Added: 200 Cost (Per Item): 0 Total: 0.00 Done

15.3 The stock is captured for the book.

LSM Items: Maintain Stock (14.1.4)

Item: **Platinum Creative Arts Grade 7 Learner's Book : Pub: Maskew Miller Longman (Pty) Ltd : ISBN:**

Total Stock: 200 Loans: 0 Write Off: 0 Available: 200

Stock Details: Lines: 1

Line	Date Added	Register	Qty Added	Item Cost	Qty WriteOff	WriteOff Cost	Total Cost	Total Item Value
1	2024/09/06	750/002	200	0.00	0	0.00	0.00	0.00

### Issue Item to Learner/Educator/Staff (14.1.6)

16. Select **Type**.

16.1 If a learner----→ Select **Grade, Class and Learner** name.

16.2 If an Educator--→ Select **Educator** name.

16.3 If a Staff member-→ Select **Staff** name.

LSM Items: Issue / Return Items (by Persons) (14.1.6)

**Person** Max View

Type:  Learner  Educator  Staff

Educator: ATORO, Liepollo Anastacia

**Mode**

Select:  Issue  Return  View Full Loan History  Print Issue Form

**Grade/Subject**

Grade: Grade R Subject: Mathematics (Gr R)

17. Example: Select an **Educator** name. Click on the **Issue** option.

18. Select **Grade** and **Subject**.

19. Click in the box of **Item** to issue. Check for the **availability** of books.

**Available Item(s) to Issue** Selected: 1 Count: 1

Click in the check box of Item(s) to Issue. Only Items with Available Qty >0 are shown.

Item	Available
<input checked="" type="checkbox"/> Book: Oxford Successful Mathematics Grade 4 Learner's Book : Pub: Oxford University Press : ISBN: 9780199042852	140

20. Capture **Issue Item** Information. Click on the **issue** button to save.



**Issue Item:**

Loan Venue:

Quantity Issued:

Date Issued:   Expected Return Date:   Educator's Term 4 ends 2024/12/11

Average Condition of Items Issued:

### Return Item by Learner/Educator/Staff (14.1.6)

21. Select **Type**.

21.1 If a learner----→ Select **Grade, Class and Learner** name.

21.2 If an Educator--→ Select **Educator** name.

21.3 If a Staff member-→ Select **Staff** name.

LSM Items: Issue / Return Items (by Persons) (14.1.6)

**Person**  Max View

Type:  Learner  Educator  Staff

Educator:

**Mode**

Select:  Issue  Return  View Full Loan History  Print Issue Form

**Outstanding Loans** Count: 1

* Date Loaned	* Item	Outstanding
<input type="checkbox"/> 2016/01/13	Book: Oxford Successful Mathematics Grade 4 Learner's Book	140

22. Click on the **Return** option. Check for the **number of outstanding** books.

23. Click in the box of **Item** to return. Capture the return of books information.

**Click in the check box of Item(s) to return stock.** 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.

Date of Return/Write Off:

Number of items being returned:   Items have been counted and checked for RETURN



### Issue Item by Grade/Subject (14.1.7)

24. Select **Grade** and **Subject**.

LSM Items: Issue (by Grade / Subject) (14.1.7)

Select Grade/Subject

Grade:  Subject:

25. Click in the box of **Item** to issue. Check for the **availability** of books.

Available Item(s) to Issue Count:

Click in the check box of Item(s) to Issue. Only Items with Available Qty >0 are shown.

Item	Available
<input checked="" type="checkbox"/> Book: Oxford Successful Technology Grade 7 Learner's Book : Pub: Oxford University Press : ISBN: 9780195938771	116

26. Capture **Issue Item(s)** Information. Click on the **issue** button to save.

### Issue Item by Item (14.1.8)

27. Select **"All"** on all options, click on **Search Fields**.

LSM Items: Issue / Return (by Item) (14.1.8)

Filters  Max View

School Subjects Group:  Area:

Grade & Subject:

Type:  Books  Others Category:

Language of Item:

Search Fields:

28. Search the **ISBN** of the Item. Click on the **GO** button.

29. Select the item and click on the **Issue/Return** button.

Click on an Item to Select the Item. Items:  + -

Books

- Text Book (1)
  - Platinum Creative Arts Grade 7 Learner's Book : Pub: Maskew Miller Longman (Pty) Ltd : ISBN: 9780636141087

View Item

Issue / Return



30. Click on **Issue**.

LSM Items: Issue / Return (by Item) (14.1.8)

**Item:** Platinum Creative Arts Grade 7 Learner's Book : Pub: Maskew Miller Longman (Pty) Ltd : ISBN: 9780636141087  
Total Stock: 200   Loans: 0   Write Off: 0   Available: 200

**Mode:**  Issue    Return    View Full Loan History

**Full Loan History for this Item:** Count: 0

* Date Loaned	* Loaned To	Quantity	Returned	Outstanding
---------------	-------------	----------	----------	-------------

31. Capture **Issue Item(s)** Information. Click on the **issue** button to save.

### Return Item by Item (14.1.8)

32. Select "**All**" on all options, click on **Search Fields**.

LSM Items: Issue / Return (by Item) (14.1.8)  Filters  Max View

**School Subjects**   Group: All   Area: All

Grade & Subject: All   All

Type:  Books    Others   Category: All

Language of Item: All

Search Fields:

33. Search the **ISBN** of the Item. Click on the **GO** button.

34. Select the item and click on the **Issue/Return** button.

Click on an Item to Select the Item. Items: 1   +   -

**Books**

- Text Book (1)
  - Platinum Creative Arts Grade 7 Learner's Book : Pub: Maskew Miller Longman (Pty) Ltd : ISBN: 9780636141087



35. Click on **Return**.

LSM Items: Issue / Return (by Item) (14.1.8)

Item: **Platinum Creative Arts Grade 7 Learner's Book : Pub: Maskew Miller Longman (Pty) Ltd : ISBN: 9780636141087**

Total Stock: **200** Loans: **200** Write Off: **0** Available: **0**

Mode:  Issue  **Return**  View Full Loan History

Outstanding Loans for this Item: Count: **1**

* Date Loaned	* Loaned To	Quantity	Returned	Outstanding
<input type="checkbox"/> 2024/09/12	Educator: MAKATSA, Elizabeth	200	0	200

36. Capture **Issue Item(s)** Information. Click on the **issue** button to save.

### **DELETE AN ITEM (14.1.2)**

37. Select "**All**" on all options, click on **Search Fields**.

LSM Items: Maintain (14.1.2)

**School Subjects** Group: All Area: All Grade & Subject: All All Type:  Books  Others Category: All Language of Item: All

Filters  Max View

Search Fields:  **GO**

Click on an Item to Select the Item. Items: 0 + -

Add New

38. Search the **ISBN** of the Item with either **School Subjects** on the upper left **ticked or unticked** (depending on where the item is falling under).



LSM Items: Maintain (14.1.2)

**School Subjects** Group: All  
Area: All  
Grade & Subject: All All  
Type:  Books  Others Category: All  
Language of Item: All Incl. Archived Items:  Search Fields:

**Search Fields**  
Partial/Full Title of Item:  Clear  
ISBN number of Item: 9780636128460  Full  Partial  
Publishers: All  
Authors: All

GO

Click on an Item to Select the Item. Items: 1 + -

Text Book (1)  
Platinum English Home Language Grade 1 Learner's Book : Pub: Maskew Miller Longman (Pty) Ltd : ISBN: 9780636128460

Add New  
View / Edit  
Delete

39. Click on the **GO** button.

40. Click on the **item** and click on the **Delete** (provided that there is **0 stock** for them and that the item is not **issued** to anyone) button.

41. Click on the **Yes** button to delete the item.



### DELETE STOCK QUANTITIES (14.1.4)

42. Select “All” on all options, click on **Search Fields**.

LSM Items: Maintain Stock Quantities (14.1.4)

School Subjects Group: All Area: All Grade & Subject: All All Type:  Books  Others Category: All Language of Item: All Search Fields:

**Search Fields**  
Partial/Full Title of Item:  Clear  
ISBN number of Item: 9781431010288  Full  Partial  
Publishers: All  
Authors: All

GO

Click on an Item to Select the Item. Items: 1 + -

Books  
Text Book (1)  
Solutions for all Natural Sciences and Technology Grade 4 Learner s Book : Pub: Macmillan South Africa (Pty)

View Item  
Stock Quantities  
Write Off Stock

43. Search the **ISBN** of the Item. Click on the **GO** button.

44. Select the item and click on the **Stock Quantities** button.

44.1 Click on the line of the stock quantity item.

44.2 Click on the **Delete Stock Data** button.

LSM Items: Maintain Stock (14.1.4)

Item: Solutions for all Natural Sciences and Technology Grade 4 Learner s Book : Pub: Macmillan South Africa  
Total Stock: 10 Loans: 0 Write Off: 0 Available: 10

Stock Details: Lines: 1

Line	Date Added	Register	Qty Added	Item Cost	Qty WriteOff	WriteOff Cost	Total Cost	Total Item Value
1	2024/09/06	750/002	10	0.00	0	0.00	0.00	0.00

Add Stock Data Delete Stock Data Done

**NB.** The Total stock should be 0 after deleting the line of the stock. If there are many stock lines, you need to delete each line at a time to get 0 stock.



### WRITE OFF STOCK OF AN ITEM (14.1.4)

45. Select “All” on all options, click on **Search Fields**.

LSM Items: Maintain Stock Quantities (14.1.4)  Filters  Max View

**School Subjects** Group: All Area: All Grade & Subject: All All Type:  Books  Others Category: All Language of Item: All Search Fields:

**Search Fields**  
Partial/Full Title of Item:  Clear  
ISBN number of Item: 9781431010288  Full  Partial  
Publishers: All  
Authors: All

GO

Click on an Item to Select the Item. Items: 1 + -

Books  
Text Book (1)  
Solutions for all Natural Sciences and Technology Grade 4 Learner s Book : Pub: Macmillan South Africa (Pty)

View Item  
Stock Quantities  
Write Off Stock

46. Search the **ISBN** of the Item. Click on the **GO** button.

47. Select the item and click on the **Write Off Stock** button.

47.1 Click on the line of the stock quantity item.

47.2 Click on the **Write Off Stock** button.

LSM Items: Maintain Stock (14.1.4)

Item: Solutions for all Natural Sciences and Technology Grade 4 Learner s Book : Pub: Macmillan South Africa  
Total Stock: 10 Loans: 0 Write Off: 0 Available: 10

Stock Details: Lines: 1

Line	Date Added	Register	Qty Added	Item Cost	Qty WriteOff	WriteOff Cost	Total Cost	Total Item Value
1	2024/09/06	750/002	10	0.00	0	0.00	0.00	0.00

Write Off Stock Done



47.3 Capture the required information to write off the stock.

**Remove from Stock Permanently (Write Off)**

Authorised By: BATEMAN Carmen Reason: Lost Save

Removal Date: 2024/09/09 2024/09/09 Qty Removed: Damaged beyond Repair Out of Date Done

48. Click on the **Save** button.

### LSM REPORTS (14.1.11)

49. Select the **Type**. Click on the **Outstanding Items** or **Loan History**.

**LSM: Loan Details**

Type:  Learners  Educators  Staff

Grade: Grade R Class: Learner:

Outstanding Items  Loan History Print

50. There are other LSM reports you can print.

**LSM: Detail Inventory List**

Type:  Inventory List per Grade  Inventory List per Area

Grade: All Print

**LSM: Inventory Summary per Grade**

Grade: All Please note that some LSM Items may be linked to multiple Grades and as such may be counted multiple times. Print

**LSM: Print Stock Write-Offs**

Filter:  by Date  by Area

From: 2016/08/01 To: 2016/08/04 Print

**LSM: Print Blank Issue Form**

Print

### LSM PAST DUE LOANS (14.1.18)

51. View and Print the Past Due Loans report. Displays which books are outstanding and have not been returned on the system.

LSM Items: Past Due Loans			
2016/08/04			
No	Dates:		Quantities:
	Expected Return	Item Details	Outstanding
	Issued	Loan Details	Issued
1	2015/12/07	Book: Platinum English First Additional Language Grade 5 Reader (ISBN:9780636138759)	124
	2015/03/11	Educator: THOOTHE, Rakatso Leswetsa Joseph (Archived)	124
2	2015/12/07	Book: Platinum English First Additional Language Grade 6 Learner's Book (ISBN:9780636135710)	150
	2015/03/10	Educator: GAAREKDE, Maetle Henry	150
3	2015/12/07	Book: Via Afrika Sesotho Puo ya Lapeng Kereiti 5 Padiso (ISBN:9781415424438)	124
	2015/03/10	Educator: MOSALA, Tsotsopi Anastatia	124
4	2015/03/10	Book: Via Afrika Sesotho Puo ya Lapeng Kereiti 4 Padiso (ISBN:9781415424407)	140
	2015/03/10	Educator: TSAOANE, Mamoshila Margret	140