

Mandarin M3[®]

Library Automation System

M3 Users Guide
4th Edition Revised

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GETTING STARTED

1

ABOUT MANDARIN M3

The M3 Library Automation System is a native MARC database and search engine designed specifically for library use. This flexible library management tool controls everything from patron search stations and circulation to cataloging and reports.

With M3:

- Use true MARC records that do not need to be reinterpreted, resulting in exceptionally fast data retrieval. All MARC fields and subfields are indexed and searchable.
- Store an unlimited number of records, with all record types conforming to either a standard or customized MARC record structure.
- Use the system's templates, context-sensitive menus, and preloaded MARC field conventions to edit and create bibliographic records, holding records, patron records, authority records, and other specialty records.
- Assign varying levels of access for Cataloging, Circulation, and the OPAC.
- Add or remove fields from windows or change font size, style, and color for windows.
- Change the OPAC Visual Catalog displays and searches; display the logo of choice on the OPAC and Web Gateway.

The M3 Core Package is the basic building block of the M3 Library Automation System. The M3 Core Package contains the following fully integrated modules: Group Editor, Cataloging, Circulation, OPAC, ReportTool, and Inventory. It also includes the following utilities: the Barcode Label Printing Utility, Configuration Editor, BEDSCAT, History Purge, and Picture Manager. Optional M3 modules include Authority Control, Web OPAC, ZServer (Z39.50 server), BookWhere™ V4 (Z39.50 client), BookWhere Online, MARC Magician, Syndetic Solutions, and the M3 Pocket Module.

WHAT'S NEW FOR M3 VERSION 1.6

For more information on these new features, refer to the pages indicated in this Users Guide.

Cataloging

- Ability to import pictures and to update patron and item records with these pictures. (See "Using M3 Picture Manager" on page 4-50.)
- Ability to create multiple holdings for a bibliographic record at one time. (See step 4 in "Creating a Holding Record" on page 4-15.)

- When sorting, non-filing characters (“the”, “a”, and so on) are now ignored.
- Two new status codes (994#a) have been added: “In Bindery” and “On Order.”
- A Date Imported (908#a) field appears in new bibliographic or authority records. This field contains the date and time the record was imported or created. You can add this field to existing bibliographic or authority records, but the date and time must be entered manually.
- When creating a new holding for an existing bibliographic record, the prefix (852#k) is now copied into the new holding record.
- Ability to tag a block of records in the main Cataloging window by selecting the first record and pressing SHIFT while selecting the last record; this tags all records in between.
- The removal of empty fields after saving a record is now optional. (See page 4-7.)
- BookWhere customers can seamlessly import retrieved records into Cataloging. (BookWhere is available as an optional module.)
- MARC Magician customers can transfer MARC records from Cataloging to MARC Magician, edit the records using MARC Magician’s tools, and transfer them back to Cataloging. (MARC Magician is available as an optional module.)

Circulation

- New shortcut toolbar on the main window contains buttons for commonly-used functions. (See page 5-4.)
- Ability to return all or renew all transactions in the Transactions pane is available from a transaction menu. (See “Returning Multiple Items for the Same Patron” on page 5-12 and “Renewing Multiple Items for the Same Patron” on page 5-14.)
- Ability to send e-mail notifications to patrons who owe a fine or have overdue items. (See “Sending E-mail Notifications for Fines and Overdue Items” on page 5-18.)
- Ability to send automatic e-mail notifications to patrons when items they reserved are returned and placed on hold. (See “Sending E-Mail Notifications for Items on Hold” on page 5-16.)
- Ability to apply refunds or enter additional fines in the Payment window. (See step 4 in “Processing Patron Fines” on page 5-19.)
- Ability to search for an item or patron from the main window by typing keywords in the Barcode box. (See “Searching for an Item Record” on page 5-23 and “Searching for a Patron Record” on page 5-32.)
- The display of override messages in Self-Check mode is now optional. If they are disabled, the only message that will display is if the item is non-circulating. (See “Using Self-Checkout and Self-Return” on page 5-22.)
- Ability to disable the History tab in the Circulation Options dialog box. (See “History Tab” on page 5-7.)

- Ability to enable a message to display when an item is being placed on hold instead of reserve. (See “Reserving or Holding an Item” on page 5-15.)
- A warning message displays when an item that is assigned to a special reserve group is returned.
- In libraries with union databases, holdings can be transferred from the lending library to the database of the returning library. (See “Items Returned at Different Sites” on page 14 of “Using Scoping,” which is available on the M3 CD.)
- When an invalid barcode is scanned, three distinct beeps sound.
- When an item is recorded as lost, the fine assigned will be the item price indicated in field 852#9. If no price exists, the fine will be the maximum fine as set in Group Editor.
- You cannot perform a reserve, hold, or booking transaction on a deleted item.
- For new M3 customers, a graphic cell appears by default in the Patron and Item panes in each Circulation mode (Loan, Return, and so on). This enables pictures to display automatically (after picture import) alongside patrons and items in these panes. If you had a version of M3 installed prior to installing 1.6, you must still add a graphic cell to the desired pane(s) for the desired modes.

Group Editor

- Ability to override the group hierarchy. (See “Creating the Group Hierarchy” on page 3-2.)

OPAC

- Ability to view book cover images. (See “Displaying Cover Images in the OPAC” on page 6-30.)
- Ability to customize your library name on the main window. (See “Modifying the OPAC Header” on page 6-29.)
- Ability to print and save holdings data from the Search Results and Bookbag windows. (See “Printing Records” on page 6-19 and “Saving Records to a File” on page 6-20.)
- When a Standard or Enhanced Search is conducted and the search term is not found, a Browse window displays, allowing the searcher to select another term from a list of indexed fields. (See “How to Search” on page 6-8 and page 6-11.)
- Ability to view holdings information in the Bookbag Details window.
- Ability to scan barcodes into the Bookbag to create a list of items. (See “Using the Bookbag to Create a List” on page 6-25.)
- In libraries with union databases, local holdings are indicated by a star-shaped Availability and Tagging check box.
- Ability to link to Syndetic Solutions, which allows patrons to view summaries, reviews, and other content data for items in your collection. It also provides cover images for thousands of items. (Syndetic Solutions is available as an optional module.)

Inventory

- Media type icons display in all reports (except Invalid Barcodes and Statistics) alongside items that have a media type assigned. (See “Note” on page 8-3.)
- Ability to change the status of Newly Found items to “Normal.” (See step B on page 8-7.)
- If a Missing item has a Location (852#a), the Location appears before the item’s call number in the Missing report.
- The font size on all reports can be changed. (See “Printing and Saving Results” on page 8-14.)

Miscellaneous

- The Search dialog box used in Cataloging, Circulation, and Group Editor is now able to handle special characters, such as ampersands (&).
- Ability to change the font size and type in the record editor (visible in Cataloging and Circulation) by modifying the **Default Grid Font** entry in the ActiveMarcEdit.ini file (located in your M3 directory). The default font setting is 15 point Verdana.

REQUIRED SETUP PROCEDURE

Attention:

You must perform these steps before using M3.

After your M3 Library Automation System is installed but before you begin to use it, certain basic setup procedures must be performed. These procedures are essential for Circulation, Cataloging, and OPAC functionality.

To streamline the setup process, perform the steps in the sequence listed here.

1. Create patron groups in the Group Editor module, setting up a hierarchy of patron groups based on the permissions they require to use M3 (see “Creating the Group Hierarchy” on page 3-2 and “Creating a New Patron Group” on page 3-4).
2. Create item groups in the Group Editor module (see “Creating a New Item Group” on page 3-17).
3. Import item records and patron records in the Cataloging module (see “Importing Bibliographic, Patron, and Authority Records” on page 4-55).
4. Add any patron records that were not imported through Cataloging (see “Creating a Patron Record” on page 4-19).
5. Assign patrons to patron groups in the Group Editor module according to the permissions they require (see “Members Tab” on page 3-12).
6. Add any item records that were not imported through Cataloging (see “Creating a Bibliographic Record” on page 4-6 and “Creating a Holding Record” on page 4-14).
7. Assign items to item groups in the Group Editor module (see “Members Tab” on page 3-19).

8. Set up your library schedules in the Circulation module (see “Modifying Library Dates and Circulation Periods” on page 5-49).
9. Create a bank of standard patron and item messages in the Circulation module (see “Using the Messages Utility” on page 5-40).

ABOUT THIS M3 USERS GUIDE

This M3 Users Guide discusses how to install and operate the M3 Core Package system and the add-on optional M3 modules. Chapters 1 through 8 discuss the M3 Core Package. Chapter 9 covers the M3 Server, both the standard version and the optional M3 ZServer (Z39.50) version. Several appendixes are also included, providing a variety of supplemental information.

INTENDED AUDIENCE

This M3 Users Guide assumes the reader is proficient with Microsoft® Windows® 98 or later and possesses at least a basic understanding of how typical Windows-based applications operate.

Chapter 9, “Using M3 Server,” and certain appendixes are designed for system and database administrators. An advanced understanding of network technology and database maintenance is required.

USERS GUIDE CONVENTIONS

This M3 Users Guide uses a number of typographical and design conventions for clarity and ease of use.

- **This font** is used for (1) application features that you click such as buttons, commands on menus, tabs, and so on, (2) text you type in windows and dialog boxes, and (3) text box labels. For example, an instruction may tell you to “Click **Bookbag**” or “Type a keyword in the **Barcode** box.”
- The **callout** font refers to different parts of an illustration.
- Notes provide special information about a topic or procedure. They appear with the word NOTE, as below.
NOTE: Read notes for important information about a topic or procedure.
- Warnings are centered on the page in bold text.

Warning:

Adhere to these warnings to avoid system problems.

SIDEHEAD: Read sideheads for tips and helpful information.

- Sideheads such as the one at left provide incidental information and helpful hints.

TIPS AND TECHNIQUES

Shortcut Menus

In many places within the M3 system, shortcut menus are available to provide fast access to a specific option. To access a shortcut menu, click the right mouse button (right-click).

Shortcut Key Combinations

Many options and entry fields in M3 have shortcut keys that let you use ALT+key combinations to select the menu or command. The shortcut keys appear on the screen as underlined letters in the name of the menu or option. For example, when you see the instruction “On the **F**ile menu...,” you can either:

- click the **F**ile menu

OR

- press ALT+F simultaneously

When you display a menu, you can access its commands or submenus by pressing the shortcut key itself without ALT. For example, press ALT+F to display the **F**ile menu, then just the letter (as in **P** for **P**rint) to access a command or submenu.

Changing Column Widths

To change column widths in lists:

1. In the column heading row, position the pointer on the dividing line to the right of the column you want to resize until the pointer changes as shown in Figure 1.1.

FIGURE 1.1



2. While holding down the left mouse button, drag the pointer right to expand the column or left to contract it.

NOTE: Resizing a column does not affect the width of other columns; instead, the entire list widens.

3. When the column is resized to your satisfaction, release the mouse button.

CHANGING THE M3 INTERFACE LANGUAGE

Note: Changing the interface language does not change the language of the records in your database.

Five of the M3 modules can be displayed in several languages. The Group Editor, Cataloging, Circulation, OPAC, and Inventory modules can be viewed in English, French, or Spanish. In addition, the OPAC can be viewed in German or Italian.

- To change the interface language of the Circulation, OPAC, and Inventory modules, you can select a language from a menu or button on the main window. See the corresponding chapter in this Users Guide for more information.
- To change the interface language of all five modules, you can change the language in the Startup.ini file (located in your M3 directory). To do so, exit M3, then change the **default_language=0** entry where 0=English, 1=French, and 2=Spanish. The change is effective the next time you start each module.

ON-SCREEN HELP

Notes:

- To start M3 Help in the OPAC, click **Help** on the Header bar.
- To start M3 Help in Group Editor, click the question mark (?) button on the main Group Editor window.

To start M3 Help:

1. On the **Help** menu, click **Help Topics**.

OR

Press F1.

2. This displays the Help Table of Contents. From there, you can click a topic of interest, or click the **Index** or **Search** tabs to locate a specific topic.

NOTES

INSTALLING M3

2

CHAPTER CONTENTS

This chapter explains how to perform a first time installation of the M3 Library Automation System or an upgrade installation for an existing M3 site. Specifically, this chapter describes:

- The minimum and recommended M3 hardware requirements (page 2-1)
- How to install Mandarin M3 from the M3 CD (page 2-3)
- How to install Microsoft® Internet Explorer version 6.0 from the M3 CD (page 2-9)
- How to start the M3 modules (page 2-9)
- Password considerations (page 2-10)
- System backup information (page 2-10)

Attention:

Be sure to read the following section, “Before You Install,” before beginning the installation process.

BEFORE YOU INSTALL

System Requirements to Operate M3

TABLE 2.1

Notes:

- If M3 is already present on your system, M3 v1.6 must be installed over M3 v1.1 or later.
- Workstation hard disk requirements are listed in a separate table (Table 2.2).

	Minimum	Recommended
Server	Windows 2000 or Windows NT 4.0 SP4 with the Windows Desktop Update component or Windows Me or Windows 98	Windows 2000
	Pentium II 300 MHz	Pentium III 450 MHz
	128 MB RAM	256 MB RAM
	400 MB hard disk space (free)	1 GB hard disk space (free)
	TCP/IP Enabled	TCP/IP Enabled
	Microsoft Internet Explorer 5.0 (For Windows NT, 5.01 SP2)	Microsoft Internet Explorer 5.5 SP2 or later
Installation only	CD-ROM drive	CD-ROM drive

	Minimum	Recommended
Workstation	Windows 2000 <i>or</i> Windows XP <i>or</i> Windows NT 4.0 SP4 <i>or</i> Windows Me <i>or</i> Windows 98	Windows 2000 <i>or</i> Windows XP
	Pentium 200 MHz	Pentium II 300 MHz
	64 MB RAM	128 MB RAM
	800 x 600 Resolution	800 x 600 Resolution
	Ink Jet Printer with postscript support	Laser Printer with postscript support
	TCP/IP Installed	TCP/IP Installed
	Microsoft Internet Explorer 5.0 (For Windows NT, 5.01 SP2)	Microsoft Internet Explorer 5.5 SP2 or later

Workstation Hard Disk Space Requirements (MB)

TABLE 2.2

	School	Public or Academic
Full Install, first-time install	570	340
Full Install, upgrade	480	240
Custom Install with ReportTool module	570	340
Custom Install without ReportTool	Up to 90, depending on selected components	Up to 90, depending on selected components

Installation Configuration Options

Before installing the M3 Library Automation System, decide which of the following two installation configuration options best suits your library situation.

- **Option I** – Install your databases onto your server and then install the M3 core client modules (Circulation, OPAC, and so on) onto the hard disks of the individual workstations. For maximum performance, this is the preferred option.
- **Option II** – Install your databases and the M3 core client modules onto your server, then run the Workstation Setup utility at each M3 workstation to enable access to the core modules installed on the server. For performance purposes, only consider this option with a high-speed network protocol.

NOTE: The Workstation Setup places the necessary .dll and .ocx files onto the workstations. It does not install the client modules onto the individual workstation hard disks.

General Installation Steps

Installing the M3 system involves multiple steps, whether installing the M3 system for the first time or installing an M3 update CD. As an overview, the order of the process is described here. Each procedure is covered in detail in upcoming sections.

1. Install the M3 Server files. The server files can only be installed onto your server.
2. Install the program files for the M3 core client modules (Circulation, OPAC, and so on). These client modules can be installed onto individual workstation hard disks (Option I in the previous section) or onto the server site (Option II in the previous section).
3. If you selected Option II in the previous step, run the Workstation Setup procedure at each workstation that requires access to the M3 core client modules. After installing the client modules, the Workstation Setup can be found in the M3 folder on the server (the default path is **C:\Program Files\Mandarin M3\Workstation Setup**).

INSTALLING THE M3 SERVER

Installation Preparation

Before you install, verify:

- You are logged on your system with full Administrator rights, at the server as well as the individual workstations.
- Everyone else is logged out of the M3 system during the installation procedure.
- Microsoft Internet Explorer 5.0 or later is installed on the server you are using. If it is not, first install that application. For convenience, Microsoft Internet Explorer 6.0 is available on the M3 CD. (See “Installing Microsoft Internet Explorer 6.0 from the M3 CD” on page 2-9.)
- You have quit all applications, including the M3 Server and client modules.

Installation Procedure

1. Insert the M3 CD into the CD-ROM drive. The installation menu should appear. If not, navigate to your CD-ROM drive (**D:** on most computers) and double-click **autorun.exe**.
2. On the installation menu, click **Install M3 Database Server**.
3. In the Choose Setup Language dialog box, select the desired language and click **OK**. This determines the language of the M3 Server setup only; it does not affect the language of the records in your database.
4. In the Welcome dialog box, click **Next**.
5. In the License Agreement dialog box, review the agreement and click **Yes** to accept and continue the installation. Or, click **No** to discontinue.
6. In the Choose Destination Location dialog box:
 - Click **Next** to install M3 Server into the default folder location on your hard disk (**C:\M3 Server**).

OR

- Click **Browse** and navigate to the desired folder location. When the desired folder has been selected, click **OK**, and then click **Next**.
- 7. If M3 has not been installed previously on this server, the Server Information dialog box displays. Type your M3 server's port number, then click **Next**.
- 8. In the Customize Global Options - Step 1 dialog box, the path to your M3 Server data displays. (If you have more than one port and you want to configure different default values for each port, select one path in the list now; you will need to rerun the server setup for each port you want to customize.) Click **Next**.
- 9. In the Customize Global Options - Step 2 dialog box, select the check box by each feature you want to enable, clear the check box by each feature you want to disable, or fill in fields where appropriate.

***Note:** If you already have a version of M3 installed on the server, the choices that are selected are your current settings.*

Circulation:

- **Enable History** – If this is selected, the History tab (in the Circulation Options window), which allows users to view patron and item transaction histories, will be available.
- **Obey Group Hierarchy** – If this is selected, the group hierarchy will be enforced when adding patrons in Circulation.
- **Add Transaction Fee** – If this is selected, a transaction or “processing” fee will automatically be added when items are recorded as lost or damaged. In the **Amount** box, type the desired fee amount.
- **Enforce Messaging** – If this is selected, override messages will display in Self-Check mode.

Patron Contact Fields:

- **Email and Phone** – Select the fields where patron e-mail addresses and phone numbers are stored in the patron records.

Email Notification:

- **SMTP Server Name** – Type the name of your e-mail server (for example, mail.mcps.edu).
- **Port** – Type the port number used for outgoing mail.
- **Sender Email** – Type the e-mail address you want to appear in the “From” field in patron e-mail notifications sent by the library.
NOTE: If you have multiple databases, multiple ports, or scoping, and need to configure more than one **Sender Email**, please contact Mandarin Technical Support.
- **cc** – If you want a “carbon copy” of patron e-mail notifications sent to an e-mail address, type the e-mail address. (You may want to create a generic e-mail address for this purpose.) If left blank, no carbon copy will be sent.

Picture Manager:

- **Bib Match Field/Subfield** – Type the field and subfield you want the Picture Manager to use to match images to bibliographic records.

***Note:** The entries **SMTP Server Name**, **Port**, and **Sender Email** are required to use the e-mail notification feature.*

***Tip:** You can enter multiple e-mail addresses to be cc'ed by separating them with commas.*

***Note:** These field and subfield entries are required to use the Picture Manager.*

- **Patron Match Field/Subfield** – Type the field and subfield you want the Picture Manager to use to match images to patron records.
10. Click **Next**.
 11. In the Start Copying Files dialog box, review the settings you have chosen. If you want to change any settings, click **Back**; otherwise, click **Next**.
 12. If you already have the M3 Server installed and it is running, a warning dialog box displays. Click **OK** to temporarily stop the service and continue with the installation.
 13. The application installs; this may take a few moments. If your server was stopped by the setup program, it is restarted.
 14. In the Setup Complete dialog box, click **Finish**. Proceed with the next section, “Installing the M3 Core Client Modules.”

INSTALLING THE M3 CORE CLIENT MODULES

The M3 core client modules can be installed at the server site or at the individual workstations that will use them (see “Installation Configuration Options” on page 2-2). The procedure below applies to both situations.

Installation Preparation

Before you install, verify:

- You are logged on your system with full Administrator rights, at the server as well as the individual workstations.
- Microsoft Internet Explorer 5.0 or later is installed at the site you are using. If it is not, first install that application. For convenience, Microsoft Internet Explorer 6.0 is available on the M3 CD. (See “Installing Microsoft Internet Explorer 6.0 from the M3 CD” on page 2-9.)
- You have quit all applications.

Installation Procedure

1. Insert the M3 CD into the CD-ROM drive. The installation menu should appear. If not, navigate to your CD-ROM drive (**D:** on most computers) and double-click **autorun.exe**.
2. On the installation menu, click **Install M3 Client Modules**.
3. In the Choose Setup Language dialog box, select the desired language and click **OK**. This determines the language of the setup and the language in which the M3 modules display; it does not affect the language of the records in your database.
4. In the Welcome dialog box, click **Next**.
5. In the License Agreement dialog box, click **Yes** to accept and continue the installation. Or, click **No** to discontinue.
6. In the Library Type dialog box, select your library type.
 - If you select **School** and choose to install ReportTool in step 8, over 800 preloaded reports generally used by K-12 schools, public libraries, and universities are installed.

Notes:

- If you already have a version of M3 installed on this machine, you will not be prompted to choose a language; the program will use the previously selected language.
- To change the interface language after installation, see “Changing the M3 Interface Language” on page 1-7.

- If you select **Public or Academic** and choose to install ReportTool in step 8, over 400 preloaded reports generally used by public libraries and universities are installed.
7. Click **Next**.
 8. In the Setup Type dialog box, select the preferred installation type:
 - **Custom Install** – Allows you to specify which modules are to be installed at this site. Select this option if you are installing at the server site.
 - **Full Install** – Automatically installs all M3 core client modules (Cataloging, Circulation, OPAC, Group Editor, Inventory, and ReportTool). It also installs the Configuration Editor, Barcode Labels, BEDSCAT, History Purge, and Picture Manager utilities.
 - **OPAC Only** – Installs the OPAC module only.
 9. Click **Next**.
 10. In the Choose Destination Location dialog box, either:
 - Click **Next** to install M3 into the default folder location on your hard disk (C:\Program Files\Mandarin M3).

OR

 - Click **Browse**. Navigate to the desired folder location, click **OK**, and then click **Next**.
 11. If you selected **Custom Install** in step 8, the Select Components dialog box displays. Clear any check box that corresponds to a module you do not want to install at this workstation. Your options are:
 - **Circulation** – Installs the Circulation module.
 - **Cataloging** – Installs the Cataloging module.
 - **OPAC** – Installs the OPAC module.
 - **Inventory** – Installs the Inventory module.
 - **ReportTool** – Installs the ReportTool module.
 - **Utilities** – Installs the Configuration Editor, Barcode Labels, BEDSCAT, History Purge, and Picture Manager utilities.

NOTE: To limit the utilities, select **Utilities** and click **Change**. Clear the check box by any utility you do not want to install, then click **Continue**.
 - **Group Editor** – Installs the Group Editor module.
 - **Workstation Setup** – Installs the Workstation Setup program on the server so client machines can start the program and use it to install required components. Select this option only if you are installing the program modules at the server site, as explained in Option II on page 2-2. This option is not appropriate if installing the program modules at individual workstations (as in Option I).
 12. Click **Next**.
 13. In the Server Information dialog box, type your M3 server's IP address and port number. Then click **Next**.

***Note:** Instructions on using BEDSCAT are included on the M3 CD in the Documentation folder. For instructions on using Picture Manager, see page 4-50.*

***Note:** If you installed M3 v1.1 prior to installing v1.6, your default path is C:\Program Files\SIRS Mandarin\M3.*

***Note:** If you currently have M3 installed, the default values display.*

Note: If you already have a version of M3 installed on this machine, the choices that are selected are your current settings.

14. In the Set Program Defaults dialog box, select the check box by each feature you want to enable, and clear the check box by each feature you want to disable.

OPAC:

- **Save Holdings** – If this is selected, then when item records are saved to a file from the Search Results or Bookbag Record List windows, holdings information for each item will be included in the saved file.
- **Print Holdings** – If this is selected, then when item records are printed from the Search Results or Bookbag Record List windows, holdings information for each item will be included in the printed records.
- **Display Cover Images** – If this is selected, cover images will display for items that have a picture assigned.
- **Show Browse Window** – If this is selected, a Browse window will display when a patron searches for a keyword and no matches are found. The Browse window will offer a list of available search terms from which the patron can choose.
- **Scan Barcodes** – If this is selected, users will be able to enter or scan barcodes into the Bookbag to create a list of items.
- **Show My Account Tab** – If this is selected, the My Account tab will be visible.
- **Display Patron Info** – If this is selected, patrons will be able to view their information that is on file with the library (for example, address and phone number). This can be password protected.
- **Show Historical Activity** – If this is selected, patrons will be able to view their previous library transactions.

Circulation:

- **Show Shortcut Toolbar** – If this is selected, the shortcut toolbar, which contains buttons for commonly-used functions, will display in the main Circulation window. This can later be disabled for the current session by pressing CTRL+T in Circulation.
- **Display Hold Alert Message** – If this is selected, a message will display when an item is being placed on hold instead of reserve.

Cataloging:

- **Strip Empty Fields** – All fields left empty when a record is saved will be deleted. If you use M3 Authority Control, this option must be enabled.

Note: If you previously configured your Bulletin Board in M3 v1.1 or later, this dialog box will not display.

15. The Bulletin Board Configuration dialog box displays.
 - If you want to configure your Bulletin Board now, type your library name, a greeting, and the hours of operation. Then click **Next**.

OR

 - If you do not want to configure the Bulletin Board now, click **Skip**.
16. In the Start Copying Files dialog box, review the settings you have chosen. If you want to change any settings, click **Back**; otherwise, click **Next**.
17. The application installs; this may take a few moments.

Tip: During installation, M3 creates a Mandarin M3 desktop folder containing shortcuts to the installed applications.

18. In the Setup Complete dialog box, click **Finish**. If you are prompted to restart your computer, you can do so now or later.

NOTE: If you installed the M3 core client modules at the server site, you need to run the setup procedure at each workstation; proceed to the following section, "Setup Procedure at Workstations."

Setup Procedure at Workstations

If you installed the M3 clients onto your server, run the following workstation installation procedure at each workstation planned for M3 use. This procedure does not install M3 onto the workstation; it simply ensures that the correct .dll and .ocx files are present on the workstation, thereby allowing the workstation to run the M3 modules installed on the server.

Before you install, verify:

- Microsoft Internet Explorer 5.0 or later is installed on the workstation where you are installing. For convenience, Microsoft Internet Explorer 6.0 is available on the M3 CD. (See "Installing Microsoft Internet Explorer 6.0 from the M3 CD" on page 2-9.)
- You have quit all applications.

Installation Procedure

1. At the individual workstation, locate the M3 folder where the M3 applications reside.
2. In the Workstation Setup folder, double-click **Setup.exe**.
3. In the Choose Setup Language dialog box, select the desired language and click **OK**. This determines the language of the workstation setup only; it does not affect the language of the interface or your database.
4. In the Welcome dialog box, click **Next**.
5. In the License Agreement dialog box, click **Yes** to accept and continue the installation. Or, click **No** to discontinue.
6. In the Choose Destination Location dialog box, either:
 - Click **Next** to install M3 into the default folder location on your hard disk (C:\Program Files\Mandarin M3).

OR

 - Click **Browse**. Navigate to the desired folder location, click **OK**, and then click **Next**.
7. In the Server Information dialog box, type your M3 server's IP address and port number. Then click **Next**.
8. In the Start Copying Files dialog box, review the settings you have chosen. If you want to change any settings, click **Back**. If you are satisfied with the settings, click **Next**.
9. The application installs; this may take a few moments.
10. In the Setup Complete dialog box, click **Finish**. If you are prompted to restart your computer, you can do so now or later.
11. Repeat this process at each workstation that will be used to access M3, and create desktop shortcuts for the modules the workstation will be using.

Note: If you installed M3 v1.1 prior to installing v1.6, your default path is C:\Program Files\SIRS Mandarin\M3.

INSTALLING MICROSOFT INTERNET EXPLORER 6.0 FROM THE M3 CD

1. Insert the M3 CD into the CD-ROM drive. The installation menu should appear. If not, navigate to your CD-ROM drive (D: on most computers) and double-click **autorun.exe**.
2. On the installation menu, click **Explore CD**.
3. In the IE6 folder, double-click **ie6setup.exe**.
4. Follow the prompts. During installation, Microsoft Internet Explorer 6.0 is placed in the workstation's Program Files folder, and a shortcut is created on the desktop.

STARTING M3

To start the individual modules of M3, either:

- Double-click the **Mandarin M3** shortcut on your desktop, then double-click the desired module.

OR

- On the taskbar, click the **Start** button, select **Programs**, select **Mandarin M3**, and then click the desired module.

***Note:** If you installed M3 v1.1 prior to installing v1.6, select **SIRS Mandarin** and then **M3** (instead of **Mandarin M3**).*

For instructions on how to start and log on a specific module, refer to the corresponding chapter in this Users Guide.

PASSWORDS

Password Setup

The default logon sequence for the Cataloging, Circulation, Group Editor, and Inventory modules is:

- Login name: **admin**
- Password: **boca raton**

For security reasons, it is recommended that you change this password immediately after initially logging on.

Modifying Patron Barcodes and Passwords

Patron barcodes, as well as patron passwords, reside in patron records. You can access and modify patron barcodes and passwords in the M3 Cataloging module. To modify, follow the procedure in "Editing a Patron Record" on page 4-21.

NOTE: Any patron record assigned to a patron group that has access privileges to the Cataloging, Circulation, Group Editor, or Inventory modules **MUST** have both a login name and a password.

M3 SYSTEM BACKUP INFORMATION

In order to protect your M3 data, it is important to perform frequent data backups. Daily backups are recommended to avoid the loss of files on the local hard disk due to disk drive failure, power outage, virus infection, accidental deletion, and other potential network problems.

The M3 Library Automation System does not currently provide continuous backup. A backup device, such as a tape backup, should be installed to allow backups. In addition, Mandarin recommends that your server be equipped with an automated backup system that can be used to schedule unattended backups.

Backup Recommendations

Mandarin recommends performing a daily backup Monday through Thursday after closing, and a full backup on Friday or before a holiday. In case of a hardware failure, a restore of a full backup followed by a restore of the latest partial backup can be completed. In case of a loss of only M3 data, a restore of the latest partial backup can be completed.

Backups must be performed when no users are logged on the M3 server and the server is not running. To stop the M3 server:

1. On the taskbar, click the **M3 Server** icon. This displays the **M3 Server** menu.
2. Select **Stop**, then click **All**. This stops the server.
3. Perform the desired backup method. Two backup methods are explained in the following section, "Backup Methods."
4. When finished, repeat step 1. Select **Start**, then click **All**. This restarts the server.

Backup Methods

Two recommended backup methods are as follows:

- **Partial backup** – Backs up only the data that is critical to daily operation of M3. This entails selecting the specific location where M3 data is stored (the default path is **C:\M3 Server\Registry**) and starting the backup. This operation completes within a few minutes, and is a reliable solution for restoring M3 data. This type of backup does not back up the operating system or any other files on the computer. If a server failure occurred and the data on the hard disk was lost, the operating system and all applications would have to be reinstalled; M3 would be restored from the latest backup, repairing all data and transactions. This type of backup is typically performed by a network administrator.
- **Full backup** – Backs up the entire server, including the operating system, users, security, login scripts, applications, and all M3 data. This entails selecting the drive(s) and starting the backup. This operation may take a half hour to several hours to complete. This type of backup is typically performed by a network administrator.

USING M3 GROUP EDITOR

3

Attention:

You must either set up a hierarchy of patron groups based on the permissions required for patrons in each group, or you must disable the hierarchy in the Global.ini.REG file. For instructions on both, see “Creating the Group Hierarchy” on page 3-2.

CHAPTER CONTENTS

This chapter describes:

- How to set up your system’s hierarchy (page 3-2)
- How to create, modify, and delete patron groups (page 3-4)
- How to create, modify, and delete item groups (page 3-17)
- How to create, modify, and delete special reserve groups (page 3-23)

ABOUT GROUP EDITOR

Group Editor is used to create the groups that M3 Circulation and OPAC require to function. Each group has a customized set of parameters and permissions.

There are three types of groups in M3: Patron, Item, and Special Reserve.

- Patron groups – Each patron record entered into the M3 system must be assigned to a patron group to establish circulation permission for the patron. A library might work with patron groups such as General Patron, VIP Patron, Volunteer, Staff Member, and Director. Permission to access patron groups is set by a user higher in the hierarchy than the patron group, and patrons cannot change which groups they can access. You can create an unlimited number of patron groups, although a patron can only be assigned to one group.
- Item groups – Each holding record must be assigned to an item group to establish the item’s circulation parameters. A library might work with item groups such as general collection, reference collection, periodicals, equipment, and rare books. Permission to access item groups is set by a user higher in the hierarchy than the patron group, and patrons cannot change which groups they can access. You can create an unlimited number of item groups, although a holding record can only be assigned to one group.
- Special Reserve groups – When a library needs to accommodate unusual circulation restrictions for a defined patron set, a special reserve group can be created. For instance, you might create a four-week special reserve group to restrict certain science books to in-library use by students involved in a chemistry project. Permission to access special reserve

groups is set by a user higher in the hierarchy than the patron group, and patrons cannot change which groups they can access. You can create an unlimited number of special reserve groups; patrons and items can be assigned to multiple special reserve groups. Special reserve group permissions override item group permissions.

CREATING THE GROUP HIERARCHY

The group hierarchy indicates which patron, item, and special reserve groups each individual patron group can modify in Group Editor. The hierarchy is determined by the entry in the Created by Patron Group box on the patron, item, and special reserve group General tabs. This box determines which groups display in the Group Access tabs. Permissions to modify patron and item access are then established in the Group Access tabs.

If you do not want to create the group hierarchy, you must disable this feature in the Global.ini.REG file (the default path is C:\M3 Server\Registry\Common) by changing the Group Hierarchy entry to Override=off. If disabled, the Group Access rules in Group Editor will not be enforced.

M3 includes four default patron groups: Administrators, Librarians, Library Assistants, and Patrons. The hierarchy has been created for these groups. Mandarin recommends that these groups be used; they cannot be deleted. You can modify these groups or create additional groups, if desired. These four groups have the following permissions:

- Administrator (first level) – has permission to modify access of all groups
- Librarians (second level) – has permission to modify access of Library Assistants and Patrons
- Library Assistants (third level) – has permission to modify access of Patrons
- Patrons (fourth level) – has no permission to modify access of other groups

If your library requires additional patron groups, use the following procedure to add groups to the hierarchy and establish permissions. In this example, a user in the “Librarian” group has created a “Faculty” group, which will have the same permissions as the group “Library Assistants.”

For instructions on creating a patron group, see “Creating a New Patron Group” beginning on page 3-4.

1. In the **General** tab for the “Faculty” group, select **Librarians** in the **Created by Patron Group** box. (No patron groups that were also created by “Librarians” will have access to the “Faculty” group unless indicated in the **Group Access** tab.)
2. In the **Group Access** tab, the groups without access to the “Faculty” group display in the **Groups Without Access** box. To grant one or more of these groups access to the “Faculty” group, select the group in the **Groups Without Access** box, then click the << button. This moves the patron group to the **Groups With Shared Access To Current** box.
3. When finished, click **OK** to save the “Faculty” group.

STARTING GROUP EDITOR

To start the Group Editor module:

Note: If you installed M3 v1.1 prior to installing v1.6, select **SIRS Mandarin** and then **M3** (instead of **Mandarin M3**).

1. On the taskbar, click the **Start** button, select **Programs**, select **Mandarin M3**, and then click **Group Editor**. This displays the Group Editor Login dialog box.
2. Type your user ID in the **Login Name** box, your password in the **Password** box, and then click **OK**. This displays the Group Editor window (Figure 3.1).

GROUP EDITOR WINDOW FEATURES

All M3 groups are created, customized, and modified through the Group Editor window (Figure 3.1). Window features are summarized below.

FIGURE 3.1

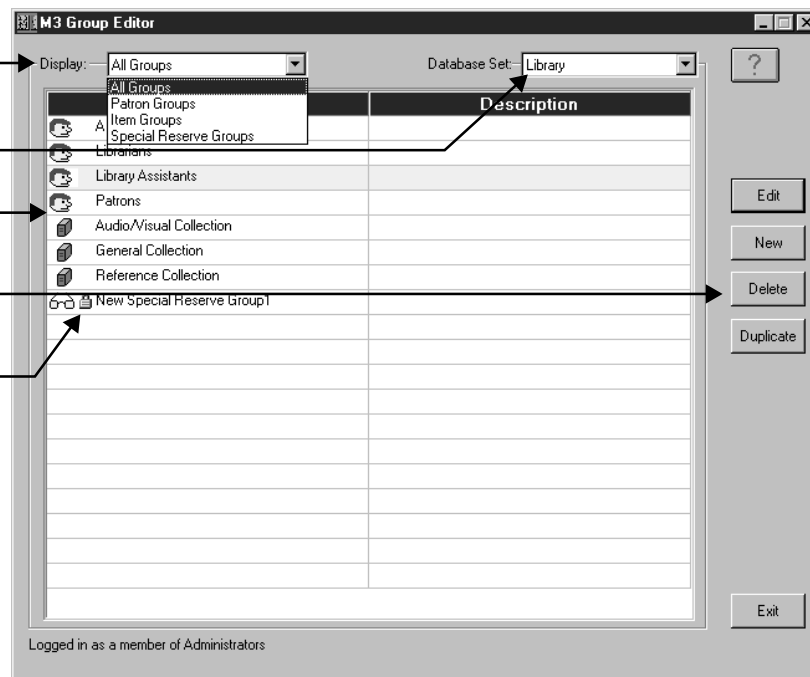
Display list

Database Set list

Group listings

Function buttons

Access lock



- **Display list** – Contains the list of display options for this main window. You can display the listings for all groups or only a particular group type (patron, item, or special reserve group). To change the displayed group type, select the desired type in the **Display** list.
- **Database Set list** – Contains the list of catalog databases available to search from your library's M3 system.
- **Group listings** – Each group listing includes the group type icon, group name, and group description. A group type icon appears to the left of each group listing. A head signifies a patron group; a book signifies an item group; eyeglasses signify a special reserve group.
- **Function buttons** – Buttons that allow you to edit, delete, and duplicate existing groups, and to create new groups.

- **Access lock** – Appears next to any group to which you have read-only access.

SELECTING A CATALOG DATABASE

Your M3 system can access multiple catalog databases. If multiple databases are available, select the catalog database you want to work with in Group Editor. To do so, in the Group Editor window, select the desired database in the **Database Set** list.

WORKING WITH PATRON GROUPS

With M3, you can create an unlimited number of patron groups with customized permissions for each group. For more information about patron groups, see page 3-1.

Entering Patron Records and Patron Groups

You must create patron groups before you can enter or import patron records through the M3 Cataloging module.

Creating a New Patron Group

To create a new patron group:

1. In the Group Editor window, select a catalog database in the **Database Set** list.
2. Click **New**. This displays the New Group dialog box (Figure 3.2).

FIGURE 3.2



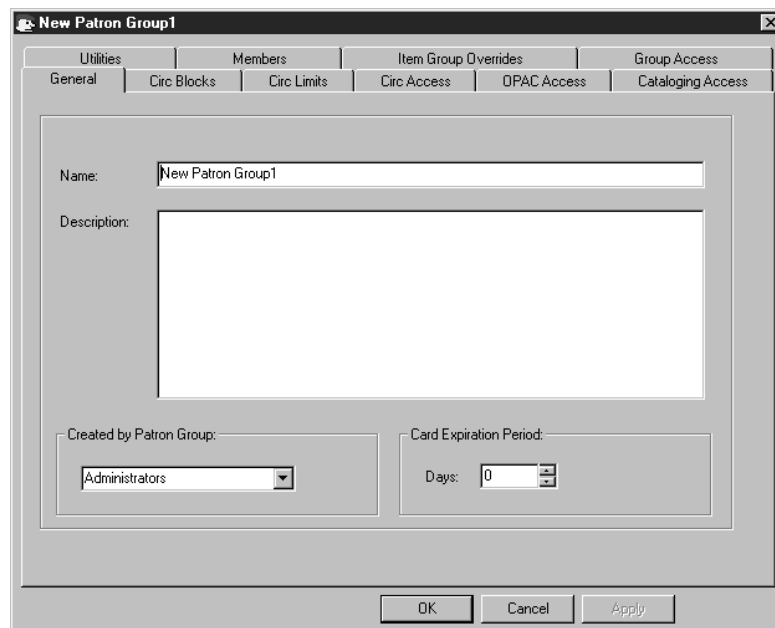
3. Click **New Patron Group**, then click **OK**. This places a “New Patron Group” listing in the Group Editor window (as shown in Figure 3.3).

NOTE: If the new listing does not appear, verify that **All Groups** or **Patron Groups** is selected in the **Display** list.

FIGURE 3.3

4. Select the new patron group, then click **Edit**. This displays the New Patron Group window (Figure 3.4), where you customize the group's characteristics. Enter the appropriate information in each tab as described in the following sections.

FIGURE 3.4



General Tab

In this tab (Figure 3.4), enter identification information for the group. This information displays in the Group Editor window.

1. In the **Name** box, type the patron group's name.
2. In the **Description** box, type any information needed to clarify this group.
3. The **Created by Patron Group** box displays the patron group of the user that created this group. Only administrators can modify this entry.
4. In the **Card Expiration Period** box, type or select the number of days a library card issued to a member of this patron group remains valid before requiring renewal.
5. Click **Apply** to save your entries in this tab, then click another tab to modify it.

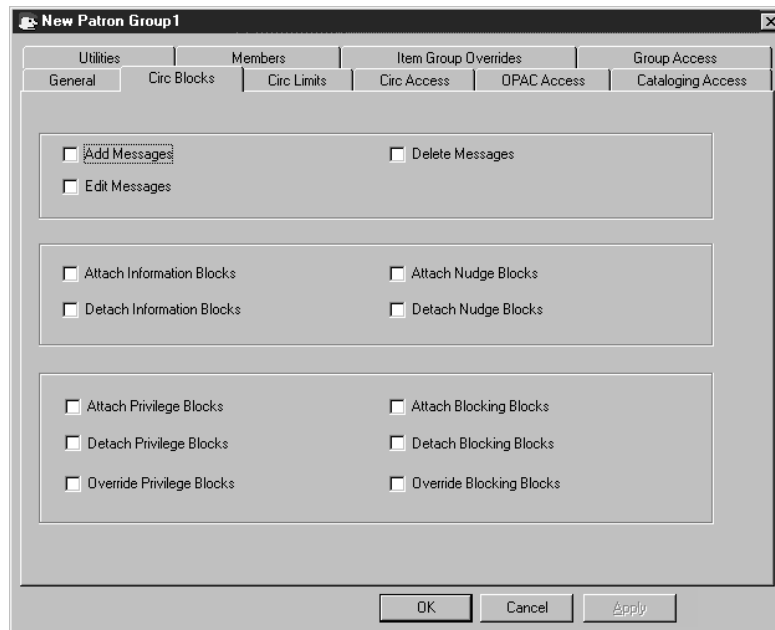
OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

Circ Blocks Tab

In this tab (Figure 3.5), customize the patron group's rights to add, modify, place, remove, and override system messages. Typically, selected library staff members require such rights—general patrons do not.

FIGURE 3.5



Depending on your permissions, some of these options may be unavailable.

1. Select the functions needed by members of this patron group:
 - **Add, Edit, and Delete Messages** allows group members to add, edit, and delete patron and item messages.
 - **Attach and Detach Information Blocks** allows group members to attach and detach messages assigned the information block type.
 - **Attach and Detach Nudge Blocks** allows group members to attach and detach messages assigned the nudge block type.

Block types are explained in "About Messages and Block Types" on page 5-40.

- **Attach, Detach, and Override Privilege Blocks** allows group members to attach, detach, or override messages assigned the privilege block type.
 - **Attach, Detach, and Override Blocking Blocks** allows group members to attach, detach, or override messages assigned the blocking block type.
2. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

Circ Limits Tab

In this tab (Figure 3.6), customize the circulation quantity limits for the patron group. Specify the maximum number of items for each type of transaction listed.

FIGURE 3.6

Depending on your permissions, some of these options may be unavailable.

1. Select a circulation limit for each limit type. To do so:
 - A. Select a limit type. If a limit is not selected, no limit is assigned.
 - B. In the list next to the limit type, select a limit amount.
2. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

Circ Access Tab

In this tab (Figure 3.7), specify whether this patron group is allowed to access any circulation functions.

FIGURE 3.7

Depending on your permissions, some of these options may be unavailable.

The screenshot shows the 'New Patron Group1' dialog box with the 'Circ Access' tab selected. The 'Access Circulation' dropdown is set to 'Yes'. The 'Operations' section contains 13 checkboxes: Loans, Holds/Reserves, Quick Returns, Self Mode, View Library Transactions, Returns, Bookings, Status, Renewals, Recalls, ILL, In-house Circulation, Add Temp Items, and Circulation Options. The 'Bibliographic Records' section has Add, Modify, and Delete checkboxes. The 'Holding Records' section has Add, Modify, and Delete checkboxes. The 'Patron Records' section has Add, Modify, and Delete checkboxes. The 'Templates' section has Add, Modify, and Delete checkboxes. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

1. In the **Access Circulation** list, select **Yes** or **No**.
 - If you select **Yes**, you can enable any available function listed on the tab by selecting the function. Functions are organized into five groups:
 - **Operations** – lists various types of circulation transactions
 - **Bibliographic Records** – pertains to bibliographic record maintenance
 - **Holding Records** – pertains to holdings record maintenance
 - **Patron Records** – pertains to patron record maintenance
 - **Templates** – pertains to template record maintenance
 - If you select **No**, all functions listed on this tab are disabled.
2. Click **Apply** to save your entries in this tab, then click another tab to modify it.

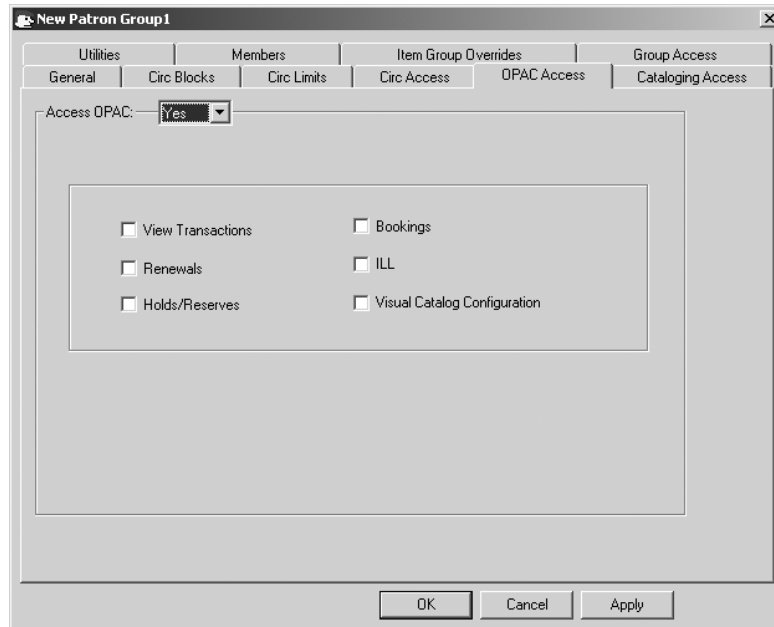
OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

OPAC Access Tab

In this tab (Figure 3.8), specify whether this patron group is allowed to access any OPAC functions.

FIGURE 3.8



Depending on your permissions, some of these options may be unavailable.

Note: The Visual Catalog Configuration check box also controls the permission to modify the OPAC header. See “Modifying the OPAC Header” on page 6-29 for information on this feature.

1. In the **Access OPAC** list, select **Yes** or **No**.
 - If you select **Yes**, you can enable any available function listed on the tab by selecting the function. Options are:
 - **View Transactions** – allows patrons to view their transactions in the My Account tab of the Windows OPAC
 - **Renewals** – allows patrons to renew items in the Web OPAC
 - **Holds/Reserves** – allows patrons to place a hold/reserve on items in the Web OPAC
 - **Bookings** – allows patrons to book items in the Web OPAC
 - **ILL** – allows patrons to request interlibrary loans in the Web OPAC
 - **Visual Catalog Configuration** – allows library staff to configure the Visual Catalog display in the Windows OPAC
 - If you select **No**, all functions listed on this tab are disabled.
2. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

Note: The Web OPAC options apply only if you have this optional module installed.

Cataloging Access Tab

In this tab (Figure 3.9), specify whether this patron group is allowed to access any cataloging functions.

FIGURE 3.9

The screenshot shows the 'New Patron Group1' window with the 'Cataloging Access' tab selected. The 'Access Cataloging' dropdown is set to 'Yes'. The window contains five groups of checkboxes for different record types: Bibliographic Records, Holding Records, Patron Records, Templates, and Authority Records. Each group has a set of functions (Add, Modify, Delete, Purge, Replace, and sometimes Override Authority, Unlink, or Quick Entry) that can be enabled or disabled. At the bottom of the window are 'OK', 'Cancel', and 'Apply' buttons.

Depending on your permissions, some of these options may be unavailable.

*The **Override Authority** option and the options under **Authority Records** are available only if you are using a version of M3 that supports Authority Control.*

1. In the **Access Cataloging** list, select **Yes** or **No**.
 - If you select **Yes**, you can enable any available function listed on the tab by selecting the function. Functions are organized into five groups:
 - **Bibliographic Records** – pertains to bibliographic record maintenance
 - **Holding Records** – pertains to holdings record maintenance
 - **Patron Records** – pertains to patron record maintenance
 - **Templates** – pertains to template maintenance
 - **Authority Records** – pertains to authority record maintenance
 - If you select **No**, all functions listed on this tab are disabled.
2. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

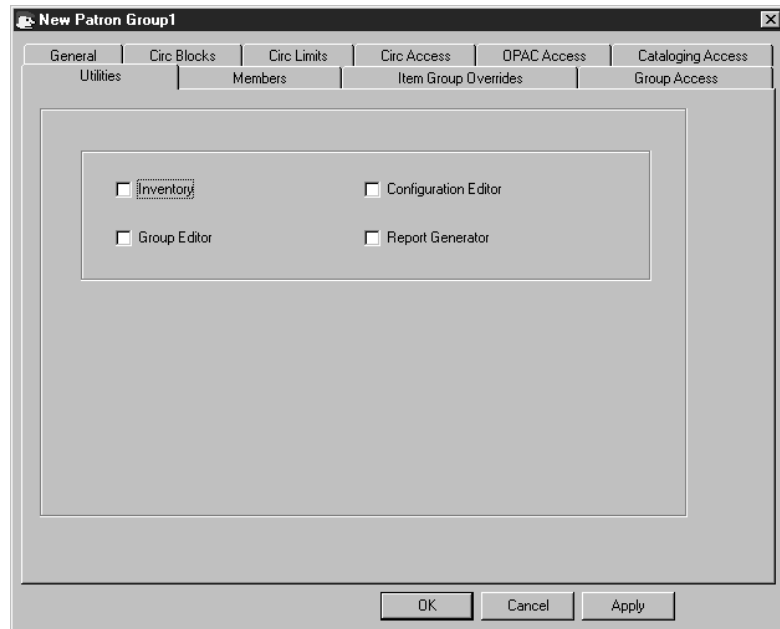
***Tip:** The **Replace** check box in this tab's **Bibliographic**, **Holding**, **Patron**, and **Authority Records** groups gives patrons access to the Replace function of the Find/Replace utility. The Find/Replace utility is part of the Cataloging module.*

Utilities Tab

In this tab (Figure 3.10), specify whether this patron group is allowed to access any of the utilities listed.

FIGURE 3.10

Depending on your permissions, some of these options may be unavailable.



1. To allow access to a utility, select the corresponding check box. Options are:
 - **Inventory** – allows members of this patron group to view and conduct catalog inventory functions through M3 Inventory
 - **Configuration Editor** – allows members of this patron group to perform configuration functions in M3 Configuration Editor
 - **Group Editor** – allows members of this patron group to view and conduct functions in M3 Group Editor
 - **Report Generator** – allows members of this patron group to view and create reports through M3 ReportTool
2. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

Members Tab

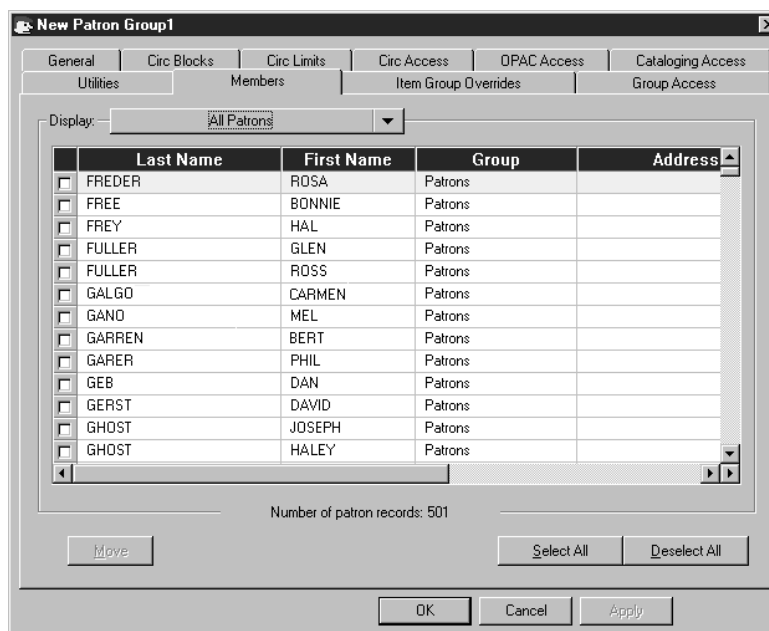
In this tab (Figure 3.11), add and remove patron group members. Skip this tab if you have not yet entered any patron records for this group. You can add members to this group later using the **Edit** function in the Group Editor window.

To add or remove patron records:

1. In the **Display** list, select **All Patrons**. This displays a list of all patrons (as shown in Figure 3.11), not just patrons currently assigned to this group.

FIGURE 3.11

***Tip:** You can also scan patrons into the group. To do so, select **Scan Patrons into Current Group** in the **Display** list. Then scan the patron's barcode or type the barcode in the **Barcode** box (not shown in Figure 3.11).*



2. Select each patron you want to add to or remove from the patron group. To locate specific patrons:
 - Use the vertical scroll bar or your up and down arrow keys to move through the list.
 - OR**
 - Click a column heading to sort the list by that column.
 - OR**
 - Search for a patron by any field indexed in the patron records. To do so:
 - A. In the **Display** list, select **Search**. This displays the Search dialog box (Figure 3.12).

FIGURE 3.12

For search tips, see
*"Searching for a Patron
 Record"* on page 4-17.

- B. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. Then click **Search**. This displays a list of patrons matching your search query.
3. Select the desired patrons, then click **Move**. This displays the Select Group dialog box (Figure 3.13).

FIGURE 3.13

4. Select the group into which you want to move the patrons, then click **OK**.
5. To view the new patron group list, select **Patrons in Current Group Only** in the **Display** list. The patron list refreshes to display only those assigned to this group.
6. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

Item Group Overrides Tab

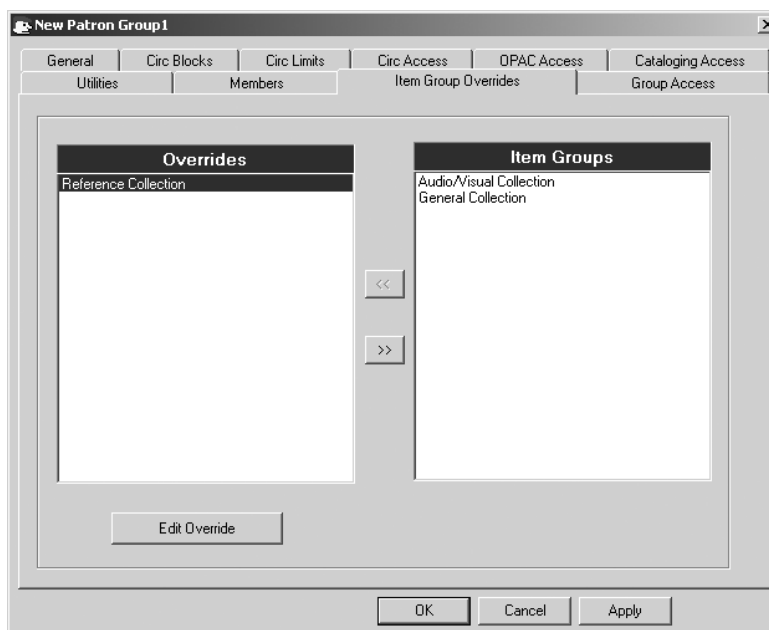
In this tab (Figure 3.14), grant this patron group rights to override specific circulation limits connected to item groups. For example, if the item group "CD Collection" limits the number of loan renewals to one, you can establish a different limit for this particular patron group.

3-14 Using M3 Group Editor

To assign item group overrides:

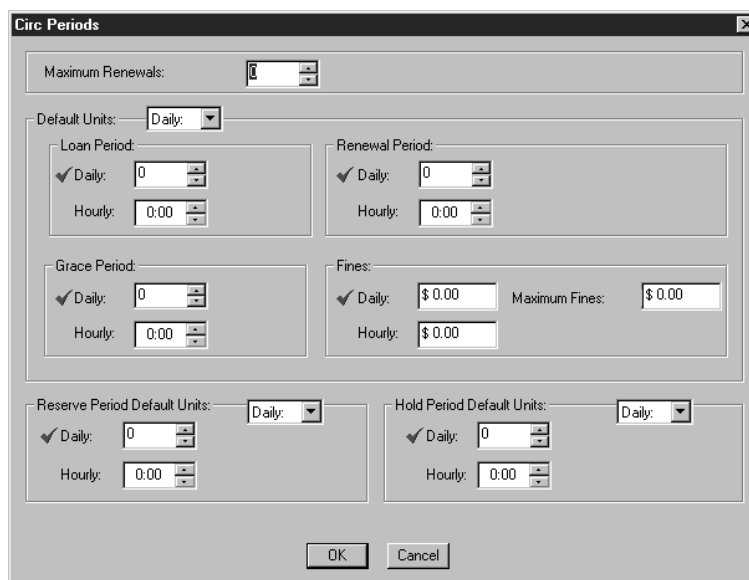
1. In the **Overrides** box, click the item group name. If it is not listed in the **Overrides** box, select the item group name in the **Item Groups** box, and then click the << button. This moves the name to the **Overrides** box (Figure 3.15).

FIGURE 3.14



2. While the item group name is selected, click **Edit Override**. The Circ Periods window appears, displaying the circulation limits for the selected item group (Figure 3.15).

FIGURE 3.15



3. In the **Maximum Renewals** list, select the maximum number of times that an item in this group can be renewed.

4. In the **Default Units** list, select **Daily** or **Hourly** as the default time unit for **Loan Period**, **Renewal Period**, **Grace Period**, and **Fines**.
5. In the **Loan Period**, **Renewal Period**, and **Grace Period** groups, enter the time limit for each period type.
6. Under **Fines**, type the fine amount per time unit and the maximum fine amount.
7. Under **Reserve Period Default Units** and **Hold Period Default Units**, select **Daily** or **Hourly** in the list, and then specify the time limit for each.
8. Click **OK** in the Circ Periods window.
9. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

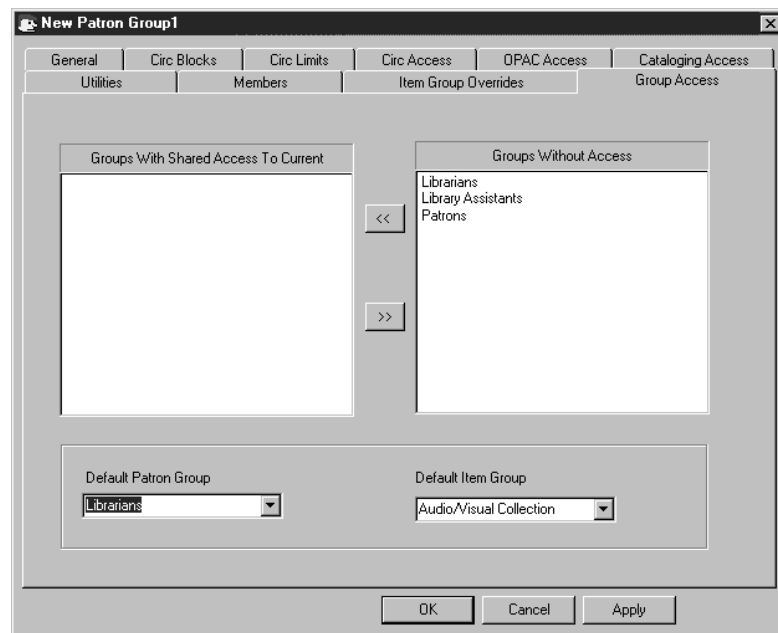
Click **OK** to save your entries in this tab and return to the Group Editor window.

Group Access Tab

In this tab (Figure 3.16), specify which patron groups you want to have access to this group.

To specify groups with access:

FIGURE 3.16



1. The **Groups Without Access** box displays the patron groups that do not have access to this group. To change the group access, click the patron group that you want to have access to this patron group, then click the **<<** button. This moves the patron group to the **Groups With Shared Access To Current** box. Repeat this for all groups that you want to have access to this patron group.

2. In the **Default Patron Group** list, select the patron group that you want to appear as the default group when a member of this patron group creates a patron record in the Cataloging and Circulation modules. This default group appears in patron records in the Standard Group (991#a) field.
3. In the **Default Item Group** list, select the item group that you want to appear as the default group when a member of this patron group creates a holding record in the Cataloging and Circulation modules. This default group appears in holding records in the Standard Group (991#a) field.
4. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

Modifying Patron Group Permissions

To modify the permissions assigned to a patron group:

1. In the Group Editor window, select a catalog database in the **Database Set** list.
2. Select a patron group, then click **Edit**. This displays the settings window for the selected group.
3. Modify the settings in the tabs as needed using the techniques described in “Creating a New Patron Group” beginning on page 3-4. When finished, click **OK** to save your changes.

Deleting a Patron Group

To delete a patron group from the M3 system:

1. In the Group Editor window, select the group to be deleted.
2. Click **Delete**.

NOTE: If members are assigned to the group, the message “You cannot delete a group that has members” appears.

3. If the group has no members, a confirmation prompt appears. Click **Yes** to proceed with the deletion.

Warning:

You cannot undo this deletion.

You cannot delete a patron group if members are assigned to the group.

WORKING WITH ITEM GROUPS

With M3, you can create an unlimited number of item groups with customized permissions for each group. For more information about item groups, see page 3-1.

Entering Item Records and Item Groups

You must create item groups before you can enter or import item records through the M3 Cataloging module.

Creating a New Item Group

To create a new item group:

1. In the Group Editor window, select a catalog database in the **Database Set** list.
2. Click **New**. This displays the New Group dialog box (Figure 3.17).

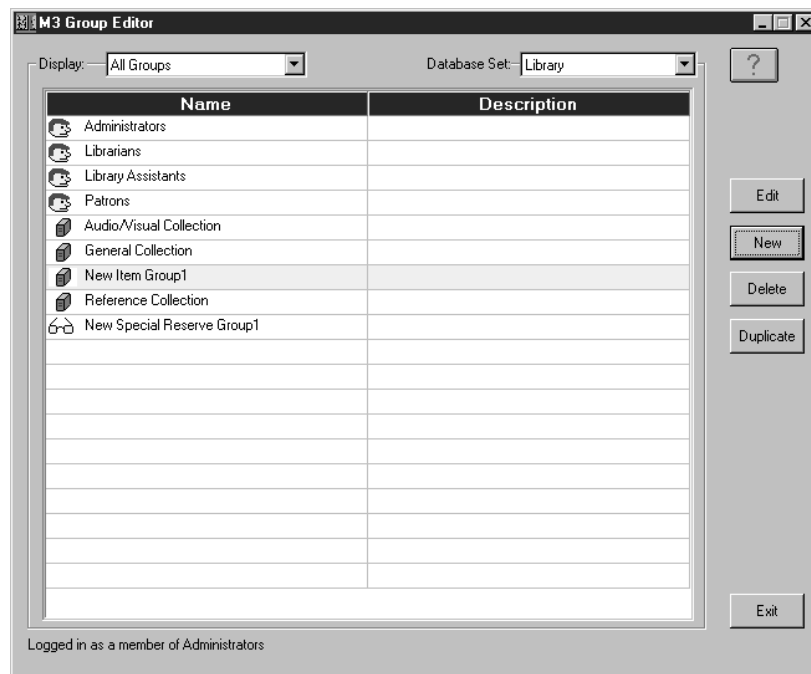
FIGURE 3.17



3. Click **New Item Group**, then click **OK**. This places a “New Item Group” listing in the Group Editor window (as shown in Figure 3.18).

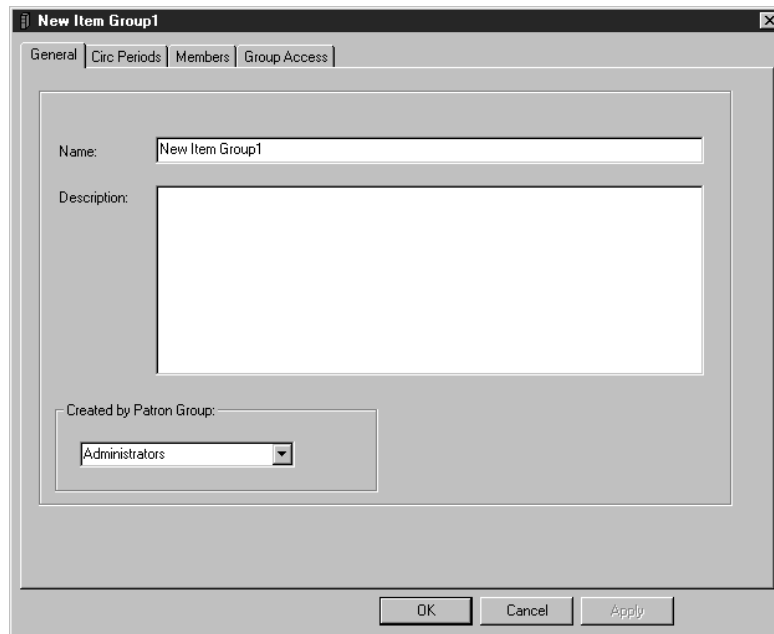
NOTE: If the new listing does not appear, verify that **All Groups** or **Item Groups** is selected in the **Display** list.

FIGURE 3.18



4. Select the new item group, then click **Edit**. This displays the New Item Group window (Figure 3.19), where you customize the group's characteristics. Enter the appropriate information in each tab as described in the following sections.

FIGURE 3.19



The screenshot shows a window titled "New Item Group1" with a close button in the top right corner. Below the title bar are four tabs: "General", "Circ Periods", "Members", and "Group Access". The "General" tab is active. Inside the tab, there is a "Name:" label followed by a text box containing "New Item Group1". Below that is a "Description:" label followed by a large, empty text area. At the bottom of the tab is a "Created by Patron Group:" label followed by a dropdown menu showing "Administrators". At the bottom of the window are three buttons: "OK", "Cancel", and "Apply".

General Tab

In this tab (Figure 3.19), enter identification information for the group. This information displays in the Group Editor window.

To enter general information:

1. In the **Name** box, type the item group's name.
2. In the **Description** box, type any information needed to clarify this group.
3. The **Created by Patron Group** box displays the patron group of the user that created this group. Only administrators can modify this entry.
4. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

Circ Periods Tab

In this tab (Figure 3.20), establish circulation time frames and fine amounts for this item group.

FIGURE 3.20

The screenshot shows the 'New Item Group' dialog box with the 'Circ Periods' tab selected. The dialog has four tabs: 'General', 'Circ Periods', 'Members', and 'Group Access'. The 'Circ Periods' tab contains the following fields:

- Maximum Renewals:** A numeric input field with a value of 0.
- Default Units:** A dropdown menu set to 'Daily'.
- Loan Period:** A section with a checked 'Daily' checkbox and a numeric input field set to 0, and an 'Hourly' checkbox with a time input field set to 0:00.
- Renewal Period:** A section with a checked 'Daily' checkbox and a numeric input field set to 0, and an 'Hourly' checkbox with a time input field set to 0:00.
- Grace Period:** A section with a checked 'Daily' checkbox and a numeric input field set to 0, and an 'Hourly' checkbox with a time input field set to 0:00.
- Fines:** A section with a checked 'Daily' checkbox and a numeric input field set to \$ 0.00, and a 'Maximum Fines' input field set to \$ 0.00. There is also an 'Hourly' checkbox with a time input field set to 0:00.
- Reserve Period Default Units:** A dropdown menu set to 'Daily'.
- Hold Period Default Units:** A dropdown menu set to 'Daily'.

At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Apply'.

1. To enter different limits for this item group, see steps 3 through 7 on page 3-14.
2. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

Members Tab

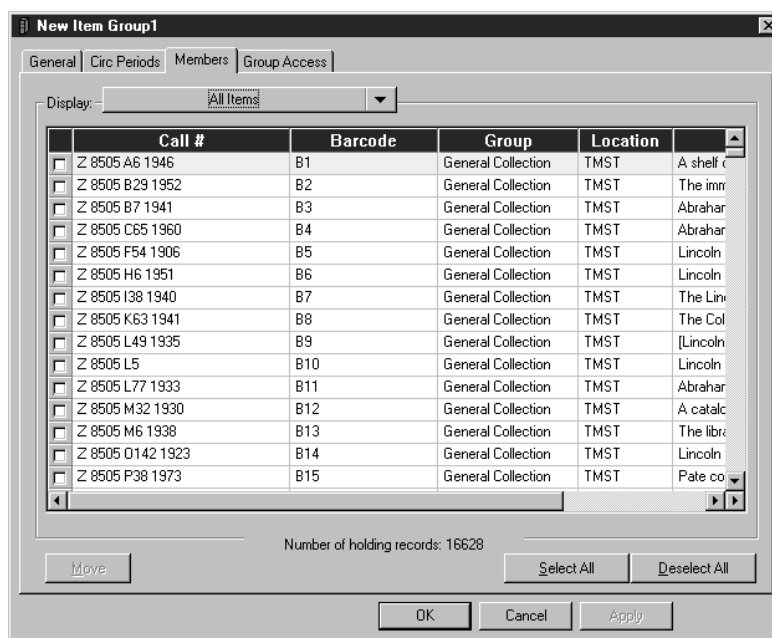
In this tab (Figure 3.21), add and remove item group members. Items assigned to this group adhere to the circulation parameters established in the Circ Periods tab on page 3-19.

To add or remove holding records:

1. In the **Display** list, select **All Items**. This displays a list of all items (as shown in Figure 3.21), not just items currently assigned to this group.

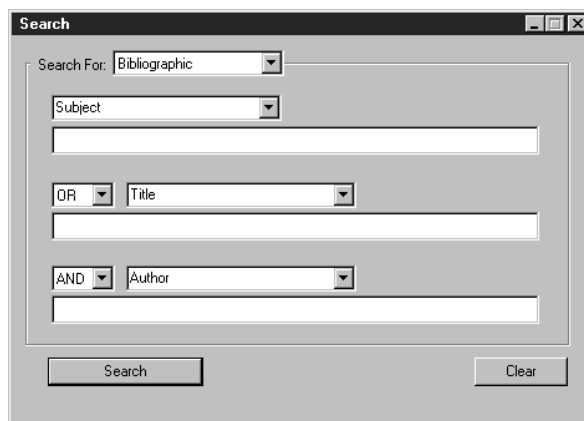
FIGURE 3.21

*Tip: You can also scan items into the group. To do so, select **Scan Items into Current Group** in the **Display** list. Then scan the item's barcode or type the barcode in the **Barcode** box (not shown in Figure 3.21).*



2. Select each item you want to add to or remove from the item group. To locate specific items:
 - Use the vertical scroll bar or your up and down arrow keys to move through the list.
 - OR**
 - Click a column heading to sort the list by that column (not applicable to **Title** and **Author**).
 - OR**
 - Search for an item by any field indexed in the item records. To do so:
 - A. In the **Display** list, select **Search**. This displays the Search dialog box (Figure 3.22).

FIGURE 3.22



- B. In the **Search For** list, select **Bibliographic** or **Holdings**.

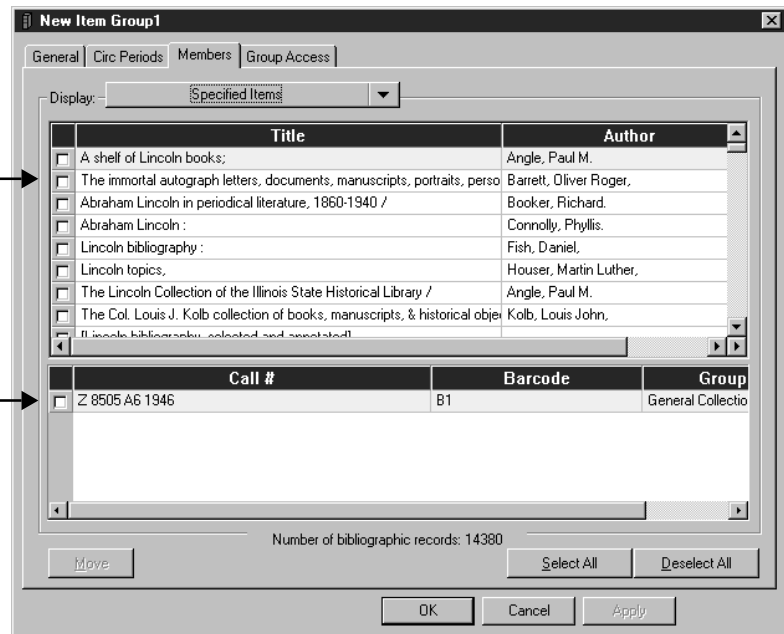
For search tips, see
"Searching for a Bibliographic Record" on page 4-4.

- C. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. Then click **Search**. This displays a list of items matching your search query (Figure 3.23).

FIGURE 3.23

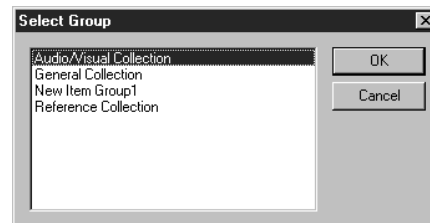
Bibliographic records

Holding record



3. Select the desired items, then click **Move**. This displays the Select Group dialog box (Figure 3.24).

FIGURE 3.24



4. Select the group into which you want to move the items, then click **OK**.
5. To view the new item group list, select **Items in Current Group Only** in the **Display** list. The item list refreshes to display only those assigned to this group.
6. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

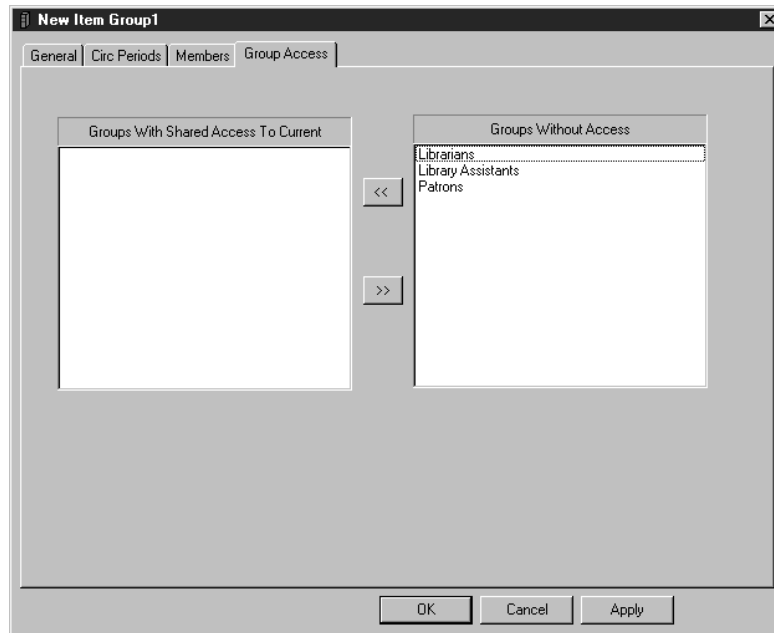
Click **OK** to save your entries in this tab and return to the Group Editor window.

Group Access Tab

In this tab (Figure 3.16), specify which patron groups you want to have access to this group.

To specify groups with access:

FIGURE 3.25



1. The **Groups Without Access** box displays the patron groups that do not have access to this group. To change the group access, click the patron group that you want to have access to this item group, then click the << button. This moves the patron group to the **Groups With Shared Access To Current** box. Repeat this for all groups that you want to have access to this item group.
2. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

Modifying Item Group Permissions

To modify the permissions assigned to an item group:

1. In the Group Editor window, select a catalog database in the **Database Set** list.
2. Select an item group, then click **Edit**. This displays the settings window for the selected group.
3. Modify the settings in the tabs as needed using the techniques described in “Creating a New Item Group” beginning on page 3-17. When finished, click **OK** to save your changes.

You cannot delete an item group if members are assigned to the group.

Deleting an Item Group

To delete an item group from the M3 system:

1. In the Group Editor window, select the group to be deleted.
2. Click **Delete**.

NOTE: If members are assigned to the group, the message “You cannot delete a group that has members” appears.

3. If the group has no members, a confirmation prompt appears. Click **Yes** to proceed with the deletion.

Warning:

You cannot undo this deletion.

WORKING WITH SPECIAL RESERVE GROUPS

With M3, you can create an unlimited number of special reserve groups with customized permissions for each group. For more information about special reserve groups, see page 3-1.

Creating a New Special Reserve Group

To create a new special reserve group:

1. In the Group Editor window, select a catalog database in the **Database Set** list.
2. Click **New**. This displays the New Group dialog box (Figure 3.26).

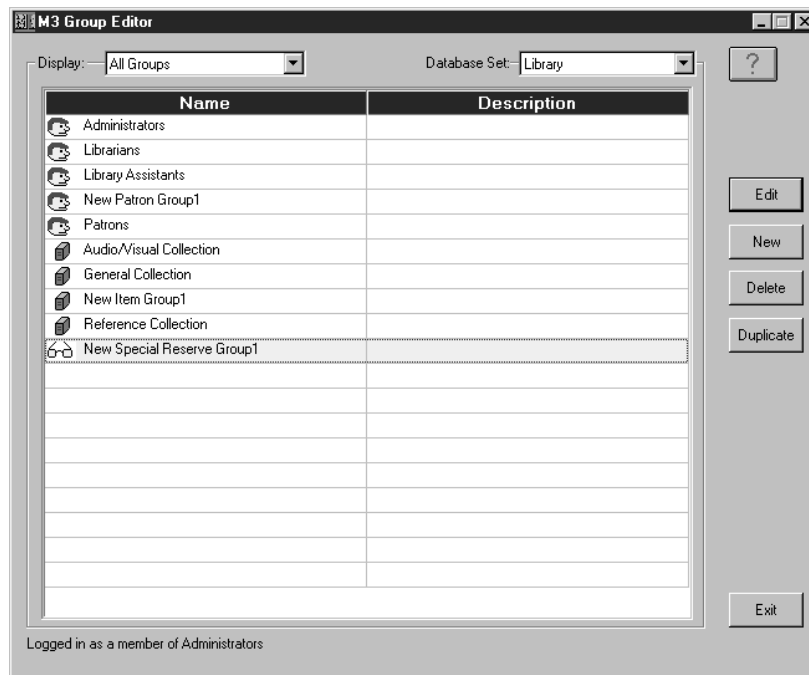
FIGURE 3.26



3. Click **New Special Reserve Group**, then click **OK**. This places a “New Special Reserve Group” listing in the Group Editor window (as shown in Figure 3.27).

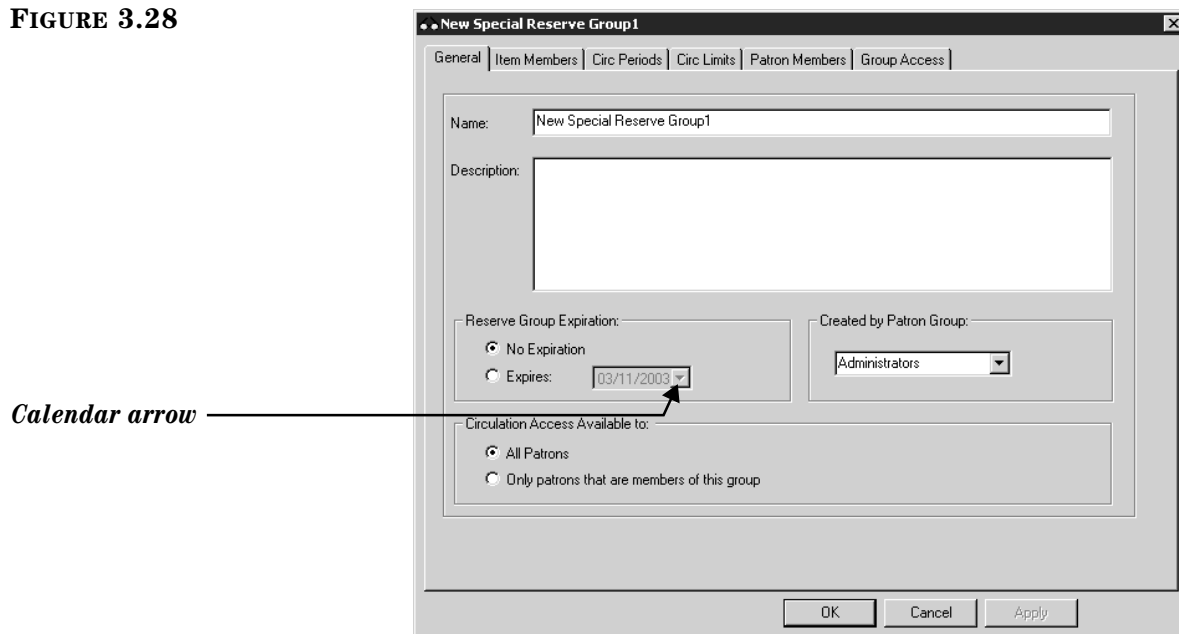
NOTE: If the new listing does not appear, verify that **All Groups** or **Special Reserve Groups** is selected in the **Display** list.

FIGURE 3.27



4. Select the new special reserve group, then click **Edit**. This displays the New Special Reserve Group window (Figure 3.28), where you customize this group's characteristics. Enter the appropriate information in each tab as described in the following sections.

FIGURE 3.28



General Tab

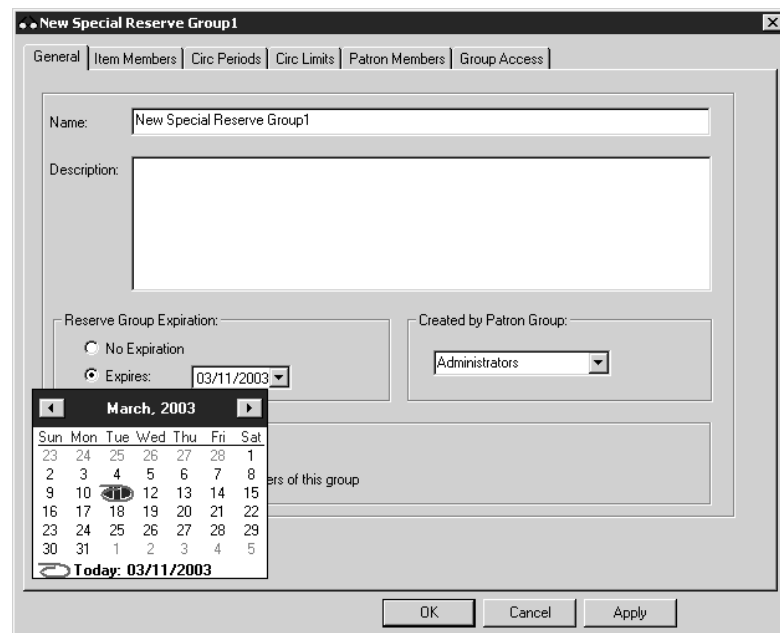
In this tab (shown in Figure 3.28), enter identification information for the group as well as information that impacts circulation behavior.

1. In the **Name** box, type the special reserve group's name.
2. In the **Description** box, type any information needed to clarify this group.
3. Under **Reserve Group Expiration**:
 - If the group has no planned expiration date, click **No Expiration**.

OR

 - If an expiration date is known, click **Expires**, and then type or select a date in the adjacent box. To select a date, click the **Calendar** arrow to display a calendar (as shown in Figure 3.29). Click the calendar's left (<) and right (>) arrows to select a month, then click the desired date. The date appears in the **Expires** box.

FIGURE 3.29



4. The **Created by Patron Group** box displays the patron group of the user that created this group. Only administrators can modify this entry.
5. Under **Circulation Access Available to**:
 - Click **All Patrons** if you want all patrons to have access to items included in this special reserve group.

OR

 - Click **Only patrons that are members of this group** if you want to restrict access to items in this special reserve group.
6. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

Item Members Tab

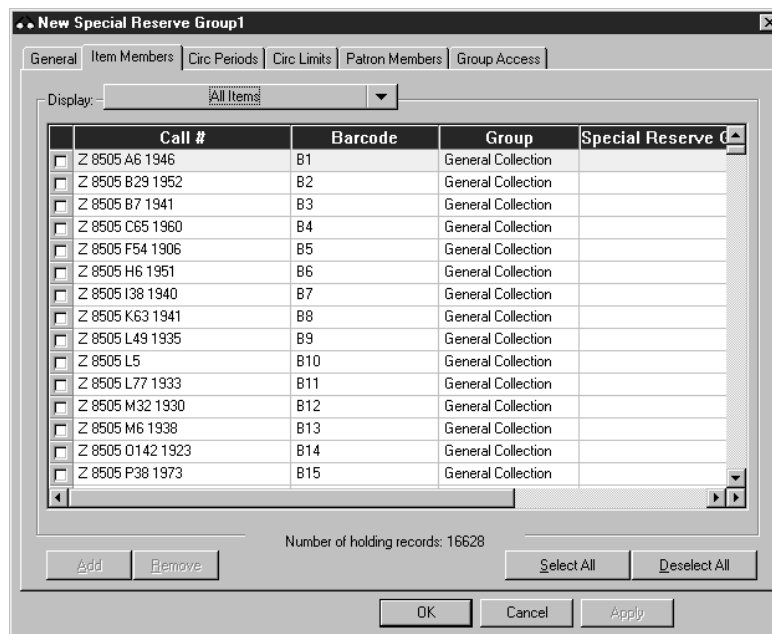
In this tab (Figure 3.30), add and remove item group members. Items assigned to this group adhere to the circulation parameters you establish in the next tab, **Circ Periods** (see page 3-28).

To add or remove holding records:

1. In the **Display** list, select **All Items**. This displays a list of all items (as shown in Figure 3.30), not just items currently assigned to this group.

FIGURE 3.30

***Tip:** You can also scan items into the group. To do so, select **Scan Items into Current Group** in the **Display** list. Then scan the item's barcode or type the barcode in the **Barcode** box (not shown in Figure 3.30).*



2. Select each item you want to add to the special reserve group. To locate specific items:
 - Use the vertical scroll bar or your up and down arrow keys to move through the list.
 - OR**
 - Click a column heading to sort the list by that column (not applicable to **Title** and **Author**).
 - OR**
 - Search for an item by any field indexed in the item records. To do so:
 - A. In the **Display** list, select **Search**. This displays the Search dialog box (Figure 3.31).

FIGURE 3.31

*For search tips, see
“Searching for a Biblio-
graphic Record” on page 4-4.*

- B. In the **Search For** list, select **Bibliographic** or **Holdings**.
- C. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. Then click **Search**. This displays a list of items matching your search query.

3. To add items, select the desired items, then click **Add**.

OR

To remove items, select the desired items, then click **Remove**.

4. To view the new item group list, select **Items in Current Group Only** in the **Display** list. The item list refreshes to display only those assigned to this group.
5. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

Circ Periods Tab

In this tab (Figure 3.32), establish circulation time frames and fine amounts for this special reserve group.

FIGURE 3.32

New Special Reserve Group1

General | Item Members | **Circ Periods** | Circ Limits | Patron Members | Group Access

Maximum Renewals: 0

Default Units: Daily

Loan Period:

✓ Daily: 0

Hourly: 0:00

Renewal Period:

✓ Daily: 0

Hourly: 0:00

Grace Period:

✓ Daily: 0

Hourly: 0:00

Fines:

✓ Daily: \$ 0.00

Hourly: \$ 0.00

Maximum Fines: \$ 0.00

OK Cancel Apply

1. To enter different limits for this special reserve group, see steps 3 through 7 on page 3-14.
2. Click **Apply** to save your entries in this tab, then click another tab to modify it.

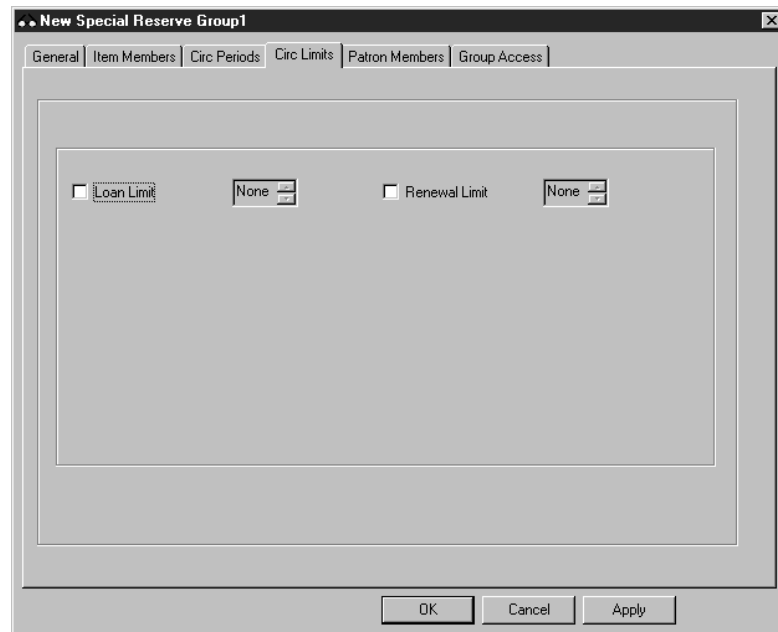
OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

Circ Limits Tab

In this tab (Figure 3.33), customize the circulation quantity limits for the special reserve group. Specify the maximum number of items for each type of transaction listed.

FIGURE 3.33



1. Select a circulation limit for each limit type. To do so:
 - A. Select a limit type. If a limit is not selected, no limit is assigned.
 - B. In the list next to the limit type, select a limit amount.
2. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

Patron Members Tab

In this tab (Figure 3.34), add and remove patron members. Use this tab only if **Only patrons that are members of this group** is selected in the **General** tab (shown in Figure 3.28).

To add or remove patron members:

1. In the **Display** list, select **All Patrons**. This displays a list of all patrons (as shown in Figure 3.34), not just patrons currently assigned to this group.

FIGURE 3.34

***Tip:** You can also scan patrons into the group. To do so, select **Scan Patrons into Current Group** in the **Display** list. Then scan the patron's barcode or type the barcode in the **Barcode** box (not shown in Figure 3.34).*

	Last Name	First Name	Group	Special Reserve
☐	FREDER	ROSA	Patrons	
☐	FREE	BONNIE	Patrons	
☐	FREY	HAL	Patrons	
☐	FULLER	GLEN	Patrons	
☐	FULLER	ROSS	Patrons	
☐	GALGO	CARMEN	Patrons	
☐	GANO	MEL	Patrons	
☐	GARREN	BERT	Patrons	
☐	GARER	PHIL	Patrons	
☐	GEB	DAN	Patrons	
☐	GERST	DAVID	Patrons	
☐	GHOST	JOSEPH	Patrons	
☐	GHOST	HALEY	Patrons	

2. Select each patron you want to add to the special reserve group. To locate specific patrons:
 - Use the vertical scroll bar or your up and down arrow keys to move through the list.
 - OR**
 - Click a column heading to sort the list by that column.
 - OR**
 - Search for a patron by any field indexed in the patron records. To do so:
 - A. In the **Display** list, select **Search**. This displays the Search dialog box (Figure 3.35).

FIGURE 3.35

For search tips, see
*"Searching for a Patron
 Record"* on page 4-17.

B. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. Then click **Search**. This displays a list of patrons matching your search query.

3. To add patrons, select the desired patrons, then click **Add**.

OR

To remove patrons, select the desired patrons, then click **Remove**.

4. To view the new patron group list, select **Patrons in Current Group Only** in the **Display** list. The patron list refreshes to display only those assigned to this group.

5. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

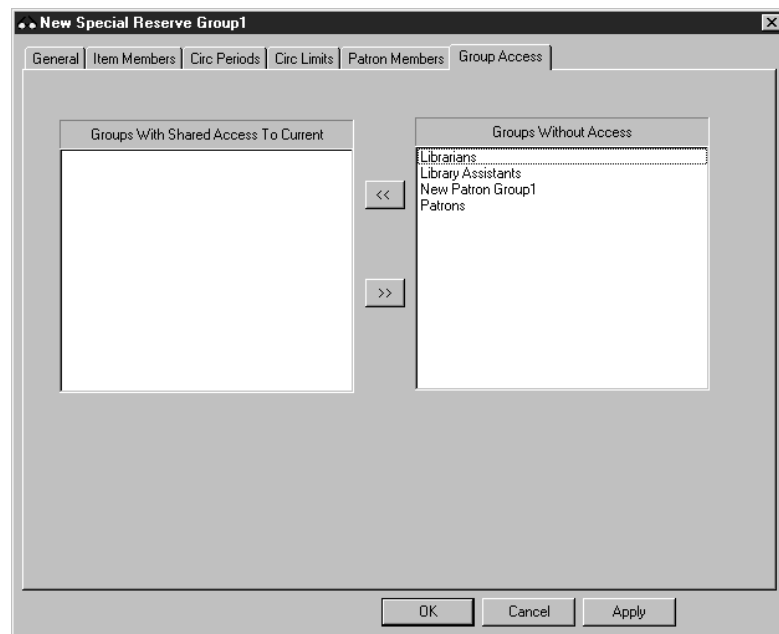
Click **OK** to save your entries in this tab and return to the Group Editor window.

Group Access Tab

In this tab (Figure 3.36), specify which patron groups you want to have access to this group.

To specify groups with access:

FIGURE 3.36



1. The **Groups Without Access** box displays the patron groups that do not have access to this group. To change the group access, click the patron group that you want to have access to this special reserve group, then click the **<<** button. This moves the patron group to the **Groups With Shared Access To Current** box. Repeat this for all groups that you want to have access to this special reserve group.

2. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

Click **OK** to save your entries in this tab and return to the Group Editor window.

Modifying Special Reserve Group Permissions

To modify the permissions assigned to a special reserve group:

1. In the Group Editor window, select a catalog database in the **Database Set** list.
2. Select the desired group, then click **Edit**. This displays the settings window for the selected group.
3. Modify the settings in the tabs as needed using the techniques described in “Creating a New Special Reserve Group” beginning on page 3-23. When finished, click **OK** to save your changes.

Deleting a Special Reserve Group

You cannot delete a special reserve group if members are assigned to the group.

To delete a special reserve group from the M3 system:

1. In the Group Editor window, select the group to be deleted.
2. Click **Delete**.

NOTE: If members are assigned to the group, the message “You cannot delete a group that has members” appears.

3. If the group has no members, a confirmation prompt appears. Click **Yes** to proceed with the deletion.

Warning:

You cannot undo this deletion.

USING M3 CATALOGING

4

CHAPTER CONTENTS

This chapter explains:

- How to search for, create, and edit records (page 4-2)
- How to update Authority Control (page 4-11)
- How to use the find and replace utility (page 4-36)
- How to mark records for deletion and purge marked records (page 4-47)
- How to import records, including pictures (page 4-55)
- How to export records (page 4-75)

ABOUT CATALOGING

This chapter assumes the user is trained in MARC cataloging practices.

All records are entered into M3 as MARC records. They are divided into five different databases: Bibliographic, Holding, Patron, Authority, and Picture. Your M3 system may not have all five databases.

The M3 Cataloging module is a full MARC record editor. Use it to add, modify, and delete MARC records in any of these databases.

STARTING M3 CATALOGING

To start the Cataloging module:

***Note:** If you installed M3 v1.1 prior to installing v1.6, select **SIRS Mandarin** and then **M3** (instead of **Mandarin M3**).*

1. On the taskbar, click the **Start** button, select **Programs**, select **Mandarin M3**, and then click **Cataloging**. This displays the Cataloging Login dialog box.
2. Type your user ID in the **Login Name** box, your password in the **Password** box, and then click **OK**. This displays the Cataloging window (Figure 4.2).

SELECTING A DATABASE

Your M3 system can access multiple catalog databases. If multiple databases are available, select the catalog database you want to use. To do so:

1. On the **File** menu, click **Change Database**. This displays the Change Database dialog box (Figure 4.1).

FIGURE 4.1



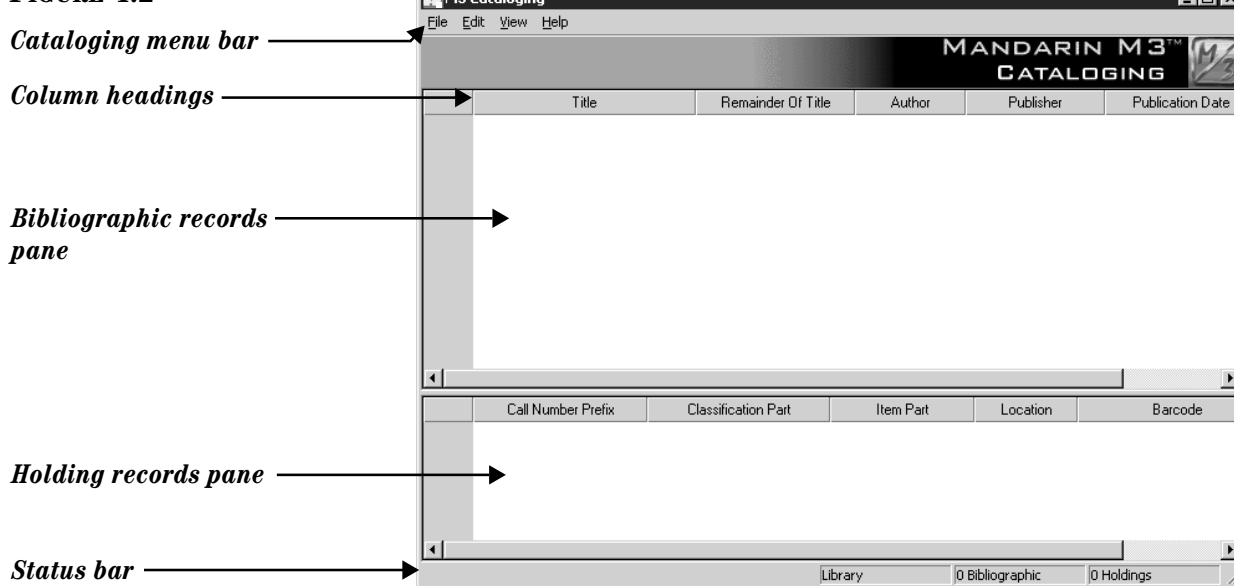
2. In the **Current Database** list, select the desired database.
3. When finished, click **OK**.

WORKING WITH BIBLIOGRAPHIC RECORDS

Cataloging Window Features

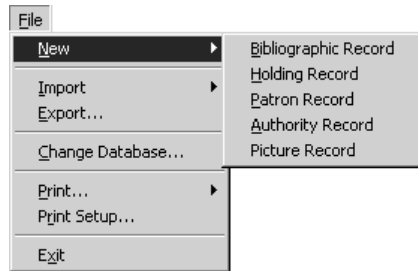
The bibliographic version of the Cataloging window (Figure 4.2) has a split window that displays brief bibliographic and holding records. The bibliographic record version of this window is shown in Figure 4.2.

FIGURE 4.2



- **Cataloging menu bar** – Contains the File, Edit, View, and Help menus.
 - From the **File** menu (Figure 4.3), create new records, import and export records, change databases, and access printing commands.

FIGURE 4.3



- From the **Edit** menu (Figure 4.4), access the commands **Undo Find/Replace**, **Search**, **Duplicate**, **Find**, **Select/Deselect All Records**, **Delete/Undelete Selected Records**, **Purge Deleted Records**, **Purge Selected Records**, and **Undo Save**, as well as several optional features (if they are available in your M3 system).

FIGURE 4.4



- From the **View** menu, enable/disable the status bar display on the Cataloging window.
- From the **Help** menu, access Cataloging Help topics and connect to the Mandarin Web page.

Tip: To sort information by any field in the pane, click the field's column heading. One click sorts in ascending order; a second click sorts in descending order.

- **Column headings** – Each pane includes a set of column headings. These are names that identify the MARC record field displayed below each heading.
- **Bibliographic records pane** – After a bibliographic record search, this pane lists brief bibliographic records matching the search query. Your library can configure which MARC fields display in this pane.
- **Holding records pane** – After a bibliographic record search, this pane lists brief holding records matching the search query. The list of holding records corresponds to the bibliographic record selected in the upper pane. Your library can configure which MARC fields display in this pane.

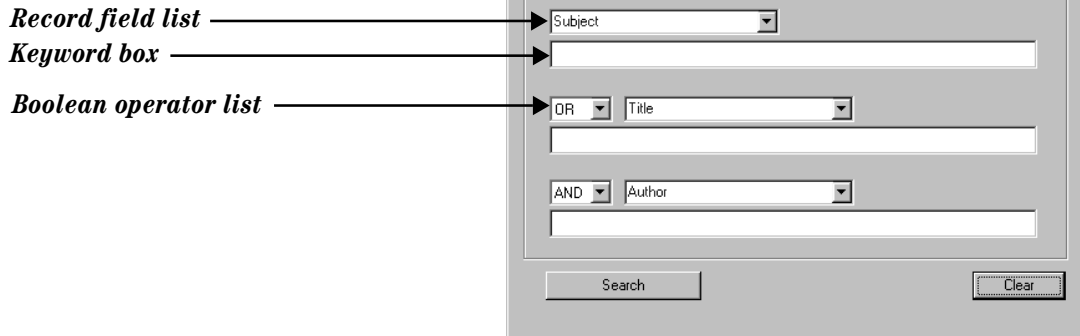
- **Status bar** – The status bar displays the current database being used and the number of bibliographic and holding records found matching the search query.

Searching for a Bibliographic Record

The Search Dialog Box

The default bibliographic version of the Search dialog box is shown in Figure 4.5.

FIGURE 4.5



All M3 Search dialog boxes use the keyword search method. You can search for keywords in as many as three bib record fields.

NOTE: Options in the record field lists are the search attributes defined by Z39.50 protocol. Among other options, they include MARC record fields and indexes of multiple MARC record fields. For simplicity, this Users Guide refers to them as MARC fields.

Your system can be configured to display different default MARC fields and Boolean operators.

How to Search

To search for a bibliographic record:

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.5).
2. In the **Search For** list, select **Bibliographic**.
3. Type your search query into the appropriate keyword boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator.
4. Click **Search**. This displays a list of records matching your search query (Figure 4.6).

Search Tips:

- You can apply the truncation asterisk (*) to the beginning and/or end of a keyword; the wildcard question mark (?) character within a keyword (wom?n); and quotation marks (" ") around a phrase.
- You can use the AND, OR, and NOT Boolean operators to connect keywords within a keyword box. Be sure to type operators in capital letters.

FIGURE 4.6

*Bib record**Corresponding holding records*

The screenshot shows the M3 Cataloging software window. The top pane displays a list of bibliographic records. The bottom pane displays a list of corresponding holding records for the selected bibliographic record.

	Title	Remainder Of Title	Author	Publisher	Publication Date
1	☐ Histories:	the rise and decline of the	Prescott, William Hicklin	Viking Press	[1963]
2	☒ History of the reign of Ferdinand ar		Prescott, William Hicklin	J. B. Lippincott Co.,	c1872.
3	☐ History of the reign of Philip the Se		Prescott, William Hicklin	Lippincott,	1882-1886.
4	☐ The conquest of Mexico,	The conquest of Peru, and	Prescott, William Hicklin	Washington Square Press	[1966]

	Call Number Prefix	Classification Part	Item Part	Location	Barcode
1	☐ DP	162	P8 1872	ALPHA	BA10505
2	☐ DP	162	P8 1872	ALPHA	BA10506
3	☐ DP	162	P8 1872	ALPHA	BA10507

At the bottom of the window, there are buttons for "Union", "4 Bibliographic", and "3 Holdings".

5. From here, you can:

- Click any bib record in the upper pane to display corresponding holding records in the lower pane.
- Double-click a brief bib or holding record to view its full MARC record. A full MARC bib record matching this search is shown in Figure 4.12; a full MARC holding record is shown in Figure 4.17.
- Select a check box to tag the corresponding record for deletion or printing. To tag a block of records, select the first record and press SHIFT while selecting the last record; this tags all records in between.
- Print tagged records or all records in the list. To do so, select **Print** on the **File** menu, then click **Records** (to print tagged) or **List** (to print all).
- Create a new similar record by clicking **Duplicate** on the **Edit** menu. (For instructions, see "Creating a Bibliographic Record" on page 4-6.)
- Move (not copy) a holding record from one bib record to a different bib record. To do so, click and drag the holding record to the appropriate bib record.
- Start another search from the **Edit** menu.

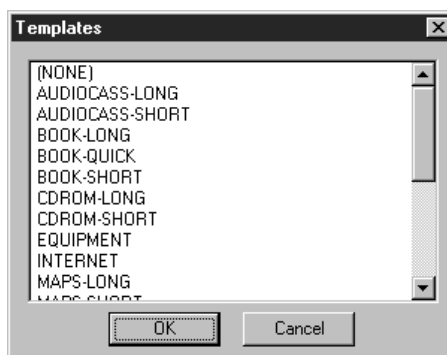
Creating a Bibliographic Record

There are three ways to create a new bibliographic record: (1) You can use a template and edit it to match the new record; (2) You can duplicate an existing bibliographic record, then edit it to create the new record; (3) You can click **New** in the **After Saving** area when creating or editing a different bib record. The first two methods are explained in the following sections, “From a Template” and “By Duplicating an Existing Bib Record.” The third method is explained in the **New** bullet in step 5 of “Editing a Bibliographic Record” on page 4-9.

From a Template

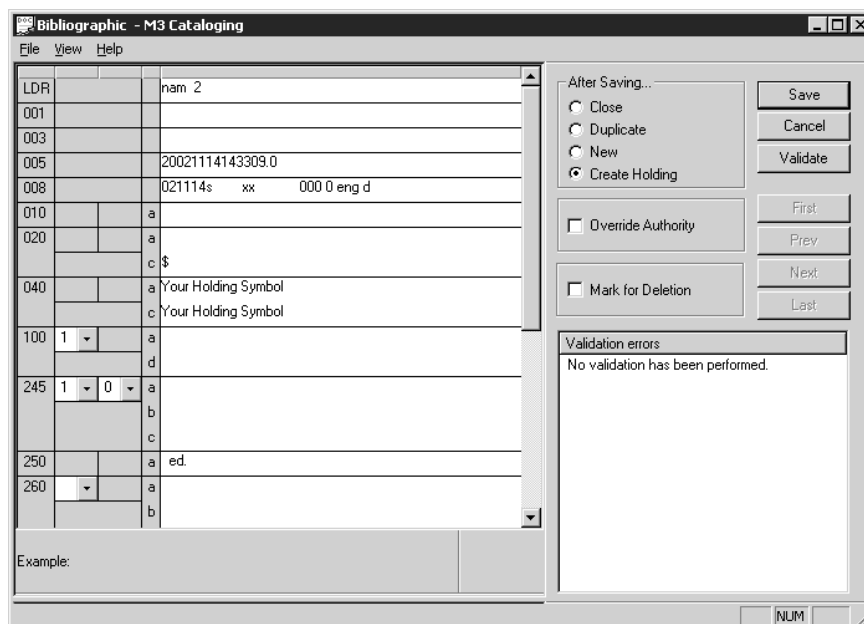
1. On the **File** menu, select **New**, and then click **Bibliographic Record**. This displays the Templates dialog box (Figure 4.7).

FIGURE 4.7



2. Click the appropriate template for the record you want to create, then click **OK**. This displays the template in the Bibliographic - Cataloging window (Figure 4.8).

FIGURE 4.8



For information on the **Override Authority** feature, see “Using the Override Authority Feature” on page 4-10.

Note: If you do not want empty fields to be deleted when the record is saved, change the **Strip Empty Fields** entry in the Active-MarcEdit.ini file (located in your M3 directory) to **OVER-RIDE=on**, then restart the Cataloging module. Authority Control users should not change this setting.

3. Enter field and subfield data for the new record. To move through the record, use your keyboard up and down arrows. Notice that status bar information changes to identify the selected field and subfield.
 - To access a menu with edit commands (Figure 4.9), right-click the field or subfield you want to edit. From this menu, options include:
 - You can insert, delete, cut, copy, paste, and move fields and subfields. (To insert multiple subfields in a field at once, click **Insert Subfield**. Type the subfields, without spaces or commas, in the text box found in the lower right corner of the Insert Subfield dialog box. For example, to enter subfields **a**, **b**, **c**, and **g**, type **abcg**.)
 - You can click **Find** to locate text within this record.
 - You can click **Toggle Prompts** to change the MARC field labels from numbers to text.

FIGURE 4.9

Tip: To insert a picture field in this record so its picture can be viewed in the Circulation and OPAC modules, see “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-37.

Insert Field...	Shift+Ins
Insert Subfield...	Ctrl+Ins
Delete Field	Shift+Del
Delete Subfield	Ctrl+Del
Cut Record	Shift+Ctrl+X
Cut Field	Shift+X
Cut Subfield	Ctrl+X
Copy Record	Shift+Ctrl+C
Copy Field	Shift+C
Copy Subfield	Ctrl+C
Paste	Ctrl+V
Move Field Up	Shift+Up
Move Field Down	Shift+Down
Move Subfield Up	Ctrl+Up
Move Subfield Down	Ctrl+Down
Find...	Ctrl+F
Toggle Prompts	Ctrl+T

- To access a list of fixed field standard choices (including position and legal characters) pertaining to a particular fixed field, double-click in the field. The dialog box for fixed field 008 is shown in Figure 4.10. You can define your fixed field by typing in text or, where available, clicking the arrow button and selecting an option in the list. When finished, click **OK**.

FIGURE 4.10

Field	Value	Description
780217	00-05	Date entered on file
s	06	Type of date/publication status
1872	07-10	Date 1
	11-14	Date 2
pau	15-17	Place of publication, production, or execution
a	18-21	Illustrations
	22	Target audience
	23	Form of item
	24	Nature of contents
	25	Nature of contents
	26	Nature of contents
	27	Nature of contents
	28	Government publication
0	29	Conference publication
0	30	Festschrift
1	31	Index
1	32	Undefined
0	33	Literary form
	34	Biography
eng	35-37	Language

OK Cancel

- If you are using a version of M3 that supports Authority Control, and the field you want to edit is managed under Authority Control, then the field is not editable (unless you use the Override Authority feature explained on page 4-10). To select an authority record, click subfield **a** in the white edit area of the subfield (shown in Figure 4.12). This displays the Authority Records dialog box (Figure 4.11).

FIGURE 4.11

Authority Records

- #aA. C. Bhaktivedanta Swami Prabhupada, #d1896-1977
- #aAaboe, Asger
- #aAardema, Verna.
- #aAaron, Chester.
- #aAaron, Daniel, #d1912-
- #aAaron, Hank, #d1934-
- #aAaron, Hank, #d1934-#vJuvenile literature.
- #aAaron, Jan.
- #aAaron, Jane
- #aAarons, Edward S. #q(Edward Sidney), #d1916-1975
- #aAas, Tonje Ström,
- #aAsseng, Nathan.
- #aAbbate, Francesco
- #aAbbate, Fred J.
- #aAbbe, Kathryn McLaughlin.
- #aAbbett, Leo
- #aAbbey, Edward, #d1927-
- #aAbbey, Margaret
- #aAbbott, Angus Evan, #d1862-1923.
- #aAbbott, Anthony S.
- #aAbbott, Carl.
- #aAbbott, David, #d1937-
- #aAbbott, Edwin Abbott, #d1838-1926.
- #aAbbott, Edwin Abbott, #d1838-1926. #tFlatland.
- #aAbbott, George, #d1887-1995
- #aAbbott, George, #d1887-1995 #tDamn Yankees.

A. C. Bhaktivedanta Swami Prabhupada, 1896-1977

#aDLC #beng #cDLC #dInJ #dOCoLC

OK Cancel

Contents of field 040

Select the authority record you want to use, then click **OK**. This returns you to the Bibliographic - Cataloging window (Figure 4.8) and enters the new record in the selected field.

- To save a version of this record as a template for future use, click **Save As Template** on the **File** menu.

4. Click **Validate** to check for errors in the record. If any errors appear in the **Validation Errors** box, fix or ignore them. To view information explaining each error, click the plus (+) sign to the left of the error.
5. When finished editing the record and validating errors (but before saving), click an **After Saving** option to indicate what you want to happen after you save the record. The options are:
 - **Close** exits the saved record and returns to the Cataloging window.
 - **Duplicate** creates a new record identical to the one you are saving; you can edit the duplicate record to create another record.
 - **New** exits the saved record and displays a new template window to modify. (If more than one bib template is available, the Templates dialog box displays. Select a template, then click **OK**.)
 - **Create Holding** exits the saved record and displays a corresponding holding record template where you can add local information such as call number, barcode number, and location. If more than one template is available, the Templates dialog box displays, allowing you to select a template.
6. To mark this record for deletion, select the **Mark for Deletion** check box. For instructions on purging records marked for deletion, see “Step 2: Purging Records Marked for Deletion” on page 4-48.
7. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected under **After Saving**.

By Duplicating an Existing Bib Record

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.5).
2. In the **Search For** list, select **Bibliographic**.
3. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
4. Click **Search**. This displays a list of bib and holding records matching your search query.
5. Click the bib record to be duplicated. On the **Edit** menu, click **Duplicate**. This displays the Bibliographic - Cataloging window (Figure 4.8) containing the corresponding full MARC record. This is a duplicate MARC bib record.
6. Edit this record as needed. For instructions, see steps 3 through 6 beginning on page 4-7.
7. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected under **After Saving**.

Editing a Bibliographic Record

To edit a bib record:

1. If the record to be edited is not displayed:
 - A. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.5).
 - B. In the **Search For** list, select **Bibliographic**.
 - C. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
 - D. Click **Search**. This displays a list of bib and holding records matching your search query.
 - E. Double-click the bib record you want to edit. This displays the selected record in full MARC format (Figure 4.12).

FIGURE 4.12

After Saving options

MARC fields and subfields

Edit area

Navigation buttons

Status bar with MARC field and subfield descriptions

LDR		0000000005
001		0000000005
005		20020401163331.0
008		000131s2001 mnua j b 001 0 eng
010		a 00008252
020		a 1575051532 (lib. bdg. : alk. paper)
040		a DLC
		c DLC
		d DLC
042		a c=Program for Cooperative Cataloging
		a ac=LC Annotated Children's Cataloging Program
050	0	0
		a QH541.5 P7
		b J65 2001
082	0	0
		a 577.4/4
		2 21
100	1	
		a Johnson, Rebecca L.
		@0000024797
245	1	2
		a A walk in the prairie /

After Saving...
☒ Close
☐ Duplicate
☐ New
☐ Create Holding
☐ Override Authority
☐ Mark for Deletion
 Save
 Cancel
 Validate
 First
 Prev
 Next
 Last

Validation errors
 + 008/31: Index note missing?
 + 010-01: Trailing blank missing.
 + 042-01: Subfield a code is Invalid.
 + 042-01: Subfield a code is Invalid.
 + 800-01: End of field punc. needed.

Cataloging Source: Transcribing agency
 Example: DLC

Tip: To navigate through the records in the search results list, click the navigation buttons **First**, **Prev**, **Next**, and **Last**.

2. Edit this record as needed. For instructions, see steps 3 through 6 beginning on page 4-7.
3. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected under **After Saving**.

Using the Override Authority Feature

If you are using a version of M3 that supports Authority Control, the Override Authority feature allows you to edit fields in a bibliographic record that are managed under Authority Control. It can be utilized when creating or editing a bibliographic record.

Note: To have access to the **Override Authority** feature, the **Override Authority** check box must be selected in Group Editor. See Figure 3.9 on page 3-10.

To use the Override Authority feature:

1. Display the bibliographic record you want to edit in the Bibliographic - Cataloging window (Figure 4.12). (For instructions on locating and displaying a record, follow steps 1A through 1E in “Editing a Bibliographic Record” on page 4-10.)
2. Select the **Override Authority** check box. This makes all Authority Control-managed fields editable.
3. Click in the white edit area of the field you want to edit and type new entries as desired.
4. When finished, click **Save** in the Bibliographic - Cataloging window.
5. Verify your bibliographic records for consistency. To do so, see the following section, “Verifying Bibliographic Records with Authority Control.”

Verifying Bibliographic Records with Authority Control

If you are using a version of M3 that supports Authority Control, you will want to verify your bibliographic records for consistency after the initial record import and subsequent imports. When you update, M3 matches the authority fields in all bibliographic records against the local authority table (and the Library of Congress authority database, if you have purchased a subscription) to ensure that all records are using the correct authority fields.

Verifying Records

To verify all records or newly added records:

On the **Edit** menu, select **Bibliographic**, select **Update Authority Control**, and then click one of the following:

- **Verify All** – Checks all records.
- **Verify New** – Checks all records added since the last update.

To verify selected records:

1. In the brief MARC record list, select the check box by each bibliographic record you want to verify.
2. Right-click in the Bibliographic records pane. In the command menu, click **Verify Selected Records**. This checks only the selected records.

Unlinking Bibliographic Records from Authority Records

If you are using a version of M3 that supports Authority Control, you can remove the links between ALL bibliographic and authority records. To do so:

On the **Edit** menu, select **Bibliographic**, select **Update Authority Control**, and then click **Unlink Bibliographic**.

NOTE: To use Authority Control after performing this procedure, you must click **Verify All** to reverify your records. For instructions, see the preceding section, “Verifying Bibliographic Records with Authority Control.”

***Note:** For more information on the Library of Congress authority database, contact Mandarin Order and Customer Service.*

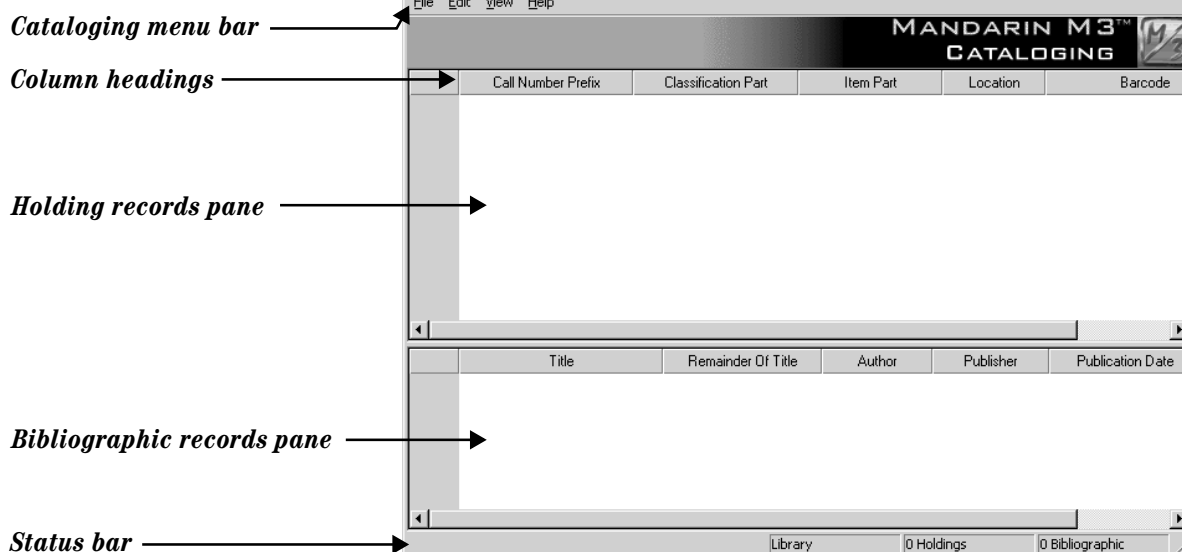
***Note:** After the update, any records that cannot be verified appear in the Cataloging window.*

WORKING WITH HOLDING RECORDS

Cataloging Window Features

As with the bib version of the Cataloging window, the holding record version has a split window that displays brief bibliographic and holding records. However, the panes are reversed; the holding record appears in the top pane and the corresponding bib record appears in the lower pane. The holding version of the window is shown in Figure 4.13. The other window features are similar to the bib version; see “Cataloging Window Features” on page 4-2 for descriptions.

FIGURE 4.13

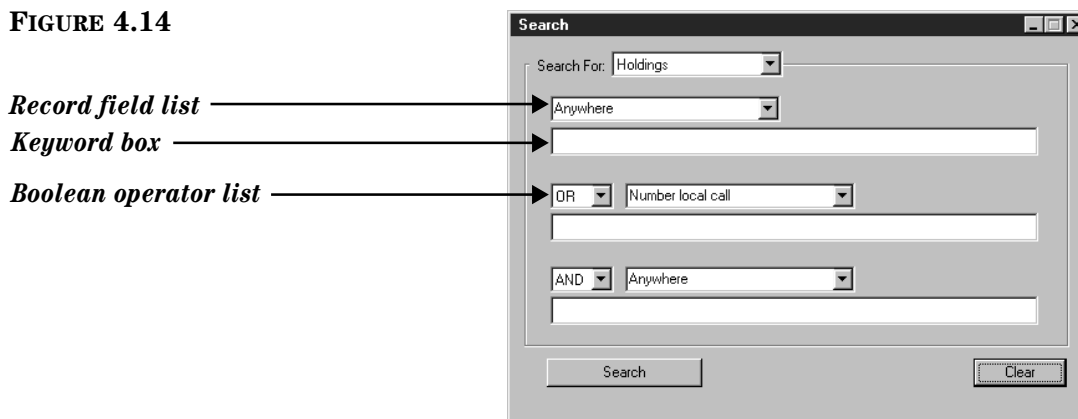


Searching for a Holding Record

The Search Dialog Box

The default holding version of the Search dialog box is shown in Figure 4.14.

FIGURE 4.14



All M3 Search dialog boxes use the keyword search method. You can search for keywords in as many as three holding record fields.

NOTE: Options in the record field lists are the search attributes defined by Z39.50 protocol. Among other options, they include MARC record fields and indexes of multiple MARC record fields. For simplicity, this Users Guide refers to them as MARC fields.

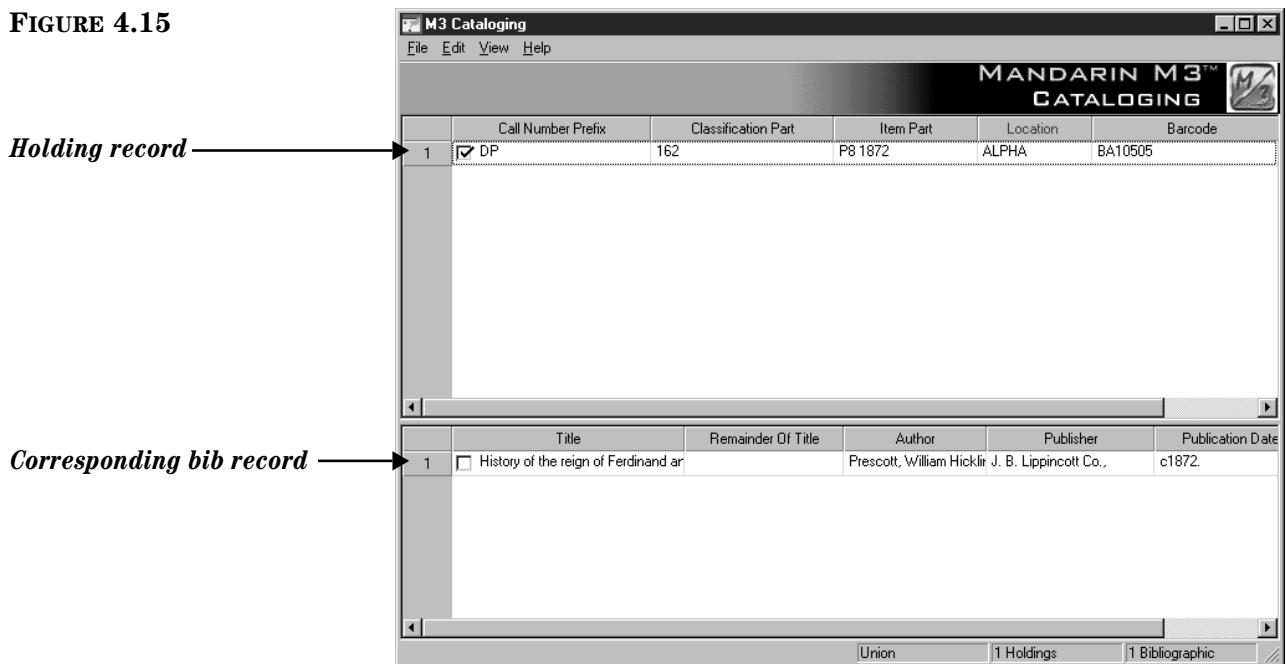
Your system can be configured to display different default MARC fields and Boolean operators.

How to Search

To search for a holding record:

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.14).
2. In the **Search For** list, select **Holdings**.
3. Type your search query into the appropriate keyword boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
4. Click **Search**. This displays a list of records matching your search query (Figure 4.15).

FIGURE 4.15



5. From here, you can:
 - Double-click a brief holding or bib record to view its full MARC record. A full MARC holding record matching this search is shown in Figure 4.17.
 - Select a check box to tag the corresponding record for deletion or printing. To tag a block of records, select the first record and press SHIFT while selecting the last record; this tags all records in between.
 - Print tagged records or all records in the list. To do so, select **Print** on the **File** menu, then click **Records** (to print tagged) or **List** (to print all).

- Create a new similar record by clicking **Duplicate** on the **Edit** menu. (For instructions, see “Creating a Holding Record” on page 4-14.)
- Start another search from the **Edit** menu.

Creating a Holding Record

To create a holding record:

1. Locate the bib record matching the holding record you want to create.
 - A. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.14).
 - B. In the **Search For** list, select **Bibliographic**.
 - C. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
 - D. Click **Search**. This displays a list of bib and holding records matching your search query (Figure 4.15).
2. Click the bib record matching the holding record you want to create.
 - If a holding record similar to the one you want to create appears in the lower pane, use this as a template. Click the holding record, then click **Duplicate** on the **Edit** menu.

OR

 - If no similar holding record exists, select **New** on the **File** menu, and then click **Holding Record**. (If more than one holding template is available, the Templates dialog box displays (Figure 4.7). Click the desired template, then click **OK**.) This displays the holding record template in the Holding - Cataloging window (Figure 4.16). The template displays some entries from the bib record you selected, including the prefix (852#k).

FIGURE 4.16

Bibliographic record →

Holding record template →

The screenshot shows the 'Holding - M3 Cataloging' window with two panes. The top pane, labeled 'Bibliographic record', displays a table of MARC fields and values. The bottom pane, labeled 'Holding record template', displays a similar table with some fields pre-filled. On the right side of the window, there are buttons for 'Save' and 'Cancel', and a section for 'After Saving...' with radio buttons for 'Close', 'Duplicate', 'New Bib', and 'New Holding'. There are also checkboxes for 'Mark for Deletion' and 'Generate Holdings', and a 'Quantity' field. At the bottom right, there are buttons for 'Prev', 'Next', 'First', and 'Last', and a 'NUM' field.

Field	Value
LDR	cam a
001	0000000009
005	20020401163424.0
008	000302s2000 nyua j b 001 0beng
010	a 00008567
020	a 0823933067 (lib. bdg.)
040	a DLC
	c DLC

Field	Value
LDR	nxm u
001	
004	0000000009
005	20021018114338.0
008	0210180u x4 0 000
843	a
852	0 0 0 a

3. Enter field and subfield data for the new record. For instructions, see step 3 beginning on page 4-7. NOTE: Since Authority Control fields are not available for holding records, skip the Authority Control option explained on page 4-8.
4. When finished editing the record (but before saving), click an **After Saving** option. This selection indicates what you want to happen once you save the record. The options are:
 - **Close** exits the saved record and returns to the Cataloging window.
 - **Duplicate** creates a new record identical to the one you are saving; you can edit the duplicate record to create another record.
 - **New Bib** exits the saved record and displays the Templates dialog box, allowing you to select a new bib template to edit.
 - **New Holding** exits the saved record and displays a new holding template to edit in the holding records pane. If more than one holding template is available, the Templates dialog box displays, allowing you to select a template.

OR

- Select the **Generate Holdings** check box to create multiple holding records, using the holding record displayed in the lower pane as a template.
 - A. Type the number of holdings you want to add in the **Quantity** box. NOTE: This number is in addition to the holding records that already exist for this bibliographic record.
 - B. If the record's barcode has a prefix, it appears in the **BC Prefix** box. Modify if desired. If the barcode does not have a prefix and you would like to add one, type a value in the **BC Prefix** box.
 - C. The barcode suffix appears in the **Start** box. Modify if desired. The suffix must be a numeric value and will be the starting value for the barcodes of the new holding records.
 - D. In the **+** box, type the number by which you want the suffix to increment. For example, if the values are **1000** in the **Start** box and **2** in the **+** box, the first holding record will be assigned a barcode of **[Prefix]1000** and the next holding record will be assigned **[Prefix]1002**.

5. To mark this record for deletion, select the **Mark for Deletion** check box. For instructions on purging records marked for deletion, see "Step 2: Purging Records Marked for Deletion" on page 4-48.
6. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected in step 4.

NOTE: If you selected **Generate Holdings** in step 4 and a barcode created by this procedure already exists, an error message displays and no holdings are created. Click **OK** and modify the value in the **Start** and/or **+** box, then click **Save** again.

Tip: If you want the holding record to display a status of "unavailable" in the OPAC (for example, until you have received the item), insert field **994#a** (Status). In the 994#a field list, select **i=IN PROCESS**.

Note: You cannot generate holdings from a holding record that is marked for deletion.

Note: The prefix and suffix values are assigned in 852#p.

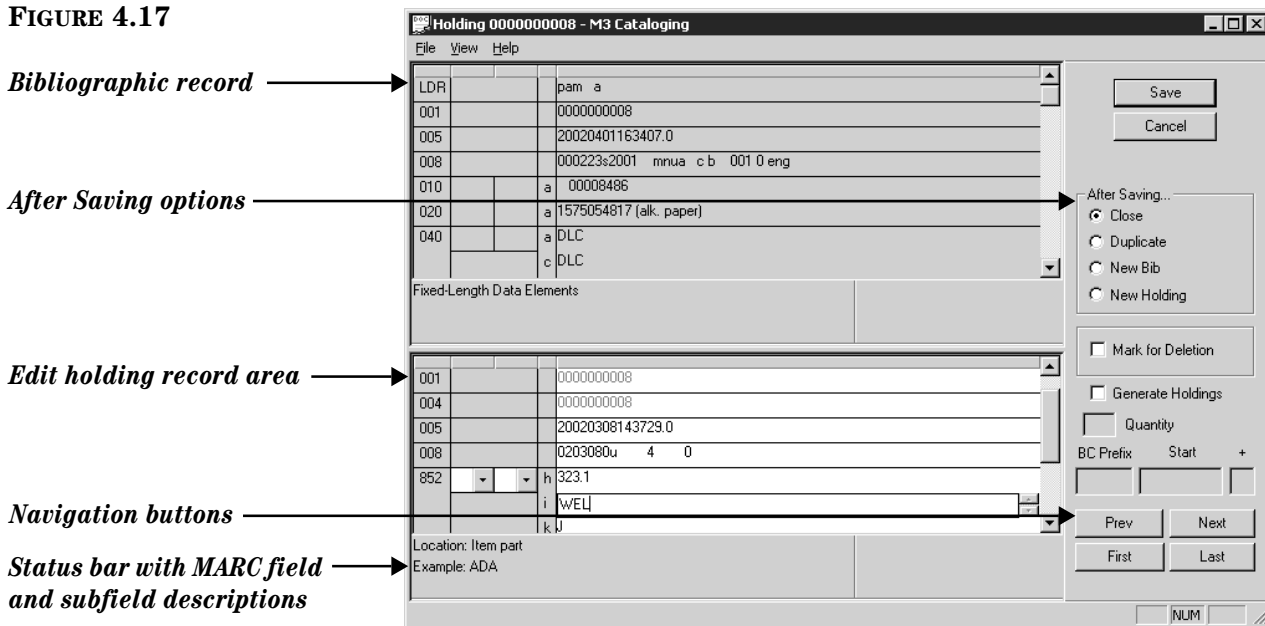
Note: Do not select the **Mark for Deletion** check box if you selected the **Generate Holdings** option in step 4.

Editing a Holding Record

To edit a holding record:

1. If the record to be edited is not displayed:
 - A. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.14).
 - B. In the **Search For** list, select **Holdings**.
 - C. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
 - D. Click **Search**. This displays a list of bib and holding records matching your search query.
 - E. Double-click the holding record you want to edit. This displays the selected record in full MARC format (Figure 4.17).

FIGURE 4.17



Tip: To navigate through the records in the search results list, click the navigation buttons **Prev**, **Next**, **First**, and **Last**.

2. Edit this record as needed. For instructions, see step 3 beginning on page 4-7. **NOTE:** Since Authority Control fields are not available for holding records, skip the Authority Control option explained on page 4-8.
3. When finished editing the record (but before saving), click an **After Saving** option or select the **Generate Holdings** check box. For instructions, see step 4 on page 4-15.
4. To mark this record for deletion, select the **Mark for Deletion** check box. For instructions on purging records marked for deletion, see “Step 2: Purging Records Marked for Deletion” on page 4-48.
5. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected under **After Saving**.

WORKING WITH PATRON RECORDS

Cataloging Window Features

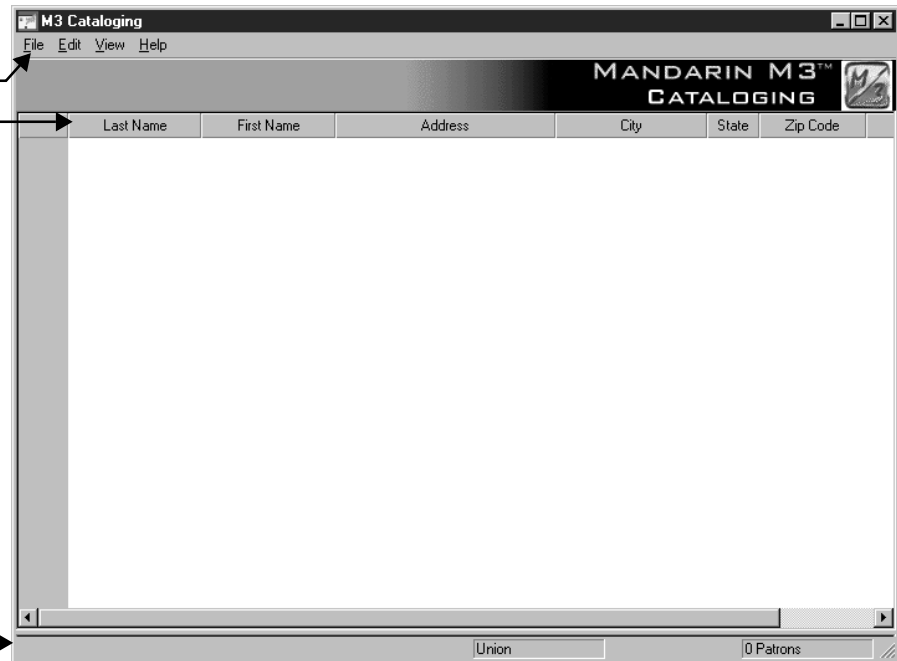
The patron version of the Cataloging window is similar to the bib version (shown in Figure 4.2), except it only contains patron records. The patron version of the window is shown in Figure 4.18. The other window features are similar to the bib version; see “Cataloging Window Features” on page 4-2 for descriptions.

FIGURE 4.18

Cataloging menu bar

Column headings

Status bar



Searching for a Patron Record

The Search Dialog Box

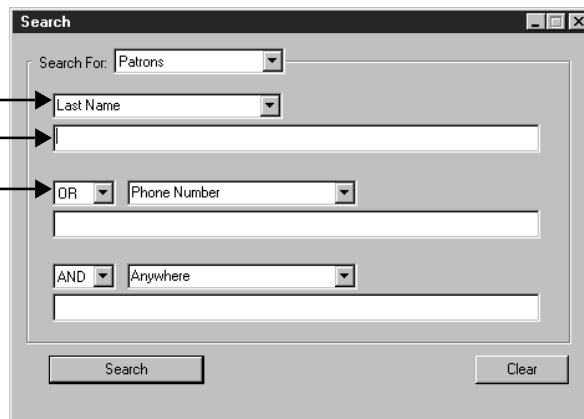
The default patron version of the Search dialog box is shown in Figure 4.19.

FIGURE 4.19

Record field list

Keyword box

Boolean operator list



All M3 Search dialog boxes use the keyword search method. You can search for keywords in as many as three patron record fields.

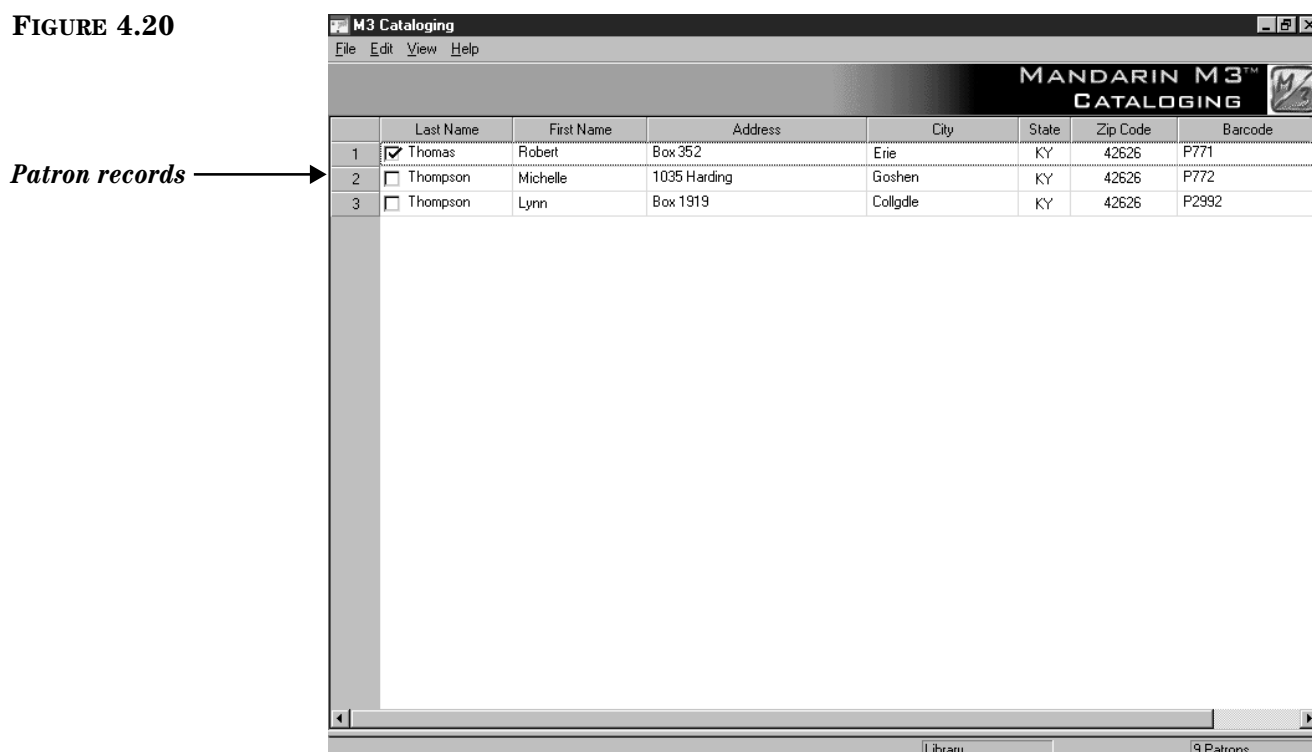
Your system can be configured to display different default patron record fields and Boolean operators.

How to Search

To search for a patron record:

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.19).
2. In the **Search For** list, select **Patrons**.
3. Type your search query into the appropriate keyword boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
4. Click **Search**. This displays a list of records matching your search query (Figure 4.20).

FIGURE 4.20



5. From here, you can:
 - Double-click a brief patron record to view its full MARC record. A full MARC patron record matching this search is shown in Figure 4.23.
 - Select a check box to tag the corresponding record for deletion or printing. To tag a block of records, select the first record and press SHIFT while selecting the last record; this tags all records in between.
 - Print tagged records or all records in the list. To do so, select **Print** on the **File** menu, then click **Records** (to print tagged) or **List** (to print all).
 - Create a new similar record by clicking **Duplicate** on the **Edit** menu. (For instructions, see “Creating a Patron Record” on page 4-19.)

- To access a list of Leader field standard choices (including position and legal characters), double-click in the Leader field. This displays the Fixed Field dialog box (Figure 4.22). In the **Record Status** list, select a status, then click **OK**.

FIGURE 4.22



- To save a version of this record as a template for future use, click **Save As Template** on the **File** menu.
3. When finished editing the record (but before saving), click an **After Saving** option to indicate what you want to happen after you save the record. The options are:
 - **Close** exits the saved record and returns to the Cataloging window.
 - **Duplicate** creates a new record identical to the one you are saving; you can edit the duplicate record to create another record.
 4. To mark this record for deletion, select the **Mark for Deletion** check box. For instructions on purging records marked for deletion, see “Step 2: Purging Records Marked for Deletion” on page 4-48.
 5. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected under **After Saving**.

By Duplicating an Existing Patron Record

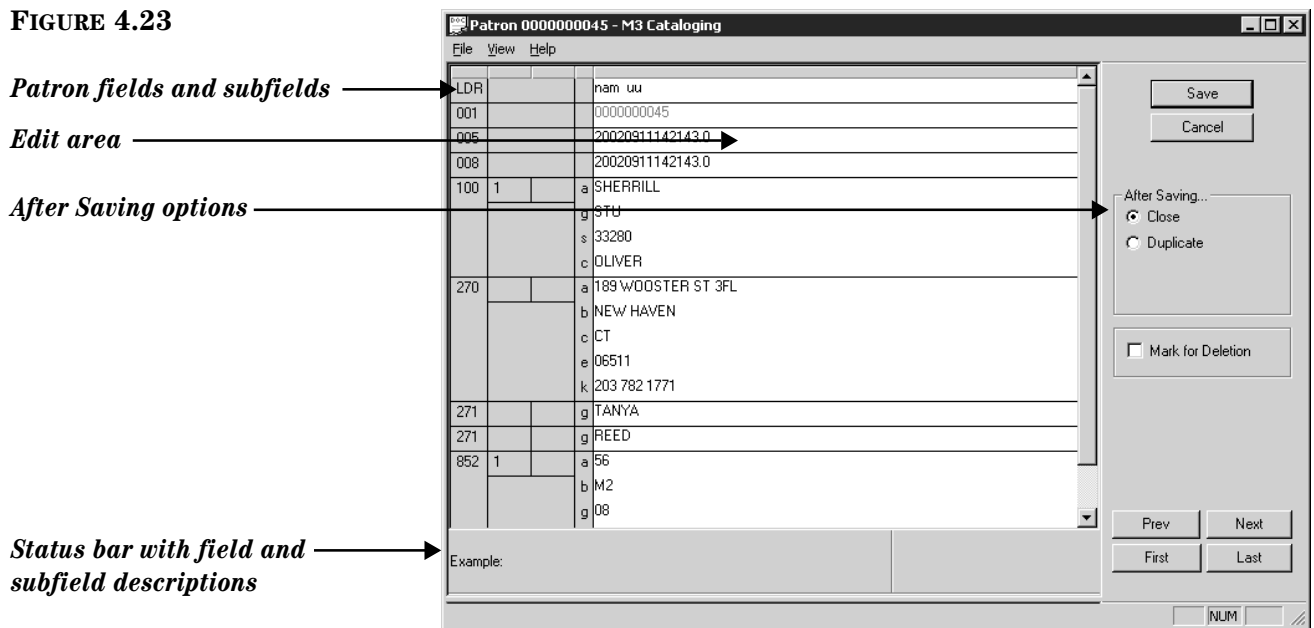
1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.19).
2. In the **Search For** list, select **Patrons**.
3. Type your search query into the appropriate keyword boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
4. Click **Search**. This displays a list of records matching your search query (Figure 4.20).
5. Click the patron record to be duplicated. On the **Edit** menu, click **Duplicate**. This displays the Patron - Cataloging window (Figure 4.21) containing the corresponding full patron record. This is a duplicate patron record.
6. Edit the record as needed. For instructions, see steps 2 through 4 beginning on page 4-19.
7. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected under **After Saving**.

Editing a Patron Record

To edit a patron record:

1. If the record to be edited is not displayed:
 - A. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.19).
 - B. In the **Search For** list, select **Patrons**.
 - C. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
 - D. Click **Search**. This displays a list of brief patron records matching your search query (Figure 4.20).
 - E. Double-click the patron record you want to edit. This displays the corresponding full record (Figure 4.23).

FIGURE 4.23



Tip: To navigate through the records in the search results list, click the navigation buttons **Prev**, **Next**, **First**, and **Last**.

2. Edit this record as needed. For instructions, see steps 2 through 4 beginning on page 4-19.
3. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected under **After Saving**.

WORKING WITH AUTHORITY RECORDS

Note: You must use a version of M3 that supports Authority Control to work with authority records.

Cataloging Window Features

As with the bib and holding versions of the Cataloging window, the authority record version has a split window that displays brief authority and bibliographic records. The default authority version of the window is shown in Figure 4.24. The other window features are similar to the bib version; see “Cataloging Window Features” on page 4-2 for descriptions.

FIGURE 4.24

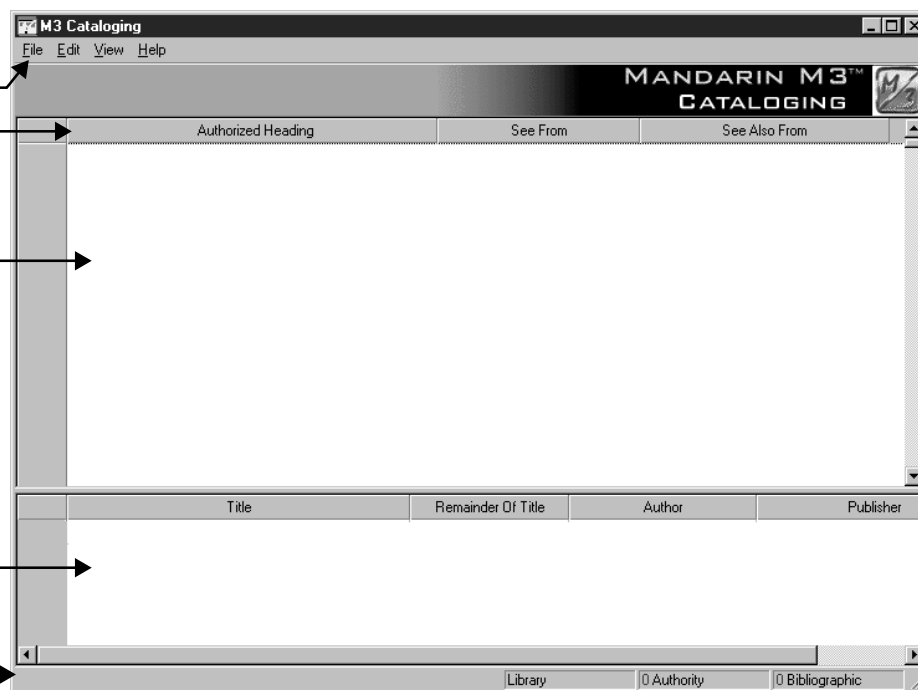
Cataloging menu bar

Column headings

Authority records pane

Bibliographic records pane

Status bar



Searching for an Authority Record

The Search Dialog Box

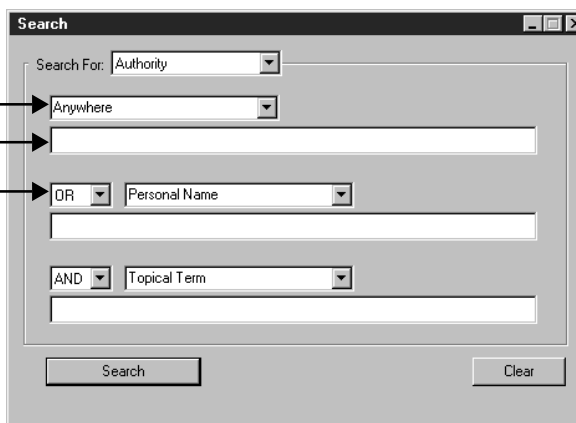
The default authority version of the Search dialog box is shown in Figure 4.25.

FIGURE 4.25

Record field list

Keyword box

Boolean operator list



All M3 Search dialog boxes use the keyword search method. You can search for keywords in as many as three authority record fields.

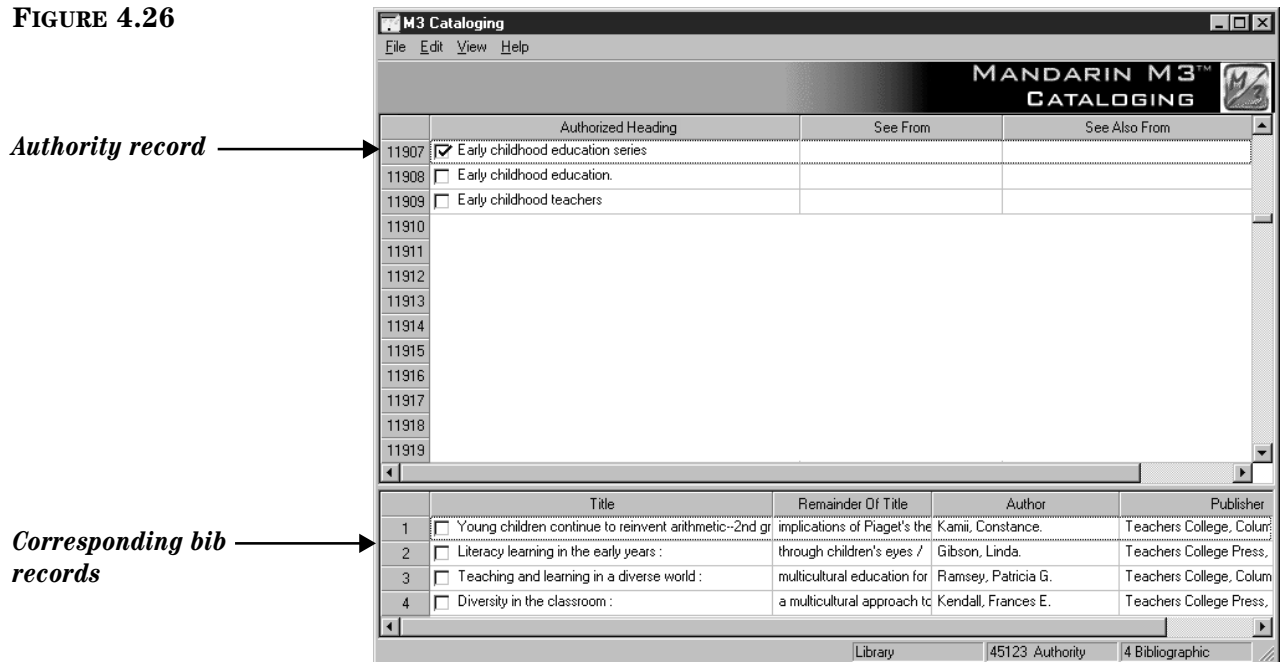
Your system can be configured to display different default authority record fields and Boolean operators.

How to Search

To search for an authority record:

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.25).
2. In the **Search For** list, select **Authority**.
3. Type your search query into the appropriate keyword boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
4. Click **Search**. This displays a list of records matching your search query (Figure 4.26).

FIGURE 4.26



5. From here you can:
 - Double-click a brief authority record to view its full MARC record. A full MARC authority record matching this search is shown in Figure 4.29.
 - Select a check box to tag the corresponding record for deletion or printing. To tag a block of records, select the first record and press SHIFT while selecting the last record; this tags all records in between.
 - Print tagged records or all records in the list. To do so, select **Print** on the **File** menu, then click **Records** (to print tagged) or **List** (to print all).

- Create a new similar record by clicking **Duplicate** on the **Edit** menu. (For instructions, see the following section, “Creating an Authority Record.”)
- Start another search from the **Edit** menu.

Creating an Authority Record

There are three ways to create a new authority record. (1) You can use a template and edit it to create the new record. (2) You can duplicate an existing authority record, then edit it to create the new record. (3) You can use the Quick Editor method (see “Using the Authority Record Quick Editor” beginning on page 4-27).

From a Template

1. On the **File** menu, select **New**, and then click **Authority Record**. (If more than one authority template is available, the Templates dialog box displays (Figure 4.7). Click the desired template, then click **OK**.) This displays the authority record template in the Authority - Cataloging window (Figure 4.27).

FIGURE 4.27

Field	Subfield	Data
LDR		nz
001		
003		
005		20021114145703.0
008		021114nl acannaabn In aaa Ill d
040		a
		c
		d
100	1	a
		c
		q
		d
400	1	a
		c
		q
		d
500	1	a
		c

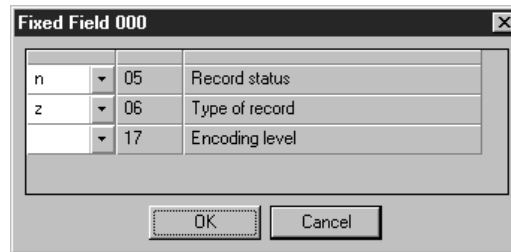
Tip: To add an authority record using the Quick Editor method, see “Using the Authority Record Quick Editor” beginning on page 4-27.

Note: If you do not want empty fields to be deleted when the record is saved, change the **Strip Empty Fields** entry in the Active-MarcEdit.ini file (located in your M3 directory) to **OVER-RIDE=on**, then restart the Cataloging module. Authority Control users should not change this setting.

2. Enter field and subfield data for the new record. To move through the record, use your keyboard up and down arrows. Notice that status bar information changes to identify the selected field and subfield.
 - To access a menu with edit commands (Figure 4.9), right-click the field or subfield you want to edit. From this menu, options include:
 - You can insert, delete, cut, copy, paste, and move fields and subfields. (To insert multiple subfields in a field at once, click **Insert Subfield**. Type the subfields, without spaces or commas, in the text box found in the lower right corner of the Insert Subfield dialog box. For example, to enter subfields **a**, **b**, **c**, and **g**, type **abcg**.)
 - You can click **Find** to locate text within this record.

- You can click **Toggle Prompts** to change the MARC field labels from numbers to text.
- To access a list of fixed field standard choices (including position and legal characters) pertaining to a particular fixed field, double-click in the field. The dialog box for fixed field 000 is shown in Figure 4.28. You can define your fixed field by typing in your text, or, where available, clicking the arrow button and selecting an option in the list. When finished, click **OK**.

FIGURE 4.28



- To save a version of this record as a template for future use, click **Save As Template** on the **File** menu.
- When finished editing the record (but before saving), click an **After Saving** option to indicate what you want to happen after you save the record. The options are:
 - **Close** exits the saved record and returns to the Cataloging window.
 - **Duplicate** creates a new record identical to the one you are saving; you can edit the duplicate record to create another record.
 - To mark this record for deletion, select the **Mark for Deletion** check box. For instructions on purging records marked for deletion, see “Step 2: Purging Records Marked for Deletion” on page 4-48.
 - When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected in the previous step.

By Duplicating an Existing Authority Record

- On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.19).
- In the **Search For** list, select **Authority**.
- Type your search query into the appropriate keyword boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
- Click **Search**. This displays a list of records matching your search query (Figure 4.26).
- Click the authority record to be duplicated. On the **Edit** menu, click **Duplicate**. This displays the Authority - Cataloging window (Figure 4.27) containing the corresponding full authority record. This is a duplicate authority record.

6. Edit this record as needed. For instructions, see steps 2 through 4 beginning on page 4-24.
7. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected under **After Saving**.

Editing an Authority Record

To edit an existing authority record:

1. If the record to be edited is not displayed:
 - A. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.19).
 - B. In the **Search For** list, select **Authority**.
 - C. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
 - D. Click **Search**. This displays a list of brief authority records matching your search query.
 - E. Double-click the authority record you want to edit. This displays the corresponding full record (Figure 4.29).

FIGURE 4.29

Authority fields and subfields

After Saving options

Edit area

Status bar with field and subfield descriptions

The screenshot shows the 'Authority 0000000007 - M3 Cataloging' window. The main area contains a table of MARC fields and subfields:

LDR			nz n
001			0000000007
003			DLC
005			20020311071440.0
008			020307nl acannaabn In aaa III
010			a n 00001036
040			a DLC
			b eng
			c DLC
100	1		a Glimm, Adele
670			a Elizabeth Blackwell, 2000:
			b CIP t.p. (Adele Glimm)
950			@0000000109

On the right, there are buttons: **Save**, **Cancel**, **Quick**, and an 'After Saving...' section with radio buttons for **Close** (selected) and **Duplicate**. There is also a checkbox for **Mark for Deletion**.

At the bottom, there are navigation buttons: **Prev**, **Next**, **First**, and **Last**. The status bar at the very bottom shows 'Heading--Personal Name: Heading--Personal Name' and 'Example:'.

Tip: To navigate through the records in the search results list, click the navigation buttons **Prev**, **Next**, **First**, and **Last**.

2. Edit this record as needed. For instructions, see steps 2 through 4 on page 4-24.
3. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected under **After Saving**.

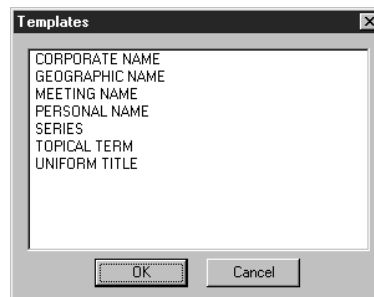
Using the Authority Record Quick Editor

The Quick Editor offers a simplified method for quickly creating and editing authority records. This method provides several commonly-used authority subfields, in a predetermined order, for each type of authority record. It also allows you to quickly add, edit, and delete “See From” and “See Also From” references. This method offers only limited access to authority record fields. For full access to additional fields or to change the order of subfields, use the MARC record editor method explained in “Creating an Authority Record” and “Editing an Authority Record” beginning on page 4-24.

Creating an Authority Record Using the Quick Editor

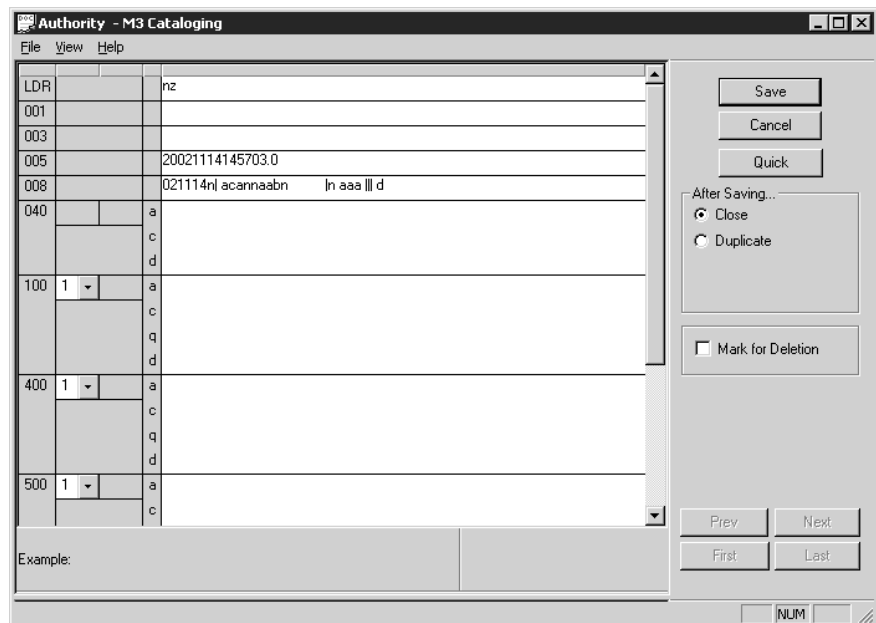
1. On the **File** menu, select **New**, and then click **Authority Record**. This displays the Templates dialog box (Figure 4.30).

FIGURE 4.30



2. Click the desired type of authority record, then click **OK**. This displays the authority record template in MARC format in the Authority - Cataloging window (Figure 4.31).

FIGURE 4.31



Tip: For information on the **After Saving** and **Mark for Deletion** options in this window, see steps 3 and 4 on page 4-25.

3. Click **Quick**. This displays the Authority - Cataloging Quick Editor window. The fields available in the **Heading** area vary depending on the type of authority record selected in step 2. Shown in Figure 4.32 is the Quick Editor window for a Personal Name authority record.

FIGURE 4.32

Heading area →

***See From** references (MARC authority field 4xx) lead a searcher from an unauthorized heading to an authorized heading. **See Also From** references (MARC authority field 5xx) lead a searcher from an authorized heading to another related authorized heading.*

NOTE: If you need access to additional fields or otherwise prefer to edit the record in MARC format, click **MARC**. This returns the record to MARC format (shown in Figure 4.31).

4. In the **Heading** area, type entries as desired.
5. Under **See From References**, click **Add**. This displays the See From References dialog box (Figure 4.33).

FIGURE 4.33

Type entries as desired, then click **OK**. This places the entries in the **See From References** box in the Authority - Cataloging window.

6. Under **See Also From References**, click **Add**. This displays the See Also From References dialog box, which contains the same fields as the See From References dialog box (Figure 4.33). Type entries as desired, then click **OK**. This places the entries in the **See Also From References** box in the Authority - Cataloging window.

- When finished, click **Save** in the Authority - Cataloging window.

Editing an Authority Record Using the Quick Editor

- Display the record you want to edit in the Authority - Cataloging window (Figure 4.34). (For instructions on locating and displaying a record, follow steps 1A through 1E in “Editing an Authority Record” on page 4-26.)

FIGURE 4.34

***Tip:** For information on the **After Saving and Mark for Deletion** options in this window, see steps 3 and 4 on page 4-25.*

- Click **Quick**. This displays the Authority - Cataloging Quick Editor window. The fields available in the **Heading** area vary depending on the type of authority record you are editing. Shown in Figure 4.35 is the Quick Editor window for a Personal Name authority record.

FIGURE 4.35

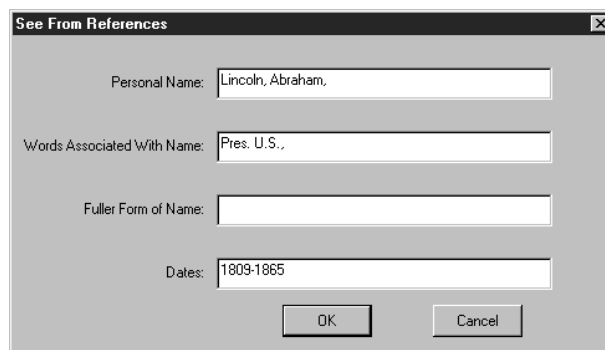
Heading area

***See From** references (MARC authority field 4xx) lead a searcher from an unauthorized heading to an authorized heading. **See Also** **From** references (MARC authority field 5xx) lead a searcher from an authorized heading to another related authorized heading.*

NOTE: If you need access to additional fields or otherwise prefer to edit the record in MARC format, click **MARC**. This returns the record to MARC format (shown in Figure 4.34).

3. In the **Heading** area, edit entries as desired.
4. Under **See From References**, select a reference, then click **Delete** or **Edit**.
 - If you click **Delete**, the reference is deleted and removed from the **See From References** box.
 - If you click **Edit**, the See From References dialog box displays (Figure 4.36).

FIGURE 4.36



The screenshot shows a dialog box titled "See From References". It contains the following fields and values:

- Personal Name: Lincoln, Abraham.
- Words Associated With Name: Pres. U.S.,
- Fuller Form of Name: (empty)
- Dates: 1809-1865

At the bottom of the dialog box are two buttons: "OK" and "Cancel".

Edit entries as desired, then click **OK**. This updates the entries in the **See From References** box in the Authority - Cataloging window.

5. Under **See Also From References**, select a reference, then click **Delete** or **Edit**.
 - If you click **Delete**, the reference is deleted and removed from the **See Also From References** box.
 - If you click **Edit**, the See Also From References dialog box displays, which contains the same fields as the See From References dialog box (Figure 4.36). Edit entries as desired, then click **OK**. This updates the entries in the **See Also From References** box in the Authority - Cataloging window.
6. When finished, click **Save** in the Authority - Cataloging window.

WORKING WITH PICTURE RECORDS

Cataloging Window Features

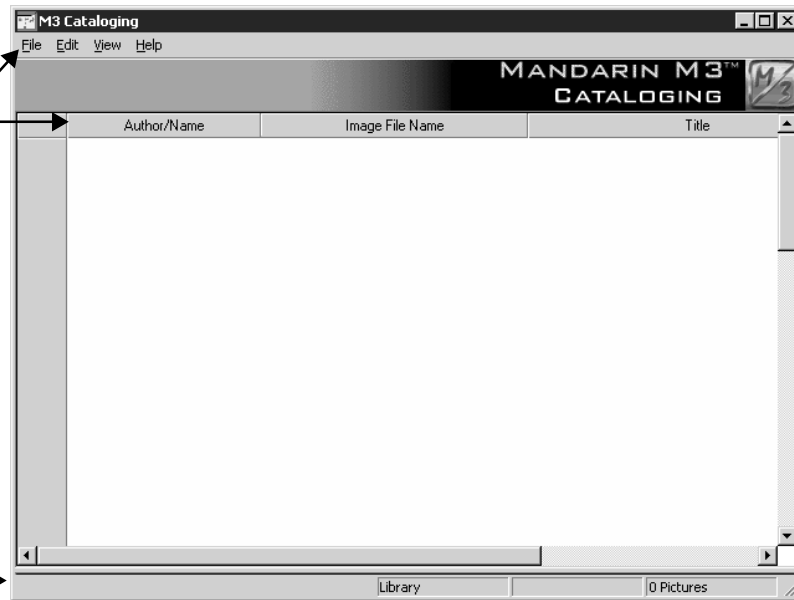
The picture version of the Cataloging window is similar to the bib version (shown in Figure 4.2), except it only contains picture records. The picture version of the window is shown in Figure 4.37. The other window features are similar to the bib version; see “Cataloging Window Features” on page 4-2 for descriptions.

FIGURE 4.37

Cataloging menu bar

Column headings

Status bar



Displaying Item and Patron Pictures

Pictures can be imported into your M3 database and displayed in the OPAC and Circulation modules. Item pictures, such as cover images, can be displayed in the OPAC and Circulation; patron photos can be displayed in Circulation. For instructions on importing images, see “Using M3 Picture Manager” on page 4-50.

In the OPAC

After importing pictures into your M3 database, you must enable them in the M3Opac.ini file. For instructions, see “Enabling Cover Images” on page 6-30. The images can then be viewed in the OPAC Search Results, Record Details, Bookbag Record List, and Bookbag Record Details windows.

In Circulation

Once pictures are imported into your M3 database, they display automatically alongside patrons and items in the Circulation Patron and Item panes if M3 v1.6 was your first installation of M3. If you had a version of M3 installed prior to installing 1.6, you must do the following:

- Add a graphic cell to the Patron pane for each Circulation mode (Loan, Return, and so on) in which you want an image to display; changes made to one mode will not apply to the other modes. For instructions, see “Modifying the Patron Pane Display” on page 5-58.

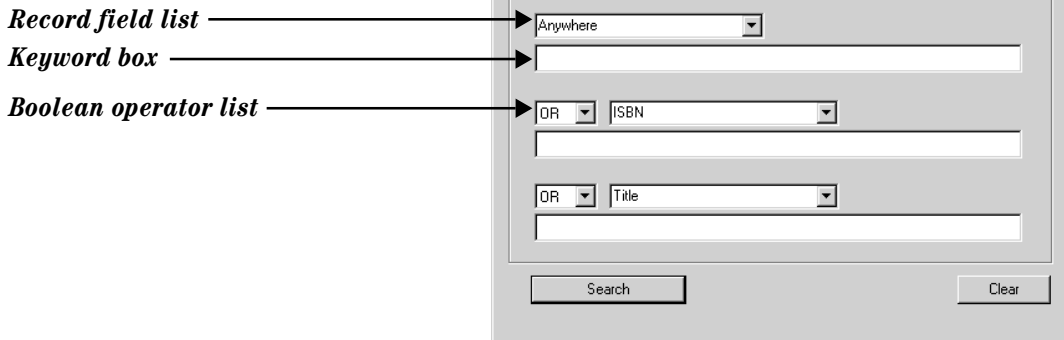
- Add a graphic cell to the Item pane for each Circulation mode (Loan, Return, and so on) in which you want an image to display; changes made to one mode will not apply to the other modes. For instructions, see “Modifying the Item Pane Display” on page 5-63.

Searching for a Picture Record

The Search Dialog Box

The default picture version of the Search dialog box is shown in Figure 4.38.

FIGURE 4.38



All M3 Search dialog boxes use the keyword search method. You can search for keywords in as many as three picture record fields.

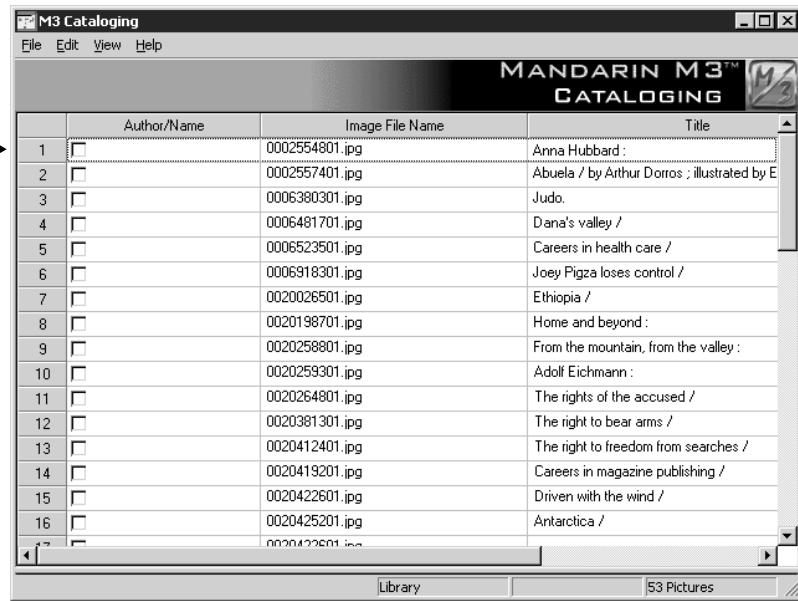
Your system can be configured to display different default picture record fields and Boolean operators.

How to Search

To search for a picture record:

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.38).
2. In the **Search For** list, select **Pictures**.
3. Type your search query into the appropriate keyword boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
4. Click **Search**. This displays a list of records matching your search query (Figure 4.39).

FIGURE 4.39

Picture records →


	Author/Name	Image File Name	Title
1	☐	0002554801.jpg	Anna Hubbard :
2	☐	0002557401.jpg	Abuela / by Arthur Dorros ; illustrated by E
3	☐	0006380301.jpg	Judo.
4	☐	0006481701.jpg	Dana's valley /
5	☐	0006523501.jpg	Careers in health care /
6	☐	0006918301.jpg	Joey Pigza loses control /
7	☐	0020026501.jpg	Ethiopia /
8	☐	0020198701.jpg	Home and beyond :
9	☐	0020258801.jpg	From the mountain, from the valley :
10	☐	0020259301.jpg	Adolf Eichmann :
11	☐	0020264801.jpg	The rights of the accused /
12	☐	0020381301.jpg	The right to bear arms /
13	☐	0020412401.jpg	The right to freedom from searches /
14	☐	0020419201.jpg	Careers in magazine publishing /
15	☐	0020422601.jpg	Driven with the wind /
16	☐	0020425201.jpg	Antarctica /
17	☐	0020422601.jpg	

Library | 53 Pictures

5. From here, you can:

- Double-click a brief picture record to view its full MARC record. A full MARC picture record is shown in Figure 4.42.
- Select a check box to tag the corresponding record for deletion or printing. To tag a block of records, select the first record and press SHIFT while selecting the last record; this tags all records in between.
- Print tagged records or all records in the list. To do so, select **Print** on the **File** menu, then click **Records** (to print tagged) or **List** (to print all).
- Create a new similar record by clicking **Duplicate** on the **Edit** menu. (For instructions, see “Creating a Patron Record” on page 4-19.)
- Start another search from the **Edit** menu.

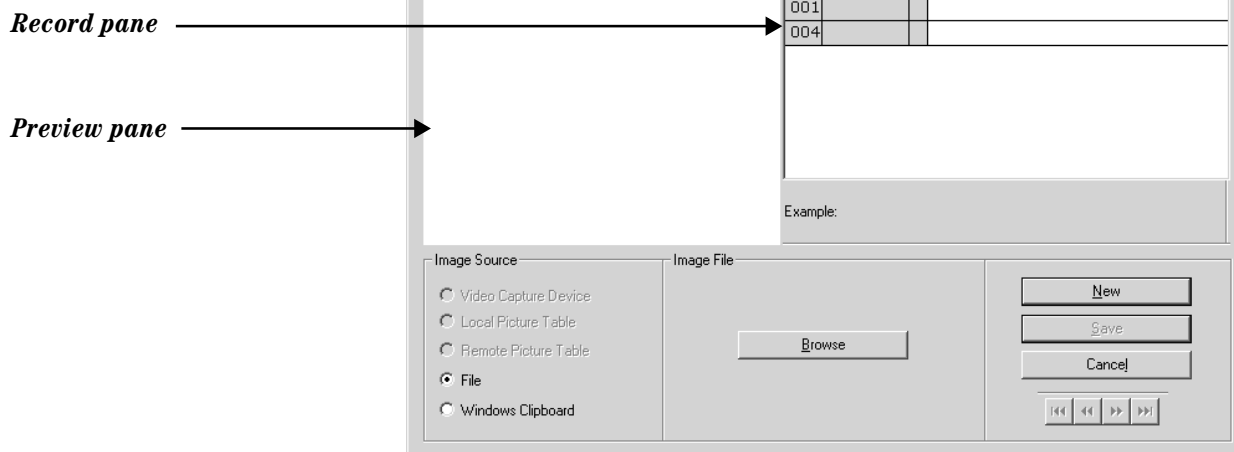
Creating a Picture Record

There are two ways to create a new picture record. (1) You can use a template and edit it to create the new record. (2) You can duplicate an existing picture record, then edit it to create the new record.

From a Template

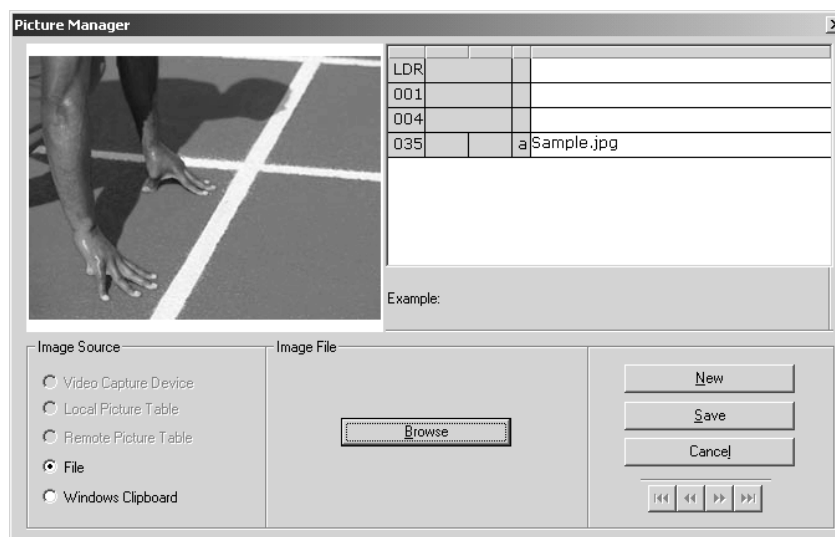
1. On the **File** menu, select **New**, and then click **Picture Record**. This displays the template in the Picture Manager dialog box (Figure 4.40)

FIGURE 4.40



- Under **Image Source**, select the source of the picture. Depending on the source selected, you must search for or navigate to the picture (for instructions on using these options, see step 6 in “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-38). After the picture is selected, it appears in the Preview pane (Figure 4.41).

FIGURE 4.41



- Enter field and subfield data for the new record. To access a menu with edit commands (Figure 4.9), right-click the field or subfield you want to edit. From this menu, options include:
 - You can insert, delete, cut, copy, paste, and move fields and subfields. (To insert multiple subfields in a field at once, click **Insert Subfield**. Type the subfields, without spaces or commas, in the text box found in the lower right corner of the Insert Subfield dialog box. For example, to enter subfields **a**, **b**, **c**, and **g**, type **abcg**.)
 - You can click **Find** to locate text within this record.

- You can click **Toggle Prompts** to change the MARC field labels from numbers to text.
4. When finished, click **Save**. This displays the Cataloging window with the new picture record listed.

By Duplicating an Existing Picture Record

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.38).
2. In the **Search For** list, select **Pictures**.
3. Type your search query into the appropriate keyword boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
4. Click **Search**. This displays a list of records matching your search query (Figure 4.39).
5. Click the picture record to be duplicated. On the **Edit** menu, click **Duplicate**. This displays the Picture Manager dialog box (Figure 4.41) containing the corresponding full picture record. This is a duplicate picture record.
6. Edit the record as needed.
 - To change the source of the picture, select an option under **Image Source**. Depending on the source selected, you must search for or navigate to the picture (for instructions on using these options, see step 6 in “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-38.) After the picture is selected, it appears in the Preview pane (Figure 4.42).
 - To access a menu with edit commands (Figure 4.9), right-click the field or subfield you want to edit. From this menu, options include:
 - You can insert, delete, cut, copy, paste, and move fields and subfields. (To insert multiple subfields in a field at once, click **Insert Subfield**. Type the subfields, without spaces or commas, in the text box found in the lower right corner of the Insert Subfield dialog box. For example, to enter subfields **a**, **b**, **c**, and **g**, type **abcg**.)
 - You can click **Find** to locate text within this record.
 - You can click **Toggle Prompts** to change the MARC field labels from numbers to text.
7. When finished, click **Save**. This displays the Cataloging window with the new picture record listed.

Editing a Picture Record

To edit a picture record:

1. If the record to be edited is not displayed:
 - A. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.19).
 - B. In the **Search For** list, select **Pictures**.

- C. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
- D. Click **Search**. This displays a list of brief picture records matching your search query (Figure 4.39).
- E. Double-click the picture record you want to edit. This displays the corresponding full record (Figure 4.42).

FIGURE 4.42

*Record pane**Preview pane*

2. Edit the record as needed. For instructions, see step 6 on page 4-35.
3. When finished, click **Save**.

USING FIND AND REPLACE TO MODIFY RECORDS

The M3 Cataloging module includes a Find and Replace utility that allows you to modify bibliographic, holding, patron, authority, and picture records. Use this utility to modify all occurrences of a keyword in all selected records, or to selectively modify occurrences in a specific record.

To use the Find and Replace utility:

1. Verify that you are working with the correct database. For instructions, see “Selecting a Database” on page 4-2.
2. Isolate the records you want to modify. To do so:
 - A. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.38).
 - B. In the **Search For** list, select the type of records you want to modify.

- C. Type your search query into the appropriate keyword boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
- D. Click **Search**. This displays the list of brief records matching your search query.

Note: During the Find and Replace operation, all Authority Control fields contained in a bibliographic record are ignored.

Tip: You can also display the Find dialog box by right-clicking the search results.

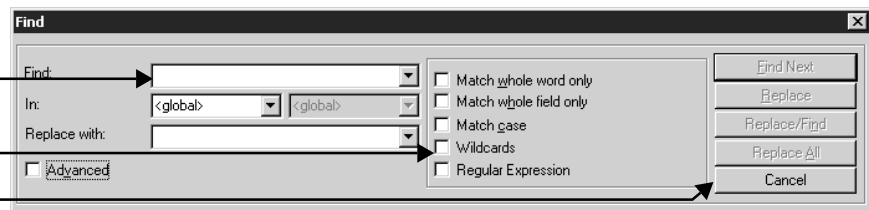
3. Select the check box by each brief record you want to include in the Find and Replace operation. Or, to include all records in the list: on the **Edit** menu, select the type of record you want to include, and then click **Select All Records**. This places a check mark by all brief records in the list.
4. On the **Edit** menu, select the type of records you want to modify, and then click **Find**. This displays the Find dialog box (Figure 4.43).

FIGURE 4.43

MARC field selection

Search options area

Find/Replace option buttons



5. Enter the desired find and replace parameters. To do so:
 - A. In the **Find** box, type the existing text you want to find and replace. This text can be any alphabetic or numeric character string, including punctuation.
 - B. In the **In** list, specify the MARC field that contains the text you want to replace.
 - To indicate a specific field, type or select the desired field.
 - To indicate any field (whether in the current record or all records isolated in step 2), select **<global>**. This looks for the text in all fields.
 - C. In the **Replace with** box, type the replacement text.
 - D. In the **Search options** area, select the appropriate options to fine-tune your search. Your choices are:
 - **Match whole word only** – Locates exact text typed into the **Find** box, treating your text as a whole word. For example: If you type **cat**, only **cat** occurrences are found, and other words such as **catalog** and **scatter** are ignored. (**Match whole word only** and **Match whole field only** cannot be selected in the same operation.)
 - **Match whole field only** – Locates exact text typed in the **Find** box, but only when that text is the entire content of a field.
 - **Match case** – Locates exact text typed in the **Find** box, but only if the case matches.

- **Wildcards** – Allows a user to apply the truncation asterisk (*) to the beginning and/or end of text typed in the **Find** box, and the wild-card question mark (?) within text in the **Find** box. Wildcard usage broadens your search.
 - **Regular expression** – Allows an advanced user to search using regular expression notation rather than plain text. Regular expressions allow you to use a character string that has special meaning when used in a pattern. For example, the string **/eg*/** would find **easy**, **egocentric**, **egg**, and all other words that have zero or more occurrences of the character preceding the asterisk (in this example, **g**). This is only one example of a regular expression search; there are many characters that can be used.
- E. Select the **Advanced** check box if you plan to use the advanced options. These options are explained in “Using the Advanced Find and Replace Features” on page 4-39.
6. Click the appropriate option button to proceed with the find and replace operation. The button you choose depends on whether you want to find and replace in all records isolated in step 2, or in just the selected record. To do so:
- Click **Replace All** to replace text in all records isolated in step 2. This locates all occurrences in all the selected records and replaces them simultaneously. This option does not allow you to preview each occurrence prior to replacement. If you click **Replace All**, this completes the find and replace operation.

OR

- Click **Find Next** to limit the find operation to locating each occurrence of the search item, one by one. This button searches all records to find the next occurrence of the text. (If you indicated a specific field in step 5B, **Find Next** limits the find operation to that specific field in the records.) When an occurrence is found, it is displayed and highlighted, waiting for you to preview the occurrence. Click in the Find dialog box and then select one of the following four option buttons.
 - **Find Next** skips this occurrence without replacing the text, then finds and displays the next occurrence.
 - **Replace** inserts replacement text for that one occurrence, then waits for you to indicate the next action. You must then click **Find Next** to look for the next occurrence.
 - **Replace/Find** inserts replacement text for that one occurrence, then automatically finds and displays the next occurrence.
 - **Replace All** inserts replacement text for all occurrences simultaneously.

NOTES:

- To cancel the find and replace operation, click **Cancel** at any time. However, any changes made prior to clicking **Cancel** are saved.

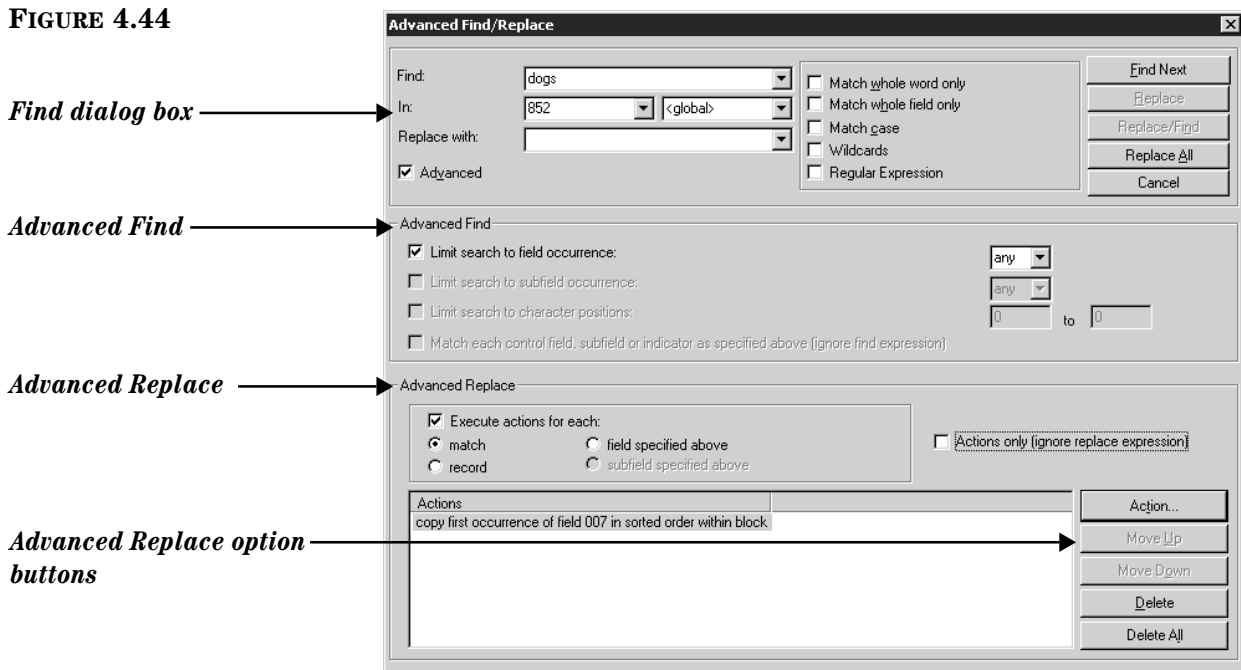
- To “undo” the changes, click **Undo Find/Replace** on the **Edit** menu. You cannot undo once you have begun another find operation, saved a record, imported or exported records, begun a standard keyword search, or exited Cataloging.

Using the Advanced Find and Replace Features

The Find and Replace utility includes an Advanced mode that allows you to make sophisticated modifications to bibliographic, holding, patron, authority, and picture records. You can use the Advanced mode to modify one or all occurrences of a selected field, add a new field, delete a field, and more by specifying your own find and replace parameters.

To use the Advanced Find and Replace mode, select the **Advanced** check box in the Find dialog box (Figure 4.43). This displays the Advanced Find/Replace dialog box (Figure 4.44).

FIGURE 4.44



Under **Advanced Find**:

- Limit search to field occurrence** – Limits a search to a specific field occurrence or any, first, or last field occurrence. (If only one occurrence exists, it qualifies as the first and the last.)
- Limit search to subfield occurrence** – Limits a search to a specific subfield occurrence or any, first, or last subfield occurrence. (If only one occurrence exists, it qualifies as the first and the last.)
- Limit search to character positions** – Limits a search to a specific range of character positions in a field and/or subfield specified in the two prior check boxes. Note that the character position starts at zero. For example, the third character in a character string is position 2, or the first character in a character string is position 0 (zero). This is defined in the MARC standard.

- **Match each control field, subfield or indicator as specified above (ignore find expression)** – Searches for a specific field or subfield, while ignoring the contents of the field.

Under **Advanced Replace**:

- **Execute actions for each:**
 - **match** – Limits the replace action to any match in any record.
 - **record** – Limits the replace action to any record regardless of match.
 - **field specified above** – Limits the replace action to the specified field.
 - **subfield specified above** – Limits the replace action to the specified subfield.
- **Actions only (ignore replace expression)** – Carries out the actions selected using **Action** and its options, and does not use the contents of the **Replace with** box.
- **Actions box** – Lists the actions created using **Action** and its options, and places them in the order they will be executed. Users can select the order of the actions in the **Actions** box by clicking **Move Up** and **Move Down**.
- **Advanced Replace option buttons:**
 - **Action** – Displays a list of options that allows the user to create one or more replace actions. The replace actions are then listed in the **Actions** box. The option buttons are:
 - **Wizard**: Leads the user through the creation of an action.
 - **Copy matching**: Copies the contents of a field or subfield that contains text matching the **Find** box into a user-specified field or subfield.
 - **Copy existing**: Copies the contents of an existing user-specified field or subfield into a different user-specified field or subfield.
 - **Move matching**: Moves (changes the position of) a field or subfield containing text that matches the **Find** box.
 - **Move existing**: Moves (changes the position of) an existing user-specified field or subfield.
 - **Rename matching**: Renames a matching field or subfield.
 - **Rename existing**: Renames an existing user-specified field or subfield.
 - **Remove matching**: Removes a matching field or subfield.
 - **Remove existing**: Removes an existing user-specified field or subfield.
 - **Insert new**: Inserts a new control field, field, or subfield.
 - **Insert text**: Inserts text into an existing control field, existing subfield, or indicator.
 - **Move Up** – Moves the currently-selected action in the **Actions** box up one position.
 - **Move Down** – Moves the currently-selected action in the **Actions** box down one position.

- **Delete** – Removes the currently selected action in the **Actions** box.
- **Delete All** – Removes all actions in the **Actions** box.

Example Find and Replace Operations

NOTE: The following examples assume that the user has all rights configured so that the Find and Replace utility operates properly.

Changing the Contents of a Field or Subfield

The first two examples explain how to replace the contents of a field or subfield.

Example 1: Correcting a spelling problem

This example shows how to correct misspelled words in records.

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.38).
2. In the **Search For** list, select the type of records you want to search.
3. In the first keyword box, type the misspelled word. To select a different MARC field, select the preferred field in the record field list.
4. Click **Search**. This limits the find and replace operation to only the records containing the misspelled word, and reduces the time needed for the find and replace operation.
5. Select the check box by each brief record you want to include in the Find and Replace operation. Or, to include all records in the list: on the **Edit** menu, select the type of record you want to include, and then click **Select All Records**. This places a check mark by all brief records in the list.
6. On the **Edit** menu, select the same record type you selected in step 2, and then click **Find**. This displays the Find dialog box (Figure 4.43).
7. In the **Find** box, type the misspelled word.
8. In the **In** lists, specify the MARC field and subfield to which you want to limit the find and replace operation.
9. In the **Replace with** box, type the correct spelling of the word.
10. Select any of the search options check boxes needed to refine your search (**Match case**, **Wildcards**, and so on).
11. Click **Find Next**. This locates the first occurrence of the **Find** text.
12. If you want the text replaced, click **Replace**. If you do not want the text replaced, click **Find Next** to locate the next occurrence.

NOTES:

- If you feel comfortable with the replace operation, click **Replace All**. This automatically completes the find and replace operation without user intervention. Use this only if the find and replace operation will work properly on every match.
- To cancel the find and replace operation, click **Cancel** at any time. However, any changes made prior to clicking **Cancel** are saved.

Note: During the Find and Replace operation, all Authority Control fields contained in a bibliographic record are ignored.

- To “undo” the changes, click **Undo Find/Replace** on the **Edit** menu. You cannot undo once you have begun another find operation, saved a record, imported or exported records, begun a standard keyword search, or exited Cataloging.

Example 2: Changing grade levels in a high school

When changing the grade level of a group of patrons, it is very important that you start the find and replace from the patrons in the highest grade first. If you do not, then all the patrons will end up with the same grade listed. (This example assumes the patron records contain the grade information. Also, if your system is using groups to differentiate between the grade levels, there is no need to perform this operation.)

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.38).
2. In the **Search For** list, select **Patron**.
3. In the first keyword box, type the highest grade level at your institution (for example, 12th grade). To select a different MARC field, select the preferred field in the record field list.
4. Click **Search**. This limits the find and replace operation to only the records containing the grade level you want to change, and reduces the time needed for the find and replace operation.
5. Select the check box by each brief record you want to include in the Find and Replace operation. Or, to include all records in the list: on the **Edit** menu, select **Patrons**, and then click **Select All Records**. This places a check mark by all brief records in the list.
6. On the **Edit** menu, select **Patrons**, and then click **Find**. This displays the Find dialog box (Figure 4.43).
7. In the **Find** box, type the number **12**.
8. In the **In** lists, select **852** and **g** to limit the find and replace operation to field 852#g.
9. In the **Replace with** box, type the number **13**.
10. Select the **Match whole word only** check box to make sure the find and replace does not find and possibly change text like 120 or 1213. While this might not be needed in this case, it is a good habit.
11. Click **Find Next**. This locates the first occurrence of the **Find** text.
12. If you want the text replaced, click **Replace**. If you do not want the text replaced, click **Find Next** to locate the next occurrence.
13. Repeat this procedure until all grades have been promoted. When finished, be sure to search for and delete all 13th graders.

NOTES:

- If you feel comfortable with the replace operation, click **Replace All**. This automatically completes the find and replace operation without user intervention. Use this only if the find and replace operation will work properly on every match.
- To cancel the find and replace operation, click **Cancel** at any time. However, any changes made prior to clicking **Cancel** are saved.

Note: During the Find and Replace operation, all Authority Control fields contained in a bibliographic record are ignored.

- To “undo” the changes, click **Undo Find/Replace** on the **Edit** menu. You cannot undo once you have begun another find operation, saved a record, imported or exported records, begun a standard keyword search, or exited Cataloging.

Deleting and / or Obsoleting Unwanted Fields and / or Subfields

Example 3: Deleting all field occurrences of field 261

This example explains how to delete a field. We will search for and delete all field occurrences of **261**.

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.38).
2. In the **Search For** list, select **Bibliographic**.
3. In the record field list, type the field tag number (**261**) over the default field name.
4. In the first keyword box, type an asterisk (*).
5. Click **Search**. This limits the find and replace operation to only the records containing the unwanted field, and reduces the time needed for the find and replace operation.
6. Select the check box by each brief record you want to include in the Find and Replace operation. Or, to include all records in the list: on the **Edit** menu, select **Bibliographic**, and then click **Select All Records**. This places a check mark by all brief records in the list.
7. On the **Edit** menu, select **Bibliographic**, and then click **Find**. This displays the Find dialog box (Figure 4.43).
8. Select the **Advanced** check box. This displays the Advanced Find/Replace dialog box (Figure 4.44).
9. Click **Action**, select **Remove existing**, and then click **field**.
10. In the first **Field/occurrence** list, select **261**. If there are multiple occurrences of the field, select which occurrence should be replaced in the second **Field/occurrence** list, and then click **Next**.
11. Select the **Execute actions for each** check box, then click **record**.
12. Click **Find Next**. This locates the first occurrence of the **Find** text.
13. If you want the field removed, click **Replace**. If you do not want the field removed, click **Find Next** to locate the next occurrence.

NOTES:

- If you feel comfortable with the replace operation, click **Replace All**. This automatically completes the find and replace operation without user intervention. Use this only if the find and replace operation will work properly on every match.
- To cancel the find and replace operation, click **Cancel** at any time. However, any changes made prior to clicking **Cancel** are saved.

***Note:** During the Find and Replace operation, all Authority Control fields contained in a bibliographic record are ignored.*

- To “undo” the changes, click **Undo Find/Replace** on the **Edit** menu. You cannot undo once you have begun another find operation, saved a record, imported or exported records, begun a standard keyword search, or exited Cataloging.

Adding a Field or Subfield

Example 4: Adding a new field to a series of records

In this example, we will add a local notes field to a series of records.

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.38).
2. In the **Search For** list, select **Bibliographic**.
3. Search for the records in which you want to add the new field. To do so, type your search query into the appropriate keyword boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator.
4. Click **Search**. This limits the find and replace operation to only the records you want to modify, and reduces the time needed for the find and replace operation.
5. Select the check box by each brief record you want to include in the Find and Replace operation. Or, to include all records in the list: on the **Edit** menu, select **Bibliographic**, and then click **Select All Records**. This places a check mark by all brief records in the list.
6. On the **Edit** menu, select **Bibliographic**, and then click **Find**. This displays the Find dialog box (Figure 4.43).
7. Select the **Advanced** check box. This displays the Advanced Find/Replace dialog box (Figure 4.44).
8. Click **Action**, select **Insert new**, and then click **field/subfield**.
9. In the **Field** list, type or select **590**. In the **Subfield** list, type or select the letter **a**, and then click **Next**.
10. Select how you want the field positioned, and then click **Next**.
11. Click **Next** to skip this dialog box.
12. Type your note, and then click **Next**. This closes the dialog box.
13. Select the **Execute actions for each** check box, then click **record**.
14. Click **Find Next**. This locates the first occurrence of the **Find** text.
15. If you want the field added, click **Replace**. If you do not want the field added, click **Find Next** to locate the next occurrence.

NOTES:

- If you feel comfortable with the replace operation, click **Replace All**. This automatically completes the find and replace operation without user intervention. Use this only if the find and replace operation will work properly on every match.
- To cancel the find and replace operation, click **Cancel** at any time. However, any changes made prior to clicking **Cancel** are saved.

***Note:** During the Find and Replace operation, all Authority Control fields contained in a bibliographic record are ignored.*

- To “undo” the changes, click **Undo Find/Replace** on the **Edit** menu. You cannot undo once you have begun another find operation, saved a record, imported or exported records, begun a standard keyword search, or exited Cataloging.

Example 5: Adding a field or subfield based on the contents of another field or subfield

In this example, we will add a General Material Designation (245#h) with contents that match the value of position 6 in the leader (000). We will use “videorecording” as the medium.

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.38).
 - A. In the **Search For** list, select **Bibliographic**.
 - B. In the first record field list, select a MARC field.
 - C. In the first keyword box, type an asterisk (*).
 - D. In the first Boolean operator list, select **NOT**.
 - E. In the next record field list, type **245#h** over the default field name.
 - F. In the keyword box below, type **video***.
2. Click **Search**. This limits the find and replace operation to only the records you want to modify, and reduces the time needed for the find and replace operation.
3. Select the check box by each brief record you want to include in the Find and Replace operation. Or, to include all records in the list: on the **Edit** menu, select **Bibliographic**, and then click **Select All Records**. This places a check mark by all brief records in the list.
4. On the **Edit** menu, select **Bibliographic**, and then click **Find**. This displays the Find dialog box (Figure 4.43).
5. In the **Find** box, type the letter **g**.
6. In the **In** list, type **000** to limit the find and replace operation to the leader.
7. Select the **Advanced** check box. This displays the Advanced Find/Replace dialog box (Figure 4.44).
8. Select the **Limit search to character positions** check box. Type **6** in both of the boxes that follow.
9. Click **Action**, select **Insert new**, select **subfield**, and then click **into existing field**.
10. In the **Subfield** list, type or select **h**, and then click **Next**.
11. In the first **Field/occurrence** list, type or select **245**. Leave **first** as the value of the second **Field/occurrence** list, then click **Next**.
12. Click **after**. In the adjacent boxes, type or select **b** in the first box, and leave **first** as the value of the second box. Then click **Next**.
13. In the text box, type [videorecording], and then click **Next**.
14. Select the **Execute actions for each** check box, and then click **match**.
15. Click **Find Next**. This locates the first occurrence of the **Find** text.

Note: During the Find and Replace operation, all Authority Control fields contained in a bibliographic record are ignored.

16. If you want the field added, click **Replace**. If you do not want the field added, click **Find Next** to locate the next occurrence.

NOTES:

- If you feel comfortable with the replace operation, click **Replace All**. This automatically completes the find and replace operation without user intervention. Use this only if the find and replace operation will work properly on every match.
- To cancel the find and replace operation, click **Cancel** at any time. However, any changes made prior to clicking **Cancel** are saved.
- To “undo” the changes, click **Undo Find/Replace** on the **Edit** menu. You cannot undo once you have begun another find operation, saved a record, imported or exported records, begun a standard keyword search, or exited Cataloging.

Renaming a Field or Subfield

Example 6: Renaming a field or subfield with incorrect information

In this example we will rename a field in records that were improperly cataloged. In this case, records have a field incorrectly named **261** that should be **262**.

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.38).
2. In the **Search For** list, select **Bibliographic**.
3. In the record field list, type the field tag number (**261**) over the default field name.
4. Click **Search**. This limits the find and replace operation to only the records containing the unwanted field, and reduces the time needed for the find and replace operation.
5. Select the check box by each brief record you want to include in the Find and Replace operation. Or, to include all records in the list: on the **Edit** menu, select **Bibliographic**, and then click **Select All Records**. This places a check mark by all brief records in the list.
6. On the **Edit** menu, select **Bibliographic**, and then click **Find**. This displays the Find dialog box (Figure 4.43).
7. Select the **Advanced** check box. This displays the Advanced Find/Replace dialog box (Figure 4.44).
8. Click **Action**, select **Rename existing**, and then click **field**.
9. In the first **Field/occurrence** list, type or select **261**. If there are multiple occurrences of the field, indicate which occurrence should be replaced in the second **Field/occurrence** list, and then click **Next**.
10. Type or select **262** as the new field tag, and then click **Next**. This closes the dialog box.
11. Select the **Execute actions for each** check box, then click **record**.
12. Click **Find Next**. This locates the first occurrence of the **Find** text.
13. If you want the field renamed, click **Replace**. If you do not want the field renamed, click **Find Next** to locate the next occurrence.

Note: During the Find and Replace operation, all Authority Control fields contained in a bibliographic record are ignored.

NOTES:

- If you feel comfortable with the replace operation, click **Replace All**. This automatically completes the find and replace operation without user intervention. Use this only if the find and replace operation will work properly on every match.
- To cancel the find and replace operation, click **Cancel** at any time. However, any changes made prior to clicking **Cancel** are saved.
- To “undo” the changes, click **Undo Find/Replace** on the **Edit** menu. You cannot undo once you have begun another find operation, saved a record, imported or exported records, begun a standard keyword search, or exited Cataloging.

DELETING AND UNDELETING RECORDS

For precautionary reasons, deleting records is a two-step process. You must first mark records for deletion, then purge the marked records. You can undelete records marked for deletion unless they have been purged. Deleting a bibliographic record also deletes that item’s holdings, but deleting a holding record does not delete the bibliographic record.

Step 1: Marking Records for Deletion

You can quickly tell when a bibliographic, holding, patron, or authority record has been marked for deletion. In a brief record format in the Cataloging window, marked records display in red. In a full MARC record, the **Mark for Deletion** check box is selected and the record status code in the Leader field is **d**. (This does not apply to picture records.)

From the Brief MARC Record List

To mark records for deletion while viewing the brief record list:

1. Select the check box by each record you want to delete. Or, to delete all records in the list, on the **Edit** menu, select the type of record you want to delete, and then click **Select All Records**. This places a check mark by all records in the list.
2. On the **Edit** menu, select the type of record you want to delete, and then click **Delete Selected Records**. The selected records display in red.

From the Full MARC Record

To mark a record for deletion while viewing its full MARC record:

- Select the **Mark for Deletion** check box.

OR

- Double-click the **Leader** field to display the Fixed Field 000 dialog box. Click the **Record status** arrow and click **d**. Click **OK** to save your changes. This selects the **Mark for Deletion** check box and displays the corresponding brief record in red.

***Note:** Use this method to delete picture records.*

***Note:** You cannot use this method to delete picture records.*

Step 2: Purging Records Marked for Deletion

Warning:

**You cannot undo a “purge” command;
records are permanently removed.**

***Note:** You cannot purge records that have open transactions, fines, or messages attached.*

To purge records marked for deletion, do one of the following:

- On the **Edit** menu, select the type of records you want to purge, and then click **Purge Deleted Records**. This removes all records marked for deletion from the system.

OR

1. Select the check box by each deleted record you want to purge.
2. On the **Edit** menu, select the type of records you are purging, and then click **Purge Selected Records**. This removes the selected records from the system.

Undeleting Records

You can undelete records marked for deletion unless they have been purged. To undelete records:

1. Select the check box by each deleted record you want to undelete. (Deleted records appear in red.)
2. On the **Edit** menu, select the type of record you want to undelete, and then click **Undelete Selected Records**. This removes the check mark by the records and changes the color of the records to black.

ADDITIONAL M3 SEARCHING CAPABILITIES

***Tip:** The record status code appears in Fixed Field 000 in the full MARC record.*

Searching by Record Status

The M3 search utility allows you to locate records by record status. This is particularly useful if you want to review the list of records marked for deletion prior to running the deletion utility. To do so:

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.45).
2. In the **Search For** list, select the type of record you want to search.
3. In the record field list, select **Record Status**.
4. In the corresponding keyword box, type the desired record status subfield code, as shown in the example in Figure 4.45:
 - **a** locates records with an increase in encoding level
 - **c** locates corrected or revised records
 - **d** locates records marked for deletion
 - **n** locates new records
 - **p** locates records with an increase in encoding level from prepublication

FIGURE 4.45

*Record field list**Keyword box**Boolean operator list*

The screenshot shows a 'Search' dialog box with the following elements:

- Search For:** A dropdown menu set to 'Bibliographic'.
- Record Status:** A dropdown menu set to 'd'.
- Keyword box:** A text input field containing the letter 'd'.
- Boolean operator list:** A section with two rows. The first row has a dropdown set to 'OR' and a text field set to 'Title'. The second row has a dropdown set to 'AND' and a text field set to 'Author'.
- Buttons:** 'Search' and 'Clear' buttons at the bottom.

5. Click **Search**. This displays the Cataloging window listing all records with the selected record status.

Searching by MARC Field Tag Numbers

The M3 search utility allows you to locate records by MARC field tag numbers and subfield codes. To do so:

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.46).
2. In the **Search For** list, select the type of record you want to search.
3. In the record field list, type the desired field tag number (for example, **260**) over the default field name. To narrow to a specific subfield, type the field tag number plus the **#** delimiter character and the subfield code (for example, **260#a**).
4. In the corresponding keyword box, type the text you want to locate, as shown in the example in Figure 4.46.

FIGURE 4.46

*Field tag number**Text to locate within designated field*

The screenshot shows the 'Search' dialog box with the following elements:

- Search For:** A dropdown menu set to 'Bibliographic'.
- Record Status:** A dropdown menu set to '260#a'.
- Keyword box:** A text input field containing the word 'Seattle'.
- Boolean operator list:** A section with two rows. The first row has a dropdown set to 'OR' and a text field set to 'Title'. The second row has a dropdown set to 'AND' and a text field set to 'Author'.
- Buttons:** 'Search' and 'Clear' buttons at the bottom.

5. Click **Search**. This displays the Cataloging window listing all records containing the text in the designated field.

USING M3 PICTURE MANAGER

Note: To add a picture to one record at a time, see “Adding a Picture Field to a Bibliographic or Patron Record” on page 4-54.

The M3 Picture Manager utility allows you to import multiple image files and automatically link the images to the appropriate bibliographic or patron records. Once imported, images can be displayed alongside the records in the Circulation window and the OPAC Search Results, Record Details, and Bookbag windows. Item and patron images can be displayed in Circulation, but only item images can be displayed in the OPAC.

This utility also allows you to update your bibliographic and patron records with pictures that have already been imported. This feature locates the pictures in your picture table and attaches them to the corresponding bibliographic or patron records. You may want to use this feature if, for example, you add bibliographic records to your database after batch importing and linking pictures.

Displaying Imported Pictures

To display images in the OPAC, they must be enabled after import. For instructions, see “Enabling Cover Images” on page 6-30.

Once pictures are imported, they display automatically in Circulation alongside patrons and items in the Patron and Item panes if M3 v1.6 was your first installation of M3. If you had a version of M3 installed prior to installing 1.6, you must do the following:

- Add a graphic cell to the Patron pane for each Circulation mode (Loan, Return, and so on) in which you want an image to display; changes made to one mode will not apply to the other modes. For instructions, see “Modifying the Patron Pane Display” on page 5-58.
- Add a graphic cell to the Item pane for each Circulation mode (Loan, Return, and so on) in which you want an image to display; changes made to one mode will not apply to the other modes. For instructions, see “Modifying the Item Pane Display” on page 5-63.

Note: Image files must be in .jpg or .bmp format to be used in M3.

Importing Pictures

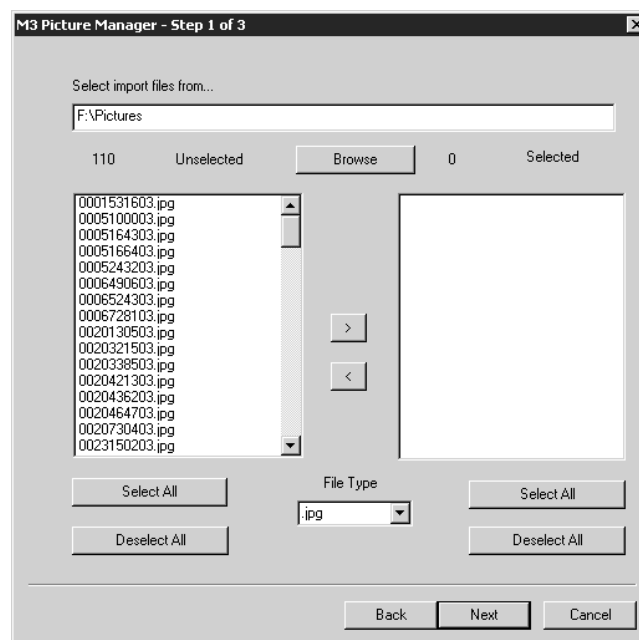
1. On the **File** menu, select **Import**, then click **Pictures**. This displays the M3 Picture Manager window (Figure 4.47).

FIGURE 4.47



2. Click **Import and link new pictures**, then click **Next**. This displays the Step 1 dialog box (Figure 4.48).

FIGURE 4.48



3. Locate the image files you want to import.
 - In the **Select import files from** box, type the path of the image files to import. The file names display in the **Unselected** box.

OR

- Click **Browse**. This displays the Open dialog box. Navigate to the directory containing the files, then click **OK**. The file names display in the **Unselected** box.

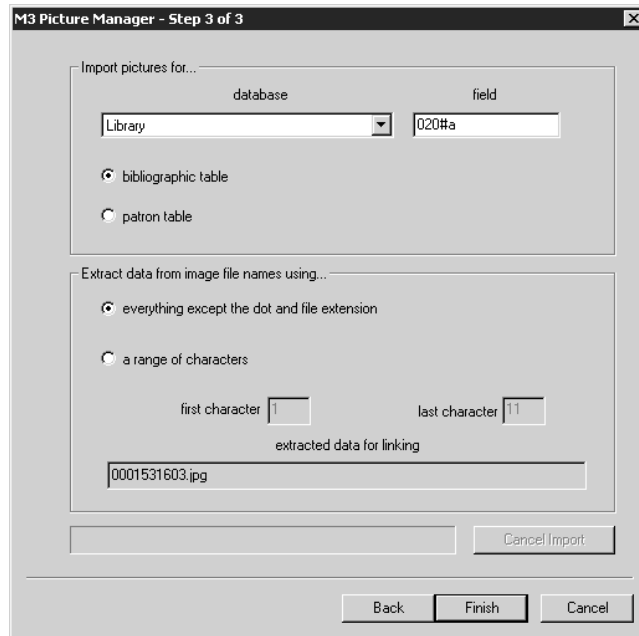
NOTE: Images are listed only if they are the type selected in the **File Type** list; if desired, select a different type. Only .jpg or .bmp files will be imported.

- Move each file you want to import from the **Unselected** box to the **Selected** box. To do so, select each of the files you want to import, then click the > button. To move all files, click **Select All**, then click the > button.
- Click **Next**. This displays the Step 2 dialog box (Figure 4.49)

FIGURE 4.49

- The first picture to be imported displays.
 - If you want to import all pictures you selected in the Step 1 dialog box without viewing them, click **Import**.
 - If you want to view each picture you selected, click **Import** or **Don't import** for this image, and then click **Next Picture**. Repeat for each picture you want to view. To skip to the end of the picture list, click **Import** or **Don't import** for the remaining images.
- Click **Next**. This displays the Step 3 dialog box (Figure 4.50).

FIGURE 4.50



Note: To disable the **field** option, change the **Allow Match Field Edit** entry in the *Global.ini.REG* file (the default path is *C:\M3 Server\Registry\Common*) from **1** to **0**. The default fields can also be modified in this file.

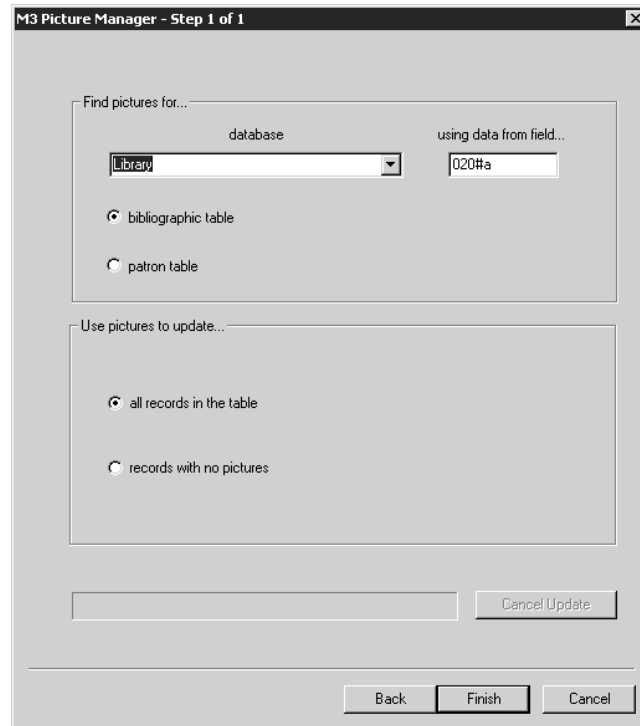
8. In the **database** list, select the database for which you want to import pictures.
9. Click **bibliographic table** or **patron table** to indicate the table for which you want to import the pictures.
10. The **field** box displays the field that will be used to match the picture to a bibliographic or patron record. This field is placed in the 991#b field of the picture record.
11. Click **everything except the dot and file extension** or **a range of characters** to indicate how you want to extract data from the image file names.
 - If your file names are descriptive names or vary in length, select **everything except the dot and file extension**. The names of all picture files being imported must be the same length to use **a range of characters**.
 - If you select **a range of characters**, enter the appropriate numbers in the **first character** and **last character** boxes. These numbers will be used to limit the data that is matched in the picture file name. For example, if you enter **3** in the **first character** box and **10** in the **last character** box, and the picture file name is 0042789354.jpg, the numbers 42789354 will be matched. The characters to be matched display in the **extracted data for linking** box. (NOTE: If you choose this option, the names of all picture files being imported must be the same length.)
12. Click **Finish**. This imports the pictures.

Updating Bibliographic or Patron Records with Pictures

Use this feature to update your bibliographic or patron records with pictures that have already been imported. If you have not yet imported pictures, see “Importing Pictures” on page 4-51.

1. On the **File** menu, select **Import**, then click **Pictures**. This displays the M3 Picture Manager window (Figure 4.47).
2. Click **Update bibliographic or patron tables**, then click **Next**. This displays the Step 1 dialog box (Figure 4.51).

FIGURE 4.51



3. In the **database** list, select the database for which you want to attach pictures.
4. Click **bibliographic table** or **patron table** to indicate whether you want to attach pictures to bibliographic records or patron records.
5. The **using data from field** box displays the field that will be used to match a picture to a bibliographic or patron record. This field is placed in the 991#b field of the picture record.
6. Click **all records in the table** or **records with no pictures** (records without a 996 field) to indicate which bibliographic or patron records you want to attach pictures to.
7. Click **Finish**. This places the ISN of the picture record in the 996#a field of the bibliographic or patron record.

Adding a Picture Field to a Bibliographic or Patron Record

Note: Image files must be in .jpg or .bmp format to be used in M3.

To add a picture field to one bibliographic or patron record at a time, follow the procedure below. To import multiple image files at once, follow the procedure in “Importing Pictures” on page 4-51.

1. Display the desired bibliographic or patron record in the Bibliographic - Cataloging (Figure 4.8) or Patron - Cataloging (Figure 4.21) window.
2. Follow the procedure beginning with step 3 in “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-37.

IMPORTING BIBLIOGRAPHIC, PATRON, AND AUTHORITY RECORDS

NOTES:

***Note:** To import pictures, see “Using M3 Picture Manager” on page 4-50.*

- If you are importing Mandarin 2.X databases as part of your system conversion to M3, refer to the 2.X to M3 Conversion Guide for detailed importing instructions. Do not use the instructions provided in this section.
- Before importing records, be sure the item or patron group you plan to import the records into has already been created in the Group Editor, as covered in Chapter 3.

Importing Overview

M3 Cataloging includes a utility to import bibliographic, patron, and authority records formatted in three different data types:

***Note:** Authority records are only in MARC format.*

- MARC – Records in MARC format.
- Delimited – Records in which each field ends with, or is “delimited” by, a particular character such as a comma or tab.
- Fixed width – Records in which each field has a designated maximum width in number of characters.

During the import procedure, despite which of the three data types applies to the records to be imported, the records are mapped into a MARC record format. This is necessary as M3 is designed exclusively to operate with MARC records to provide optimum performance.

The import procedure for each data type is explained in this section. In addition, an optional high-speed import procedure is available that can be used the first time you import records into M3.

The same import procedures apply to bibliographic, patron, and authority records; the only difference occurs when you specify the type of record to import.

M3 also includes a Picture Manager utility to import pictures. To use this utility, see “Using M3 Picture Manager” beginning on page 4-50.

Optional High-Speed Import Option

For the first mass import of records into M3, you may want to use the high-speed import option. This option cannot be run while others are using any part of the M3 system.

Warning:

Do not use the high-speed import option to load records into an existing catalog containing records. If your catalog contains records, use one of the three import options explained in the preceding section, “Importing Overview.”

To use the high-speed import option:

1. Press and hold CTRL, then click **Import** on the **File** menu. When an asterisk appears by the menu options on the **Import** submenu, release CTRL.

2. Proceed with the importing instructions in one of the following sections, depending on the type of data you are importing (MARC, delimited, or fixed width). (As the procedure progresses, a dialog box advises you that it is going to index. This is appropriate.)

Importing MARC Records

To import records that are in MARC format:

1. Verify that you are working with the correct database. For instructions, see “Selecting a Database” on page 4-2.
2. On the **File** menu, select **Import**, and then click the type of records you are importing. This displays the Open dialog box.
3. Navigate to the file containing the records you want to import, and then click **Open**.
4. In the Step 1 dialog box (Figure 4.52), specify the range of records you want to import.

FIGURE 4.52

M3 Data Import - Step 1 of 3

Please choose the data type that best describes your data and the range of records to be imported

Original Data Type

☒ MARC - Data is MARC based.

☐ Delimited - Characters such as commas or tabs separate each field.

☐ Fixed width - Fields are aligned in columns with spaces between each field.

Start import at row: 1 Stop import at row: 456

Preview of File

Row #	Record
1	Messengers
2	Nerves at work
3	Shares in the futures
4	Stanford prison experiment
5	Life under pressure
6	Admission and discharge
7	Discussions in bioethics
8	Controlling the spread of disease, pt.1: medical aseptic
9	To breathe, to breathe, to live
10	How to create a non-person
11	Urethral catheterization

Back Next Cancel

To do so:

- A. Skip **Original Data Type**. The **MARC** option should automatically be selected.
- B. In the **Start import at row** and **Stop import at row** boxes, select the range of records you want to import. By default, the first and last row numbers in the import file are displayed. If you only want to import a portion of the records in the file, type the row numbers corresponding to the range you want to import.

NOTE: The data in the Preview pane displays differently depending on the record type you are importing.

Tip: To see the field entries in other records of the import file, click the navigation buttons in the lower left of the Step 2 dialog box (see Figure 4.53). From left to right, these buttons access the first record in the import file range, the previous record, the next record, and the last record.

FIGURE 4.53

Unite check box column

Include check box column

Navigation buttons

C. When finished, click **Next**.

5. In the Step 2 dialog box (Figure 4.53), indicate the field mapping structure that you want the records to conform to once they are imported. By default, the dialog box is set to import the field mapping configuration currently used by the records to be imported.

NOTE: When the Step 2 dialog box appears, it displays the field entries for the first record in the range of records you plan to import. In addition, you see the comprehensive list of fields and subfields used by the entire range of records in your import file. Because this first record may not have entries in every field used by the range of records, you are likely to see ****Field not in current record**** throughout the **Field Data** column.

	Field	Field Data	Action	Map To	Occ
☒	001		Keep	001	1
☒	005	19990611113206.0	Keep	005	1
☒	008	990611s1988 nju eng u	Keep	008	1
☒	010	**Field not in current record**			
☒	010o		Keep	010o	1
☒	016	**Field not in current record**			
☒	016a		Keep	016a	1
☒	020	**Field not in current record**			
☒	020a		Keep	020a	1
☒	020c		Keep	020c	1
☒	024	1029654	Keep	024a	1
☒	024	**Field not in current record**			
☒	024a		Keep	024a	2
☒	024	**Field not in current record**			
☒	024a		Keep	024a	3
☒	035	**Field not in current record**			

1 of 456 imported record(s)

Field Mapping Configuration: [Dropdown]

Back Next Cancel

Your options in this dialog box are:

- Accept the default field mapping configuration and continue the import process. To do so, click **Next**, and then skip to step 7 on page 4-60.
- Accept the default field mapping configuration and save it for future importing sessions before continuing. To do so:
 - A. In the **Field Mapping Configuration** list, select **Save As**. This displays the Save Field Mapping As dialog box.
 - B. Type a descriptive name for the new configuration, then click **OK**.
 - C. After the Step 2 dialog box refreshes, click **Next**, and then skip to step 7 on page 4-60.

- Use a field mapping configuration that was previously saved. To do so:
 - A. In the **Field Mapping Configuration** list, select **Load**. This displays the Load Field Mapping Configuration dialog box.
 - B. Select the desired configuration, then click **OK**.
 - C. After the Step 2 dialog box refreshes, click **Next**, and then skip to step 7 on page 4-60.
- Create a new field mapping configuration by modifying the default configuration. To do so, follow the modification instructions as explained in step 6.
- Create a new field mapping configuration by modifying a configuration that was previously saved. To do so:
 - A. In the **Field Mapping Configuration** list, select **Load**. This displays the Load Field Mapping Configuration dialog box.
 - B. Select the desired configuration, then click **OK**.
 - C. After the Step 2 dialog box refreshes, make any desired changes as explained in step 6.

6. To modify a field mapping configuration:

***Tip:** To map most but not all occurrences of a repeating field to the same destination field, you can still use the optional **Unite** procedure explained in step A, with one modification. After selecting the **Unite** check box and revising the **Map To** destination as explained in step F on page 4-59, clear the **Unite** check box. This separates the repeating field listings once again but maintains the **Map To** modification entered while the fields were united. You can then modify the mapping as explained in step F for those few listings that do not match the global change you entered while the fields were united.*

- A. In the Step 2 dialog box, review the **Field** column for fields that repeat. If you plan to change the mapping of a repeating field, and if all occurrences of the repeating field are to be mapped to the same destination field, then you can save time and keystrokes by using the optional **Unite** check box feature. This collapses all the occurrences of the repeating field into one line, creating a single occurrence, thereby enabling you to simultaneously remap all occurrences of this field to the same field. (If the field repeats several times, this could save you considerable time. If you do not use this feature, you must revise the mapping for each occurrence individually.)

To use this time-saving option, select the **Unite** check box by the first occurrence of the repeating field. (This action collapses all the repeated field occurrences into a single listing.) Then continue to step B.
- B. In the **Include** check box column, select the fields and subfields you want to import among those listed in the **Field** column. In the default configuration, all fields and subfields are selected based on the assumption you want to import all data contained in the records you are importing. If you do not want to import a particular field or subfield, clear the field's **Include** check box.
- C. In the **Field** column, do nothing. The **Field** column provides a comprehensive list of the fields and subfields used by the records to be imported. Some records may not have entries in each field and subfield in this list.
- D. The **Field Data** column works with the **Action** column. By default, the **Field Data** column displays the actual field and subfield data for the first record in the range you plan to import. To view the data contained in other records, click the navigation buttons in the lower left of this dialog box.

- E. In the **Action** column, select **Keep** or **Replace** for each field and subfield you plan to import. In the default mapping configuration, **Keep** is selected for each field and subfield.
- Select **Keep** if you want the data currently stored in that field to be kept during the import procedure.
 - Select **Replace** if you want to change the current data in a field to a constant value (such as a library name, regional code, or field label) during the import procedure. This constant value overwrites all data contained in the field prior to importing. If you select **Replace**, then in the **Field Data** column, type the information you want to appear in this field.

- F. In the **Map To** column, select the destination MARC field or subfield for each field you plan to import. The default mapping configuration assumes you want to import to the same field locations; therefore, the **Map To** column displays the same field tag number and subfield code listed in the **Field** column.

To change the default mapping to a different destination field or subfield, click the **Map To** arrow and select the preferred destination field or subfield from the tree. (You can expand and collapse the field tree by clicking the field's corresponding plus (+) and minus (–) signs.)

- G. In the Occurrence Number (**Occ.#**) column, select the order in which you want any repeating fields to appear in the new records. (This is not applicable if the repeating field's **Unite** check box is selected.) In the default mapping configuration, any repeating fields are numbered in sequential order in the **Occ.#** column. (To review the type of information in each occurrence of the field, look at the entries in the **Field Data** column.) For example, if subfield 020#a occurs twice, the first listing is assumed to be occurrence 1 and the second is occurrence 2. You can override this occurrence order by typing the preferred order numbers into this column.

If you revise the **Map To** column, the utility assumes that the field or subfield you are remapping becomes the first occurrence of that field in the new records. You are prompted to either accept this first occurrence order or change to a preferred occurrence order. (If the new occurrence order leaves gaps between occurrence numbers, a GAP error message advises and allows you to revise the order.)

- H. When finished:
- If you want to save the mapping configuration to use during another import session, select **Save As** in the **Field Mapping Configuration** list. This displays the Save Field Mapping As dialog box. Type a descriptive name for the new mapping configuration, then click **OK**.

OR

- If you do not want to save the mapping configuration, proceed to the next step.
- I. In the Step 2 dialog box (Figure 4.53), click **Next**.

7. In the Step 3 dialog box (Figure 4.54), specify the import options.

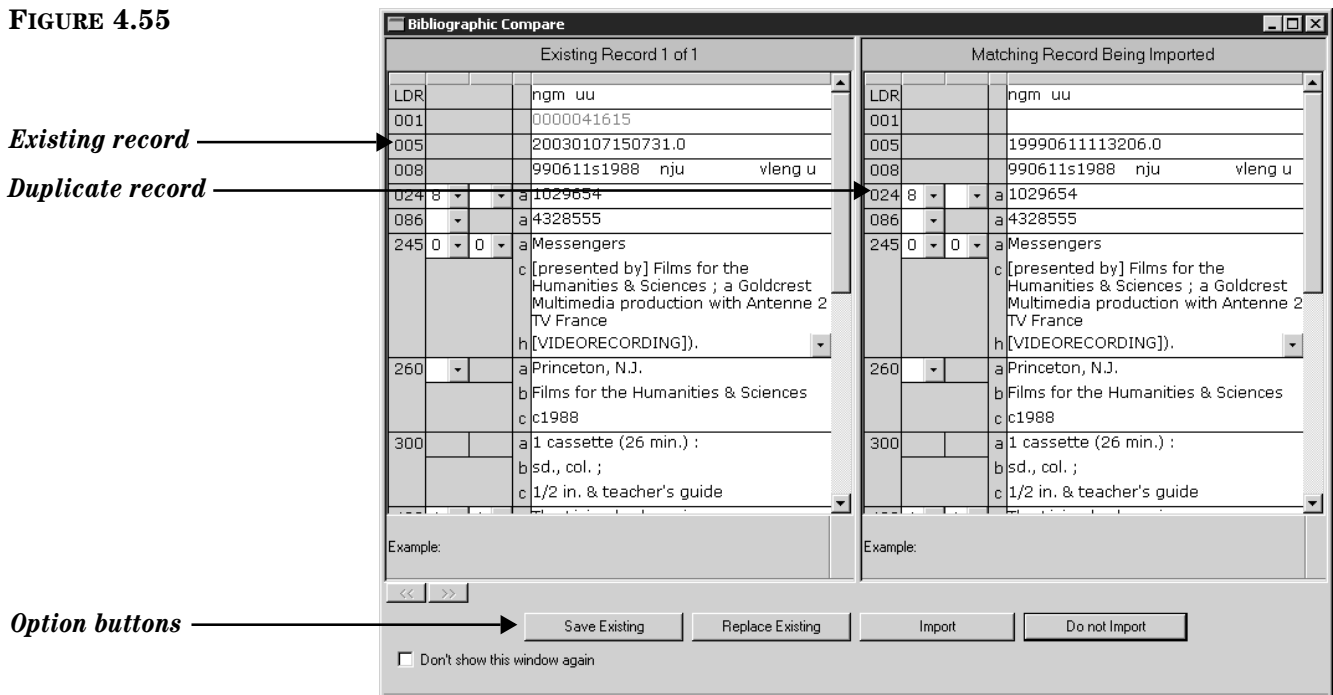
FIGURE 4.54

To do so:

- A. If you are importing bibliographic or authority records, the **Duplicates** options are available. Choose one of the following:
- To prevent the import of records that may duplicate existing records, click **Don't allow duplicates**. (All fields in two records need not match to consider the records as duplicates; matching is based upon specific vital field criteria. For example, two bibliographic records may be considered duplicates if just the ISBN field matches.)
 - To import records that may duplicate existing records, click **Allow duplicates**.
 - To be prompted when duplicate records are found during the import process, accept the default **Prompt if duplicates are found** option. This lets you compare the record you are importing to the record already in the M3 system, and then decide whether to import the duplicate record.

If a duplicate record is found, the Bibliographic Compare or Authority Compare dialog box displays (depending on the type of record you are importing), showing the two records side by side. Figure 4.55 shows the Bibliographic Compare dialog box.

FIGURE 4.55



Tip: Select the **Don't show this window again** check box before clicking a button to apply the action to the displayed record and all records being imported in this session.

Note: If you are importing authority records, only the **Duplicates** options are available. Skip to step 7E on page 4-62.

Using the option buttons, you have the following four choices:

Save Existing – Saves the existing record and does not import the duplicate record. If it is a bibliographic record, all corresponding holding records are imported. Result: One bibliographic record with all corresponding holding records.

Replace Existing – Imports the duplicate record and replaces the existing record. If it is a bibliographic record, all corresponding holding records are also imported. Result: One bibliographic record with all corresponding holding records.

Import – Imports the duplicate record and keeps the existing record. If it is a bibliographic record, all corresponding holding records are also imported and linked to the duplicate bibliographic record, not the existing bibliographic record. Result: Two bibliographic records and two sets of holdings—the existing bibliographic record and its original holdings, and the duplicate bibliographic record and its corresponding holdings.

Do not Import – Does not import the duplicate record. Result: The existing authority record, or bibliographic record and its holding records, remain the same.

- B. If you are importing bibliographic records, the **Holding Records** option is available. If you do not want to generate holding records, clear the **Generate holding records** check box. Otherwise, accept the default.

Tip: You must have 852 entries in the records you are importing or other fields mapped to 852 in order for **Update barcode values in 852 field with** to work. If no 852 field is found in a record, then no barcode is generated for that record.

- C. Under **Barcode**, you can choose to create new barcodes for the records being imported, whether barcodes exist in the original records or not. To do so, select the **Update barcode values in 852 field with** check box. You must then accept or change the values in the four boxes below it:
- **Prefix** – To assign a constant prefix to the barcode imported into the 852 field, type it here. For example, type **b** for bibliographic records or **p** for patron records. You must assign different prefixes to bibliographic records and patron records.
 - **Suffix Starting Value** – To assign an incrementing suffix to the barcodes in the order they import into the system, type the numeric starting value for these records (for example, type 1).
 - **Suffix Increment Type** – If you assign a suffix, you must select a format in this list.
 - **Suffix Increment By** – If you assign a suffix, type the number of increments you want the records to increase by (for example, 1 increment).
- D. In the **Assign to group** list, select the group to which you want the imported data assigned.
- E. When finished, click **Finish**. While the import procedure takes place, the Import Progress bar displays on screen.

8. When the import procedure is complete, a confirmation prompt displays and asks if you want to view the Import Summary. Click **Yes** to view it now or **No** to view it later. It is best to view it now to evaluate the results of the import procedure.

Importing Delimited Records

Delimited data appears in columns, with each field separated by a character such as a comma, tab, semicolon, or space. To import records that are in delimited format:

1. Verify that you are working with the correct database. For instructions, see “Selecting a Database” on page 4-2.
2. On the **File** menu, select **Import**, and then click the type of records you are importing. This displays the Open dialog box.
3. Navigate to the file containing the records you want to import, then click **Open**.
4. In the Step 1 dialog box (Figure 4.56), specify the range of records you want to import.

The Import Summary is a log containing the start and end time of the import session, the number of records in the import file, the number of records imported successfully, any duplicate barcodes, and the barcode creation summary. Duplicate barcodes are changed to a barcode of “SIRS” followed by the ISN number.

FIGURE 4.56

Please choose the data type that best describes your data and the range of records to be imported

Original Data Type

☐ MARC - Data is MARC based.
☒ Delimited - Characters such as commas or tabs separate each field.
☐ Fixed width - Fields are aligned in columns with spaces between each field.

Start import at row: Stop import at row:

Preview of File

Row #	Record
1	"Herman, Charlotte."; "Millie Cooper, take a chance /"; "
2	"Hurwitz, Johanna."; "Busybody Nora /"; "Johanna Hurwitz
3	"Vega Di Tolla, Luigi."; "His Memorias"; "written and ill
4	"Bernhard, Durga."; "What's Maggie up to? /"; "written an

Back Next Cancel

To do so:

- A. Skip **Original Data Type**. The **Delimited** option should automatically be selected.
- B. In the **Start import at row** and **Stop import at row** boxes, select the range of records you want to import. By default, the first and last row numbers in the import file are displayed. If you only want to import a portion of the records in the file, type the row numbers corresponding to the range you want to import.

NOTE: The data in the Preview pane displays differently depending on the record type you are importing.

- C. When finished, click **Next**.

5. In the Step 2 dialog box (Figure 4.57):

FIGURE 4.57

M3 Data Import - Step 2 of 4

This screen lets you set the delimiters your data contains. See how your data is affected in the preview below.

Field Delimiter: Comma Text Qualifier: Double Quote

Herman, Charlotte.	:	:	
Hurwitz, Johanna.	:	:	
Vega Di Tolla, ...	:	:	
Bernhard, Durga.	:	:	

Back Next Cancel

- A. In the **Field Delimiter** list, specify the field delimiter character used by the data to be imported to separate fields in the file. The import utility makes an educated guess based on the contents of the file you are importing; however, verify the delimiter by reviewing the columns of data in the Preview pane. If data does not appear in correct column order, select the appropriate field delimiter. Each time you select a different field delimiter, the Preview pane refreshes.
 - B. In the **Text Qualifier** list, specify the character (if any) used by the file to be imported to mark the beginning and end of the data in a field. For instance, if a field contains **lastname, firstname**, the data might be enclosed within quotes to mark the beginning and end of the data, as in "lastname, firstname".
 - C. Click **Next**.
6. In the Step 3 dialog box (Figure 4.58), indicate the MARC field mapping structure that you want the records to conform to once they are imported. (M3 is designed to work with MARC records; therefore, all data fields must map to a MARC field.)

FIGURE 4.58

M3 Data Import - Step 3 of 4

Please select or define the field mapping configuration to be used during this import session.

	Column Data	Action	Map To	Occ
☐	Herman, Charlotte.	Keep		1
☐	:	Keep		1
☐	:	Keep		1

1 of 4 imported record(s)

Field Mapping Configuration

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By default, the dialog box does not have a mapping structure selected. You must select or modify an existing mapping structure (if you've imported delimited records before), or create a new configuration.

- To select a field mapping configuration that was previously saved:
 - A. In the **Field Mapping Configuration** list, select **Load**. This displays the Load Field Mapping Configuration dialog box.
 - B. Select the desired configuration, then click **OK**.
 - C. After the Step 3 dialog box refreshes, click **Next**, and then skip to step 7 beginning on page 4-67.
- To create a new field mapping configuration by modifying a configuration that was previously saved:
 - A. In the **Field Mapping Configuration** list, select **Load**. This displays the Load Field Mapping Configuration dialog box.
 - B. Select the desired configuration, then click **OK**.
 - C. After the Step 3 dialog box refreshes, make any desired changes as explained in the next bullet.
- To create a new field mapping configuration:
 - A. In the check box column, select each field you want to import in the **Column Data** column. By default, no fields are selected.

F. When finished:

If you want to save the configuration to use during another import session, select **Save As** in the **Field Mapping Configuration** list. This displays the Save Field Mapping As dialog box. Type a descriptive name for the new mapping configuration, and then click **OK**.

OR

If you do not want to save the mapping configuration, proceed to the next step.

G. In the Step 3 dialog box, click **Next**.

7. In the Step 4 dialog box (Figure 4.60), specify the import options.

FIGURE 4.60

To do so:

- A. If you are importing bibliographic records, the **Duplicates** options are available. If so, do one of the following:
- To prevent the import of records that may duplicate existing records, click **Don't allow duplicates**. (All fields in two records need not match to consider the records as duplicates; matching is based upon specific vital field criteria. For example, two records may be considered duplicates if just the ISBN field matches.)
 - To import records that may duplicate existing records, click **Allow duplicates**.

*Tip: Select the **Don't show this window again** check box before clicking a button to apply the action to the displayed record and all records being imported in this session.*

- To be prompted when duplicate records are found during the import process, accept the default **Prompt if duplicates are found** option. This lets you compare the record you are importing to the record already in the M3 system, and then decide whether to import the duplicate record.

If a duplicate record is found, the Bibliographic Compare dialog box displays (Figure 4.55), showing the two records side by side. Using the option buttons, you have the following four choices:

Save Existing – Saves the existing bibliographic record and does not import the duplicate bibliographic record. It imports any corresponding holding records. Result: One bibliographic record with all corresponding holding records.

Replace Existing – Imports the duplicate bibliographic record and replaces the existing bibliographic record. It also imports all corresponding holding records. Result: One bibliographic record with all corresponding holding records.

Import – Imports the duplicate bibliographic record and keeps the existing bibliographic record. It also imports the corresponding holding records and links them to the duplicate bibliographic record, not the existing bibliographic record. Result: Two bibliographic records and two sets of holdings—the existing bibliographic record and its original holdings, and the duplicate bibliographic record and its corresponding holdings.

Don't Import – Does not import the duplicate record. Result: The existing bibliographic record and its holding records remain the same.

- B. If you are importing bibliographic records, the **Holding Records** option is available. If you do not want to generate holding records, clear the **Generate holding records** check box. Otherwise, accept the default.
- C. Under **Barcode**, you can choose to create new barcodes for the records being imported, whether barcodes exist in the original records or not. To do so, select the **Update barcode values in 852 field with** check box. You must then accept or change the values in the four boxes below it:

Prefix – To assign a constant prefix to the barcodes imported into the 852 field, type it here. For example, type **b** for bibliographic records or **p** for patron records. You must assign different prefixes to bibliographic records and patron records.

- **Suffix Starting Value** – To assign an incrementing suffix to the barcodes in the order they import into the system, type the numeric starting value for these records (for example, type 1).
- **Suffix Increment Type** – If you assign a suffix, you must select a format in this list.
- **Suffix Increment By** – If you assign a suffix, type the number of increments you want the records to increase by (for example, 1 increment).

- D. In the **Assign to group** list, select the group to which you want the imported data assigned.

*Tip: You must have 852 entries in the records you are importing or other fields mapped to 852 in order for **Update barcode values in 852 field with** to work. If no 852 field is found in a record, then no barcode is generated for that record.*

The Import Summary is a log containing the start and end time of the import session, the number of records in the import file, the number of records imported successfully, any duplicate barcodes, and the barcode creation summary. Duplicate barcodes are changed to a barcode of "SIRS" followed by the ISBN number.

E. When finished, click **Finish**. While the import procedure takes place, the Import Progress bar displays on screen.

8. When the import procedure is complete, a confirmation prompt displays and asks if you want to view the Import Summary. Click **Yes** to view it now or **No** to view it later. It is best to view it now to evaluate the results of the import procedure.

Importing Fixed Width Records

Fixed width data appears in columns, with each field in the original record separated into columns of a specified width. Typically, fixed width records are patron records. To import records that are in fixed width format:

1. Verify that you are working with the correct database. For instructions, see "Selecting a Database" on page 4-2.
2. On the **File** menu, select **Import**, and then click the type of records you are importing. This displays the Open dialog box.
3. Navigate to the file you want to import, then click **Open**.
4. In the Step 1 dialog box (Figure 4.61), specify the range of records you want to import.

FIGURE 4.61

M3 Data Import - Step 1 of 4

Please choose the data type that best describes your data and the range of records to be imported

Original Data Type

☐ MARC - Data is MARC based.
☐ Delimited - Characters such as commas or tabs separate each field.
☒ Fixed width - Fields are aligned in columns with spaces between each field.

Start import at row: Stop import at row:

Preview of File

Row #	Record
1	1017084STU ASLEE SETH TBASLEE
2	1018194STUADMIRE BROOKE DADMIRE
3	1015893STUADMIRE JACOB CADMIRE
4	1013966STUADMIRE MICHAEL CADMIRE
5	1019045STUALDEWICK AMIRA FALDEWICK
6	1006408STUALLEN PAIGE MALLER
7	1012996STUALLEY LAUREN NALLEY
8	1014655STUALVAREZ JESSICA ALVAREZ
9	1010121STUANDERSON JACOB MANDERSON
10	1018132STUANDERSON JAKE TANDERSON
11	1018195STUANDREWS JORDAN MANDREWS

Back Next Cancel

To do so:

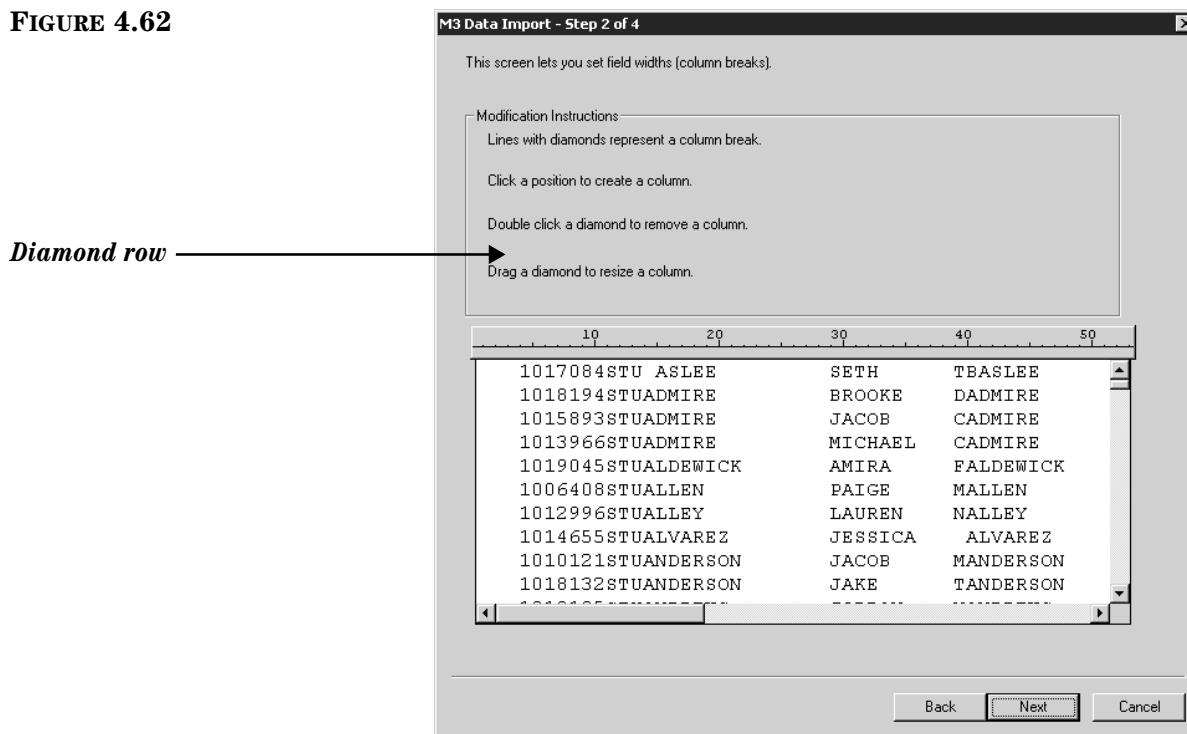
- A. Skip **Original Data Type**. The **Fixed width** option should automatically be selected.

- B. In the **Start import at row** and **Stop import at row** boxes, select the range of records you want to import. By default, the first and last row numbers in the import file are displayed. If you only want to import a portion of the records in the file, type the row numbers corresponding to the range you want to import.

NOTE: The data in the Preview pane looks different depending upon the record type you are importing.

- C. When finished, click **Next**.
5. In the Step 2 dialog box (Figure 4.62), indicate where the column break is for each column in the data. No column breaks are designated by default.

FIGURE 4.62



To indicate a column break:

- A. Click in the diamond row where a column break should occur, which is always to the left of the field data. This creates a vertical line at the column break point.
- To move a column break, click and drag the diamond in the diamond row.
 - To remove a column break, double-click the diamond in the diamond row.
- B. Repeat this for each desired column break. When finished, click **Next**.
6. In the Step 3 dialog box (Figure 4.63), indicate the MARC field mapping structure that you want the records to conform to once they are imported. (M3 is designed to work with MARC records; therefore, all data fields must map to a MARC field.)

FIGURE 4.63

Please select or define the field mapping configuration to be used during this import session.

	Column Data	Action	Map To	Occ
☐	SETH	Keep		1
☐	TBASLEE	Keep		1
☐	GREGG	Keep		1
☐	505 S HUNTINGTON	Keep		1
☐	GREENWOOD	Keep		1
☐	MO 64034GRAHAM	Keep		1
☐	01M	Keep		1

Field Mapping Configuration

1 of 487 imported record(s)

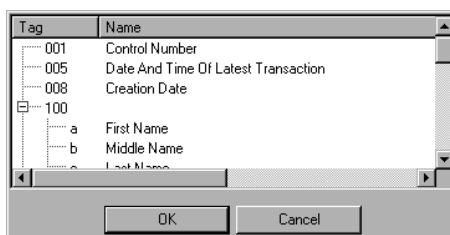
Back Next Cancel

By default, the Step 3 dialog box does not have a mapping structure selected. You must select or modify an existing mapping structure (if you've imported fixed width records before), or create a new configuration.

- To select a field mapping configuration that was previously saved:
 - A. In the **Field Mapping Configuration** list, select **Load**. This displays the Load Field Mapping Configuration dialog box.
 - B. Select the desired configuration, then click **OK**.
 - C. After the Step 3 dialog box refreshes, click **Next**, and then skip to step 7 on page 4-73.
- To create a new field mapping configuration by modifying a configuration that was previously saved:
 - A. In the **Field Mapping Configuration** list, select **Load**. This displays the Load Field Mapping Configuration dialog box.
 - B. Select the desired configuration, and then click **OK**.
 - C. After the Step 3 dialog box refreshes, make any desired changes as explained in the next bullet.
- To create a new field mapping configuration:
 - A. Select the check box by each field you want to import. By default, no fields are selected.

- B. The **Column Data** column provides a list of the fields used by the records to be imported. By default, the actual field data for the first record in the file is displayed. (To display the data for other records, click the navigation buttons in the lower left of this dialog box.) The **Column Data** column works with the **Action** column.
- C. In the **Action** column, select **Keep** or **Replace** for each field you plan to import. By default, **Keep** is selected for each field.
- Select **Keep** if you want to import all data currently stored in that field.
- Select **Replace** if you want to change the current data in a field to a constant value (such as a library name, a regional code, or a field label). This constant value then appears in this field in all imported records. If you select **Replace**, then in the **Column Data** column, type the information you want to appear in this field.
- D. In the **Map To** column, select the destination MARC field or subfield for each field listed in the **Column Data** column. To map to a destination field or subfield, click the **Map To** arrow and select the destination field (Figure 4.64). (You can expand and collapse the field tree by clicking the field's corresponding plus (+) and minus (–) signs.)

FIGURE 4.64



- E. In the Occurrence # (**Occ.#**) column, select the order in which you want any repeating fields to occur in the destination records. By default, any repeating fields are numbered in sequential order in the Occ.# column. For example, if a field containing the patron's last name occurs twice, the first listing is assumed to be occurrence 1 and the second is occurrence 2. You can override this occurrence order by typing the preferred order numbers into this column.

NOTE: The import utility assumes that the field or subfield you are mapping to in the **Map To** column becomes the first occurrence of that field in the new records. You are prompted to either accept this first occurrence order or change to a preferred occurrence order. (If the new occurrence order leaves gaps between occurrence numbers, a GAP error message advises and allows you to revise the order.)

F. When finished:

If you want to save the configuration to use during another import session, select **Save As** in the **Field Mapping Configuration** list. This displays the Save Field Mapping As dialog box. Type a descriptive name for the new mapping configuration, and then click **OK**.

OR

If you do not want to save the mapping configuration, proceed to the next step.

G. In the Step 3 dialog box, click **Next**.

7. In the Step 4 dialog box (Figure 4.65), specify the import options.

FIGURE 4.65

To do so:

- A. If you are importing bibliographic records, the **Duplicates** options are available. If so, do one of the following:
- To prevent the import of records that may duplicate existing records, click **Don't allow duplicates**. (All fields in two records need not match to consider the records as duplicates; matching is based upon specific vital field criteria. For example, two records may be considered duplicates if just the ISBN field matches.)
 - To import records that may duplicate existing records, click **Allow duplicates**.

Tip: Select the **Don't show this window again** check box before clicking a button to apply the action to the displayed record and all records being imported in this session.

- To be prompted when duplicate records are found during the import process, click **Prompt if duplicates are found**. This lets you compare the record you are importing to the record already in the M3 system, and then decide whether to import the duplicate record.

If a duplicate record is found, the Bibliographic Compare dialog box displays (Figure 4.55), showing the two records side by side. Using the option buttons, you have the following four choices:

Save Existing – Saves the existing bibliographic record and does not import the duplicate bibliographic record. It imports any corresponding holding records. Result: One bibliographic record with all corresponding holding records.

Replace Existing – Imports the duplicate bibliographic record and replaces the existing bibliographic record. It imports all corresponding holding records. Result: One bibliographic record with all corresponding holding records.

Import – Imports the duplicate bibliographic record and keeps the existing bibliographic record. It also imports the corresponding holding records and links them to the duplicate bibliographic record, not the existing bibliographic record. Result: Two bibliographic records and two sets of holdings—the existing bibliographic record and its original holdings, and the duplicate bibliographic record and its corresponding holdings.

Don't Import – Does not import the duplicate record. Result: The existing bibliographic record and its holding records remain the same.

- B. If you are importing bibliographic records, the **Holding Records** option is available. If you do not want to generate holding records, clear the **Generate holding records** check box. Otherwise, accept the default.
- C. Under **Barcode**, you can choose to create new barcodes for the records being imported, whether barcodes exist in the original records or not. To do so, select the **Update barcode values in 852 field with** check box. You must then accept or change the values in the four boxes below it:
- **Prefix** – To assign a constant prefix to the barcode imported into the 852 field, type it here. For example, type **b** for bibliographic records or **p** for patron records. You must assign different prefixes to bibliographic records and patron records.
 - **Suffix Starting Value** – To assign an incrementing suffix to the barcodes in the order they import into the system, type the numeric starting value for these records (for example, type 1).
 - **Suffix Increment Type** – If you assign a suffix, you must select a format in this list.
 - **Suffix Increment By** – If you assign a suffix, type the number of increments you want the records to increase by (for example, 1 increment).
- D. In the **Assign to group** list, select the group to which you want the imported data assigned.

Tip: You must have 852 entries in the records you are importing or other fields mapped to 852 in order for **Update barcode values in 852 field with** to work. If no 852 field is found in a record, then no barcode is generated for that record.

The Import Summary is a log containing the start and end time of the import session, the number of records in the import file, the number of records imported successfully, any duplicate barcodes, and the barcode creation summary. Duplicate barcodes are changed to a barcode of "SIRS" followed by the ISN number.

- E. When finished, click **Finish**. While the import procedure takes place, the Import Progress bar displays on screen.
8. When the import procedure is complete, a confirmation prompt displays and asks if you want to view the Import Summary. Click **Yes** to view it now or **No** to view it later. It is best to view it now to evaluate the results of the import procedure.

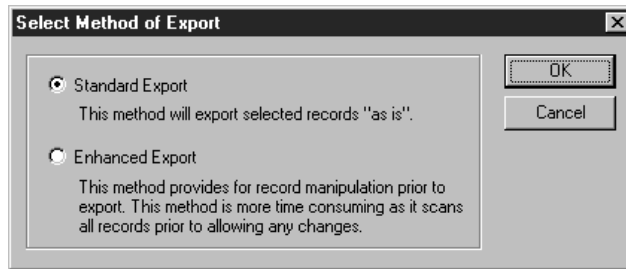
EXPORTING BIBLIOGRAPHIC, HOLDING, PATRON, AND AUTHORITY RECORDS

This section explains how to export records from the M3 system. All M3 records are in MARC format; they can be mapped to export in their current format or you can specify a different format by mapping the information into different fields prior to performing the export.

To export MARC records:

1. Verify that you are working with the correct database. For instructions, see "Selecting a Database" on page 4-2.
2. Perform a search to isolate the records you want to export. To do so:
 - A. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.46).
 - B. In the **Search For** list, select the type of records you are exporting.
 - C. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator.
 - D. Click **Search**. This displays a list of records matching your search query (Figure 4.6).
3. Select the check box by each record you want to export. Or, to export all records in the list, on the **Edit** menu, select the type of record you want to export, and then click **Select All Records**.
4. On the **File** menu, click **Export**. This displays the Select Method of Export dialog box (Figure 4.66).

FIGURE 4.66



5. Select a method of export, then click **OK**.
 - **Standard Export** – This method exports the records “as is,” maintaining the current MARC field structure.
 - **Enhanced Export** – This method allows you to revise the MARC field structure during the export process. Fields can be remapped or excluded during the export procedure. This method of export takes longer as all records are scanned prior to allowing any changes.
6. If you selected **Standard Export** in step 5, continue with step 7. If you selected **Enhanced Export**, skip to the next section, “Completing the Enhanced Export,” for instructions.
7. In the Export Records dialog box, select the path and type the file name for the records you are exporting, and then click **Save**. This exports the records.
8. When the export is finished, a confirmation prompt appears. Click **OK**.

Completing the Enhanced Export

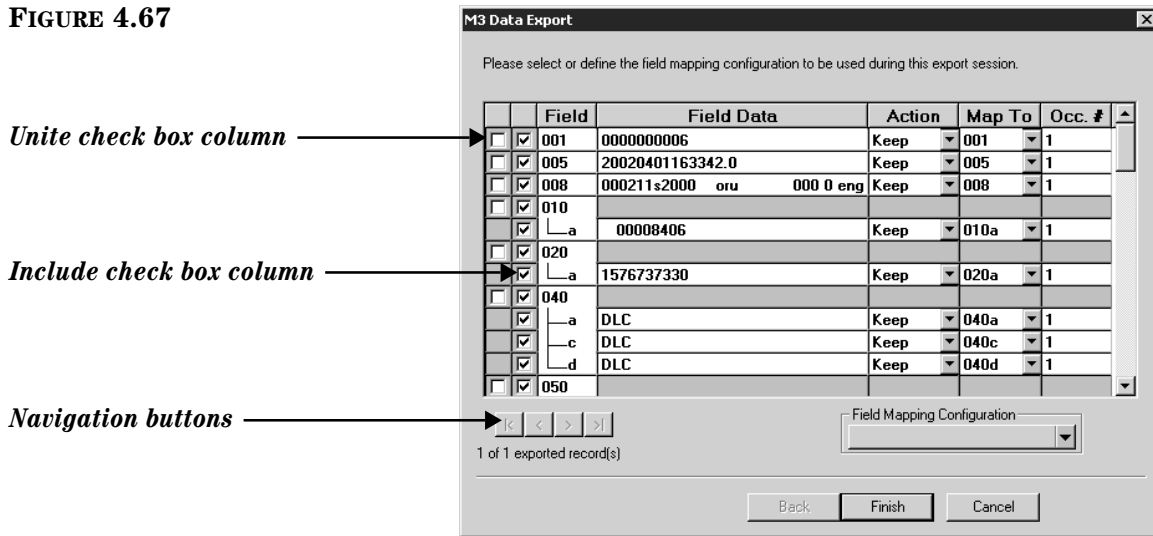
The Enhanced Export method allows you to revise the MARC field structure during the export process. To do so:

1. Complete steps 1 through 5 in “Exporting Bibliographic, Holding, Patron, and Authority Records” beginning on page 4-75, selecting **Enhanced Export** in step 5.
2. In the M3 Data Export dialog box (Figure 4.67), select the field mapping structure you want the records to conform to once they are exported. By default, the dialog box is set to export the field mapping configuration currently used by the records being exported.

NOTE: When the M3 Data Export dialog box displays, you see the field entries for the first record in the range of records you plan to export. In addition, you see the comprehensive list of fields and subfields used by the entire range of records selected for export. Because this first record may not have entries in every field used by the range of records, you are likely to see ****Field not in current record**** throughout the **Field Data** column.

Tip: To see the field entries in other records selected for export, click the navigation buttons in the lower left of the M3 Data Export dialog box. From left to right, these buttons access the first record selected for export, the previous record, the next record, and the last record.

FIGURE 4.67



Your options in this dialog box are:

- Accept the default field mapping configuration and continue the export process. To do so, click **Finish**, then skip to step 5 on page 4-79. (This is equivalent to selecting **Standard Export**.)
- Accept the default field mapping configuration and save it for future exporting sessions before continuing. To do so:
 - A. In the **Field Mapping Configuration** list, select **Save As**. This displays the Save Field Mapping As dialog box.
 - B. Type a descriptive name for the new configuration, then click **OK**.
 - C. After the M3 Data Export dialog box refreshes, click **Finish**, and then skip to step 5 on page 4-79.
- Use a field mapping configuration that was previously saved. To do so:
 - A. In the **Field Mapping Configuration** list, select **Load**. This displays the Load Field Mapping Configuration dialog box.
 - B. Select the desired configuration, then click **OK**.
 - C. After the M3 Data Export dialog box refreshes, click **Finish**, and then skip to step 5 on page 4-79.
- Create a new field mapping configuration by modifying the default configuration. To do so, skip to step 3.
- Create a new field mapping configuration by modifying a configuration that was previously saved. To do so:
 - A. In the **Field Mapping Configuration** list, select **Load**. This displays the Load Field Mapping Configuration dialog box.
 - B. Select the desired configuration, then click **OK**.
 - C. After the M3 Data Export dialog box refreshes, make any desired changes as explained in the next step.

***Tip:** To map most but not all occurrences of a repeating field to the same destination field, you can still use the optional **Unite** procedure explained in step A, with one modification. After selecting the **Unite** check box and revising the **Map To** destination as explained in step F on page 4-78, then clear the **Unite** check box. This separates the repeating field listings once again but maintains the **Map To** modification entered while the fields were united. You can then modify the mapping as explained in step F for those few listings that do not match the global change you entered while the fields were united.*

3. To modify a field mapping configuration:

- A. In the M3 Data Export dialog box, review the **Field** column for fields that repeat. If you plan to change the mapping of a repeating field, and if all occurrences of the repeating field are to be mapped to the same destination field, then you can save time and keystrokes by using the optional **Unite** check box feature. This collapses all the occurrences of the repeating field into one line, creating a single occurrence, thereby enabling you to simultaneously remap all occurrences of this field to the same field. (If the field repeats several times, this could save you considerable time. If you do not use this feature, you must revise the mapping for each occurrence individually.)

To use this time-saving option, select the **Unite** check box by the first occurrence of the repeating field. (This action collapses all the repeated field occurrences into a single listing.) Then continue to step B.

- B. In the **Include** check box column, select the fields and subfields you want to export among those listed in the **Field** column. In the default configuration, all fields and subfields are selected based on the assumption you want to export all data contained in the records you are exporting. If you do not want to export a particular field or subfield, clear the field's **Include** check box.
- C. In the **Field** column, do nothing. The **Field** column provides a list of the fields and subfields used by the records to be exported. Some records may not have entries in each field and subfield in this list.
- D. The **Field Data** column works with the **Action** column. By default, the **Field Data** column displays the actual field and subfield data for the first record in the range you plan to export. To view the data contained in other records, click the navigation buttons in the lower left of this dialog box.
- E. In the **Action** column, select **Keep** or **Replace** for each field and subfield you plan to export. In the default mapping configuration, **Keep** is selected for each field and subfield.
- Select **Keep** if you want the data currently stored in that field to be kept during the export procedure.
 - Select **Replace** if you want to change the current data in a field to a constant value (such as a library name, regional code, or field label) during the export procedure. This constant value overwrites all data contained in the field during the export process. If you select **Replace**, then in the **Field Data** column, type the information you want to appear in this field.
- F. In the **Map To** column, select the destination MARC field or subfield for each field you plan to export. The default mapping configuration assumes you want to export to the same field locations; therefore, the **Map To** column displays the same field tag number and subfield code listed in the **Field** column.

To change the default mapping to a different destination field or subfield, click the **Map To** arrow and select the preferred destination field or subfield from the tree. (You can expand and collapse the field tree by clicking the field's corresponding plus (+) and minus (-) signs.)

- G. In the Occurrence Number (**Occ.#**) column, select the order in which you want any repeating fields to appear in the new records. (This is not applicable if the repeating field's **Unite** check box is selected.) In the default mapping configuration, any repeating fields are numbered in sequential order in the **Occ.#** column. (To review the type of information in each occurrence of the field, look at the entries in the **Field Data** column.) For example, if subfield 020#a occurs twice, the first listing is assumed to be occurrence 1 and the second is occurrence 2. You can override this occurrence order by typing the preferred order numbers into this column.

If you revise the **Map To** column, the export utility assumes that the field or subfield you are remapping becomes the first occurrence of that field in the new records. You are prompted to either accept this first occurrence order or change to a preferred occurrence order. (If the new occurrence order leaves gaps between occurrence numbers, a GAP error message advises and allows you to revise the order.)

- H. When finished:

- If you want to save the mapping configuration to use during another export session, select **Save As** in the **Field Mapping Configuration** list. In the Save Field Mapping As dialog box, type a descriptive name for the new mapping configuration, and then click **OK**.

OR

- If you do not want to save the mapping configuration, proceed to the next step.

4. In the M3 Data Export dialog box, click **Finish**.
5. In the Export Records dialog box, select the path and type the file name for the records you are exporting, and then click **Save**. This exports the records.
6. When the export is finished, a confirmation prompt appears. Click **OK**. The export procedure is complete.

NOTES

USING M3 CIRCULATION

5

CHAPTER CONTENTS

This chapter describes:

- How to modify Circulation options (page 5-6)
- How to conduct circulation transactions (loans, returns, renewals, reserves and holds, bookings, fine processing) (page 5-9)
- How to print transaction information and receipts (page 5-20)
- How to search for, create, and edit records (page 5-23)
- How to display pictures in Circulation (page 5-36)
- How to add messages to and delete messages from your Circulation system (page 5-41)
- How to attach messages to and detach messages from records (page 5-42)
- How to set up one or more circulation schedules for your library, including closed dates and hours of operation (page 5-49)
- How to temporarily change the system date (page 5-52)
- How to work with transaction reports and upload transactions (page 5-54)
- How to modify the Circulation window display (page 5-58)

CIRCULATION SETUP STEPS

Before you begin to use Circulation, be sure to perform the following procedures:

- Create item groups. See “Creating a New Item Group” on page 3-17.
- Create patron groups. See “Creating a New Patron Group” on page 3-4.
- Import item barcodes, assigning items to item groups as part of this process. See “Importing Bibliographic, Patron, and Authority Records” on page 4-55.
- Enter patron records, assigning patrons to patron groups as part of this process. See “Importing Bibliographic, Patron, and Authority Records” on page 4-55.
- Set up your library schedules. See “System Schedule Setup” on page 5-49.
- Set up your receipt printer, assuming you plan to print transaction receipts. See “Setting Up Your Receipt Printer” on page 5-20.
- Add standard patron and item messages to your system. See “Adding Messages to the Circulation System” on page 5-41.

***Tip:** Patron barcodes can be alphanumeric, maximum 255 characters, and are case-insensitive.*

STARTING CIRCULATION

To start the Circulation module:

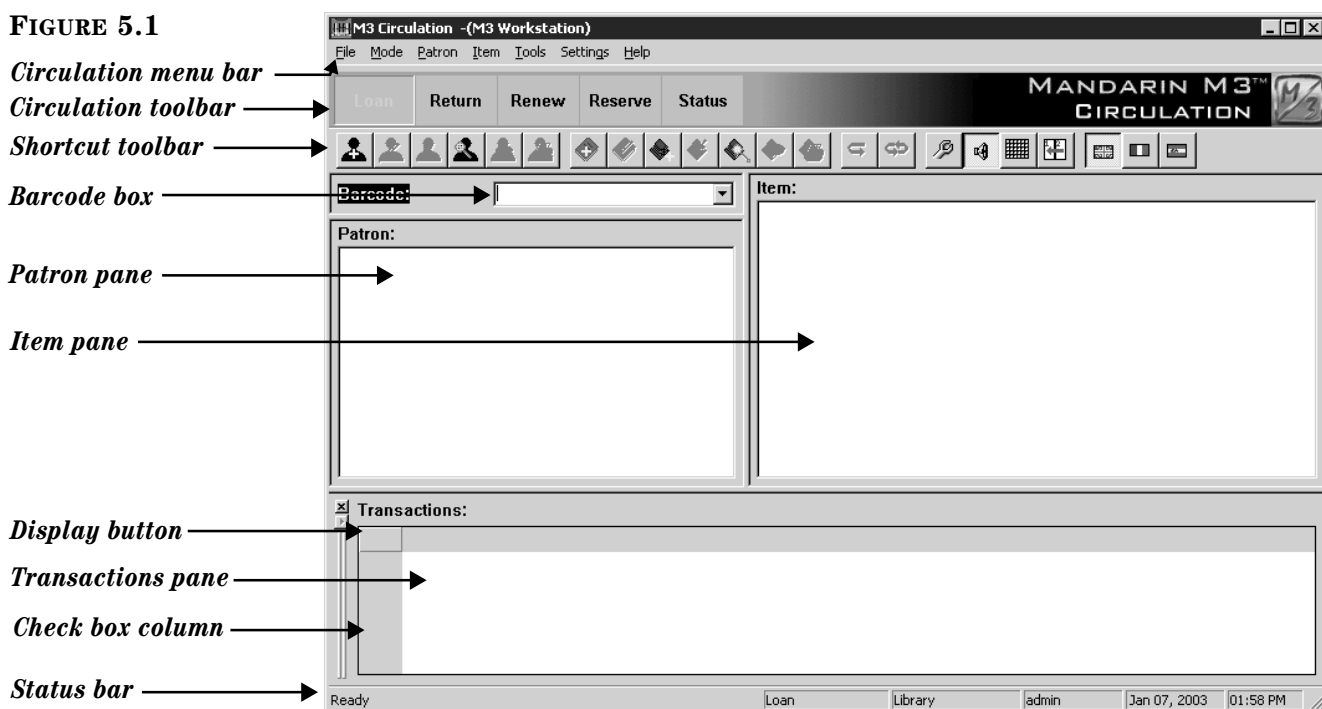
Note: If you installed M3 v1.1 prior to installing v1.6, select **SIRS Mandarin** and then **M3** (instead of **Mandarin M3**).

1. On the taskbar, click the **Start** button, select **Programs**, select **Mandarin M3**, and then click **Circulation**. This displays the Circulation Login dialog box.
2. Type your user ID in the **Login Name** box, your password in the **Password** box, and then click **OK**. This displays the Circulation window (Figure 5.1).

CIRCULATION WINDOW FEATURES

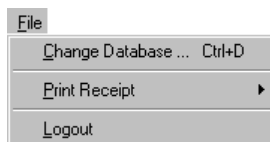
Circulation transactions are processed at the main M3 Circulation window (Figure 5.1). This window consists of three panes: a patron pane, an item pane, and a transactions pane. Window features are summarized in this section.

FIGURE 5.1



- **Circulation menu bar** – Contains the File, Mode, Patron, Item, Tools, Settings, and Help menus.
 - File menu (Figure 5.2): Change to a different database, print a receipt, or log out of the Circulation module.

FIGURE 5.2



- Mode menu (Figure 5.3): Select the transaction mode you want to use. Because of their frequent use, five of the transaction modes are also available from toolbar buttons.

FIGURE 5.3



- Patron menu (Figure 5.4): Add or edit a patron record, process fine payment information, attach a message to a patron record, check a patron's transaction history, or search for a patron. (Many of these functions are also available by right-clicking the Patron pane in the Circulation window.)

FIGURE 5.4

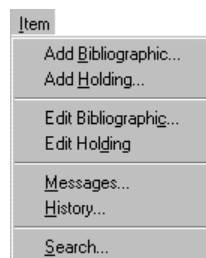
*Note: The **History** option is available only if **Enable Patron History** is selected in Circulation Options. For details, see "Modifying Circulation Options" beginning on page 5-6.*



- Item menu (Figure 5.5): Add or edit a bibliographic record, add or edit a holding record, attach a message to an item record, review an item's history, or search for an item record. (Many of these functions are also available by right-clicking on the Item pane in the Circulation window.)

FIGURE 5.5

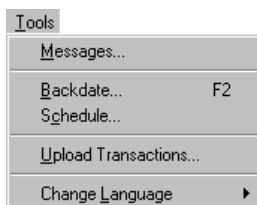
*Note: The **History** option is available only if **Enable Item History** is selected in Circulation Options. For details, see "Modifying Circulation Options" beginning on page 5-6.*



- Tools menu (Figure 5.6): Create and edit the messages available for attachment to patron and item records, modify and backdate the circulation calendar, configure the overall library schedule, change to a different interface language, or import offline TriCoder transactions (such as TriCoder transactions conducted from a bookmobile or while your main system is unavailable).

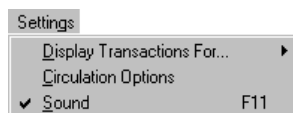
5-4 Using M3 Circulation

FIGURE 5.6



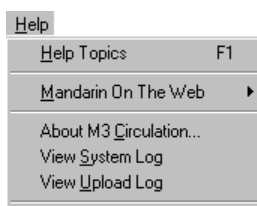
- Settings menu (Figure 5.7): Turn the Transactions pane display off/on, enable/disable transaction identification sounds, and access circulation options for timeout periods, item and patron history displays, due date overrides, and more (see “Modifying Circulation Options” on page 5-6).

FIGURE 5.7



- Help menu (Figure 5.8): Access Circulation Help topics, connect to the Mandarin Web page, and view the circulation system log and upload log.

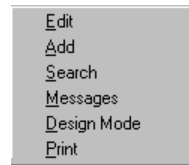
FIGURE 5.8



Note: To disable the shortcut toolbar, change the **Shortcut Toolbar** entry in the *Mcircsys.ini* file (located in the Circulation folder in your M3 directory) from **ON** to **OFF**, then restart the Circulation module.

- **Circulation toolbar** – Contains buttons for frequently-used transactions: Loan, Return, Renew, Reserve, and Status. These functions are also available through the Mode menu.
- **Shortcut toolbar** – Contains buttons for commonly-used functions, such as adding an item or patron, accessing circulation options and the schedule, and changing the interface language. To view the function of each button, rest your mouse pointer on the button for a moment to display a ToolTip. To turn the shortcut toolbar on or off for the current session, press CTRL+T.
- **Barcode box** – Allows you to type an item or patron barcode to access the matching record.
- **Patron pane** – Displays vital statistics for the selected patron. The information displayed in this pane is customizable, but typically contains data such as the patron name, ID number, address, phone number, and patron transaction statistics. Any MARC record field tag and set of statistics can be configured to appear in this pane. The font size, style, and color in this pane can also be customized. (See “Modifying the Patron Pane Display” on page 5-58 for customization information.) A convenient right-click transaction menu (Figure 5.9) can be accessed when information appears in this pane.

FIGURE 5.9



Tip: Click a column heading in the Transactions pane to sort by that heading.

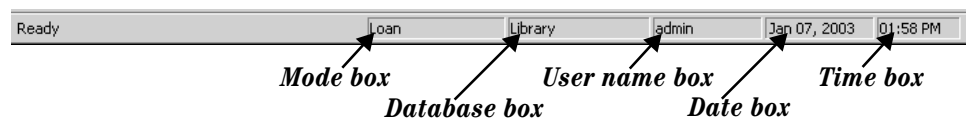
- **Item pane** – Displays brief information about the selected item. As with the Patron pane, the type of information displayed here can be configured. The font size, style, and color in this pane can also be customized. (See “Modifying the Item Pane Display” on page 5-63 for customization information.) A convenient right-click transaction menu can be accessed when information appears in this pane (shown in Figure 5.9).
- **Transactions pane** – Lists the transactions related to the active patron or item in the upper panes. The type of information displayed here can be configured. The font size, style, and color in this pane can also be customized. (See “Modifying the Transactions Pane Display” on page 5-64 for customization information.) A convenient right-click transaction menu (Figure 5.10) can be accessed when information appears in this pane.

FIGURE 5.10



- **Display button** – Switches the Transactions pane display between all transactions, patron transactions, and item transactions. A “head” icon on the Display button represents patron transactions; a “book spine” icon represents item transactions; and no icon represents all transactions.
- **Check box column** – When information appears in the Transactions pane, a check box corresponding to each transaction appears in this column.
- **Status bar** – Provides details about the information displayed in the Circulation window. In addition to the status message on the left of the status bar, there are five boxes on the right (shown in Figure 5.11).

FIGURE 5.11



- **Mode box** – identifies the active transaction mode.
- **Database box** – identifies the active database.

- **User name box** – identifies who is logged onto the circulation system.
- **Date box** – identifies today's date based on the circulation system calendar.
- **Time box** – identifies the current system time based on the circulation clock.

You can right-click several of these boxes to access shortcut options. A right-click on the mode box opens a transaction menu (Figure 5.12); a right-click on the database box displays the Change Database dialog box (Figure 5.18); and a right-click on the date or time boxes displays the circulation calendar and clock, allowing for temporary date and time changes.

FIGURE 5.12

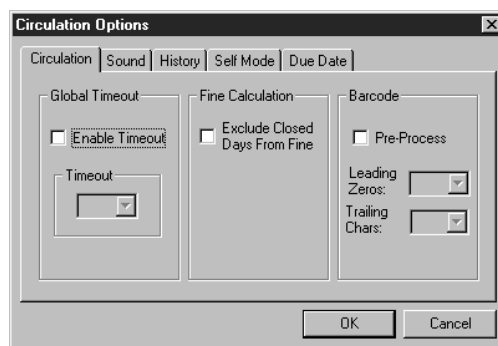


MODIFYING CIRCULATION OPTIONS

Several circulation setup options are available from within the Circulation module, including timeout settings, patron and item history display toggles, and more. Each setting is covered in this section.

1. To access these options, click **Circulation Options** on the **Settings** menu. This displays the Circulation Options dialog box (Figure 5.13), which has five tabs.

FIGURE 5.13



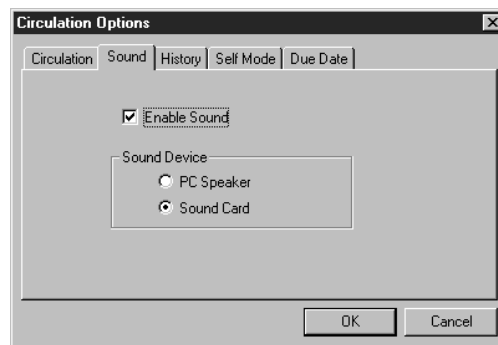
*Note: To access the **Circulation**, **History**, and **Self Mode** tabs, the **Circulation Options** check box must be selected in Group Editor. See Figure 3.7 on page 3-8.*

2. Click the appropriate tab, and modify as desired.
 - **Circulation tab** (Figure 5.13):
 - **Global Timeout** – Select the **Enable Timeout** check box to enable the timeout feature. In the **Timeout** list, select the desired number of

seconds before the Circulation window automatically clears after a transaction.

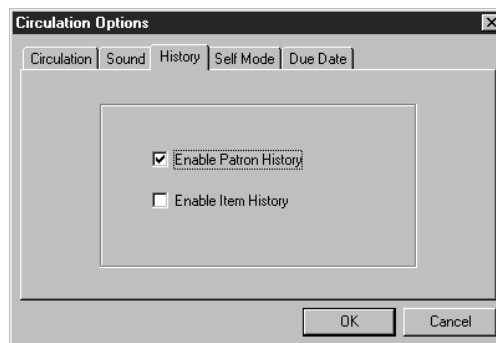
- **Fine Calculation** – Select the **Exclude Closed Days From Fine** check box if your institution does not want to include closed days in fine accruals.
- **Barcode** – Select the **Pre-Process** check box to have the system pre-process barcodes as they are scanned into the system. Some barcode scanners automatically add leading zeros or following characters to barcodes as they are scanned into the system. You can select the number of leading or trailing characters to be removed from scanned barcodes in the **Leading Zeros** and **Trailing Chars** lists.
- **Sound tab** (Figure 5.14):

FIGURE 5.14



- **Enable Sound** – Select to enable the sound cues that accompany each circulation transaction.
- **Sound Device** – Select the type of sound device installed on your computer.
- **History tab** (Figure 5.15):

FIGURE 5.15

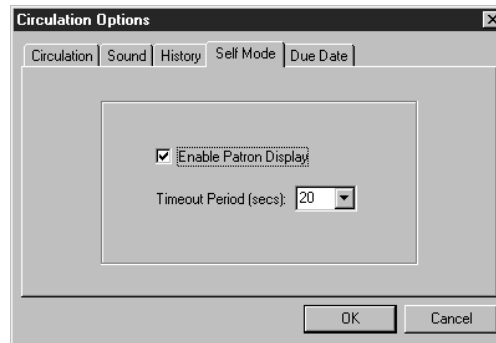


Note: To disable this tab, change the **History Option** entry in the Global.ini.REG file (the default path is C:\M3 Server\Registry\Common) to **Disable=on**.

- **Enable Patron History** – Select if you want the option to view patron transaction histories during standard circulation transactions. If enabled, a **History** option appears on the Patron menu (Figure 5.4). When **History** is selected, the Transactions pane can be switched to display Patron History.

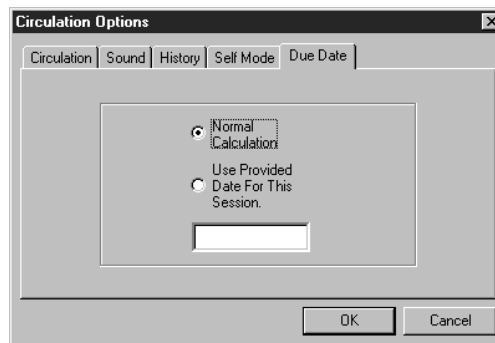
- **Enable Item History** – Select if you want the option to view item transaction histories during standard circulation transactions. If enabled, a **History** option appears on the Item menu (Figure 5.5). When **History** is selected, the Transactions pane can be switched to display Item History.
- **Self Mode tab** (Figure 5.16):

FIGURE 5.16



- **Enable Patron Display** – Select to display active patron transaction information in the Transactions pane during self-checkout and self-return modes.
- **Timeout Period (secs)** – Select the number of seconds that a self-checkout or self-return transaction displays after a transaction is completed. After the timeout period elapses without any workstation activity, data in the Circulation window clears.
- **Due Date tab** (Figure 5.17):

FIGURE 5.17



- **Normal Calculation** – Click this option to use the default loan period due date (set by item group in the Group Editor).
 - **Use Provided Date For This Session** – Click this option to override the default due date calculation based on the item group loan period. This displays a calendar. Use the calendar's left (<) and right (>) arrows to select a month, then click the desired date. The selected date appears in the box. This date stays in effect until you click **Normal Calculation** or log out of Circulation.
3. When finished, click **OK**.

SELECTING AN INTERFACE LANGUAGE

With M3 Circulation, you can specify the interface language. This affects screen elements such as names of windows, buttons, and text boxes; it does not affect the language of the records in your database. (The default language and the languages displayed in the list can be reconfigured by the system administrator.)

To select an interface language:

***Tip:** You can also change the language by clicking the corresponding flag on the shortcut toolbar.*

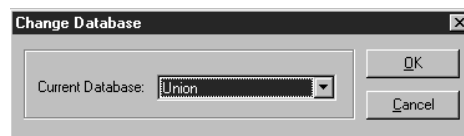
1. On the **Tools** menu, click **Change Language**. This displays a sub-menu with the languages available for selection.
2. Click the language you want to use. This refreshes your circulation interface to display the selected language.

SELECTING A CIRCULATION DATABASE

M3 Circulation may operate the circulation of items in several databases. If so, it is easy to change to a different database while using the system. To do so:

1. On the **File** menu, click **Change Database**. This displays the Change Database dialog box (Figure 5.18).

FIGURE 5.18



2. In the **Current Database** list, select the desired database.
3. Click **OK**. The selected database displays on the status bar.

CONDUCTING TRANSACTIONS

***Note:** If a scanned barcode is invalid, three distinct beeps will sound.*

All circulation transactions are accessed from the Circulation window. You can view patron and item status, loan items, return items, renew items, reserve and hold items, book equipment and rooms, attach patron and item messages, process fine payments, forgive fines, and record patron claims of lost, previously paid, never had, and previously returned. Procedures are explained in the following sections.

Viewing Patron and Item Status

To view the status of a patron or item:

1. On the toolbar, click **Status**.
2. In the **Barcode** box, type the item or patron barcode, and then press ENTER (or scan the barcode). This displays a record in the Patron or Item pane, depending upon the type of code you entered. If there are any open transactions for this patron or item, they display in list form in the Transactions pane (Figure 5.19).

NOTE: This list of transactions can be printed if, for example, you want to provide a patron with a list of items he or she has on loan. To print the list, right-click in the Transactions pane and click **Print**.

FIGURE 5.19

Barcode box

Tip: To retrieve a recently used barcode (patron or item), click the desired barcode in the **Barcode** list.

Mode box

The screenshot shows the M3 Circulation software interface. At the top, there is a menu bar with 'File', 'Mode', 'Patron', 'Item', 'Tools', 'Settings', and 'Help'. Below the menu bar is a toolbar with icons for various functions. The main window is divided into several sections. On the left, there is a 'Barcode:' box with a dropdown menu showing 'P4'. Below this is a 'Patron:' section displaying information for 'P4 Smith, Wiley', including address and phone number. To the right of the patron information is a 'Current Statistics' section showing 'Loans: 1', 'Holds: 0', 'Reserves: 0', and 'Fines: 0'. On the right side of the window is a large empty box labeled 'Item:'. At the bottom of the window is a 'Patron Transactions:' table with columns for 'Barcode', 'Call Number', 'Item', 'Transaction', 'Created', and 'Due'. The table contains one row with the following data: Barcode: 1031892, Call Number: 520.JAS, Item: Astronomy, Transaction: Loan, Created: 30 Oct 2002, Due: 13 Nov 2002. At the very bottom of the window is a status bar with the text 'Ready', 'Status', 'Library', 'admin', 'Jan 07, 2003', and '03:49 PM'.

3. To view the status of another patron or item, enter a different barcode in the **Barcode** box.

OR

To continue with a transaction, right-click the mode box on the status bar. This opens a transaction menu (Figure 5.12). These transactions are explained in the following sections.

Loaning Items

To loan one or more items to a patron:

1. On the toolbar, click **Loan**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the barcode).

NOTES:

- If your library has not yet established a circulation schedule, an error message displays. For information on establishing a circulation schedule, see "System Schedule Setup" on page 5-49.
- If any patron has a fine associated with it, a fine message displays. You can:
 - Click **Override** to ignore the message and continue with the transaction.
 - Click **Payment** to accept payment of the fine (see "Processing Patron Fines" on page 5-19 for instructions).
 - Click **Cancel** to stop the transaction.

3. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the barcode). The loan transaction appears in the Transactions pane as shown in Figure 5.20.

FIGURE 5.20

Tip: Click the **Display** button to switch between a list of patron transactions, item transactions, and all transactions.

The screenshot shows the M3 Circulation software interface. At the top, there's a menu bar with 'File', 'Mode', 'Patron', 'Item', 'Tools', 'Settings', and 'Help'. Below the menu bar is a toolbar with various icons. The main window is divided into several sections:

- Barcode:** A text box containing '1008708'.
- Patron:** A list box showing 'P4 Smith, Wiley' with address '4149 SeaGate, Toledo OH 43623, 882-7900'.
- Current Statistics:** A section showing 'Loans: 1' and 'Holds: 0'.
- Item:** A section showing details for item '1008708': 'Call No. E KIS', 'Title: The birthday thing /', 'Author: Kiser, SuAnn.', 'Publisher: Greenwillow Books.', 'Date: c1989.', 'Pages: [24] p.:', 'Date Due: 17 Jan 2003'.
- Current Statistics:** A section showing 'Loans: 1'.
- Patron Transactions:** A table with columns: Barcode, Call Number, Item, Transaction, Created, Due. It shows one transaction: '1008708 E KIS The birthday thing / Loan 03 Jan 2003 17 Jan 2003'.

At the bottom, there's a status bar with 'Ready', 'Loan', 'Library', 'admin', 'Jan 07, 2003', and '02:02 PM'.

4. To loan more items to this patron, type the next item barcode in the **Barcode** box, and then press ENTER (or scan the barcode). Repeat this process for each item loaned to this patron.

Returning Items

M3 Circulation provides five methods to return items. Four methods are described here, and Self-Return is described on page 5-22.

- Single Return method – Used when a patron is returning a single item.
- Multiple Return method – Used when one patron is returning multiple items.
- Quick Return method – Used when scanning bookdrop returns without patrons present.
- In-House Circulation method – “Returns” items left on tables and desks after in-library use.

Returning One Item

To return an item:

1. On the toolbar, click **Return**.
2. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the barcode). This returns the item.

Note: If an item is returned that belongs to a special reserve group, a warning message displays. For more information on special reserve groups, see “Working with Special Reserve Groups” beginning on page 3-23.

Returning Multiple Items for the Same Patron

To return multiple items for one patron:

1. On the toolbar, click **Loan**, **Reserve**, or **Status**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the barcode).
3. To return one or more items listed in the Transactions pane, select the check box by each item the patron is returning, and then right-click. In the menu (Figure 5.10), click **Return**.

***Note:** In a scoped environment, **Return All** applies only to the current organization's transactions. Items that belong to other organizations can still be returned individually.*

OR

To return all items listed in the Transactions pane, right-click, and in the menu click **Return All**.

Quick Return

This rapid entry method is designed for situations such as bookdrop returns. Quick Return does not alert you to patron messages since it is assumed that patrons are not present. (This information is included in the patron record and displays the next time the patron conducts a circulation transaction.) Quick Return does alert you when a Hold is attached to an item.

To return items using the Quick Return method:

1. On the **Mode** menu, click **Quick Return**.
2. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the barcode). Repeat this for each item being returned.
3. When finished, select another transaction mode to exit Quick Return.

NOTE: The Patron, Item, and Transactions panes do not update during the Quick Return procedure.

In-House Circulation Returns

This method is designed to “return” items that were removed from shelf positions and left on library tables or desks, presumably used at the library though not checked out. This feature takes the guesswork out of tracking in-library usage of your collection. As with Quick Returns, the In-House Circulation return mode does not alert you to any messages except when a Hold is attached to an item.

To perform In-House Circulation returns:

1. On the **Mode** menu, click **In-House Circulation**.
2. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the barcode). Repeat this for each item being returned. When finished, select another transaction mode on the toolbar to exit In-House Circulation.

Recording an Item as Lost or Damaged

If you want to automatically attach a fine to the patron's record when an item is recorded as lost or damaged, the **Fine Transactions** entry in the global.ini.REG file (the default path is **C:\M3 Server\Registry\Common**) must be set to **generate=yes**. Then, if there is an entry in field 852#9 (price), this amount will be used as the fine. If there is no entry in 852#9, the fine amount will be the maximum amount established in Group Editor for members of the item group (see step 6 on page 3-15).

*If the **Fine Transactions** entry is set to **generate=no**, then no fine will be attached.*

NOTE: If you want to be prompted to add an additional transaction fee to a lost or damaged item (see step 4), the **Transaction Fee** entry in the Global.ini.REG file must be set to **Prompt for fee=on**. In the **amount** entry, the default is \$5.00; change if desired.

1. On the toolbar, click **Loan**, **Reserve**, or **Status**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the barcode).
3. In the Transactions pane, select the check box by the item to record as lost or damaged, and then right-click. This opens a transaction menu (Figure 5.10).
4. Click **Lost** or **Damaged**. At the confirmation prompt, click **Yes**.

NOTE: If an additional transaction fee has been configured, the Transaction Fee dialog box displays the default fee amount. Change if desired, then click **OK**. This amount is added to the lost or damaged fine.

The item is removed from the listing in the Transactions pane.

Claiming an Item as Returned or Never Had

1. On the toolbar, click **Loan**, **Reserve**, or **Status**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the barcode).
3. In the Transactions pane, select the check box by the item claimed as returned or never had, and then right-click. This opens a transaction menu (Figure 5.10).
4. Click **Claimed Returned** or **Claimed Never Had**. The item is removed from the listing in the Transactions pane.

Renewing a Loan on an Item

M3 Circulation provides two methods to renew items on loan, which are described in the following two sections. The second method saves time if the patron is renewing more than one item.

Renewing One Item

To renew an item:

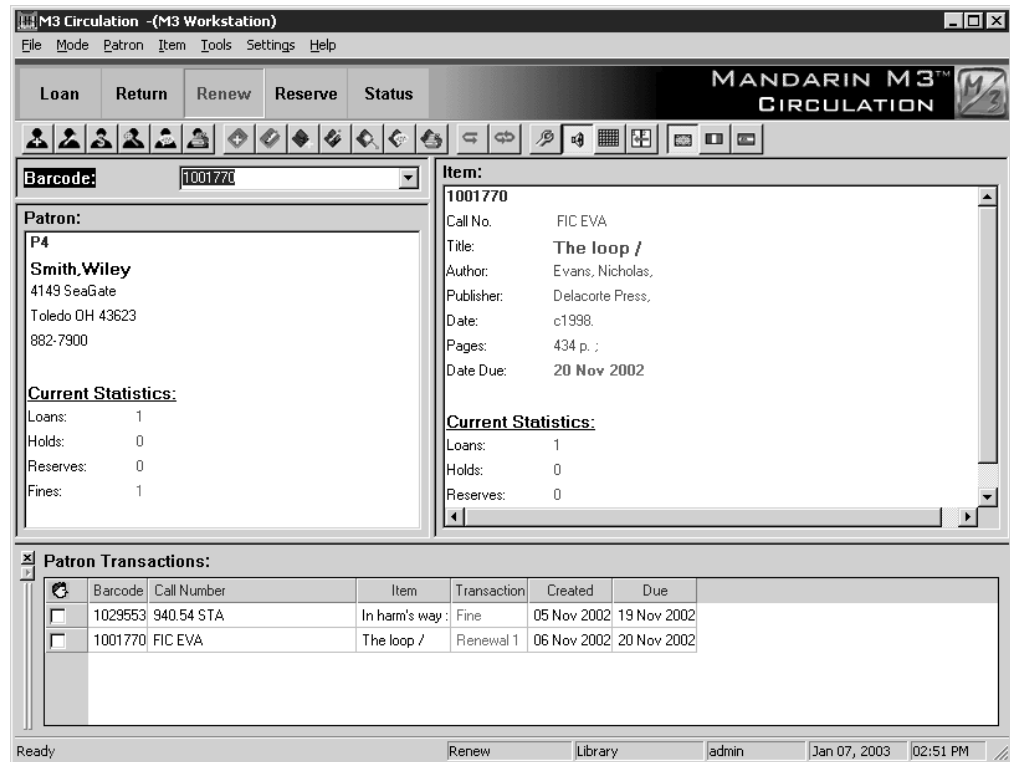
1. On the toolbar, click **Renew**.
2. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the barcode).

NOTE: If the item is overdue, an overdue message displays. You can:

- Click **Override** to ignore the message and continue with the transaction.
- Click **Payment** to accept payment of the fine (see “Processing Patron Fines” on page 5-19 for instructions).
- Click **Cancel** to stop the transaction.

The renewal transaction appears in the Transactions pane as shown in Figure 5.21.

FIGURE 5.21



Renewing Multiple Items for the Same Patron

To renew multiple items for one patron:

1. On the toolbar, click **Loan**, **Reserve**, or **Status**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the barcode).

NOTE: If the patron has overdue items, an overdue message displays. You can:

- Click **Override** to ignore the message and continue with the transaction.
 - Click **Payment** to accept payment of the fine (see “Processing Patron Fines” on page 5-19 for instructions).
 - Click **Cancel** to stop the transaction.
3. To renew one or more items listed in the Transactions pane, select the check box by each item the patron is renewing, and then right-click. This opens a transaction menu (Figure 5.10). Click **Renew**. Or, to renew all items listed in the Transactions pane, click **Renew All**.

NOTE: If any of the selected items are overdue, an overdue message displays. You can:

- Click **Override** to ignore the message and continue with the transaction.
- Click **Payment** to accept payment of the fine (see “Processing Patron Fines” on page 5-19 for instructions).

***Note:** In a scoped environment, **Renew All** applies only to the current organization's transactions. Items that belong to other organizations can still be renewed individually.*

- Click **Cancel** to stop the transaction.

The renewal transaction appears in the Transactions pane as shown in Figure 5.21.

Reserving or Holding an Item

Reserve and hold transactions are conducted from the Reserve mode. A hold is applied when the requested item is currently checked into the library and is therefore available; a reserve is applied when the item is currently checked out.

To reserve or hold an item:

1. On the toolbar, click **Reserve**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the barcode).
3. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the barcode). The reserve or hold transaction appears in the Transactions pane as shown in Figure 5.22.

Notes:

- You cannot reserve or hold a deleted item.
- If you want to be notified when an item is being placed on hold instead of reserve, change the **Display Placed on Hold Messages** entry in the *Mcircsys.ini* file (located in the Circulation folder in your M3 directory) from **OFF** to **ON**, then restart the Circulation module.

FIGURE 5.22

M3 Circulation - (M3 Workstation)

File Mode Patron Item Tools Settings Help

Loan Return Renew **Reserve** Status

Barcode: 1024100

Patron:

P4
Smith, Wiley
4149 SeaGate
Toledo OH 43623
882-7900

Current Statistics:

Loans: 1
Holds: 1
Reserves: 0
Fines: 1

Item:

1024100
Call No. J 821 CHD
Title: The baby's good morning book /
Author: Choroa, Kay.
Publisher: E.P. Dutton,
Date: c1986.
Pages: 64 p. :
Date Due: 13 Nov 2002

Current Statistics:

Loans: 0
Holds: 1
Reserves: 0
Fines: 0

Patron Transactions:

	Barcode	Call Number	Item	Transaction	Created	Due
☐	1029553	940.54 STA	In ham's way :	Fine	05 Nov 2002	19 Nov 2002
☐	1001770	FIC EVA	The loop /	Renewal 1	06 Nov 2002	20 Nov 2002
☐	1024100	J 821 CHD	The baby's good morning book /	Hold	06 Nov 2002	13 Nov 2002

Ready Reserve Library admin Jan 07, 2003 02:55 PM

Sending E-Mail Notifications for Items on Hold

You can configure M3 to send automatic e-mail notifications to patrons when items they reserved are returned and placed on hold.

1. In the Global.ini.REG file (the default path is C:\M3 Server\Registry\Common), do the following:

Note: There must be an e-mail address entered in the patron record to use this feature.

- A. The default fields for patron notification are as follows. Change if desired.

[PATRON INFO FIELD]
email= I I 0#m
phone= I I 0#k

- B. Type the name of your e-mail server.

[SMTP SERVER]
name=

- C. Type the e-mail address that will appear in the "From" field in the e-mail notifications.

[NOTIFICATION EMAIL]
sender=

Tip: If you want to "cc" (carbon copy) e-mail notifications to another e-mail address, type the address in the **cc=** entry. You can enter multiple e-mail addresses by separating them with commas.

2. When a reserved item is placed on hold, the e-mail confirmation is sent, and a copy of the e-mail is sent to the address indicated in step C.

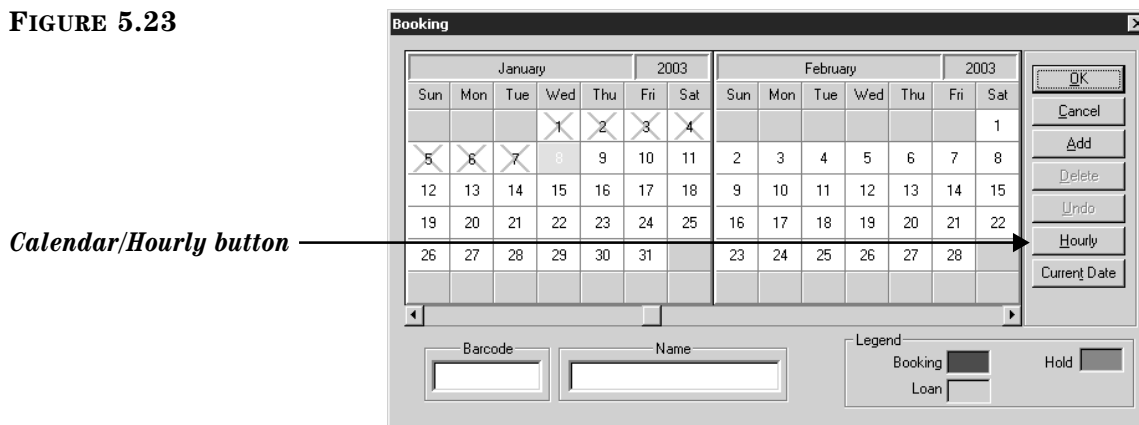
Booking an Item

Use the Booking feature to reserve an item such as a conference room or piece of equipment for a future day and/or time. You can book an item for a single day, a range of days, or for specific hours.

To book an item:

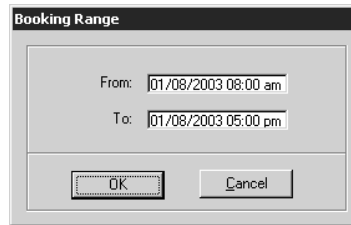
1. On the **Mode** menu, click **Booking**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the barcode). This displays the patron's record in the Patron pane.
3. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the barcode). This displays the Booking dialog box (Figure 5.23).

FIGURE 5.23



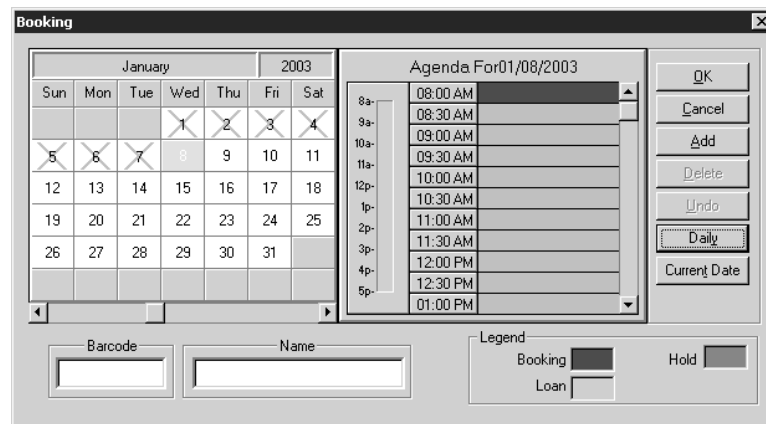
4. Select the date and, if applicable, the time to book the item. To do so:
 - To book an item for one day, click the day you want the item, and then click **Add**. This displays the Booking Range dialog box (Figure 5.24) with the date selected. Click **OK** to return to the Booking dialog box and place a marker on the selected day. When finished, click **OK**.

FIGURE 5.24



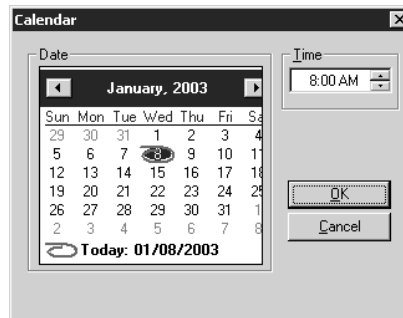
- To book an item for more than one day, click the first day you want the item and drag the mouse to the last day you want the item. Then click **Add**. This places a marker within the selected range of days. When finished, click **OK**.
- To book an item for a few hours, click the **Calendar/Hourly** button. This displays the Agenda window (shown in Figure 5.25). Click the start time you want for the item and drag the mouse to the ending time you want for the item. Then click **Add**. This places a color-coded marker along the selected time. When finished, click **OK**.

FIGURE 5.25



- To manually book an item:
 - A. In the Booking dialog box, click **Add**. This displays the Booking Range dialog box (Figure 5.24).
 - B. Click in the **From** box. This displays a calendar with today's date highlighted (Figure 5.26).

FIGURE 5.26



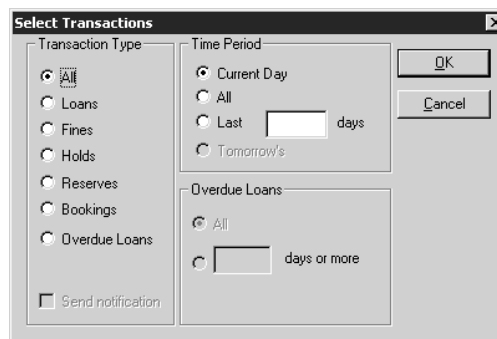
- C. In the calendar, click the first date in the range you want to book. In the **Time** box, select the start time. When finished, click **OK**. This returns you to the Booking Range dialog box.
 - D. Click in the **To** box, then repeat step C to enter the date and time you want to return the booked item. When finished, click **OK**. The selected time frame now displays in the Booking dialog box.
5. When finished booking the item, click **OK**. The booking transaction appears in the Transactions pane.

Sending E-mail Notifications for Fines and Overdue Items

You can send e-mail notifications to patrons who owe fines or have overdue items.

1. Indicate the e-mail address that will appear in the “From” field in the e-mail notifications. To do so, see step 1C on page 5-16.
2. To send notifications, click **Library Transactions** on the **Mode** menu. This displays a listing of all transactions in the Transactions pane.
3. Right-click in the Transactions pane, then click **Select Transactions** on the command menu. This displays the Select Transactions dialog box (Figure 5.27).

FIGURE 5.27



4. Under **Transaction Type**, click **Fines** or **Overdue Loans**, and then select the **Send notification** check box. Then do one of the following:
 - If you clicked **Fines**, select an option under **Time Period**.

OR

 - If you clicked **Overdue Loans**, select an option under **Overdue Loans**.

- Click **OK**. All patrons with transactions that meet the fine or overdue criteria are sent a notification, and these transactions display in the Transactions pane.

Processing Patron Fines

Note: To send e-mail notifications to patrons who owe fines, see the preceding section, "Sending E-mail Notifications for Fines and Overdue Items."

Before you can receive payment or forgive a fine, the overdue item must be returned or claimed as lost or damaged. The item status changes from Overdue Loan to Fine when the item is returned.

Recording a Payment

- On the toolbar, click **Loan**, **Reserve**, or **Status**.
- In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the barcode). This displays a message stating the patron has unpaid fines.
- Click **Payment**. This displays the Payment window (Figure 5.28), which lists the patron's overdue items and related fine information. A Totals box appears in the lower left; the current fine total appears in the **Total** box in the **Payment** column.

FIGURE 5.28

Pay check box

Current overdue item

Totals box

Current fine total

The screenshot shows the 'Payment' window with a table of overdue items. The first item is 'In harm's way' with a fine of 1.00. The 'Pay' checkbox is checked. The 'Totals box' at the bottom shows a total of 1.00. The 'Current fine total' is also 1.00. The 'Tendered' and 'Change' fields are empty.

Title	Fine	Refunded	Balance	Payment	Forgiven	Reason	Claimed Paid	Date Returned
In harm's way	1.00	0.00	1.00	1.00	0.00	MISSING	☒	11/05/2002

	Payment	Balance
Total	1.00	0.00
Tendered:		
Change:	0.00	

- Review the current fine total in the Totals box. If the patron intends to pay the full fine amount now, skip to step 5.
 - If the patron wants to exclude an item from payment at this time, clear the **Pay** check box. This changes the color of the amount in the **Balance** column from green to red.
 - If the patron wants to make a partial payment on a specific item's fine, click the item's listing in the **Payment** column and type the amount being paid now.
 - If you want to forgive all or part of a fine on an overdue item, click the item's listing in the **Forgiven** column and type the amount to be forgiven.
 - If the patron claims that he or she previously paid a particular fine, click **History** to review the payment history. If you want to record that this item was previously paid, select the **Claimed Paid** check box by that item. This eliminates the item's fine amount in the **Payment** column, and reduces the payment amount in the **Total** box.

- If you want to increase an item's fine amount, click the item's listing in the **Fine** column and type the new amount. (This is useful if you want to charge for not rewinding a tape, damage, and so on.)
- To add a new fine, click **New Fine**. Type the amount of the fine and a note, if desired (the note will display in the **Title** column of the Payment window). Click **OK**.
- To apply a refund, click **Refund**. Type the amount of the refund and a note, if desired (the note will display in the **Title** column of the Payment window). Click **OK**.

*Tip: To view refunds, click **History**.*

5. Type the amount of currency received in the **Tendered** line, then click **OK**. If change is due back, a dialog box displays the amount to be returned to the patron. To close the dialog box, click **Close**.
6. This displays a dialog box asking if you want to print a receipt. Click **Yes** or **No**.

NOTE: If the amount typed in the **Tendered** box is less than the **Total** payment amount, an error message displays. Click **Close** to close the dialog box, then adjust the appropriate entry in the Payment window.

Reviewing the Patron's Fine History

1. On the toolbar, click **Status**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the barcode).
3. On the **Patron** menu, click **Payments**. This displays the Payment window (Figure 5.28).
4. Click **History**. This displays the patron's list of previously paid fines, if any are on record.

Printing Transaction Receipts

You can print several transaction receipts through Circulation, including:

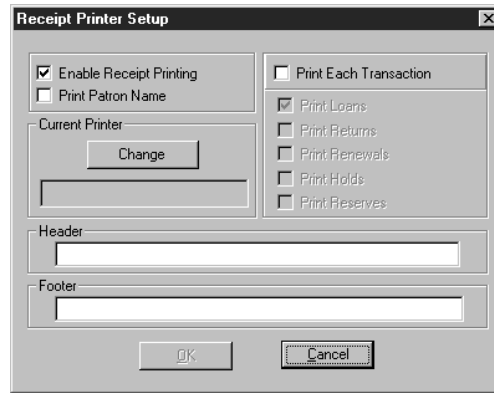
- **Status** – Lists all transactions for the selected patron.
- **Today's All** – Lists all transactions for the current day for the selected patron.
- **Today's Loans** – Lists all loans for the current day for the selected patron.
- **Today's Returns** – Lists all returns for the current day for the selected patron.

Setting Up Your Receipt Printer

Before you can print transaction receipts, you must set up your receipt printer. To do so:

1. On the **File** menu, select **Print Receipt**, and then click **Printer Setup**. This displays the Receipt Printer Setup dialog box (Figure 5.29).

FIGURE 5.29



2. To print receipts, select the **Enable Receipt Printing** check box. This activates several functions on this dialog box.
3. If you want the patron's name to appear on the receipt, select the **Print Patron Name** check box.
4. Under **Current Printer**, click **Change**. This displays the Print Setup dialog box.

NOTE: Verify that your receipt printer is connected to your computer and that the printer device drivers are installed.

- A. In the **Name** list, select the appropriate printer.
- B. Change settings as desired, then click **OK**.
5. If you want the system to print receipts automatically for specific transaction types, select the **Print Each Transaction** check box, and then select the check box next to each appropriate transaction type.
6. To place header and/or footer text on each receipt, type the desired text in the **Header** and/or **Footer** boxes.
7. When finished, click **OK** to save your entries and return to the Circulation window.

Printing Receipts

To print a transaction receipt:

- On the **File** menu, click **Print Receipt**, and then select the appropriate receipt type.

OR

- If you are in Loan mode, press **F12** on your keyboard while the transaction is displayed.

Printing Transaction Information

You can print patron information from the Patron pane, item information from the Item pane, transaction information from the Transactions pane, and historical library circulation reports from the Transactions pane while in the Library Transactions mode. To print circulation reports, see "Viewing, Sorting, and Printing Circ Reports" on page 5-54.

To print patron, item, or transaction information:

1. On the Circulation window, right-click the pane you want to print. This displays a transaction menu (Figure 5.9).
2. Click **Print**. If a Print dialog box appears, change settings if desired, and then click **OK**.

Using Self-Checkout and Self-Return

These features allow patrons to check out or return items without staff assistance.

NOTES:

- For system security, once the Self-Check transaction mode is selected, the patron cannot perform any other type of circulation transaction. The patron's only options are to self-checkout or log out of the Circulation module. Similarly, if the Self-Return transaction mode is selected, then the patron is limited to self-return or log out. Libraries using the Self mode can set up a network workstation restricted to self-checkout transactions, and a separate workstation restricted to self-return transactions.
- For privacy, the Self mode can be configured so patron and item transactions do not display. See "Modifying Circulation Options" on page 5-6.
- To enable override messages in Self-Check mode, change the **Self Mode** entry in the Global.ini.REG file (the default path is **C:\M3 Server\Registry\Common**) to **Skip Override=off**. Otherwise, the only override that will display is if the item is non-circulating.

Using Self-Checkout

To conduct self-checkout transactions:

1. On the **Mode** menu, click **Self-Check**. The workstation remains in this mode until you log out of circulation.
2. Type the patron barcode in the **Barcode** box, then press ENTER (or just scan the barcode).
3. Type the item barcode in the **Barcode** box, then press ENTER (or just scan the barcode). The loan transaction appears in the Transactions pane.

NOTE: If a Self mode timeout period has been set, the transaction information clears automatically. (See "Modifying Circulation Options" on page 5-6.)

Using Self-Return

To conduct self-return transactions:

1. On the **Mode** menu, click **Self-Return**. The workstation remains in this mode until you log out of circulation.
2. Type the item barcode in the **Barcode** box, then press ENTER (or just scan the barcode). This returns the item.

NOTE: If a Self mode timeout period has been set, the transaction information clears automatically. (See "Modifying Circulation Options" on page 5-6.)

WORKING WITH ITEM RECORDS

You can search for, edit, and create new bibliographic and holding records from both the M3 Circulation module and the M3 Cataloging module. Because the M3 Cataloging module includes templates and record duplicating functions, it is a better choice when creating a number of records. To delete records, you must use the M3 Cataloging module.

In this section, items are sometimes divided into bibliographic records and holding records.

Searching for an Item Record

You may want to search for an item record if you do not know the item's barcode. There are two methods of searching in Circulation: from the main window and with the Search dialog box.

Searching from the Main Window

This procedure is a quick and simple method of searching for an item by title.

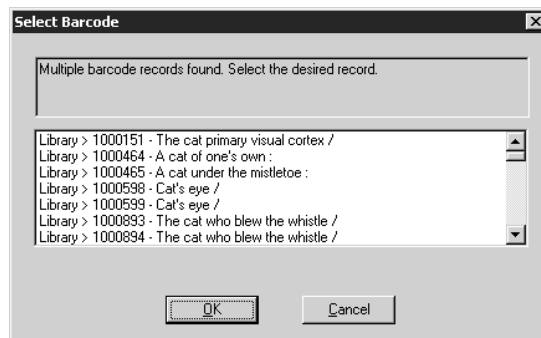
NOTE: If you are in Loan, Reserve, or Booking mode, there should be an active patron in the Patron pane before searching by this method.

1. Type a keyword in the **Barcode** box.
2. If a match is found, the record displays in the Item pane of the Circulation window, ready for a transaction. NOTE: If no match is found for an item but a match is found for a patron, the patron results display.

OR

If more than one match is found, the Select Barcode dialog box displays (Figure 5.30). Click the desired record, then click **OK**. The record displays in the Item pane of the Circulation window, ready for a transaction.

FIGURE 5.30



Searching with the Search Dialog Box

This procedure offers more search options. It also locates both the bib and any corresponding holding records.

1. On the **Item** menu, click **Search**. This displays the Holding Search dialog box (Figure 5.31).

FIGURE 5.31

Record field list

Keyword box

Boolean operator list

Note: Your system can be configured to display different bib record fields and Boolean operators, as well as different options within the record field lists.

Search Tips:

- You can apply the truncation asterisk (*) to the beginning and/or end of a keyword; the wildcard question mark (?) character within a keyword (wom?n); and quotation marks (" ") around a phrase.
- You can use the AND, OR, and NOT Boolean operators to connect keywords within a keyword box. Be sure to type operators in capital letters.

2. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator.
3. Click **Search**. This displays the Holding Search Results window (Figure 5.32) with your search results listed.

FIGURE 5.32

Bibliographic record matching the keyword search

Holding record corresponding to the bib record in the top pane

	Title	Remainder Of Title	Author	Publisher
1	Historic houses of America,	open to the public;		American Heri

	Call Number Prefix	Classification Part	Item Part	Enumeration
1	E	159	.H7 1971	

4. From here, you can:

Tip: You can also double-click a bib or holding record to transfer the information to the Circulation window.

- Select a bibliographic or holding record, then click **OK**. This transfers the item information to the Item pane in the Circulation window.

OR

- Click **Search** to display the Holding Search dialog box (Figure 5.31) and begin a new search.

OR

- Click **Cancel** to return to the Circulation window.

Creating an Item Record

The procedure to create a bibliographic record varies from the procedure to create a holding record. Both procedures are covered in this section.

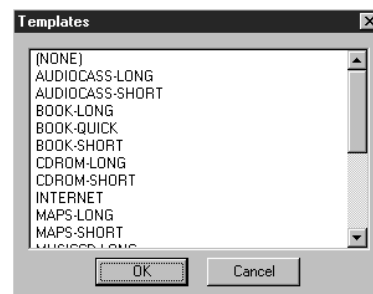
Creating a Bibliographic Record

At times, it may be convenient to create a bibliographic record while using the M3 Circulation module. You can also create records from the M3 Cataloging module. If you have several records to add, you may find it more efficient to import them using the M3 Cataloging module. To do so, see “Importing Bibliographic, Patron, and Authority Records” on page 4-55.

To create a bibliographic record:

- On the **Item** menu, click **Add Bibliographic**. This displays the Templates dialog box (Figure 5.33) containing a list of available bibliographic record templates.

FIGURE 5.33



- Select a template, then click **OK**. This displays the Create New Bibliographic Record window (Figure 5.34 shows the template “Book-Long”).

FIGURE 5.34

MARC fields and subfields

Edit area

Status bar with MARC field and subfield descriptions

Field	Subfield	Description
Leader		nam
Control Number		
Control Number Identifier		
Date And Time Of Latest		19981109095533.0
Fixed-Length Data Element		981109s xx 000 0 eng d
LC control number		
International Standard Book Number		
Terms of availability		\$
Original cataloging agency		Your Holding Symbol
Transcribing agency		Your Holding Symbol
Language code of text/s	1	
Language code of summary		
Language code of origin		
Personal name	1	
Dates associated with a		
Uniform title	1	0
Title	1	0
Remainder of title		
Remainder of title page		
Title proper/short title	3	
Edition statement		ed.
Place of publication, distribution		
Name of publisher, distributor		
Leader		

Note: If you do not want empty fields to be deleted when the record is saved, change the **Strip Empty Fields** entry in the Active-MarcEdit.ini file (located in your M3 directory) to **OVER-RIDE=on**, then restart the Circulation module. Authority Control users should not change this setting.

3. Enter field and subfield data for the new record. To move through the record, use your keyboard up and down arrows. Notice that status bar information changes to identify the selected field and subfield.
 - To access a menu with edit commands (Figure 5.35), right-click the field or subfield you want to edit. From this menu, options include:
 - You can insert, delete, cut, copy, paste, and move fields and subfields. (To insert multiple subfields in a field at once, click **Insert Subfield**. Type the subfields, without spaces or commas, in the text box found in the lower right corner of the Insert Subfield dialog box. For example, to enter subfields **a**, **b**, **c**, and **g**, type **abcg**.)
 - You can click **Find** to locate text within this record.
 - You can click **Toggle Prompts** to change the MARC field labels from numbers to text.

FIGURE 5.35

Tip: To insert a picture field in this record so a picture displays in the Item pane when the item is selected, see “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-37.

Insert Field...	Shift+Ins
Insert Subfield...	Ctrl+Ins
Delete Field	Shift+Del
Delete Subfield	Ctrl+Del
Cut Record	Shift+Ctrl+X
Cut Field	Shift+X
Cut Subfield	Ctrl+X
Copy Record	Shift+Ctrl+C
Copy Field	Shift+C
Copy Subfield	Ctrl+C
Paste	Ctrl+V
Move Field Up	Shift+Up
Move Field Down	Shift+Down
Move Subfield Up	Ctrl+Up
Move Subfield Down	Ctrl+Down
Find...	Ctrl+F
Toggle Prompts	Ctrl+T

- To access a list of fixed field standard choices (including position and legal characters) pertaining to a particular fixed field, double-click in the field. The dialog box for fixed field 000 is shown in Figure 5.36. You can define your fixed field by typing in text or, where available, clicking an arrow button and selecting an option in the list. When finished, click **OK**.

FIGURE 5.36

Character codes →

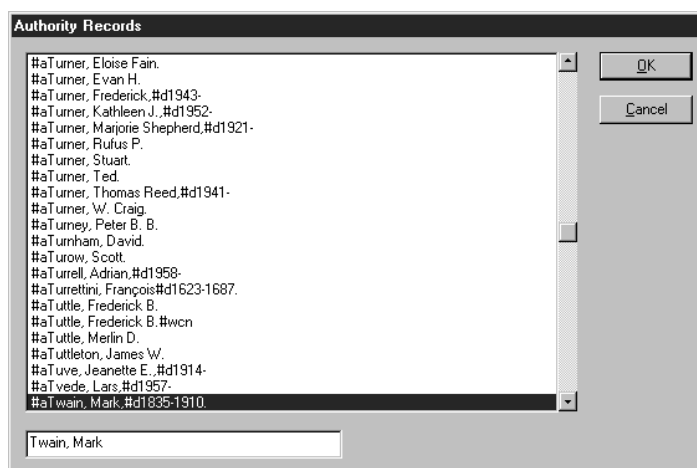
Character positions →

The dialog box titled "Fixed Field 000" contains a table with character codes and positions for various fields. The fields are: Record status (05), Type of record (06), Bibliographic level (07), Type of control (08), Encoding level (17), Descriptive cataloging form (18), and Linked record requirement (19). The character codes are: n, a, m, 2, and empty. The character positions are: 05, 06, 07, 08, 17, 18, and 19. The dialog box has OK and Cancel buttons at the bottom.

Character codes	Character positions	Field Name
n	05	Record status
a	06	Type of record
m	07	Bibliographic level
	08	Type of control
2	17	Encoding level
	18	Descriptive cataloging form
	19	Linked record requirement

- If you are using a version of M3 that supports Authority Control, and the field you want to enter is managed under Authority Control, then you must select a predefined authority record. To do so, click in the white edit area of the field (as shown in Figure 5.34). This displays the Authority Records dialog box (Figure 5.37).

FIGURE 5.37



Select the authority record you want to use, then click **OK**. This returns you to the Create New Bibliographic Record window (Figure 5.34) and enters the new record in the selected field.

4. When finished adding information to this bibliographic record, click **OK** in the Create New Bibliographic Record window. This places the new record in your library's bibliographic record database, now available for circulation purposes and searching.
5. At the prompt "Create Holding Record?" click **Yes** or **No**.

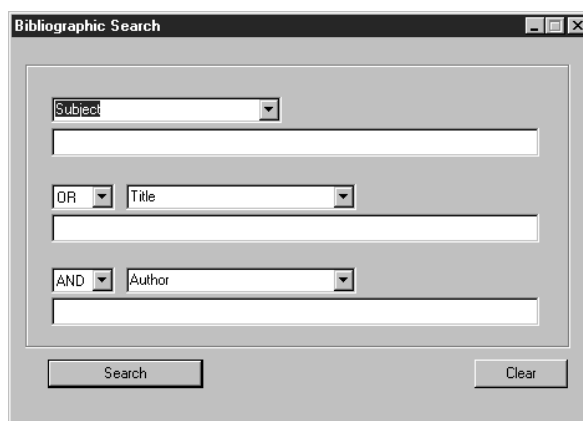
Creating a Holding Record

At times, it may be convenient to create a holding record while using the M3 Circulation module. You can also create a holding record from the M3 Cataloging module.

To create a holding record:

1. Locate the bib record matching the holding record you want to create.
 - A. On the **Item** menu, click **Add Holding**. This displays the Bibliographic Search dialog box (Figure 5.38).

FIGURE 5.38



For search tips, see page 5-24.

- B. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator.
2. Click **Search**. This displays the Bibliographic Search Results window with your search results listed (Figure 5.39).

FIGURE 5.39

*Bibliographic records
matching your keyword
search*

*Holding record
corresponding to the
bib record selected in
the top pane*

	Title	Remainder Of Title	Author	Publisher
1	The adventures of Tom Sawyer /		Twain, Mark,	Junior Deluxe Editions,
2	The new Mark Twain handbook /		Long, E. Hudson	Garland Pub.,
3	Adventures of Huckleberry Finn /		Twain, Mark,	Published in cooperation
4	Concerning the Jews /		Twain, Mark,	Running Press,
5	Mark Twain's own autobiography :	the chapters from the North	Twain, Mark,	University of Wisconsin P
6	Personal recollections of Joan of Arc /		Twain, Mark,	Ignatius Press,
7	Mississippi writings /		Twain, Mark,	Literary Classics of the Ur

	Call Number Prefix	Classification Part	Item Part	Location	
1		813	T969at	TMSJ	B2169

3. Click the bib record in the upper pane that corresponds to the holding record you want to create, then click **OK**. This displays the Create New Holding Record window (Figure 5.40).

FIGURE 5.40

Edit area

Create New Holding Record			
Leader		nam	
Control Number			
Control Number For Field		0000000765	
Date And Time Of Latest		20000221090201.0	
Fixed-Length Data Element		000221 xx 000	
Location	1		
Standard Group		General Collection	

Example:

4. Enter field and subfield data for the new record. For instructions, see step 3 beginning on page 5-26. NOTE: Since Authority Control fields are not available for holding records, skip the Authority Control option explained on page 5-27.

5-30 Using M3 Circulation

Notes:

- If you want temporary items to remain in the catalog after being returned, change the Temporary Holding option in the Mcircsys.ini file. Contact your system administrator for assistance.
- Temporary items cannot be placed on reserve.

5. Select the **Temp** check box if this record is temporary. When the item is returned, the record is marked for deletion, and the barcode record is labeled “detached” so it can be used again.
 6. When finished:
 - Click **OK** to save your entries and return to the Circulation window. If M3 Circulation is in Loan mode and a patron is currently active, the new item is now on loan; if Circulation is in the Reserve mode, the new item is now placed on reserve.
- OR**
- Click **Cancel** to erase your new entries and return to the Circulation window.
- OR**
- Click **Get Biblio** to display the Bibliographic Search dialog box (Figure 5.38) and begin a new search.

Editing an Item Record

The procedure to edit a bibliographic record differs from the procedure to edit a holding record. Both procedures are covered in this section.

Editing a Bibliographic Record

To edit a bib record:

1. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the barcode). This displays item information in the Item pane of the Circulation window.
2. On the **Item** menu, click **Edit Bibliographic**. This displays the Edit Bibliographic Record window (Figure 5.41).

FIGURE 5.41

Edit area →

Edit Bibliographic Record		
Leader		nam 1a
Control Number		0000009906
Date and Time of Last		19990810140830.0
Fixed-Length Data Element		750723(1965)kxx [000]0leng d
LC control number		65020157
System control number		ocm01470649
Transcribing agency		UF
Modifying agency		TMS
	9 9	TMSC
Classification number	0 0	E159
Item number		N5
Personal name	1 0	Nicholson, Arnold.
Title	1 0	American houses in history.
Place of publication, distribution	0	New York.
Name of publisher, distributor		Viking Press
Date of publication, distribution		[1965]
Extent		260 p.
Other physical details		illus. (part col.) ports.
Dimensions		28 cm.
Series statement	0	A Studio book
Bibliography, etc. note		Bibliography: p. 256-257.
Topical term or geographic	0	Architecture, Domestic
Geographic subdivision		United States.
Leader		

3. Edit this record as needed. For instructions, see step 3 beginning on page 5-26.
4. When finished, click **OK** to save your changes.

Editing a Holding Record

To edit a holding record:

1. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the barcode). This displays item information in the Item pane of the Circulation window.
2. On the **Item** menu, click **Edit Holding**. This displays the Edit Holding Record window (Figure 5.42).

FIGURE 5.42

Leader		
Control Number		0000012844
Control Number For Rela		0000009906
Date And Time Of Lates		19990810140830.0
Location	1	Alpha Library
Shelving location		G
Classification part		159
Item part		.N5
Call number prefix		E
Piece designation		BA12844
Standard Group		Alpha Item Access Group
Renewal Count		2
Current Renewal Count		0
Hold Count		1
Current Hold Count		0
Damaged Count		4
Current Fines Count		0
Current Due Amount		0.00
Loan Count		8
Current Loan Count		1
Due Date		19991123170000.0
Last Borrower		0000000154
Status 1		Normal
Leader		

3. Edit this record as needed. For instructions, see step 3 beginning on page 5-26. **NOTE:** Since Authority Control fields are not available for holding records, skip the Authority Control option explained on page 5-27.
4. When finished, click **OK** to save your changes.

Deleting an Item Record

You cannot delete a bibliographic or holding record from the M3 Circulation module. For security reasons, you can only delete item records from the M3 Cataloging module. For instructions, see “Deleting and Undeleting Records” on page 4-47.

WORKING WITH PATRON RECORDS

You can search for, edit, and create patron records from both the M3 Circulation module and the M3 Cataloging module. When adding several records, M3 Cataloging is the best module to use. To delete records, you must use the M3 Cataloging module.

Patron records are treated as a separate MARC database within M3 Circulation.

Searching for a Patron Record

You may want to search for a patron record if you do not know the patron's barcode. There are two methods of searching in Circulation—from the main window and with the Search dialog box.

Searching from the Main Window

This procedure is a quick and simple method of searching for a patron by name.

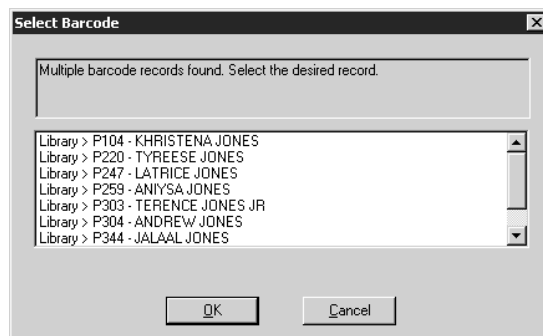
NOTE: If you are in Loan, Reserve, or Booking mode and another patron already appears in the Patron pane, press ESC to clear the pane before searching by this method.

1. Type the patron's last name in the **Barcode** box.
2. If a match is found, the record displays in the Patron pane of the Circulation window, ready for a transaction. NOTE: If no match is found for a patron but a match is found for an item, the item results display.

OR

If more than one match is found, the Select Barcode dialog box displays (Figure 5.30). Click the desired record, then click **OK**. The record displays in the Patron pane of the Circulation window, ready for a transaction.

FIGURE 5.43



Searching with the Search Dialog Box

This procedure offers more search options.

1. On the **Patron** menu, click **Search**. This displays the Patron Search dialog box (Figure 5.44).

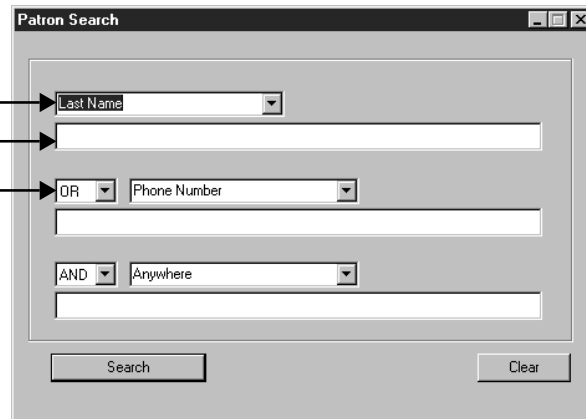
FIGURE 5.44

Record field list —————→

Keyword box —————→

Boolean operator list —————→

***Note:** Your system can be configured to display different patron record fields and Boolean operators, as well as different options within the record field lists.*



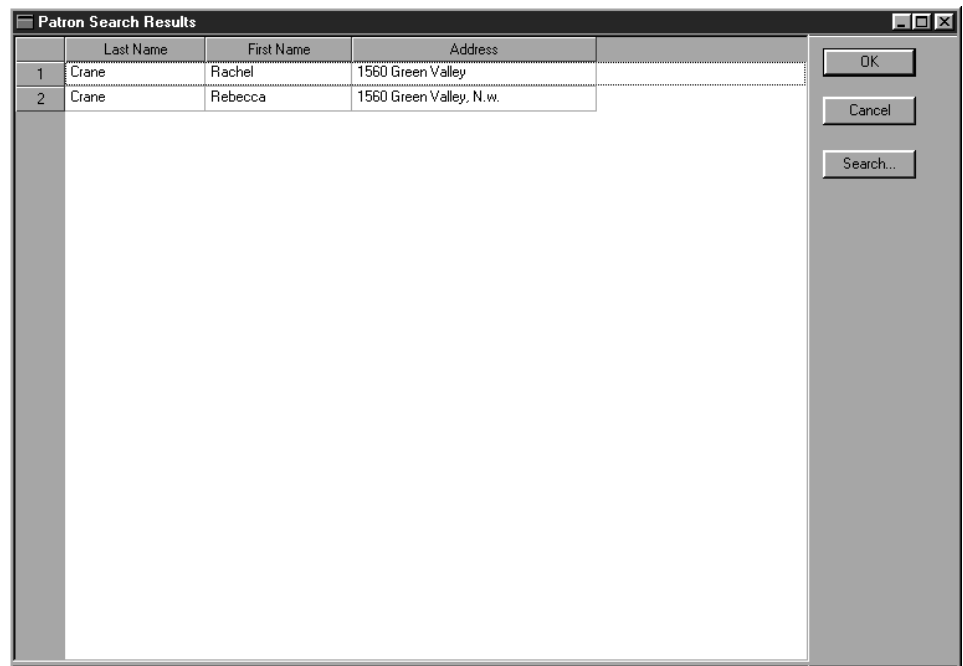
The Patron Search dialog box contains the following elements:

- A dropdown menu labeled "Last Name" (indicated by the "Record field list" label).
- A large text input field (indicated by the "Keyword box" label).
- A dropdown menu labeled "OR" (indicated by the "Boolean operator list" label).
- A dropdown menu labeled "Phone Number" (indicated by the "Record field list" label).
- A second large text input field.
- A dropdown menu labeled "AND" (indicated by the "Boolean operator list" label).
- A dropdown menu labeled "Anywhere" (indicated by the "Record field list" label).
- A second large text input field.
- "Search" and "Clear" buttons at the bottom.

For search tips, see page 5-24.

2. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator.
3. Click **Search**. This displays the Patron Search Results window (Figure 5.45) with your search results listed.

FIGURE 5.45



The Patron Search Results window displays a table of search results. The table has four columns: Last Name, First Name, Address, and an empty column. The results are as follows:

	Last Name	First Name	Address	
1	Crane	Rachel	1560 Green Valley	
2	Crane	Rebecca	1560 Green Valley, N.w.	

On the right side of the window, there are three buttons: "OK", "Cancel", and "Search...".

Tip: You can also double-click a patron record to transfer the information to the Circulation window.

4. From here, you can:

- Select a patron, then click **OK**. This transfers the patron information into the Patron pane in the Circulation window.

OR

- Click **Search** to display the Patron Search dialog box (Figure 5.44) and begin a new search.

OR

- Click **Cancel** to return to the Circulation window.

Creating a Patron Record

At times, it may be convenient to create a patron record while using the M3 Circulation module. You can also create records from the M3 Cataloging module. If you have several records to add, you may find it more efficient to import them using the M3 Cataloging module. To do so, see “Importing Bibliographic, Patron, and Authority Records” on page 4-55.

When adding a patron record, you must first conduct a search to confirm that the patron is not already entered in the system.

To create a patron record:

1. On the **Patron** menu, click **Add Patron**.

- If more than one patron template exists, the Templates dialog box displays. Select the template you want to use, then click **OK**. This displays the Patron Search dialog box (Figure 5.44).

OR

- If only one patron template exists, the Patron Search dialog box (Figure 5.44) displays.

2. To make sure the patron is not already in the system, type the patron’s information in the appropriate keyword boxes, then click **Search**.

- If there is no patron in the system with this information, the Create New Patron Record window displays (Figure 5.46).

OR

- If there is a patron in the system with this information, the Patron Search Results window displays the search results (Figure 5.45). Review the list to confirm that the patron you are entering is not included, then click **Cancel**. This displays the Create New Patron Record window (Figure 5.46).

Tip: If you think the name may be misspelled in the system, use truncation to broaden your keyword search. For example, type **whitn*** to locate *whitney*, *whitnee*, *whitnie*, and so on.

FIGURE 5.46

Leader	n00 000
Control Number	
Date And Time Of Lates	19990430080746.0
Creation Date	19990430080746.0
First Name	
Middle Name	
Last Name	
Primary Address 1	
City	
State or Province	
Country	
Postal Code	
Phone	
Fax	
Electronic Mail	
Location	
Login name	
Password	
Barcode	
Expiry of Membership	
Standard Group	Patrons

Tip: To insert a picture field in this record so a picture displays in the Patron pane when the patron is selected, see “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-37.

3. Edit this record as needed. For instructions, see step 3 beginning on page 5-26. NOTE: Since Authority Control fields are not available for patron records, skip the Authority Control option explained on page 5-27.
4. When finished, click **OK** to save your changes.

Editing a Patron Record

To edit a patron record:

1. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the barcode). This displays patron information in the Patron pane of the Circulation window.
2. On the **Patron** menu, click **Edit Patron**. This displays the Edit Patron Record window (Figure 5.47).

FIGURE 5.47

Patron fields and subfields

Edit area

Status bar with field and subfield descriptions

Leader		nam
Control Number		0000000022
Date And Time Of Lates		20010710065029.0
Creation Date		20010710065029.0
First Name	1	Courtne
Last Name		Brown
ID or Social Security Num		00308895180223
City		Boca Raton
Record created from NonMARC resource by marcout.		
Barcode	1	PA154
Standard Group		Patrons

Leader

Tip: To insert a picture field in this patron record so a picture displays in the Patron pane when the patron is selected, see “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-37.

3. Edit this record as needed. For instructions, see step 3 beginning on page 5-26. NOTE: Since Authority Control fields are not available for patron records, skip the Authority Control option explained on page 5-27.
4. When finished, click **OK** to save your changes.

Deleting a Patron Record

You cannot delete a patron record from the M3 Circulation module. For security reasons, you must delete patron records from the M3 Cataloging module. For instructions, see “Deleting and Undeleting Records” on page 4-47.

DISPLAYING ITEM AND PATRON PICTURES

Pictures, such as cover images and patron photos, can be displayed alongside items and patrons in the Circulation window.

To import and link multiple image files at once, use the M3 Picture Manager utility, which can be accessed through the M3 Cataloging module (see “Using M3 Picture Manager” on page 4-50). To add a picture to one item or patron record at a time, see the following section, “Adding a Picture Field to a Bibliographic or Patron Record.”

Once pictures are imported into your M3 database, they display automatically alongside patrons and items in the Circulation Patron and Item panes if M3 v1.6 was your first installation of M3. If you had a version of M3 installed prior to installing 1.6, you must do the following:

- Add a graphic cell to the Patron pane for each Circulation mode (Loan, Return, and so on) in which you want an image to display; changes made to one mode will not apply to the other modes. For instructions, see “Modifying the Patron Pane Display” on page 5-58.
- Add a graphic cell to the Item pane for each Circulation mode (Loan, Return, and so on) in which you want an image to display; changes made to one mode will not apply to the other modes. For instructions, see “Modifying the Item Pane Display” on page 5-63.

Adding a Picture Field to a Bibliographic or Patron Record

To add a picture field to a bibliographic or patron record:

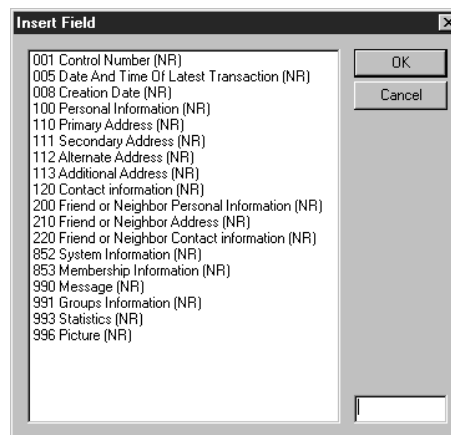
1. In the **Barcode** box, type the barcode of the item or patron to which you want to assign the picture, and then press ENTER (or scan the barcode). This displays the item or patron information in the Item or Patron pane of the Circulation window.
2. If you are working with an item record, click **Edit Bibliographic** on the **Item** menu. This displays the Edit Bibliographic Record window (Figure 5.41).

OR

If you are working with a patron record, click **Edit Patron** on the **Patron** menu. This displays the Edit Patron Record window (Figure 5.47).

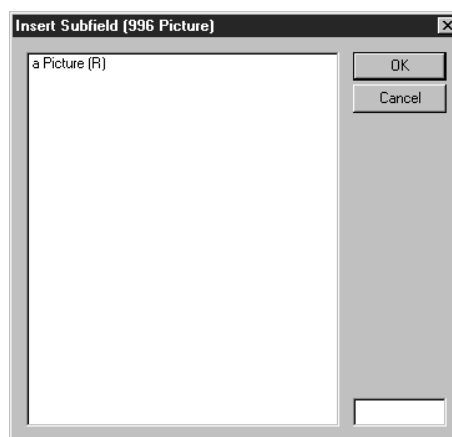
3. Right-click in the window to open a command menu (Figure 5.35), then click **Insert Field**. This displays the Insert Field dialog box (Figure 5.48 shows the Insert Field dialog box for patron records).

FIGURE 5.48



4. Select field **996 Picture**, then click **OK**. This displays the Insert Subfield dialog box (Figure 5.49).

FIGURE 5.49



5. Click subfield **a**, then click **OK**. This displays the Picture Manager dialog box (Figure 5.50).

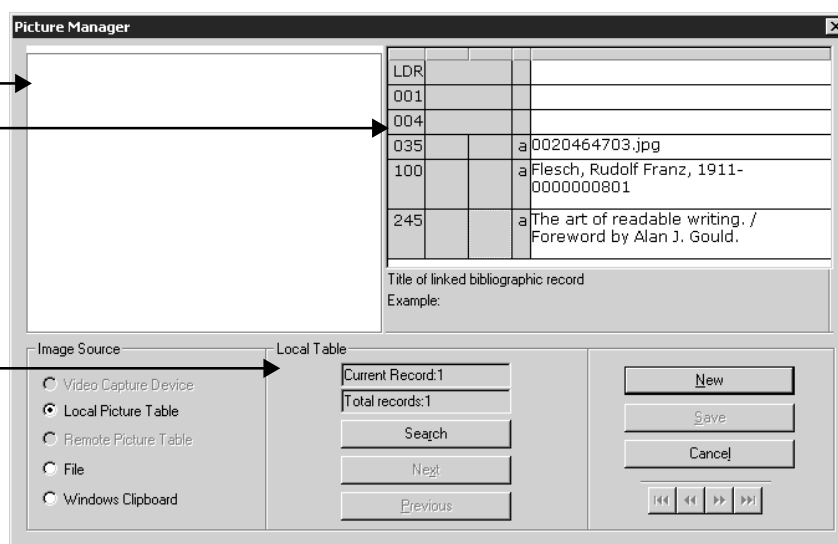
FIGURE 5.50

Preview pane →

Record pane →

Image Selection pane →

Tip: You can also double-click the 996 field in the record window to display the Picture Manager dialog box.



6. Under **Image Source**, select the source of the picture. After you click an option, the name of and the options available in the Image Selection pane (shown in Figure 5.50) change.

Note: The video capture device driver must be Microsoft DirectX® compatible.

- **Video Capture Device** – Use a video capture device (preferably a USB camera) hooked to your computer to capture a picture. To do so, point the camera at the subject for the picture. The image appears in the Preview pane (shown in Figure 5.52). Click **Capture**. If satisfied with the image, click **Save**; if not, click **Preview** to view the image and capture it again.
- **Local Picture Table** – Search a local table for picture records. To do so, click **Search**. This displays the Picture Search dialog box (Figure 5.51).

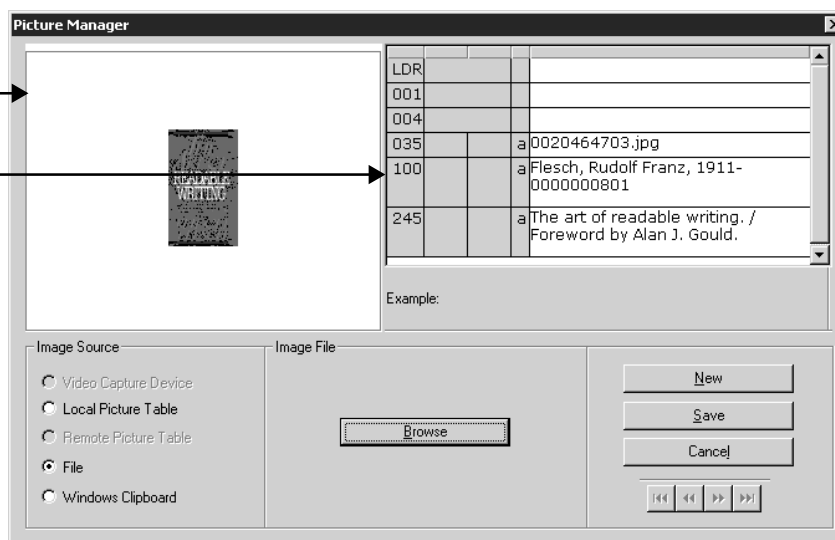
FIGURE 5.51

- A. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator.
 - B. Click **All**, **Restrict to patron**, or **Restrict to bibliographics** to search for all pictures, pictures assigned a **p** (patron) in the 991#a field, or pictures assigned a **b** (bibliographic) in the 991#a field.
 - C. Click **OK**. This displays the picture of the first search result in the Preview pane, and the record's fields and subfields in the Record pane (shown in Figure 5.52).
- **Remote Picture Table** – Search a remote table for picture records. This option is intended for bibliographic records. The procedure is identical to the procedure for the Local Picture Table option.
 - **File** – Use a previously-saved picture file (in .jpg or .bmp format). To do so, click **Browse**. In the Open Image File dialog box, navigate to the desired file, and then click **Open**. This displays the picture in the Preview pane and the record's fields and subfields in the Record pane (shown in Figure 5.52).
 - **Windows Clipboard** – Use a picture copied to the Windows Clipboard. To do so, copy the picture to the Clipboard, then click **Paste**. This displays the picture in the Preview pane and the record's fields and subfields in the Record pane (shown in Figure 5.52).

Tip: To copy a picture to the Clipboard:

- While viewing the picture, press **ALT+PRINT SCREEN**.
- Open the picture in a word processing or drawing program, then click **Copy** (usually on the **Edit** menu).

FIGURE 5.52

*Preview pane**Record pane*

7. To add fields to this picture record (such as file name or title), right-click in the Record pane and repeat steps 3 through 5, selecting the field and subfield you want to add.
8. When finished, click **Save**. This returns you to the Edit Patron Record window or the Edit Bibliographic Record window, and inserts a picture subfield in field 996.

USING THE MESSAGES UTILITY

About Messages and Block Types

You can attach one or more messages to a patron record so the messages appear whenever the patron barcode is entered. Similarly, you can attach messages to an item record that appear each time the item's barcode is entered.

When attaching a message to a record, the attacher must also assign a block type to the attachment. The four block types are:

- **Information Blocks** – When an information block message appears, the user can bypass the message by clicking anywhere on the Circulation window. This is the least intrusive block type.
- **Blocking Blocks** – When a blocking block message appears, the user must select an option in the message dialog box in order to proceed.
- **Nudge Blocks** – When a nudge block message appears for the first time, the user must select an option in the dialog box in order to proceed, as with a blocking block message. Any time this message appears again with this record, it acts as an information block (no decision required to bypass).
- **Privilege Blocks** – When a privilege block message appears, a password is required to bypass the message dialog box. This is the most intrusive block type.

Adding Messages to the Circulation System

As part of the initial circulation setup, a bank of patron and item messages appropriate for your library should have been defined. You can add, edit, and delete messages within the bank at any time.

Generally, when you want to modify your message bank, you use the Messages utility on the Tools menu. However, if you need to create or edit a message while conducting a circulation transaction, you can also access and modify the message bank “on the fly.”

Both options are described in the following sections.

Creating a Bank of Patron and Item Messages

To add messages to the bank when not conducting a transaction:

1. On the **Tools** menu, click **Messages**. This displays the Add/Edit Messages window (Figure 5.53). If no messages have been added at your library, this window is empty.

FIGURE 5.53



2. Click **Patron** or **Item**, depending on the type of messages you want to add.
3. Click **New**. This displays the Add New Message dialog box (Figure 5.54).

FIGURE 5.54

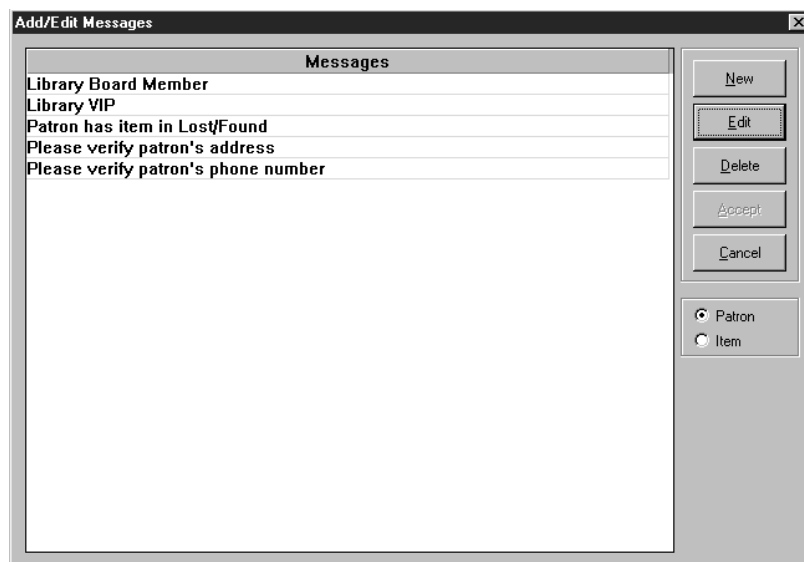


Tip: General messages provide greater flexibility.

4. Type the message, then click **OK**. Your new message appears in the Add/Edit Messages window.

5. Repeat steps 3 and 4 for each message you want to include. After adding several messages, the Add/Edit Messages window looks similar to the example in Figure 5.55.

FIGURE 5.55



6. When finished, click **Cancel**.

Deleting a Message from the System

Note: Only messages not in use can be deleted.

To delete a message from the circulation message bank:

1. On the **Tools** menu, click **Messages**. This displays the Add/Edit Messages window (Figure 5.55).
2. Click the message type you want to delete, **Patron** or **Item**.
3. Select the message you want to delete, then click **Delete**. Repeat this step for each message you want to delete.

NOTE: If **Delete** is not active, the selected message is attached to a record and cannot be deleted.

4. When finished, click **Cancel**.

Attaching a Message to a Patron Record

While conducting a circulation transaction, you can attach, create, and edit a patron message.

Attaching an Existing Message to a Record

1. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the barcode).
2. On the **Patron** menu, click **Messages**. This displays the Attach Message(s) to Patron window (Figure 5.56), listing all available patron messages.

FIGURE 5.56

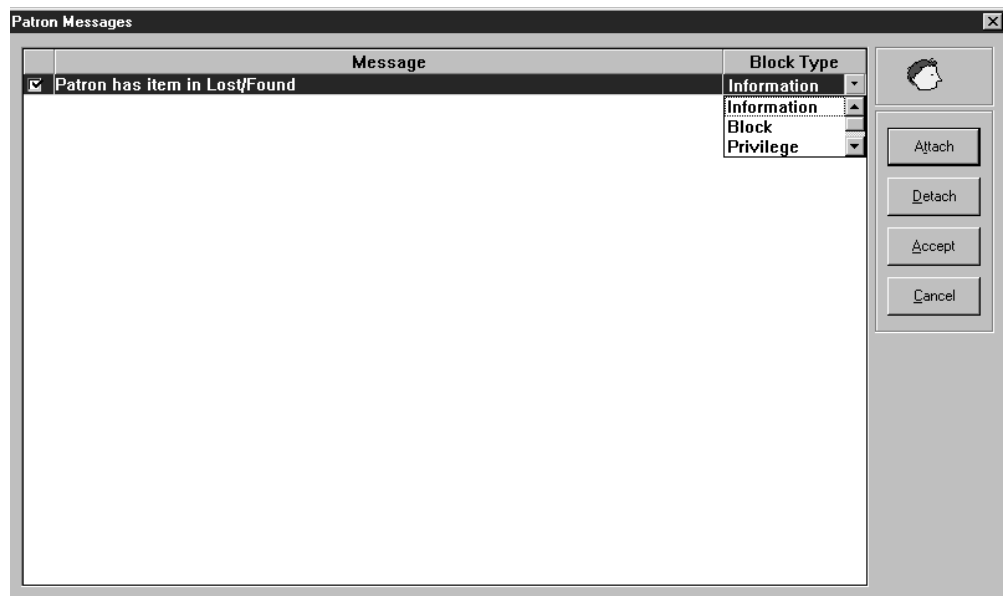


3. From here, do one of the following:

- If the list includes any appropriate messages:
 - A. Select all desired messages, then click **Accept**. This displays the Patron Messages window (Figure 5.57).

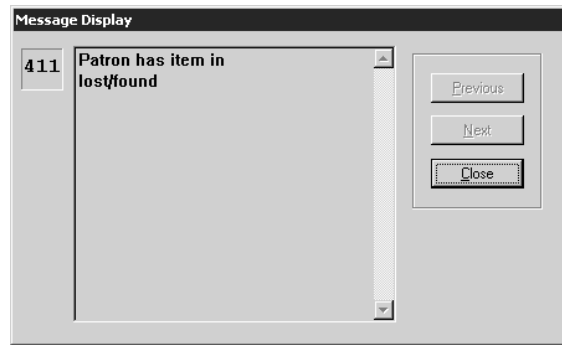
FIGURE 5.57

*If this patron already has messages attached, the Patron Messages window (Figure 5.57) lists all attached messages. Click **Attach** to attach a different message, or **Detach** to detach this message.*



- B. Select a block type in the **Block Type** list. Do this for each selected message. (Block types are defined on page 5-40.)
- C. When finished, click **Accept**. The attached messages (as shown in Figure 5.58) appear whenever this patron record is accessed from M3 Circulation.

FIGURE 5.58



- If the message you need does not appear in the list, follow the procedure in the next section, "Creating a Message "On the Fly"."
- If a similar message exists that you want to edit before attaching, follow the procedure in "Editing a Message "On the Fly"" on page 5-45.

NOTE: If you edit a message that is attached to other records, the edited version displays for all records.

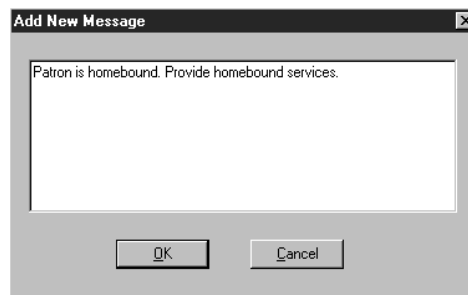
Creating a Message "On the Fly"

This procedure assumes you are working with a patron message; however, the procedure also works for item messages.

If you are conducting a circulation transaction and the message you want to attach does not exist in the message bank, you can create the new message during the transaction, or "on the fly." To do so:

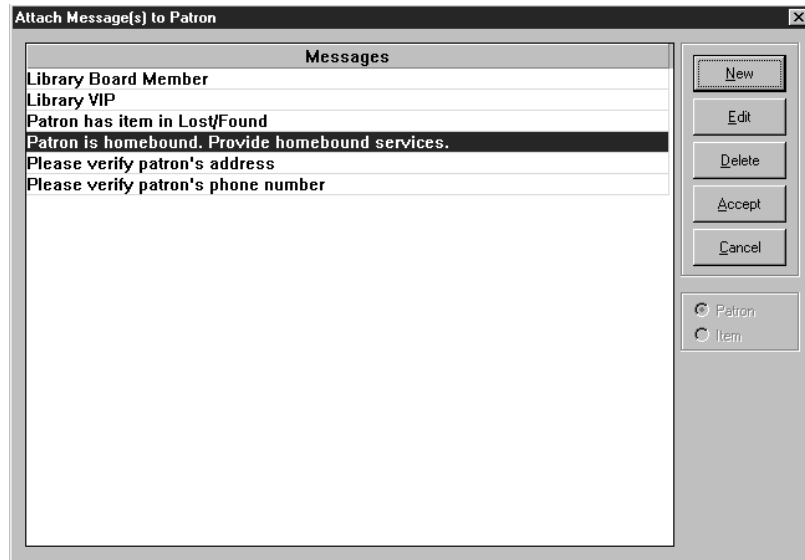
1. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the barcode).
2. On the **Patron** menu, click **Messages**. This displays the Attach Message(s) to Patron window (Figure 5.56).
3. Click **New**. This displays the Add New Message dialog box (Figure 5.59).

FIGURE 5.59



4. Type the message, then click **OK**. The new message appears in the Attach Message(s) to Patron window (Figure 5.60).

FIGURE 5.60



5. If you are satisfied with the message, click **Accept**. This displays the Patron Messages window (Figure 5.57).
6. Select the new message, then click a block type in the **Block Type** list. (Block types are defined on page 5-40.)
7. When finished, click **Accept**. The attached message (as shown in Figure 5.58) appears whenever this patron record is accessed from M3 Circulation.

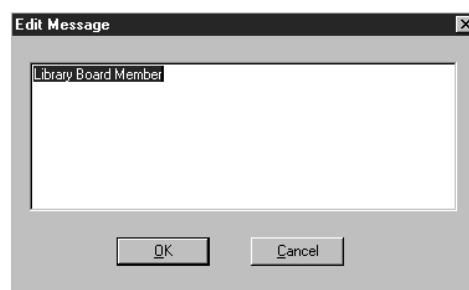
Editing a Message “On the Fly”

If you are conducting a library transaction and the message you want to attach requires editing, you can do so during the transaction, or “on the fly.” To do so:

1. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the barcode).
2. On the **Patron** menu, click **Messages**. This displays the Attach Message(s) to Patron window (Figure 5.60).
3. Select the message you want to edit, then click **Edit**. This displays the Edit Message dialog box (Figure 5.61) with the selected message displayed.

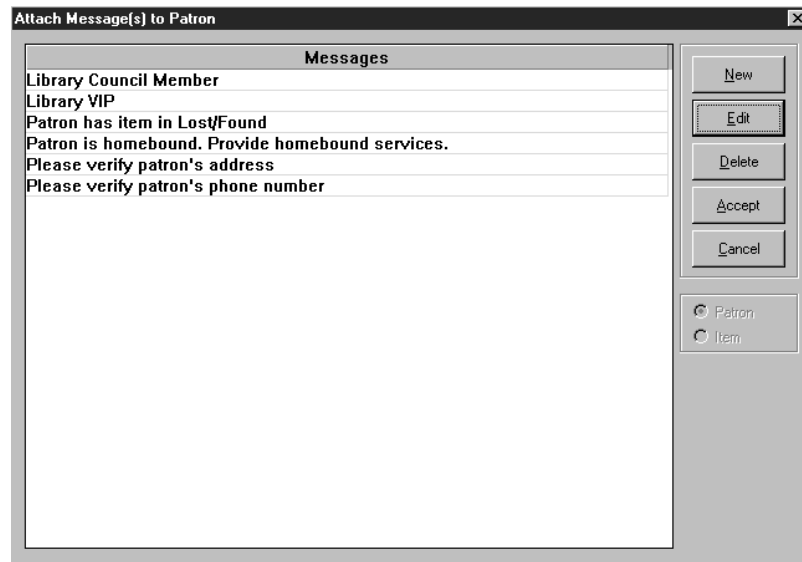
This procedure assumes you are working with a patron message; however, the procedure also works for item messages.

FIGURE 5.61



4. Edit the message as desired, then click **OK**.
5. Your edited message appears in the Attach Message(s) to Patron window (Figure 5.62).

FIGURE 5.62



6. If satisfied with the message, click **Accept**. This displays the Patron Messages window (Figure 5.57).
7. Select the new message, then click a block type in the **Block Type** list. (Block types are defined on page 5-40.)
8. When finished, click **Accept**. The attached message (as shown in Figure 5.58) appears whenever this patron record is accessed from M3 Circulation.

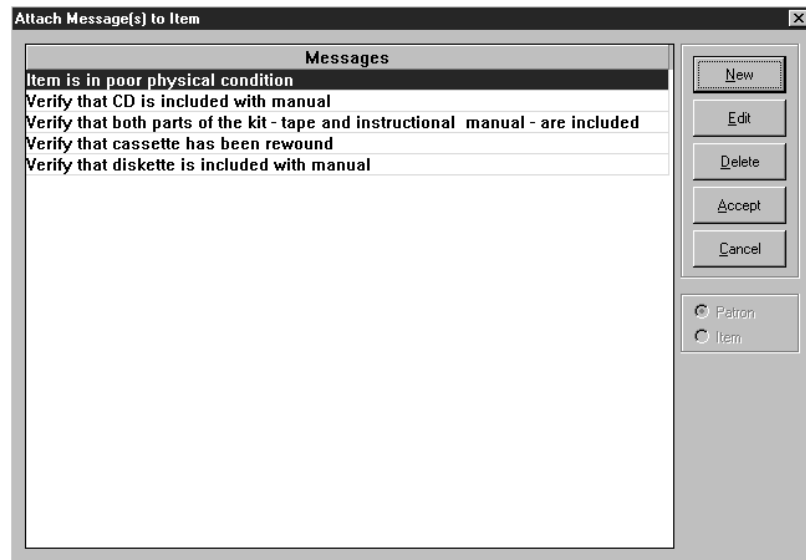
Attaching a Message to an Item Record

While conducting a circulation transaction, you can attach, create, and edit an item message. The procedure to attach a message to an item record is similar to the procedure for patron records; only the access path and window names are different.

To attach a message to an item record:

1. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the item's barcode).
2. On the **Item** menu, click **Messages**. This displays the Attach Message(s) to Item window (Figure 5.63), listing all available item messages.

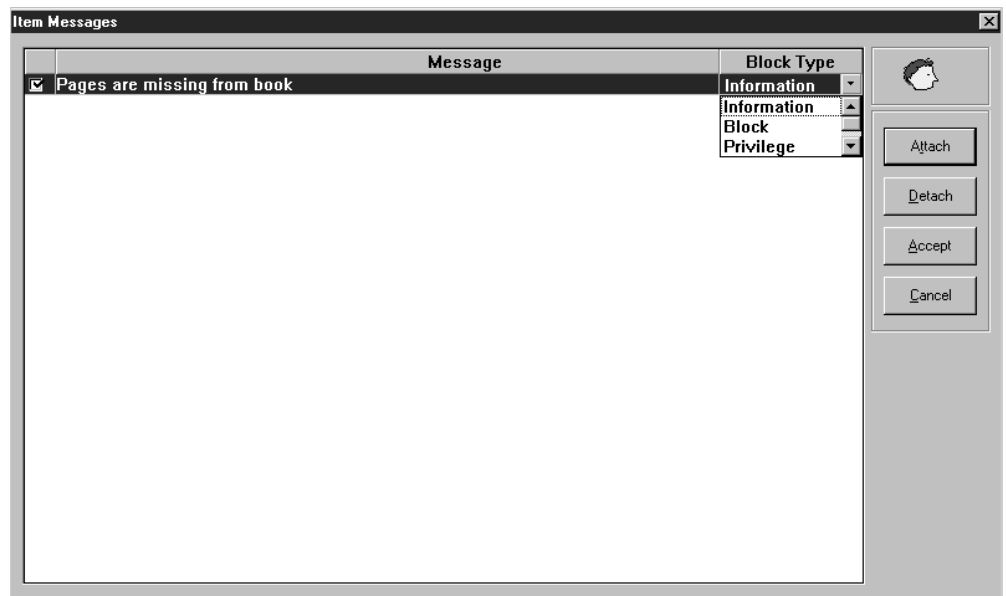
FIGURE 5.63



3. From here, do one of the following:
 - If the list includes any appropriate messages:
 - A. Select the desired messages, then click **Accept**. This displays the Item Messages window (Figure 5.64).

FIGURE 5.64

*If this item already has messages attached, the Item Messages window (Figure 5.64) lists all attached messages. Click **Attach** to attach a different message, or **Detach** to detach this message.*



- B. Select a block type in the **Block Type** list. Do this for each selected message. (Block types are defined on page 5-40.)
 - C. When finished, click **Accept**. The attached messages (as shown in Figure 5.58) appear whenever this item record is accessed from M3 Circulation.
- If the message you need does not appear in the list, follow the procedure in “Creating a Message “On the Fly”” on page 5-44.

- If a similar message exists that you want to edit before attaching, follow the procedure in “Editing a Message “On the Fly”” on page 5-45.

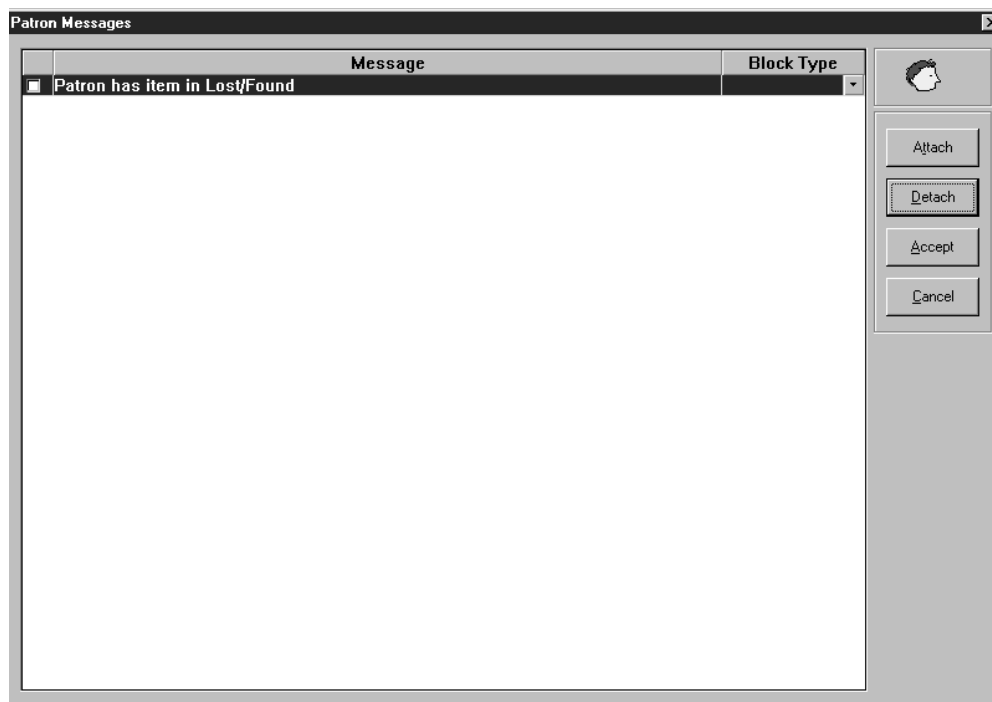
NOTE: If you edit a message that is attached to other records, the edited version displays for all records.

Detaching a Message

If a message displays after you enter a patron or item barcode, you can detach the message during the transaction. To do so:

1. Close the message. On the **Patron** or **Item** menu (depending on which type of record the message is attached to), click **Messages**. This displays the Item Messages or Patron Messages window (Figure 5.65),

FIGURE 5.65



2. Select the message you want to detach, and then click **Detach**.
3. Click **Accept**. This detaches the message.

MODIFYING LIBRARY DATES AND CIRCULATION PERIODS

Tip: The default loan periods are established in the Group Editor.

After your library's circulation calendar is set up, you can modify it for special circumstances. For example, you can backdate the circulation date, which is helpful if you have an evening bookdrop. You can also change the loan expiration date for circumstances when you want to temporarily override the typical loan period. The following sections explain how to establish your library schedules, then temporarily revise the setup to accommodate backdating and date changes.

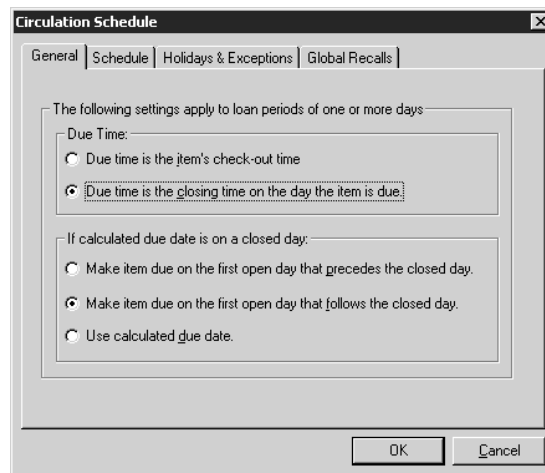
System Schedule Setup

When you install M3 Circulation, you should set up your library's system schedule. You can set up multiple schedules to accommodate different times of the year. For example, your summer schedule may differ from the rest of the year.

To set up your library circulation schedule:

On the **Tools** menu, click **Schedule**. This displays the Circulation Schedule window (Figure 5.66). Enter the appropriate information in each tab as described in the following sections.

FIGURE 5.66



General Tab

In this tab (shown in Figure 5.66), establish general loan period rules.

1. Under **Due Time**, click the option appropriate for your library.
2. Under **If calculated due date is on a closed day**, click the option appropriate for your library.
3. When finished, click **OK**.

Schedule Tab

In this tab (Figure 5.67), establish your library's opening and closing day for each day of the week. You can create multiple schedules to apply to different times of the year.

FIGURE 5.67

Period	Day	Circulation Hours	
		Start Time	End Time
From: 06/17/2001 To: 12/30/2001	Mon	Open	8:00 AM - 5:00 PM
	Tue	Open	8:00 AM - 5:00 PM
	Wed	Open	8:00 AM - 5:00 PM
	Thu	Open	8:00 AM - 5:00 PM
	Fri	Open	8:00 AM - 5:00 PM
	Sat	Open	8:00 AM - 5:00 PM
	Sun	Open	8:00 AM - 5:00 PM

1. Under **Period**, specify this schedule's starting date in the **From** box. To do so:

- Select the date, then type the new date in MM/DD/YY format.

OR

- Click the **Calendar** arrow to display a calendar (Figure 5.68). Click the calendar's left (<) and right (>) arrows to select a month, then click the desired date. The date appears in the **From** box.

FIGURE 5.68

2. Repeat step 1 for the **To** box.
3. Under **Day**, click the **Mon** arrow, and then click **Open** or **Closed**. Repeat for all days of the week.

4. Under **Circulation Hours**, select the **Start Time** and **End Time** for each day of the week. To do so, click a time box, then click the adjoining arrows to select a time. Repeat this for each box until the correct times display for each day of the week.

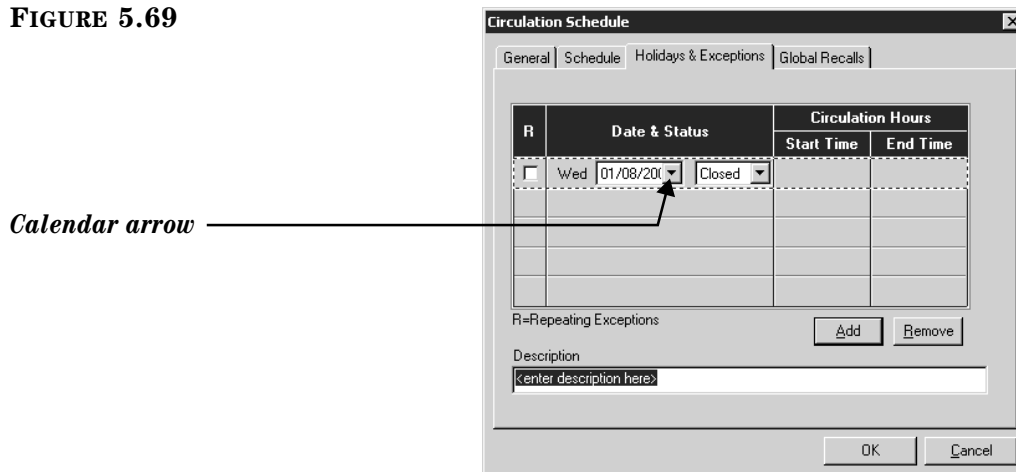
NOTE: If you want to create an additional schedule, wait until you have completed the **Holidays & Exceptions** tab and the **Global Recalls** tab for this schedule.

5. When finished, click **OK**.

Holidays & Exceptions Tab

In this tab (Figure 5.69), eliminate or add irregular dates within the schedule you created in the Schedule tab.

FIGURE 5.69

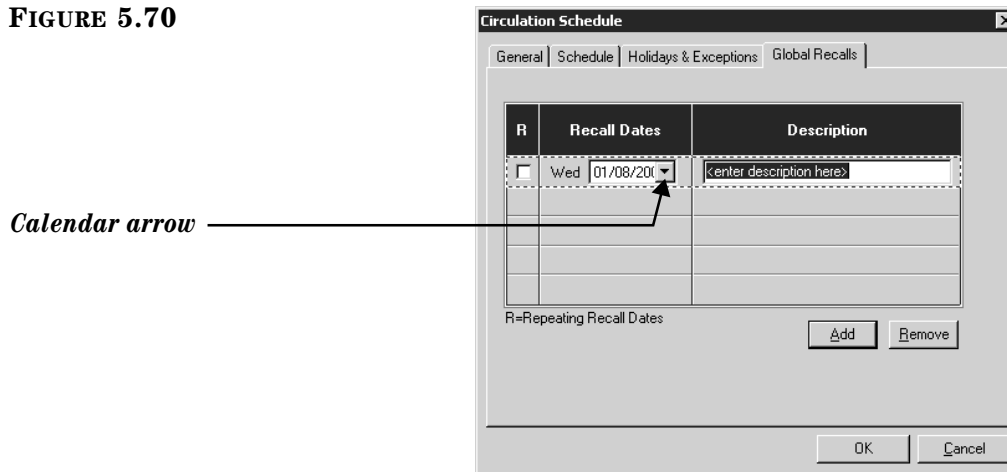


1. In the **Holidays & Exceptions** tab, click **Add**. This activates a line.
2. In this line, enter information for the exception date as follows:
 - A. Select the **R** check box if this exception date should repeat every year. This would be appropriate for holidays that always occur on the same date each year, such as New Year's Day.
 - B. In the date box under **Date & Status**, enter the exception date. To do so, select the date, then type the new date using MM/DD/YY format. Or, click the **Calendar** arrow (shown in Figure 5.69) to display a calendar. Click the calendar's left (<) and right (>) arrows to select a month, then click the desired date. The date appears in the box.
 - C. In the box beside the date box, click **Open** or **Closed** to indicate whether the library is open or closed on the date entered in step B.
 - D. If you clicked **Open** in step C, enter the **Start Time** and **End Time** for this exception day. Follow the procedure in step 4 page 5-51. If you clicked **Closed** in step C, no times can be entered.
 - E. In the **Description** box, type any information necessary to clarify this exception date.
3. To enter more dates, click **Add** and repeat step 2.
4. When finished, click **OK**.

Global Recalls Tab

In this tab (Figure 5.70), specify the date all items have to be back in the library, such as the end of a school term or an inventory date.

FIGURE 5.70



1. In the **Global Recalls** tab, click **Add**. This activates a line.
2. In this line, enter information for the closing date as follows:
 - A. Select the **R** check box if this closing date should repeat every year.
 - B. Under **Recall Dates**, enter the closing date. To do so, select the date, then type the new date using MM/DD/YY format. Or, click the **Calendar** arrow (shown in Figure 5.70) to display a calendar. Click the calendar's left (<) and right (>) arrows to select a month, then click the desired date. The date appears in the box.
 - C. In the **Description** box, type any text necessary to clarify this closing date.
3. To enter more dates, click **Add** and repeat step 2.
4. When finished, click **OK**.
5. If you want to add another circulation period (such as a "summer hours" schedule), repeat the procedures for the **Schedule**, **Holidays & Exceptions**, and **Global Recalls** tabs beginning with "Schedule Tab" on page 5-50.

Temporarily Backdating the Library System Calendar

Occasionally, the circulation desk needs to backdate the system calendar to process a return. This is standard practice for libraries with evening bookdrops.

There are two ways to backdate the system calendar; one is through the menu bar, and the other is through a right-click procedure.

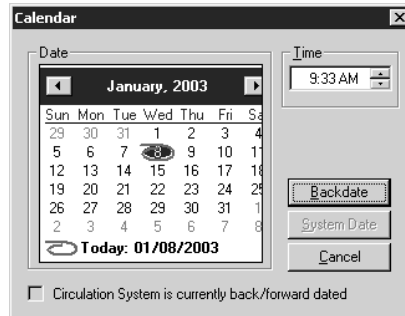
To backdate the system calendar:

1. On the toolbar, click **Return**.
2. On the **Tools** menu, click **Backdate**. This displays the Calendar dialog box with today's system date highlighted (Figure 5.71).

OR

In the Circulation window, right-click today's system date on the status bar. This displays the Calendar dialog box with today's system date highlighted (Figure 5.71).

FIGURE 5.71



3. Click the desired earlier day. If you need to select a day in the previous month, click the left (<) arrow to select a month, then click the desired day.
4. Click **Backdate**. The system date on the Circulation window status bar changes to the earlier date you selected.
5. Enter all the item barcodes that you want to return based on this revised system date.
6. To return the system to today's date:
 - On the **Tools** menu, click **Backdate**. When the calendar displays, click **System Date**.

OR

 - In the Circulation window, right-click the system date on the status bar. In the Calendar dialog box, click **System Date**.

OR

 - Click a different transaction mode on the toolbar.

Temporarily Changing the Loan Expiration Date

Occasionally, the circulation desk needs to make the default loan period shorter or longer. For example, the default loan period may be too short for someone traveling out of town, or too long when you know the item will soon be needed for a special project.

After this change date transaction is completed, the date automatically returns to the default loan expiration date.

To change the loan expiration date:

1. On the toolbar, click **Loan**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the barcode).
3. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the barcode). If multiple items are involved, enter the barcode for each item. This processes the loan transactions based on the default loan period. The items on loan appear in the Transactions pane. You now need to revise the expiration date.

4. In the Transactions pane, select the check box or boxes corresponding to the items you just loaned. Right-click an item to display a transaction menu.
5. Click **Change Date**. This displays a calendar.
6. Click the desired expiration date. If you need to select a day in the next month, click the right (>) arrow to select a month, and then click the expiration date.
7. Click **OK**. The revised expiration date appears in the Transactions pane.

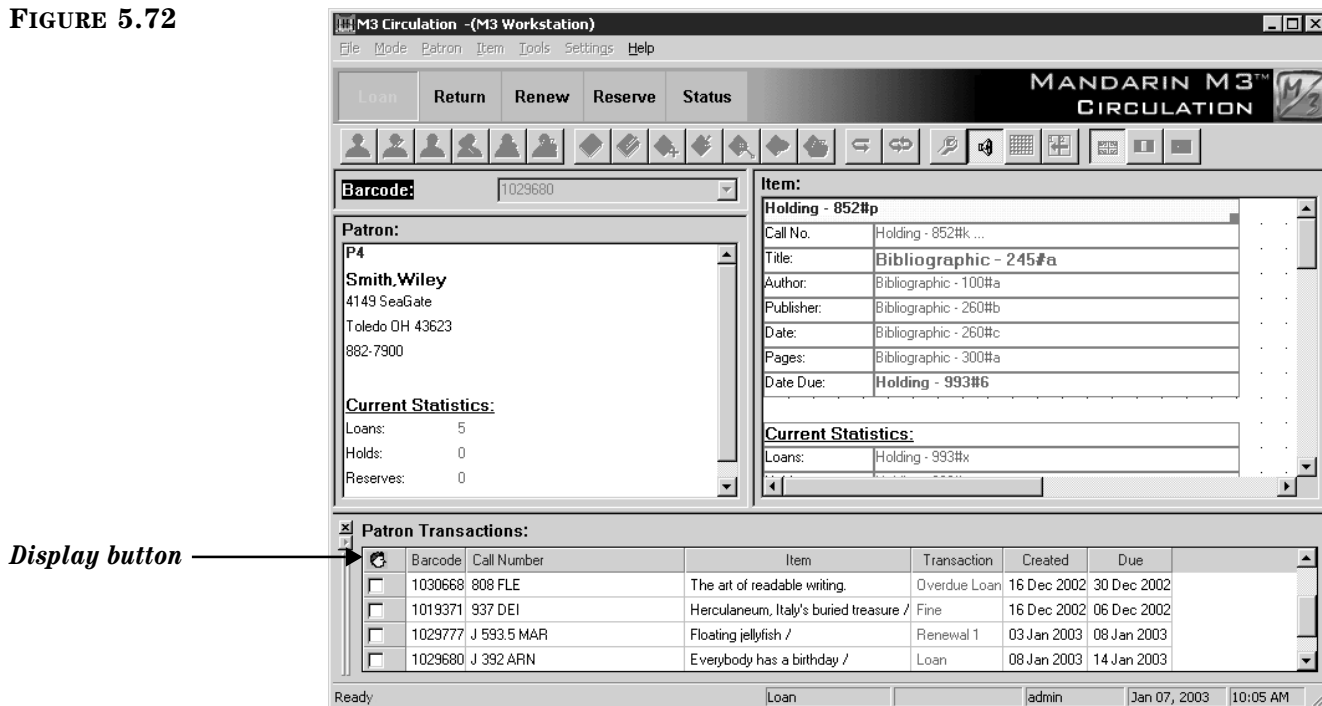
USING THE TRANSACTIONS REPORTS UTILITY

M3 Circulation provides transaction reports to monitor your library status and activity. These reports are discussed in the following section, “Viewing, Sorting, and Printing Circ Reports.” (More system reports are available through the report generator; see page 7-1.)

Viewing, Sorting, and Printing Circ Reports

1. On the **Mode** menu, click **Library Transactions**. This displays a listing of all transactions in the Transactions pane except returns for the current circulation period (as defined in your system’s Schedule tab; see “Schedule Tab” on page 5-50).

FIGURE 5.72



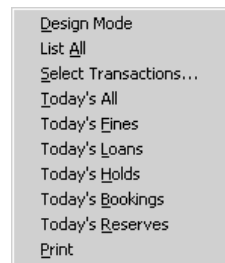
Note: To view transactions for your equipment database, you must switch to that database. See “Selecting a Circulation Database” on page 5-9.

2. From here, your options are:
 - To view the patron and/or item information related to one of the listed transactions, double-click the transaction in the Transactions pane. This displays any relevant patron or item information in the two upper panes.

To return to the full transaction list, click **List All** on the command menu.

- To switch the view in the Transactions pane between all transactions, patron transactions, and item transactions, double-click a transaction in the Transactions pane. Then click the **Display** button (shown in Figure 5.72) until the desired transaction type displays. A “head” icon on the Display button represents patron transactions; a “book spine” icon represents item transactions; and no icon represents all transactions.
- To limit the displayed transactions to today’s data, right-click in the Transactions pane. This opens a command menu (Figure 5.73) with sorting and other commands. Click the sort option that suits your needs: **Today’s All**, **Today’s Fines**, **Today’s Loans**, **Today’s Holds**, **Today’s Bookings**, or **Today’s Reserves**.

FIGURE 5.73

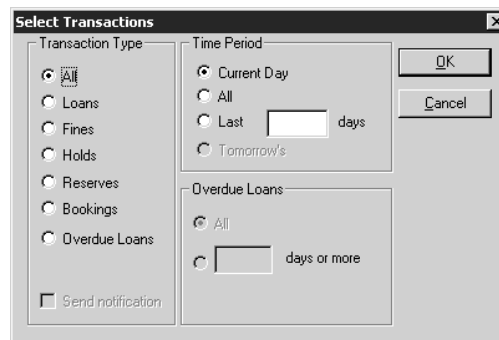


To return to the full transaction list, click **List All** on the command menu.

- To sort transactions by transaction type or a time period, click **Select Transactions** on the command menu (Figure 5.73). In the Select Transactions dialog box (Figure 5.74), click a transaction type and a time period, and then click **OK**.

FIGURE 5.74

To send e-mail notifications to patrons with fines or overdue items, see “Sending E-mail Notifications for Fines and Overdue Items” on page 5-18.



- To print the transactions listed in the Transactions pane, click **Print** on the command menu (Figure 5.73). If a Print dialog box displays, change the settings if desired, and then click **OK**.
- To configure which information displays and how it displays in the Transactions pane while in the Library Transactions mode, click **Design Mode** on the command menu (Figure 5.73). This procedure is explained in “Modifying the Transactions Pane for Library Transactions” on page 5-66.

USING A TRICODER TO CONDUCT TRANSACTIONS

Note: The following instructions describe the scanning procedure using a Worth Data TriCoder™. If you are using a different type of scanner, your procedure may differ.

You may want to conduct transactions using a portable scanning device such as a TriCoder. This is useful when your main M3 Circulation system is not available, such as while working from a bookmobile.

This procedure includes scanning the patron and/or item barcodes using the TriCoder, then uploading them into Circulation. You can scan and upload barcodes for only one transaction mode at a time (unless you use the Transaction Barcodes sheet; see “Using the Transaction Barcodes Sheet” on page 5-57).

Scanning Barcodes

1. On the TriCoder, press **ON**, then press any key.
2. At the data collection prompt, press **YES**.
3. At the program number prompt, press **0**.
4. Scan the patron and/or item barcodes.
 - If you are conducting a loan or reserve transaction, scan the patron barcode and then scan the item barcodes. Repeat for each transaction you are conducting.
 - If you are conducting a return or renew transaction, scan the item barcodes only.
5. Press **END**. You are now ready to upload the data into Circulation.

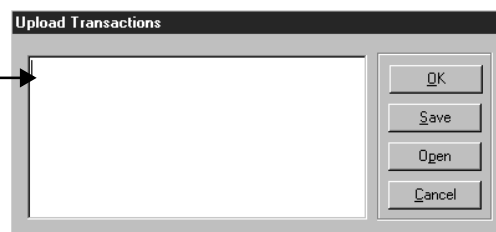
Note: You can also type the patron and/or item barcodes into the TriCoder; be sure to press **ENTER** on the TriCoder between each barcode.

Uploading Data

1. Connect the TriCoder to your Circulation workstation.
2. In Circulation, click the toolbar button corresponding to the type of transaction you are conducting (**Loan**, **Return**, **Renew**, or **Reserve**).
3. On the **Tools** menu, click **Upload Transactions**. This displays the Upload Transactions dialog box (Figure 5.75).

FIGURE 5.75

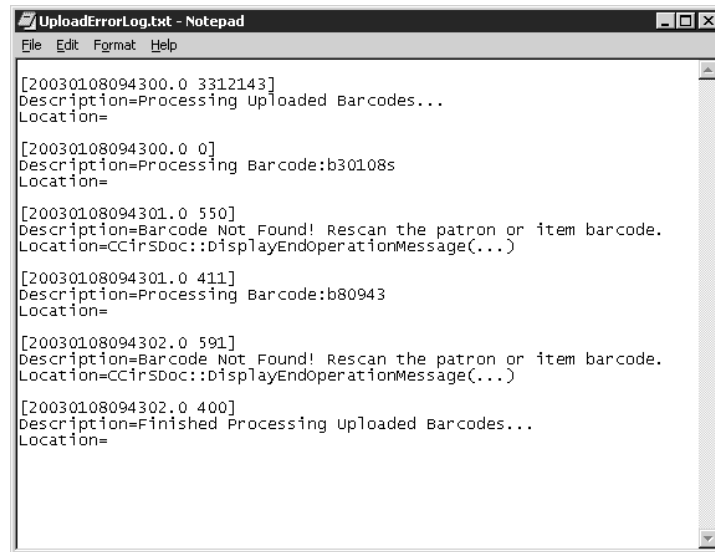
Text box



4. Click in the text box.
5. On the TriCoder, press **NO** at the data collection prompt, then press **YES** at the data upload prompt.
6. The barcodes display in the Upload Transactions dialog box. Click **OK** to upload the transactions to the database.
7. When the upload process is complete, a message displays confirming a successful upload or alerting you to errors that occurred during the upload procedure.

NOTE: If an error message displays, click **View Upload Log** on the **Help** menu. This displays a log identifying the errors (as shown in the example in Figure 5.76).

FIGURE 5.76



Using the Transaction Barcodes Sheet

Included with your M3 documentation is a laminated sheet titled *Transaction Barcodes*. You can use this barcode sheet to conduct transactions using a Tri-Coder.

1. Follow steps 1 through 3 in “Scanning Barcodes” on page 5-56.
2. Scan the desired transaction mode barcode on the Transaction Barcodes sheet (**Loan Mode**, **Return Mode**, and so on).
3. Scan the patron and/or item barcodes.
 - If you are conducting a loan or reserve transaction, scan the patron barcode and then scan the item barcodes. Repeat for each transaction you are conducting in the current mode.
 - If you are conducting a return or renew transaction, scan the item barcodes only.
4. Repeat steps 2 and 3 as desired.
5. Press **END**.
6. Connect the TriCoder to your Circulation workstation.
7. In Circulation, click any toolbar button.
8. Upload the data into Circulation. To do so, follow steps 3 through 7 in “Uploading Data” on page 5-56.

MODIFYING CIRCULATION WINDOW DISPLAYS

Note: If M3 v1.6 was your first installation of M3, graphic cells appear by default in the Patron and Item panes for all modes.

You can modify the MARC fields and font characteristics that display in the Circulation window. You can also configure different displays for each transaction mode (Loan, Return, Renew, Reserve, and Status) in each pane (Patron, Item, Transactions). M3 Circulation includes default settings for all of these situations, but you can reconfigure as appropriate for your library.

Modifying the Patron Pane Display

1. Click the toolbar button corresponding to the transaction mode to be modified (**Loan**, **Return**, **Renew**, **Reserve**, or **Status**). Changes made to one mode will not apply to the other modes; you must modify each mode individually.
2. Right-click in the Patron pane. This opens a command menu (Figure 5.9).
3. Click **Design Mode**. This changes the Patron pane to the Design mode, with information displaying in data cells (Figure 5.77).

Tip: Create a dummy patron record to use during administrative tasks such as display modifications.

FIGURE 5.77

Tip: If a grid does not display in the Patron pane, right-click in the pane, then click **Show Grid**.

Database field cell

Label cell

The screenshot shows the M3 Circulation (M3 Workstation) window. The top menu bar includes File, Mode, Patron, Item, Tools, Settings, and Help. The main window has tabs for Loan, Return, Renew, Reserve, and Status. The Patron pane is active and displays a grid of database field cells and label cells. The Item pane shows details for item 1029680. The Patron Transactions pane shows a list of transactions.

Barcode	Call Number	Item	Transaction	Created	Due
1030668	808 FLE	The art of readable writing.	Overdue Loan	16 Dec 2002	30 Dec 2002
1019371	937 DEI	Herculaneum, Italy's buried treasure /	Fine	16 Dec 2002	06 Dec 2002
1029777	J 593.5 MAR	Floating jellyfish /	Renewal 1	03 Jan 2003	08 Jan 2003
1029680	J 392 ARN	Everybody has a birthday /	Loan	08 Jan 2003	14 Jan 2003

4. To create a new cell, click where you want the cell in the Patron pane, then drag to the desired size. This displays the New Cell dialog box (Figure 5.78).

FIGURE 5.78

The New Cell dialog box is shown. It has three radio buttons: Label (text), Database Field(s), and Graphic (picture). The Label (text) option is selected. There are OK and Cancel buttons.

Note: If M3 v1.6 was your first installation of M3, graphic cells appear by default in the Patron and Item panes for all modes.

FIGURE 5.79

Tips:

- When selected, a cell appears with a yellow background.
- To resize a cell, drag the box in the lower right corner of the cell to the desired size.
- To move a cell, drag it to the desired location. If it is part of a group of cells (displaying in blue), this moves the entire group.

Tip: You can also double-click a cell to display the Properties dialog box.

Tip: You can create a group of cells by pressing CTRL and dragging the mouse to select the desired cells. Cells in a group appear outlined in blue. Groups allow you to cut, copy, paste, delete, and align multiple cells. You can ungroup a group of cells by clicking outside of the group.

5. Click the type of cell you want to create, then click **OK**.
6. To modify cells, right-click a cell or group of cells. This opens a command menu (Figure 5.79).



Several of the options in this menu are explained here:

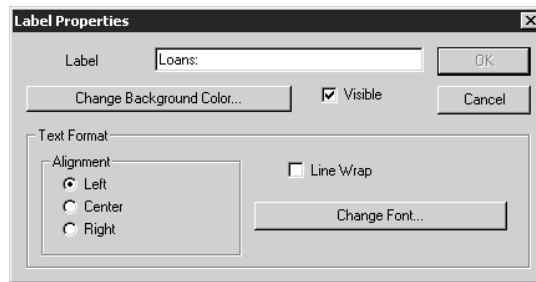
- **Properties** – Depending on the type of cell you select (label cell, database field cell, or graphic cell), a Properties dialog box appears. See the following three sections, “Modifying a Label (Text) Cell,” “Modifying a Database Field Cell,” and “Modifying a Graphic Cell” for instructions on modifying each cell type.
- **Send To Front** and **Send To Back** – If cells are overlapping, select a cell and click one of these options to send the cell to the front or back of the overlapping cells.
- **Select All** – Creates a group of all cells, including any cells that are out of view. Use the scroll bar to view all cells.
- **Cut Cell** and **Cut Group** – Deletes the cells from the display and stores it on the clipboard.
- **Copy Group** – If you use this option to copy a group, then click **Paste**, the new group is pasted on top of the original group. You can then drag the new cells to a new location.
- **Paste** – Pastes the last cut or copy operation. To paste multiple cells, create a group, click **Copy Group**, and then click **Paste**.
- **Move Left to Grid** – Aligns the selected cell with the grid line to the left of the cell.
- **Move Up to Grid** – Aligns the selected cell with the grid line directly above the cell.
- **Align Group Vertically** – Vertically aligns the group with the selected cell.

- ***Align Group Horizontally*** – Horizontally aligns the group with the selected cell.
7. When finished modifying the display, right-click in the Patron pane. In the command menu, click **Save**.
 8. Right-click again in the Patron pane. In the command menu, click **Exit Design Mode**. This exits the Design mode.

Modifying a Label (Text) Cell

To make changes in the Label Properties dialog box (Figure 5.80):

FIGURE 5.80



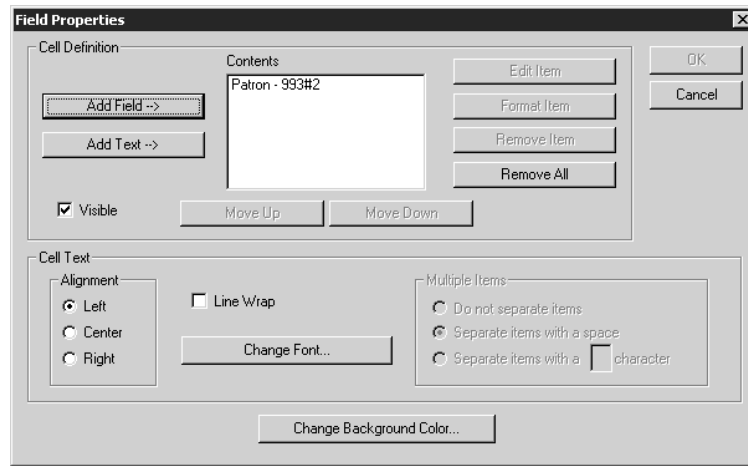
1. In the **Label** box, type any new text you want to display in the cell.
2. To change the background color of the cell, click **Change Background Color**. This displays the Color dialog box. Choose a color, then click **OK**.
3. To make the cell and its contents invisible in Display mode, clear the **Visible** check box.
4. Under **Alignment**, select the desired text alignment.
5. If you want the text to wrap to the next line if it is too long to display in the cell, select the **Line Wrap** check box. NOTE: You may need to increase the height of the cell to make the wrapped text visible.
6. To change the font, click **Change Font**. This displays the Font dialog box. Change settings as desired, then click **OK**.
7. When finished, click **OK**.

Modifying a Database Field Cell

To make changes in the Field Properties dialog box (Figure 5.81):

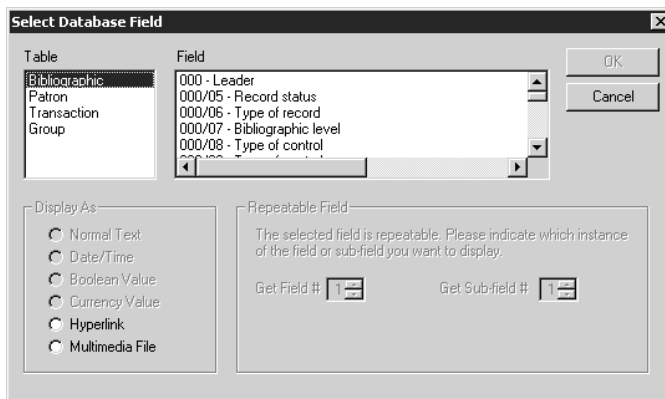
FIGURE 5.81

The **Contents** box displays items in the order they appear in the cell. To change the order, select an item and click **Move Up** or **Move Down**.



1. To add a field to a cell, click **Add Field**. This displays the Select Database Field dialog box (Figure 5.82).

FIGURE 5.82



2. To make changes in this dialog box:
 - A. In the **Table** list, select the table containing the data you want to display.
 - B. In the **Field** list, select the record field you want to display.
 - C. Under **Display As**, select the format in which you want the field to display.
 - D. If the field is repeatable, select an option under **Repeatable Field**.
 - E. When finished, click **OK**. This returns you to the Field Properties dialog box (Figure 5.81).
3. To add text to the cell, click **Add Text**. This displays the Add Text dialog box. Type the text you want to display, then click **OK**.
4. To make the cell and its contents invisible in Display mode, clear the **Visible** check box.

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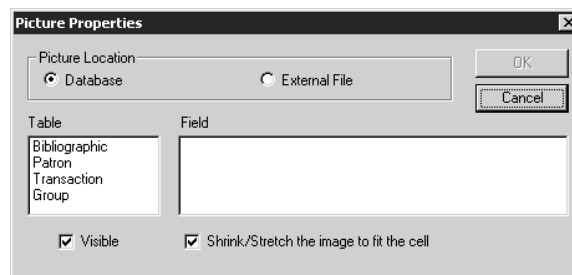
Tip: You can also double-click the item to display the Select Database Field dialog box.

5. To edit an item, select the item in the **Contents** box, then click **Edit Item**. This displays the Select Database Field dialog box (Figure 5.82). To make changes, follow the procedure explained in step 2.
6. To format an item, select the item in the **Contents** box, then click **Format Item**. This displays a Format dialog box corresponding to the format you selected in step 2C. Make changes as desired, then click **OK**.
7. To remove an item from the cell:
 - To remove one item, select the item in the **Contents** box, then click **Remove Item**. This removes the item.
 - To remove all items, click **Remove All**. This removes all items and places an “Undefined Field” entry in the cell.
8. Under **Alignment**, select the desired text alignment.
9. To make the text wrap to the next line if it is too long to display in the cell, select the **Line Wrap** check box.
10. To change the font, click **Change Font**. This displays the Font dialog box. Change settings as desired, then click **OK**.
11. Under **Multiple Items**, indicate how you want to separate multiple items in this cell.
12. To change the background color of the cell, click **Change Background Color**. This displays the Color dialog box. Select a color, then click **OK**.
13. When finished, click **OK**.

Modifying a Graphic Cell

To make changes in the Picture Properties dialog box (Figure 5.83):

FIGURE 5.83

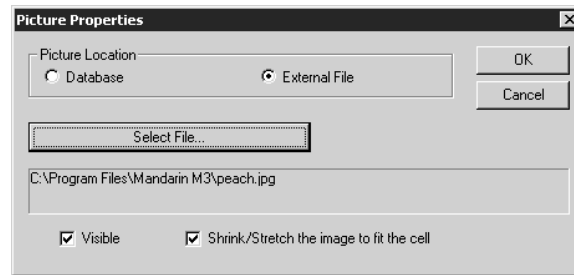


Tips:

- To import pictures into your M3 database, see “Using M3 Picture Manager” on page 4-50.
- To add a picture field to a record, see “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-37.

1. Under **Picture Location**, click **Database** or **External File**.
 - If you choose **Database**, select the table containing the data you want to display in the **Table** list, then select the field you want to display in the **Field** list.
 - If you choose **External File**, click **Select File**. This displays the Open dialog box. Navigate to the location of the file you want to open, then click **Open**. This displays the path and file name in the Picture Properties dialog box, as shown in Figure 5.84.

FIGURE 5.84



2. To make the image invisible in Display mode, clear the **Visible** check box.
3. If you want the image to fit the dimensions of the cell, select the **Shrink/Stretch the image to fit the cell** check box. NOTE: If the image is larger than the cell and you do not select this check box, only a portion of the image will appear in the cell.
4. When finished, click OK.

Modifying the Item Pane Display

1. Click the toolbar button corresponding to the transaction mode to be modified (**Loan**, **Return**, **Renew**, **Reserve**, or **Status**). Changes made to one mode will not apply to the other modes; you must modify each mode individually.
2. Right-click in the Item pane. This opens a command menu (Figure 5.9).
3. Click **Design Mode**. This changes the Item pane to the Design mode, with data displaying in cells (Figure 5.85).

***Tip:** Create a dummy item record to use during administrative tasks such as display modifications.*

FIGURE 5.85

***Tip:** If a grid does not display in the Item pane, right-click in the pane, then click **Show Grid**.*

Label cell

Database field cell

Barcode	Call Number	Item	Transaction	Created	Due
1030668	808 FLE	The art of readable writing.	Overdue Loan	16 Dec 2002	30 Dec 2002
1019371	937 DEI	Herculaneum, Italy's buried treasure /	Fine	16 Dec 2002	06 Dec 2002
1029777	J 593.5 MAR	Floating jellyfish /	Renewal 1	03 Jan 2003	08 Jan 2003
1029680	J 392 ARN	Everybody has a birthday /	Loan	08 Jan 2003	14 Jan 2003

- Follow steps 4 through 8 beginning on page 5-59 to modify the data displayed in the Item pane, substituting the word “item” for “patron” in the procedure.

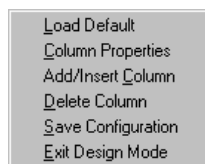
Modifying the Transactions Pane Display

There are three Transactions pane displays: Patron, Item, and Library Transactions. Each has a different display configuration. This section explains how to modify the Patron and Item displays for the Transactions pane. To modify the Library Transactions display, see “Modifying the Transactions Pane for Library Transactions” on page 5-66.

To modify the Patron or Item displays for the Transactions pane:

- Click the toolbar button corresponding to the transaction mode to be modified (**Loan**, **Return**, **Renew**, **Reserve**, or **Status**).
- In the **Barcode** box, type the patron (or item) barcode, and then press ENTER (or scan the barcode).
- Right-click in the Transactions pane. This opens a command menu (Figure 5.10).
- Click **Design Mode**. This changes the Transactions pane to the Design mode and clears the pane.
- In the Transactions pane, right-click the column heading of the column you want to edit. This opens a command menu (Figure 5.86).

FIGURE 5.86



- If you want to delete the column or insert a new column, click the appropriate command.

OR

If you want to revert to the default settings for the Transactions pane, click **Load Default**.

OR

If you want to edit the properties of the selected column, click **Column Properties**. This displays the Column Properties dialog box (Figure 5.87).

Tip: You can also double-click the column heading to open the Column Properties dialog box.

FIGURE 5.87

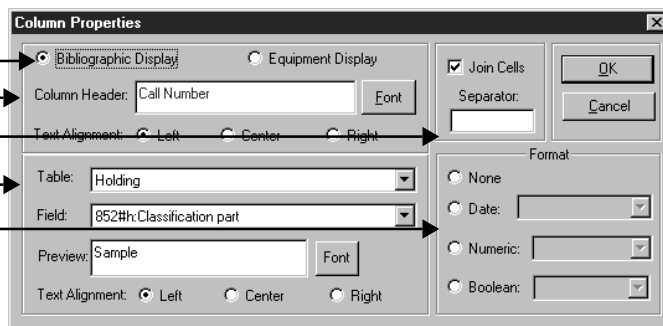
Display options

Header options

Join options

Data options

Format options



Edit the column properties as desired:

- **Display options** – Each column has different display properties for bibliographic items and equipment items. Bibliographic display settings apply when the transaction involves a bibliographic item, and equipment display settings apply when the transaction involves an equipment item. Therefore, you may want to click **Bibliographic Display** and select the settings used for bibliographic items, then click **Equipment Display** and select the settings used for equipment items.
 - **Header options** – To establish display properties for the column header:
 - A. In the **Column Header** box, type the column heading text.
 - B. To change the font properties for the column data, click **Font**. This displays the Font dialog box. Modify the font properties as desired, then click **OK**.
 - C. Click a **Text Alignment** option to establish the text justification for the column header.
 - **Join options** – If the information in this cell should be joined with the information displayed in the cell to the right (the information is combined and displays in the left cell):
 - A. Select the **Join Cells** check box.
 - B. In the **Separator** box, type a space, comma, or any other text to separate the content of the two cells.
 - **Data options** – To set up the data that displays in this column:
 - A. In the **Table** list, select the table containing the data you want to display.
 - B. In the **Field** list, select the record field you want to display.
 - C. To change the font properties for the column data (as shown in the sample text in the **Preview** box), click **Font**. This displays the Font dialog box. Modify the font properties as desired, then click **OK**.
 - D. Click a **Text Alignment** option to establish the text justification for data in the column.
 - **Format options** – If the column data requires a consistent format, click an option (**Date**, **Numeric**, **Boolean**), and then click the desired format in the corresponding list.
7. When finished editing entries for this column, click **OK**.
 8. Repeat steps 5 through 7 for each column you want to modify in the Transactions pane.
 9. When finished, right-click in the Transactions pane. In the command menu (Figure 5.86), click **Save Configuration**. (Or, to revert to the default settings for the Transactions pane, click **Load Default**.)
 10. Repeat steps 1 through 9 for each transaction mode you want to modify in the Transactions pane.

11. When finished, right-click in the Transactions pane. In the command menu (Figure 5.86), click **Exit Design Mode**. This exits the Design mode.

Modifying the Transactions Pane for Library Transactions

To modify the Library Transactions display for the Transactions pane:

1. On the **Mode** menu, click **Library Transactions**.
2. Right-click in the Transactions pane. This opens a command menu (Figure 5.73).
3. Click **Design Mode**. This changes the Transactions pane to the Design mode and clears the pane.
4. Follow the procedure in steps 5 through 11 beginning on page 5-64.

USING THE M3 WINDOWS OPAC

6

CHAPTER CONTENTS

This chapter provides instructions for searching your library's databases and working with the search results. It describes:

- How to select an interface language (page 6-4)
- How to select databases and database types to search (page 6-4)
- How to conduct a Standard, Enhanced, and Visual Catalog search of your library's holdings (page 6-7)
- How to review your search session history and return to prior searches (page 6-13)
- How to work with search results in brief and expanded record formats (page 6-17)
- How to determine item availability (page 6-19) and location (page 6-21)
- How to add records to the Bookbag (page 6-23)
- How to print (page 6-19) and save records (page 6-20)
- How to use Shelf Browse (page 6-22)
- How to use the My Account tab (page 6-25)
- How to use the Reset feature to reset defaults and clear the search history (page 6-28)
- How to use the Bulletin Board (page 6-28)
- How to modify the OPAC header (page 6-29)
- How to display cover images (page 6-30)
- How to customize the Visual Catalog interface using Configuration Mode (page 6-31)

ABOUT THE M3 OPAC

The M3 Online Public Access Catalog (OPAC) is a flexible, multilingual search interface that enables the patron to search for records using three different search methods. The patron can then work with the search results in a variety of brief and expanded record formats.

The three available search methods are:

- **Standard Search** – A basic keyword search method that recognizes Boolean logic, truncation, and phrase searches, and allows index browsing.

- **Enhanced Search** – A more advanced search method that offers search flexibility and options. Patrons can enter simple or complex keyword search queries, and use index browsing.
- **Visual Catalog Search** – An easy point-and-click graphical search method. Patrons click colorful buttons to narrow their searches from broad topics to more defined sub-topics, ultimately reaching search results.

The following five features enhance the patron's search session.

- The **Bookbag** allows a patron to set aside selected records throughout the course of the search session for additional review or batch printing.
- The **Shelf Browse** function quickly locates records with a call number similar to that of a selected record. This is equivalent to looking at items to the left or right of a specific item on a library shelf.
- The **History** function keeps a cumulative list of Enhanced Search queries. A time-saving **AutoSearch** feature lets you select a search in the list and return to that search by clicking a button. To ensure privacy, a patron can clear this cumulative list at any time.
- The **Reset** feature deletes all information stored in the History, and returns all OPAC settings to their default positions.
- The **Bulletin Board** links to either a local HTML file or a World Wide Web address that your library wants patrons to view.

Displaying the M3 OPAC

To display the M3 OPAC correctly, set the resolution on your monitor to 800x600 or higher. If necessary, refer to your Windows documentation for detailed instructions.

STARTING THE M3 OPAC

To start the M3 OPAC module:

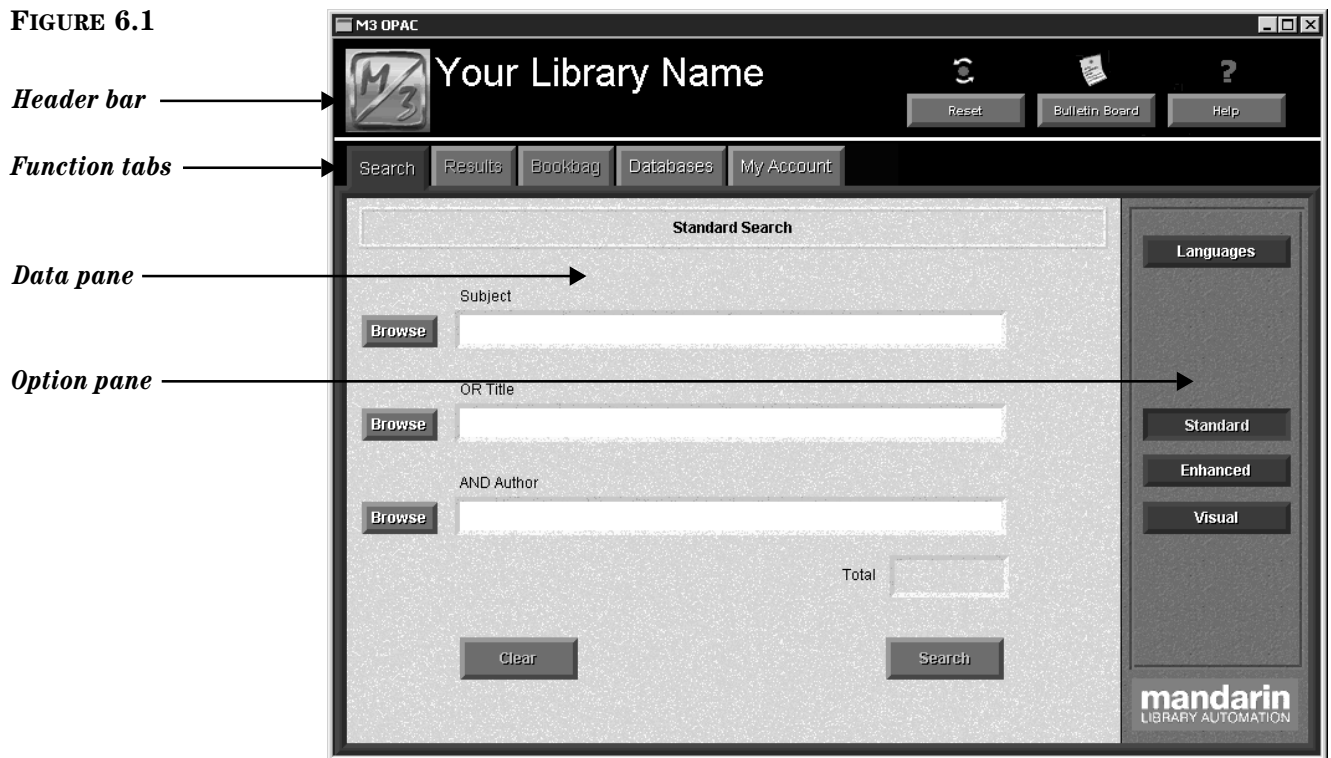
***Note:** If you installed M3 v1.1 prior to installing v1.6, select **SIRS Mandarin** and then **M3** (instead of **Mandarin M3**).*

On the taskbar, click the **Start** button, select **Programs**, select **Mandarin M3**, and then click **OPAC**. This displays the main M3 OPAC window (Figure 6.1).

OPAC WINDOW FEATURES

The default M3 OPAC window is shown in Figure 6.1. The main window consists of four distinct areas.

FIGURE 6.1



- **Header bar** – This area contains the Reset, Bulletin Board, and Help buttons. The header can be configured to display your library's logo. For instructions, see "Modifying the OPAC Header" on page 6-29.
- **Function tabs** – Five tabs allow you to move between different OPAC functions: Search, Results, Bookbag, Databases, and My Account. Each tab is subdivided into two sections: a data pane on the left and an option pane on the right.
 - Search tab (shown in Figure 6.1) – Select a search method and perform a search.
 - Results tab – View and work with search results in brief and expanded record formats.
 - Bookbag tab – View and work with records added to the Bookbag.
 - Databases tab – Select the database type and databases to be searched.
 - My Account tab (optional) – View personal information and transaction history.
- **Data pane** – Within each tab, this area displays information related to the selected tab.

- **Option pane** – Within each tab, this area contains the option buttons appropriate for the information displayed in the data pane. Each tab includes a different set of option buttons.

SELECTING AN INTERFACE LANGUAGE

The M3 OPAC allows patrons to select a language for the interface. Changing the interface language affects screen elements such as names of windows, buttons, and text boxes; it does not change the language of the information in the database.

To select a different interface language:

1. On the **Search** tab, click **Languages**. This displays the Languages dialog box (Figure 6.2).

FIGURE 6.2



2. Select the interface language, then click **OK**. This changes the interface language.

SELECTING A DATABASE TO SEARCH

Overview

Before beginning a search, you should always verify you are connected to the appropriate database type and databases.

Two database types are predefined in the M3 OPAC. Your system administrator can add, modify, and delete database types to suit your institution's needs. The two predefined database types are:

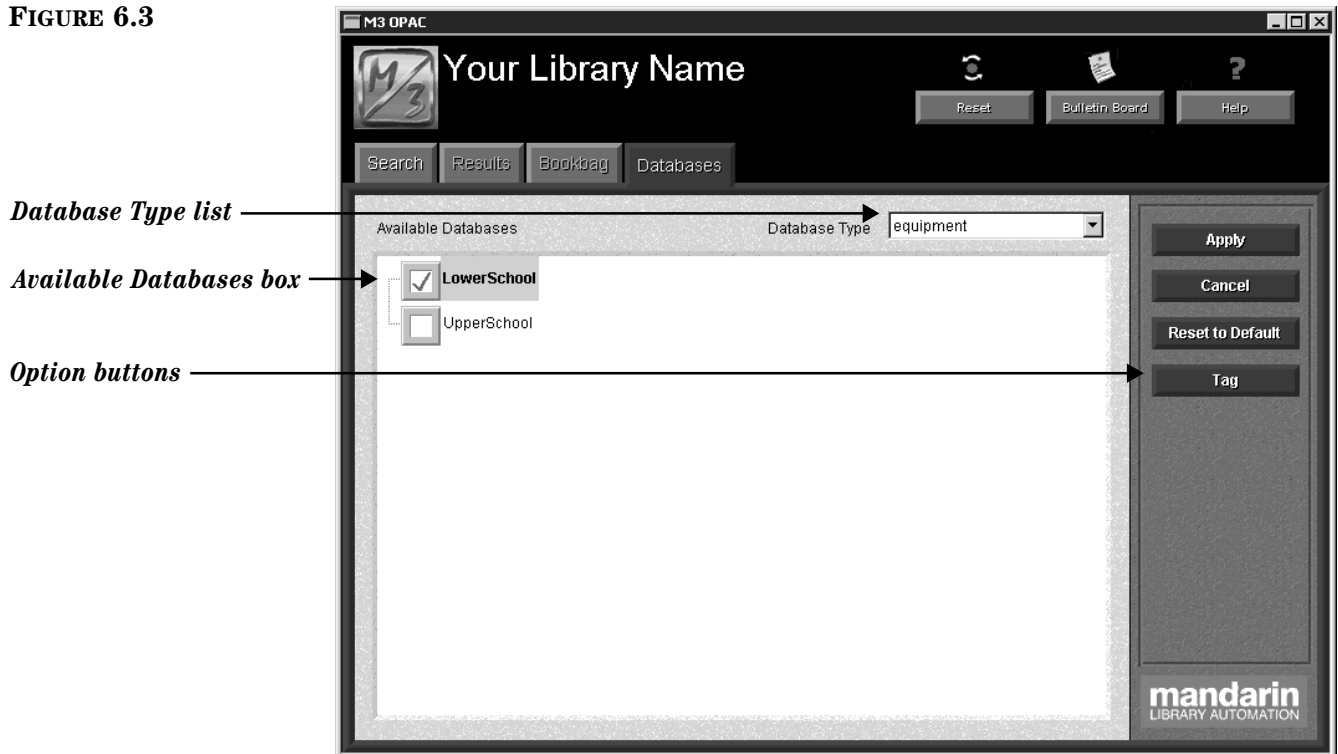
- **Standard** – Intended for standard catalog databases. The field labels and tag structure conform to USMARC standards, as defined by the Library of Congress.
- **Equipment** – Applicable for databases that contain equipment. Field labels and structure have been modified to correspond to the needs of equipment databases.

NOTE: The M3 system is specifically designed to manage MARC records. All record types (bibliographic, holdings, patrons, equipment, transaction, specialty databases) conform to a standard or customized MARC record structure.

Databases Tab Features

A sample Databases tab is shown in Figure 6.3.

FIGURE 6.3



- **Database Type list** – Lists the types of databases available to search. Each type has a different MARC field structure. By default, **standard** (appropriate for catalog databases) is selected.
- **Available Databases box** – Lists the databases available to search.
- **Option buttons** – The **Apply** and **Cancel** buttons allow the patron to apply or cancel any changes just made in the Databases tab. The other two buttons access menus with the following options listed:

Reset to Default options:

- **Revert To Application Defaults** – Changes all M3 OPAC settings back to their default positions, including default search indexes, formats, database selections in all database types, and so on.
- **Revert To [database] Defaults** – Changes all settings for the selected database type back to default positions.
- **Revert To Default Databases** – For the selected database type, reverts back to the default selection of databases.
- **Revert To Default Database Restrictions** – Not applicable unless searching a centralized (union) database.

Tag options:

- **Tag/Untag All Databases** – Tags or untags all databases within the selected database type.

*Tip: The **Tag** button is available only if you have more than one database to choose from.*

- **Tag/Untag Restrictions for [database]** – Not applicable unless searching a centralized (union) database.

Selecting a Database

Before sending a search query, verify that you are connected to the appropriate database type and databases. To do so:

1. Click the **Databases** tab. A sample Databases tab is shown in Figure 6.4.

FIGURE 6.4



2. If you are already connected to the correct database type and databases, click the **Search** tab and conduct your search as described in “Conducting a Standard Search” on page 6-7, “Conducting an Enhanced Search” on page 6-9, or “Conducting a Visual Catalog Search” on page 6-14.

OR

If you are not connected to the appropriate database type and databases:

- A. In the **Database Type** list, select the desired database type. **Standard** is appropriate for catalog databases; **equipment** is appropriate for equipment databases. (Your system administrator may have modified this list.)
- B. In the **Available Databases** box, select the check box by each database you want to search, and clear the check box by each database you do not want to search. (Many institutions only have one available database per database type.)
- C. Click **Apply**. This sends a connection query to each selected database.

NOTE: If you receive a warning message stating you deselected a database that still contains search results in the Results tab:

*Tip: When several databases are available, click **Tag** to access a shortcut menu.*

- Click **No** to go back and add any search results to the Bookbag.

OR

- Click **Yes** to connect to the selected databases. This sends connecting queries to the selected databases and deletes any search information in the Results tab. Any information stored in the Bookbag or History are not deleted.
- D. Click the **Search** tab and conduct your search query as explained in “Conducting a Standard Search” in the following section, “Conducting an Enhanced Search” on page 6-9, or “Conducting a Visual Catalog Search” on page 6-14.

CONDUCTING A STANDARD SEARCH

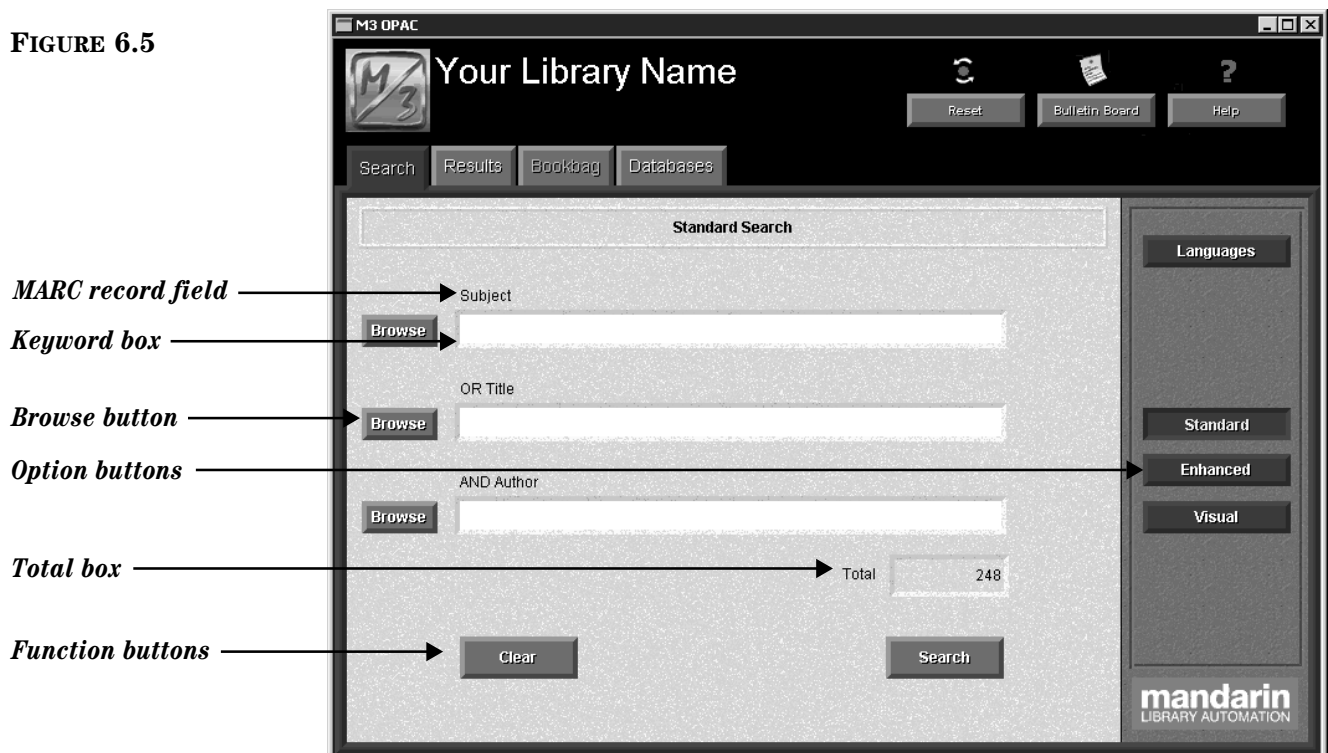
Tip: The three default MARC record fields are indexes of multiple fields rather than single fields. For simplicity, this Users Guide refers to all of them as fields. Entries conform to Z39.50 use attribute standards.

The Standard Search method suits basic search needs; patrons are limited to keyword searches within three specific MARC record fields. Boolean logic, truncation, and phrase searching are available to the patron, as well as index browsing.

Standard Search Window Features

The default Standard Search window is shown in Figure 6.5.

FIGURE 6.5



- MARC record fields** – Indicate the MARC record fields available for searching. (The default fields and the fields included in the lists can be reconfigured by your system administrator.)
- Keyword boxes** – Allow the patron to enter keywords to search the selected MARC record fields.

- **Browse buttons** – Display a list of all data currently contained in the selected MARC record field. This allows patrons to select a search term from existing data, particularly useful to those unsure of the search they want to enter. This search selection technique is known as Index Browse.
- **Option buttons** – The Languages button displays a list of available interface languages. The Standard, Enhanced, and Visual buttons select the search method to be used.
- **Total box** – Displays the number of records found matching the search query.
- **Function buttons** – The Clear and Search buttons perform the following functions:
 - Clear – Erases any keywords entered in the keyword boxes and any results listed in the Results tab.
 - Search – Submits the search query typed into the keyword boxes and, if matches are found, automatically proceeds to the Results tab.

How to Search

This procedure assumes that you have selected the database(s) you want to search (if you have more than one to choose from). For more information, see “Selecting a Database to Search” on page 6-4.

1. On the **Search** tab, click **Standard**. This displays the Standard Search window (Figure 6.5).
2. Type your search query into one or more of the three keyword boxes, as shown in Figure 6.5. Each box is labeled to indicate the MARC record field it searches. The two lower labels also indicate the Boolean operator applied to the box below. (The default MARC record fields and Boolean operators can be reconfigured by your system administrator.)

NOTE: You can also use the Index Browse technique to enter a search term. See “Using Index Browse in a Search Query” on page 6-12.

3. Click **Search**.

NOTE: If no matches are found, the Browse window displays (if enabled by your system administrator). This window lists the indexed entries for the selected field and takes you to the closest alphabetical match for your keywords. Double-click a listing to enter it into the keyword box in the search window, then click **Search** again.

TIP: To enable or disable the Browse window, modify the entry in the M3Opac.ini file (located in your M3 client directory) as follows:

To enable: **No_Result_Browse=1**

To disable: **No_Result_Browse=0**

4. The Search Results window displays the list of search results (Figure 6.6). See “Working with Search Results” on page 6-17 for more information on options within the Results tab.

Search Tips:

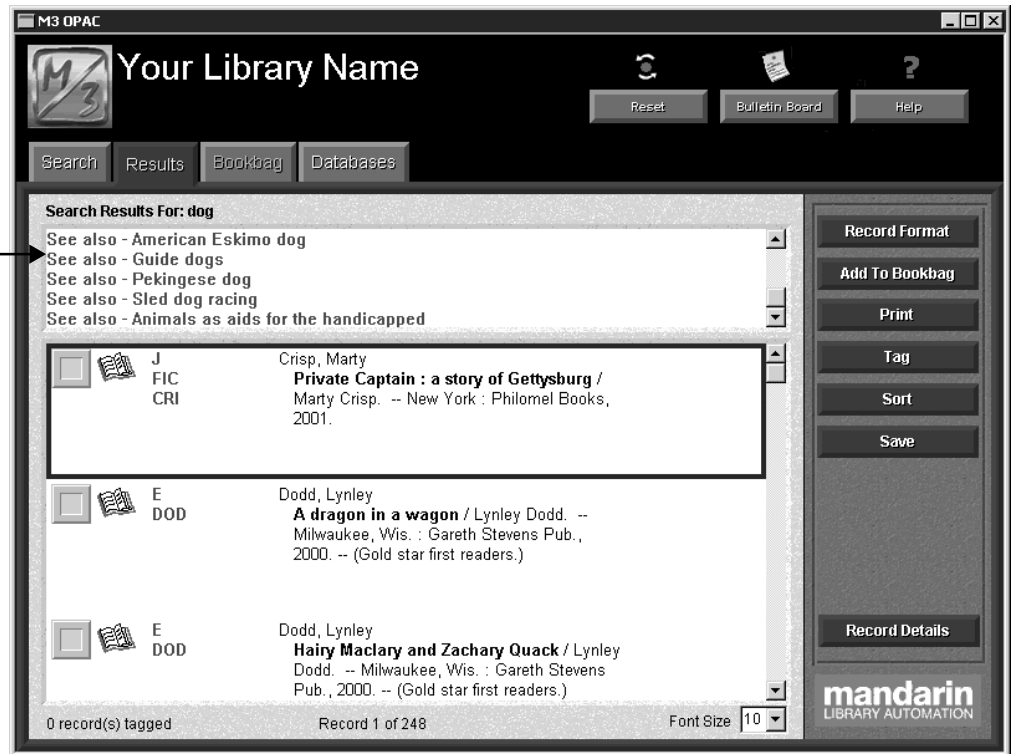
- You can apply the truncation asterisk (*) to the beginning and/or end of a keyword; the wildcard question mark (?) character within a keyword (wom?n); and quotation marks (“ ”) around a phrase.

- You can use the AND, OR, and NOT Boolean operators to connect keywords within a keyword box. Be sure to type operators in capital letters.

FIGURE 6.6

Cross-Reference box →

*Note: The **Cross-Reference** box displays only if you are using a version of M3 that supports Authority Control and the search term you entered is managed under Authority Control.*



CONDUCTING AN ENHANCED SEARCH

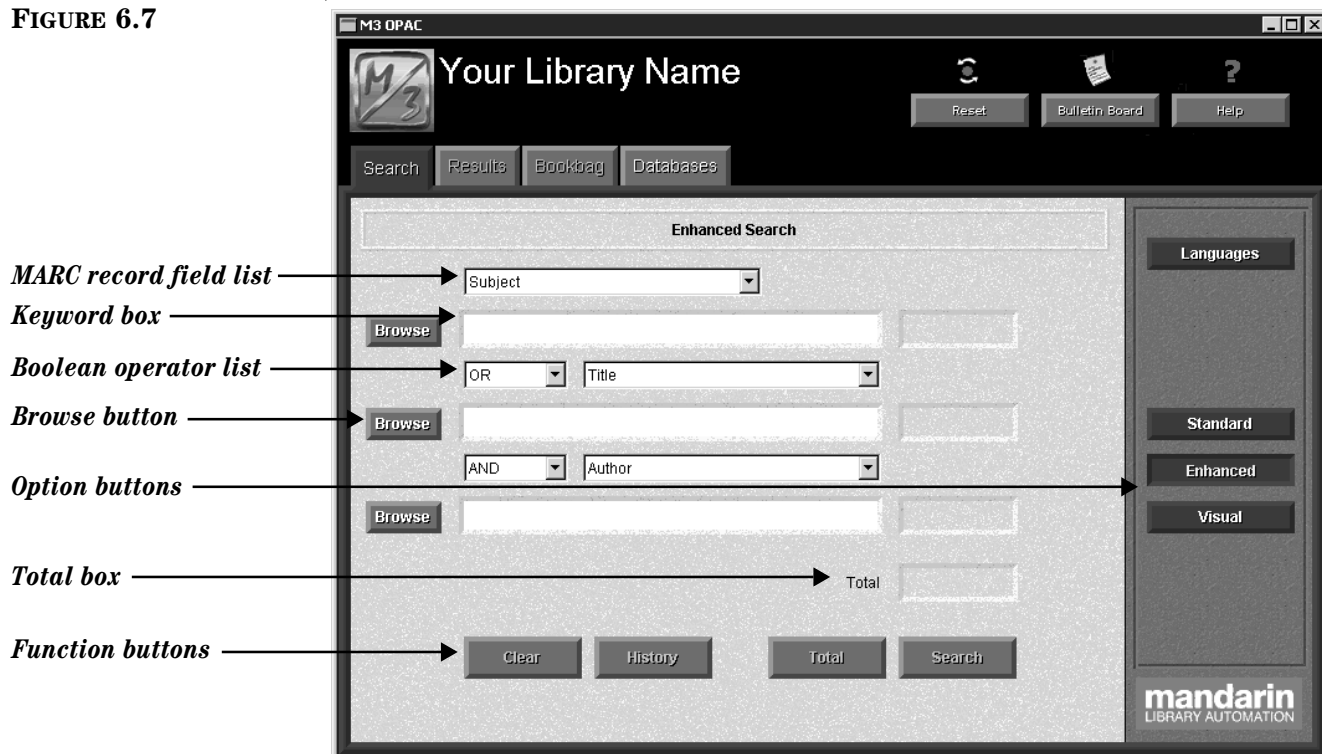
The Enhanced Search method provides search flexibility. Patrons can enter simple or complex keyword search queries, select the fields and Boolean operators for the search, and use index browsing.

Enhanced Search Window Features

The default Enhanced Search window is shown in Figure 6.7.

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FIGURE 6.7



Tip: Many entries in the MARC record field lists are indexes of multiple fields rather than single fields. For simplicity, this Users Guide refers to all of them as fields. Entries conform to Z39.50 use attribute standards.

- **MARC record field lists** – List the MARC record fields available for searching. (The default fields and the fields listed here can be reconfigured by your system administrator.)
- **Keyword boxes** – Allow the patron to enter keywords to search the selected MARC record fields.
- **Boolean operator lists** – List all Boolean operators available for patron use. Each Boolean operator list applies to the keywords in the keyword box below it. (The default operators and the operators included in the lists can be reconfigured by your system administrator.)
- **Browse buttons** – Display a list of all data currently contained in the selected MARC record field. This allows patrons to select a search term from existing data, particularly useful to those unsure of the search they want to enter. This search selection technique is known as Index Browse.
- **Option buttons** – The Languages button displays a list of available interface languages. The Standard, Enhanced, and Visual buttons select the search method to be used.
- **Total box** – Displays the number of records found matching the search query.
- **Function buttons** – The Clear, History, Total, and Search buttons perform the following functions:
 - **Clear** – Erases any keywords entered in the keyword boxes and any results listed in the Results tab.
 - **History** – Displays the History Selection dialog box (Figure 6.10), which lists all Enhanced Search queries submitted by the patron

during the current search session, along with the number of resulting records. The patron can use the History function as a shortcut to return to a previous search. For more information, see “Using the Search History” on page 6-13.

- **Total** – Submits the search query typed into the keyword boxes and displays the number of records found matching the search query in the Total box.
- **Search** – Submits the search query typed into the keyword boxes and, if matches are found, automatically proceeds to the Results tab.

How to Search

This procedure assumes that you have selected the database(s) you want to search (if you have more than one to choose from). For more information, see “Selecting a Database to Search” on page 6-4.

1. On the **Search** tab, click **Enhanced**. This displays the Enhanced Search window (Figure 6.7).
2. Type a search query into one or more of the three keyword boxes, as shown in Figure 6.8. To use different MARC record fields or Boolean operators, select a different field or operator from the appropriate list.

For search tips, see page 6-8.

NOTE: You can also use the Index Browse technique to enter a search term. See “Using Index Browse in a Search Query” on page 6-12.

FIGURE 6.8

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*You can click **Total** to determine how many records match your search query. Use this feature to fine-tune the search query before viewing the list of search results.*

3. Click **Search**.

NOTE: If no matches are found, the Browse window displays (if enabled by your system administrator). This window lists the indexed entries for the selected field and takes you to the closest alphabetical match for your keywords. Double-click a listing to enter it into the keyword box in the search window, then click **Search** again.

TIP: To enable or disable the Browse window, modify the entry in the M3Opac.ini file (located in your M3 client directory) as follows:

To enable: **No_Result_Browse=1**

To disable: **No_Result_Browse=0**

4. The Search Results window displays the list of search results (Figure 6.6). See “Working with Search Results” on page 6-17 for more information on options in the Results tab.

Using Index Browse in a Search Query

In addition to typing a keyword into a keyword box, a patron can review and select a search term from existing field data. This is possible because most MARC record fields have been indexed. A patron can browse a field index (such as subject, title, or author) to make a search term selection. This is particularly useful to patrons who are unsure of the search they want to enter.

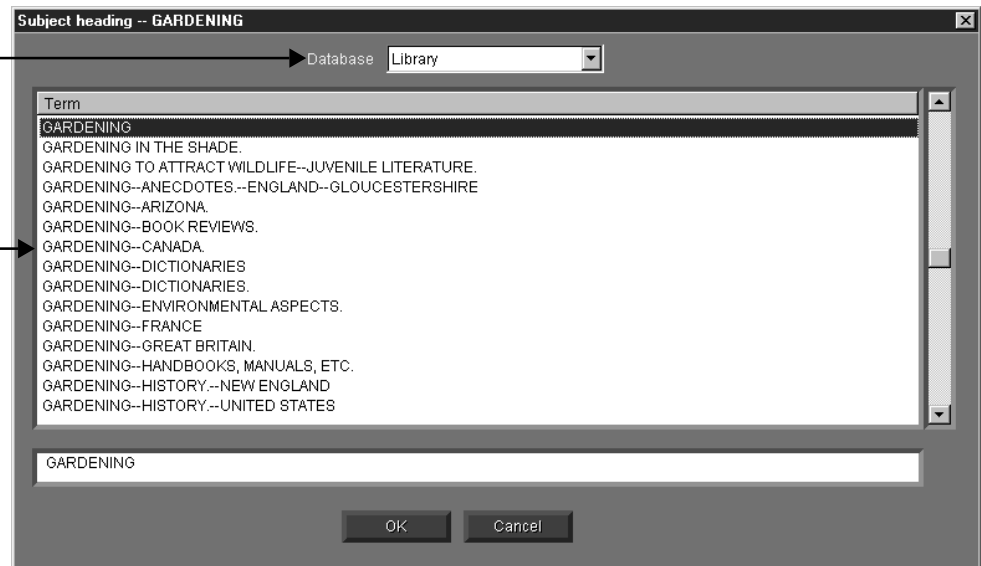
The Index Browse feature can be used while entering a Standard or Enhanced Search query. An Index Browse term can be entered into a keyword box by itself or along with typed keywords.

To use Index Browse:

1. In the Standard Search or Enhanced Search window, type a keyword in the appropriate keyword box. In an Enhanced Search, you can select a MARC record field in the list above the box. Then click the corresponding **Browse** button. This displays the indexed entries for the selected MARC field and takes you to the closest alphabetical match for your keywords (Figure 6.9).

NOTE: In an Enhanced Search, if the selected field is not indexed, and therefore cannot be browsed, the corresponding Browse button is not available.

FIGURE 6.9

*Database list**Indexed entries*

2. If you are searching multiple databases and want to switch to a different database, select a database in the **Database** list.
3. Double-click a listing. This enters the listing into the keyword box in the search window.

NOTE: You can only enter one listing into each keyword box. You can type additional keywords into the same keyword box, if desired.

4. When finished entering your search query into one or more of the three keyword boxes, click **Search**.

Using the Search History

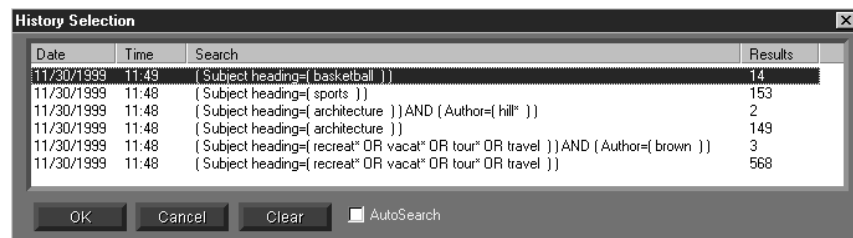
For convenience, a list of Enhanced Search queries accumulates during each patron's Enhanced Search session. (This feature is not included in the Standard or Visual Catalog search method.)

A patron can use the search history to return to a previous search query in the Search tab. This allows the patron to fine-tune the query before accessing the Search Results window.

A patron can also use the search history to return to the Search Results window for any search listed in the History Selection dialog box. The AutoSearch feature is used to accomplish this.

A sample search history is shown in Figure 6.10.

FIGURE 6.10



As seen in this example, the search history includes the date and time of the search, the search query, and the number of records resulting from the search.

Returning to a Previous Search Query

To return to a previous Enhanced Search query:

1. In the Enhanced Search window, click **History**. This displays the History Selection dialog box.
2. Select the search you want to return to, then click **OK**. This displays the query in the Search tab.

Returning to Previous Results

To return to a previous list of search results:

1. In the Enhanced Search window, click **History**. This displays the History Selection dialog box.
2. Select the **AutoSearch** check box.
3. Select the search you want to return to, then click **OK**. This displays the previous list of search results in the Search Results window. For details on working with the list of search results, see “Search Results (Brief Records)” on page 6-17.

Deleting the Search History

For privacy, all information in the History Selection dialog box can be deleted. All information is deleted automatically when the OPAC workstation times out after a designated time period of inactivity. (The default time-out period can be reconfigured by your system administrator.)

To delete the history, use one of the following methods:

At any point in the search session, click **Reset** in the header bar. This deletes all information in the History Selection dialog box and resets all workstation settings to the system default settings. Patrons should be encouraged to click Reset before starting a search session and when ending a search session.

OR

1. In the Enhanced Search window, click **History**. This displays the History Selection dialog box (Figure 6.10).
2. Click **Clear**. This deletes all information in the History Selection dialog box. It does not change any settings the patron has established during the search session.

CONDUCTING A VISUAL CATALOG SEARCH

Visual Catalog Overview

The Visual Catalog search method provides patrons with an easy point-and-click graphical search method. From a patron’s perspective, a search is just a click on a topic button and then a related sub-topic button; this generates a list of search results. In actuality, it is a keyword search method disguised behind a graphical interface; topic buttons are connected to query buttons, which are linked to pre-defined search queries. A query button launches a search of the selected databases and returns a list of results.

These graphical buttons can also be configured to launch other software applications. Launcher buttons are optional; you can add, modify, and delete them from the interface.

The simplicity of the Visual Catalog search method makes it ideal for novice researchers and those unfamiliar with computers. It should be noted that this design does not provide the type of search flexibility found in the Standard and Enhanced keyword search methods, which contributes to its ease of use.

The Visual Catalog interface is easily customized. Topics and their related search queries can be added, modified, and deleted. The number of levels before a search results list appears can be reduced or increased. Sound and visual effects can be changed and disabled. For details on these customizations and more, see “Customizing the Visual Catalog” on page 6-31.

Visual Catalog Search Window Features

The default Visual Catalog Search window is shown in Figure 6.11.

FIGURE 6.11



How to Search

This procedure assumes that you have selected the database(s) you want to search (if you have more than one to choose from). For more information, see “Selecting a Database to Search” on page 6-4.

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Tip: Topic, query, and launcher buttons look the same. The result of selecting them is what makes them different. A topic button opens a sub-menu. A query button returns search results. A launcher button opens another application or Web page.

1. On the **Search** tab, click **Visual**. This displays a button menu that can contain any combination of topic, query, and launcher buttons. The default button menu (shown in Figure 6.11) consists of topic buttons.
2. Click a topic button. Unless extra topic levels have been added to the default interface, this opens a sub-menu of related query buttons, as shown in Figure 6.12 for the Animals topic.

FIGURE 6.12

Tip: At the sub-menu level, the selected topic is listed at the top of the tab.

Navigation buttons



Tip: Two navigation buttons function as follows:

- **Back** returns to the previous button menu level.
- **Start Over** returns to the first button menu level.

3. Click a query button. This searches the selected databases, then displays the Search Results window in the Results tab.

NOTE: The button menus shown in this procedure are based on the default buttons. Your Visual Catalog interface may have been reconfigured to add or delete menu levels, to change the topic or query buttons, or to include launcher buttons.

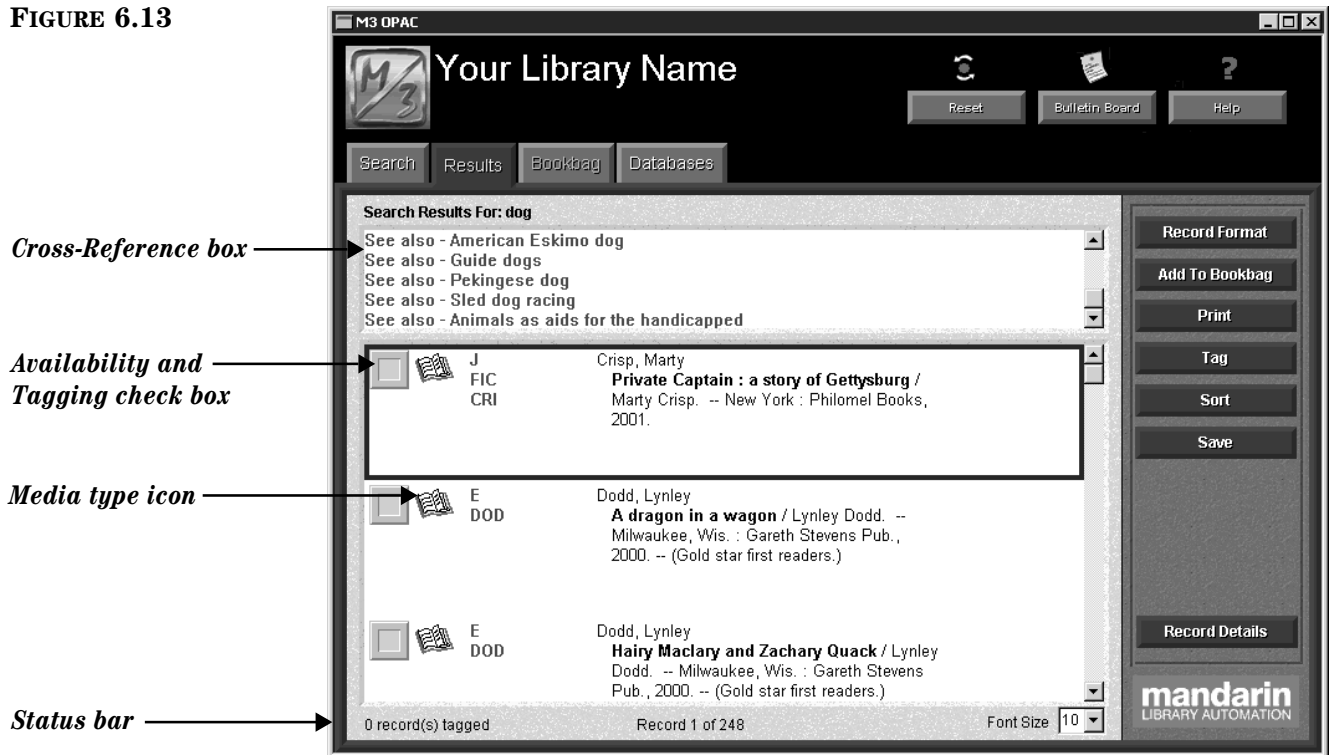
4. See the next section, “Working with Search Results,” for details on your options in the Results tab.

WORKING WITH SEARCH RESULTS

Search Results (Brief Records)

Once a search query is sent, the Results tab appears listing all items found matching the query. By default, records appear in a brief record format, similar to the example shown in Figure 6.13.

FIGURE 6.13



A patron can perform several functions from this window. These functions are described in the following sections.

Using Cross-References

The **Cross-Reference** box displays links to more appropriate headings used by your library or related headings that may also be useful. Click a “See” or “See also” link to view the search results for that heading.

***Note:** The **Cross-Reference** box displays only if you are using a version of M3 that supports Authority Control and the search term you entered is managed under Authority Control.*

Determining Item Media Type

To determine the media type of an item listed in the search results, refer to Table 6.1. The media type icon is shown beside the item. (Media type icons also appear in the Search Results Record Details window and the Bookbag windows.)

TABLE 6.1

Icon	Definition
	Artifact
	Book
	Photo
	Music Cassette
	Data CD
	Movie, Slide
	Electronic Media
	Journal
	Library Kit
	Map
	Book on Tape
	Music CD
	Sheet Music
	Video Recording
	Online Resource

Determining Item Availability

To determine each item's availability, refer to the color of the **Availability & Tagging** check box. Green represents available and red represents unavailable.

Changing the Record Format

To select a different format for the records displayed:

1. Click **Record Format**. This displays the Record Format dialog box (Figure 6.14).

FIGURE 6.14



2. Select a record format, then click **OK**.

NOTE: If an expanded format is selected, the amount of information in a record may exceed the amount of space in the list of search results. When this occurs, ellipses appear in the lower right corner of the box. To view the entire record, click **Record Details**.

Adding Records to the Bookbag

To add records to the Bookbag for later viewing or printing:

1. If you want to add:
 - all records in the list, click **Add To Bookbag**, and then click **Add All**.
 - several records in the list, select the **Availability and Tagging** check box next to each record you want to add. Click **Add To Bookbag**, then click **Add Tagged**.
 - the active record only, click **Add To Bookbag**, and then click **Add Active**.
2. A message appears confirming the addition of the records to the Bookbag.

Printing Records

To print records from the Search Results or Bookbag Record List windows:

1. If you want to print:
 - all records in the list, click **Print**, and then click **Print All**.
 - several records in the list, select the **Availability and Tagging** check box next to each record you want to print. Click **Print**, then click **Print Tagged**.
 - the active record only, click **Print**, and then click **Print Active**.
2. This displays the Print dialog box. Change settings if desired, then click **OK**.

To print records from the Search Results Record Details or Bookbag Record Details windows, click **Print** while viewing the record you want to print. This displays the Print dialog box. Change settings if desired, then click **OK**.

Note: No duplicate listings are placed in the Bookbag.

Note: To enable the printing of holdings information, change the **Print Holdings** entry in the M3Opac.ini file (located in your M3 directory) from **0** to **1**, then restart the OPAC module. Holdings will then be listed in the printed item records.

Tagging Records

The Tag button is a time-saving feature that allows you to select or deselect all records in the Search Results or Bookbag Record List windows at once.

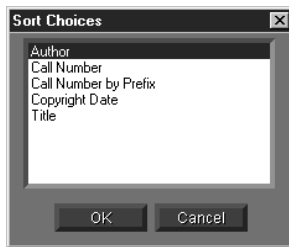
- To tag all records in the list, click **Tag**, and then click **Tag All**.
- To untag all records in the list, click **Tag**, and then click **Untag All**.

Sorting Records

To sort the records displayed in the Search Results or Bookbag Record List windows by a different sort formula:

1. Click **Sort**. This displays the Sort Choices dialog box (Figure 6.15).

FIGURE 6.15



2. Select a sort formula, then click **OK**.

Saving Records to a File

To save records in the Search Results or Bookbag Record List windows to a file:

1. If you want to save:
 - all records in the list, click **Save**, and then click **Save All**.
 - several records in the list, select the **Availability and Tagging** check box next to each record you want to save. Click **Save**, then click **Save Tagged**.
 - the active record only, click **Save**, and then click **Save Active**.
2. This displays the Save As dialog box. Navigate to the location where you want to save the records.
3. In the **File name** box, type a name for the file, and then click **Save**. This saves the records in rich text format (RTF).

Accessing Record Details

To access more information about a specific brief record, including the expanded record and location of items (copies) held by the library, see the next section, “Record Details (Expanded Records).”

***Note:** To enable the saving of holdings information, change the **Save Holdings** entry in the M3Opac.ini file (located in your M3 directory) from **0** to **1**, then restart the OPAC module. Holdings will then be listed in the saved RTF files.*

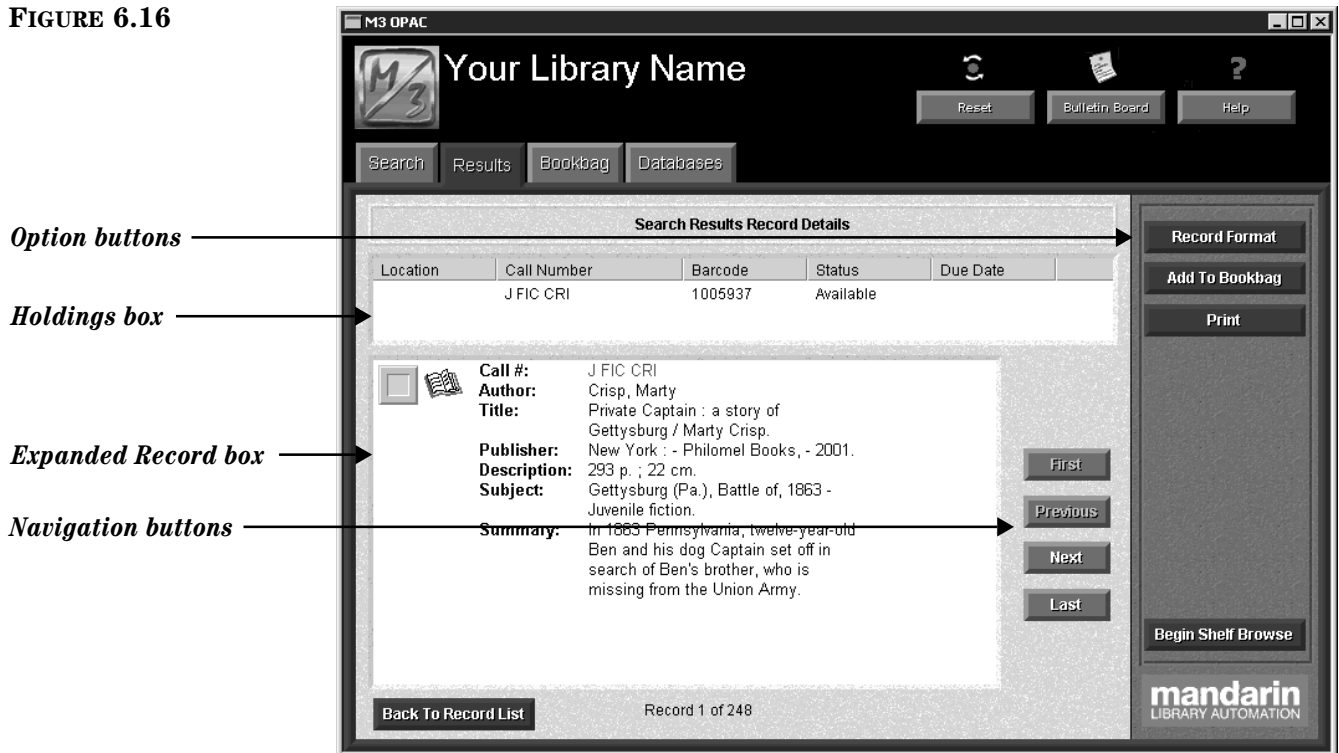
Record Details (Expanded Records)

To view details about a specific item including location, status information, and the expanded record:

Tip: You can also double-click the brief record to view the Search Results Record Details window.

1. In the Search Results or Bookbag Record List windows, select the record you want to view.
2. Click **Record Details**. This displays the Search Results Record Details or Bookbag Record Details window (the Search Results Record Details is shown in Figure 6.16).

FIGURE 6.16



- **Holdings box** – Lists each copy of the item selected in the results list. By default, this holding record information includes the location, call number, availability status, and, if applicable, due date. (The default fields can be reconfigured by your system administrator.)
- **Expanded Record box** – Displays an expanded version of the bibliographic record selected in the Search Results window, along with an availability check box and media type icon. (Media type icons are defined on page 6-18.)
- **Navigation buttons** – Access other records in the list of Search Results:
 - First – Displays the first record in the list.
 - Previous – Displays the previous record in the list.
 - Next – Displays the next record in the list.
 - Last – Displays the last record in the list.

- **Option buttons** – These buttons in the Search Results Record Details window provide the patron with a variety of options:
 - Record Format – Allows the patron to change the format for the record displayed in the Expanded Record box.
 - Add To Bookbag – Adds the record to the Bookbag for later viewing or printing.
 - Print – Prints the record displayed in the tab.
 - Begin Shelf Browse – Allows the patron to conduct a Shelf Browse from the Search Results Record Details. For more information, see the next section, “Using Shelf Browse.”
 - Back To Record List – Returns to the Search Results window.

Using Shelf Browse

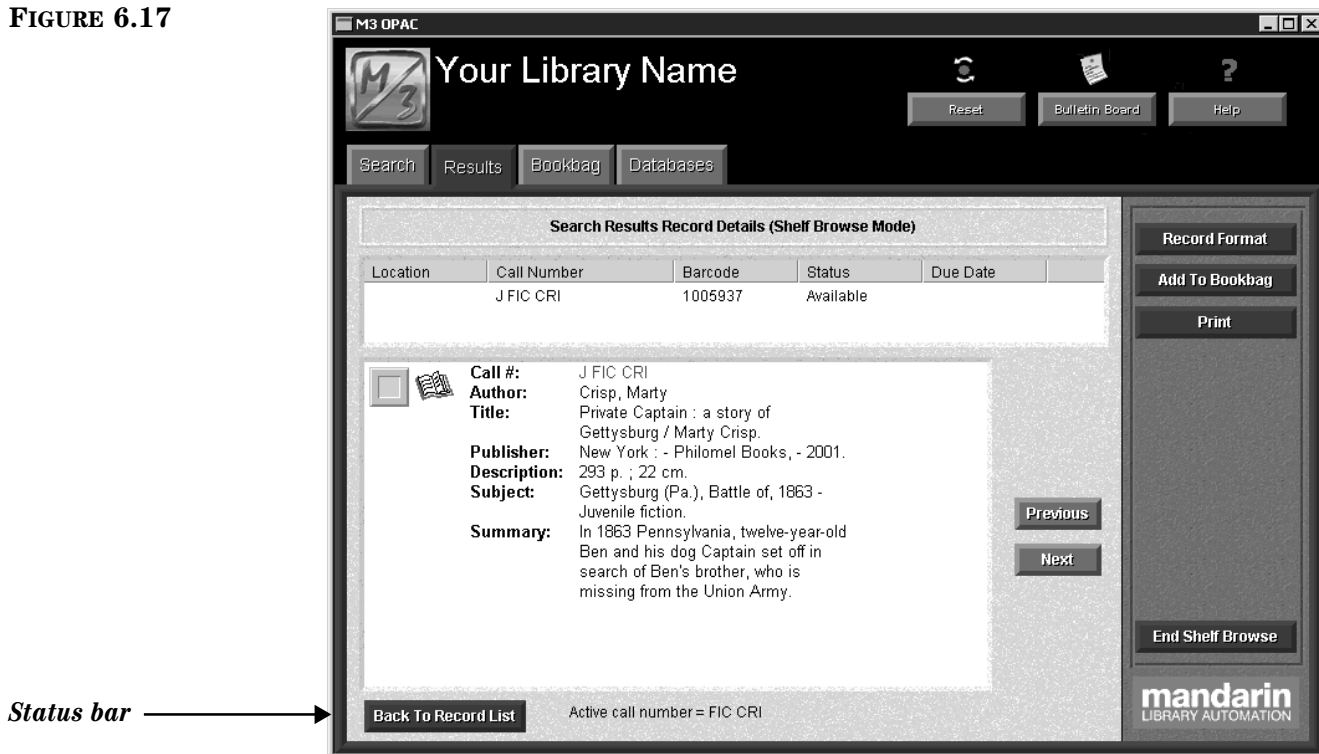
Shelf Browse allows a patron to quickly find records with a call number similar to that of a selected record. The patron can move one bibliographic record at a time forward or back. This is similar to looking at items to the left or right of a selected item on a library shelf.

NOTE: The call number system used by your shelf browse option is established when your library collection is indexed during system setup. To change to the other call number system, your collection must be re-indexed.

To use Shelf Browse:

1. In the Search Results Record Details window (Figure 6.16), click **Begin Shelf Browse**. This changes the window to Shelf Browse mode (Figure 6.17). Notice that the active call number for this record appears in the status bar.

FIGURE 6.17



2. From here, you have the following options:
 - To view the previous record “on the shelf,” click **Previous**.
 - To view the next record “on the shelf,” click **Next**.
 - To modify the format in which the record is displayed, click **Record Format**, select the preferred format, and then click **OK**.
 - To add a record to the Bookbag, click **Add To Bookbag**.
 - To print the record, click **Print**.
 - To end this Shelf Browse session, click **End Shelf Browse**.
 - To return to the Search Results window, click **Back To Record List**.

WORKING WITH RECORDS IN THE BOOKBAG

During a search session, you may want to set aside promising records for additional review or batch printing. The Bookbag temporarily stores records during the search session. The Reset feature deletes any records stored in the Bookbag.

Adding Records to the Bookbag

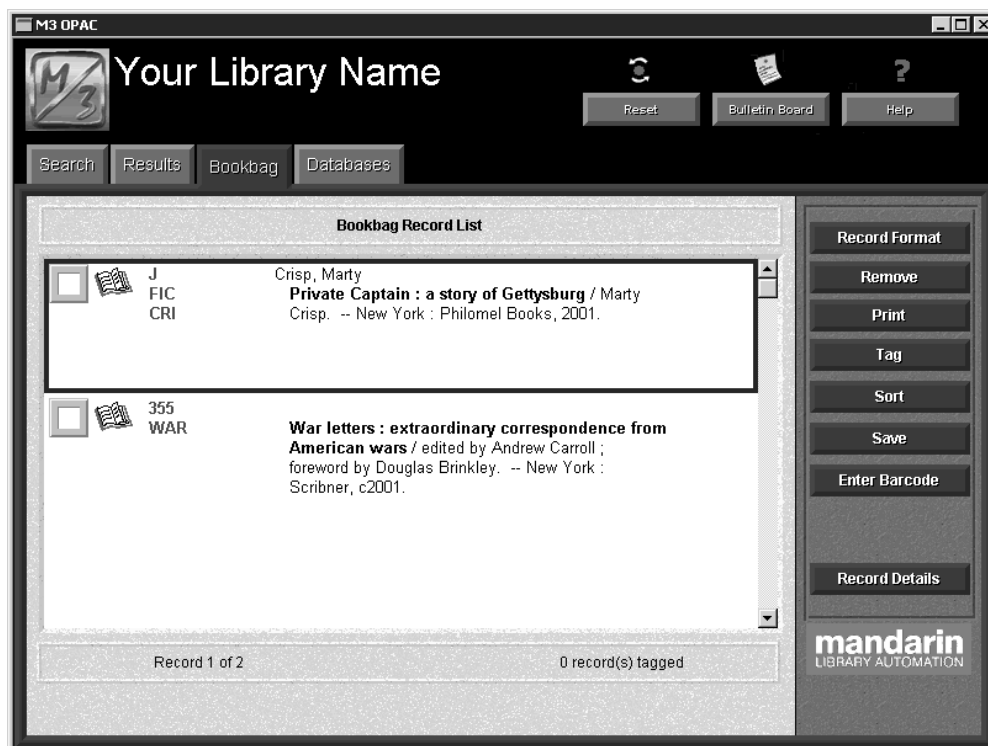
To add records to the Bookbag from the Search Results window, see “Adding Records to the Bookbag” on page 6-19.

To add records to the Bookbag from the Search Results Record Details window, click **Add To Bookbag**.

Viewing and Working with Bookbag Records

To view the records placed in the Bookbag during the active search session, click the **Bookbag** tab at any time. A sample Bookbag tab is shown in Figure 6.18.

FIGURE 6.18



The buttons provide the following options:

- To display records listed in the Bookbag by a different format, click **Record Format**, and then select a display format. For more information, see “Changing the Record Format” on page 6-19.
- To remove records from the Bookbag, click **Remove**, and then select an option in the list.
- To print records, follow the procedure in “Printing Records” on page 6-19.
- To tag or untag all records currently in the Bookbag, click **Tag**, and then select an option in the list.
- To sort the records listed in the Bookbag by a different sort formula, click **Sort**, and then select a sort formula. For more information, see “Sorting Records” on page 6-20.
- To save records to a file, follow the procedure in “Saving Records to a File” on page 6-20.
- To enter barcodes to create a list, follow the procedure in the next section, “Using the Bookbag to Create a List.”
- To view the record details for a selected record, click **Record Details**.

Note: This option must be enabled in the M3Opac.ini file. For instructions, see “BOOKBAG SCREEN setting” on page A-2.

Using the Bookbag to Create a List

You can enter or scan barcodes into the Bookbag to create a list of items. To do so:

1. In the Bookbag Record List window, click **Enter Barcode**. This displays the Enter Barcode dialog box (Figure 6.19).

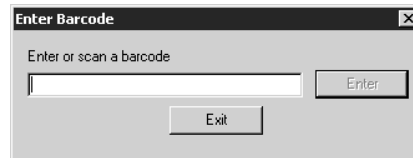


FIGURE 6.19

2. Type or scan the barcode, then click **Enter**. Repeat for each item you want to add to the list.
3. When finished, you can print or save the list. To do so, follow the procedure in “Printing Records” on page 6-19 or “Saving Records to a File” on page 6-20.

USING THE MY ACCOUNT TAB (OPTIONAL)

The My Account tab is an optional tab that your system administrator can activate if the library chooses to use it. Once activated, patron access must be enabled in the Group Editor. Patrons may then view their current transactions, past transactions, and personal information that is on record with the library.

Warning:

The following information is only for the use of system administrators. If you do not possess a comprehensive understanding of configuration files, do not attempt to change the M3Opac.ini file. Improper procedures could affect the OPAC performance. Before you proceed, it is suggested that you perform a complete backup of your system.

Activating the My Account Tab

To activate the My Account tab:

1. Using a simple text editor such as Notepad or WordPad, open the M3Opac.ini file (the default path is **C:\Program Files\Mandarin M3**).
2. Under [PATRON HISTORY SCREEN], change **Patron_Tab_Visible=0** to **Patron_Tab_Visible=1**.
3. When finished, save the file. The customized configuration becomes active the next time you start the OPAC.

Note: If you installed M3 v1.1 prior to installing v1.6, your default path is **C:\Program Files\SIRS Mandarin\M3**.

Allowing Patron Access to the My Account Tab

To allow patrons access to this tab, you must enable the option in the Group Editor module. To do so:

1. Start the Group Editor as explained in “Starting Group Editor” on page 3-3.
2. In the Group Editor main window, select the patron group you want to grant access to the tab, and then click **Edit**.
3. In the **OPAC Access** tab:
 - A. In the **Access OPAC** list, select **Yes**.
 - B. Select the **View Transactions** check box.
4. Click **OK**.

Using the My Account Tab

After the system administrator activates the My Account tab, the next time you start the OPAC, the tab appears to the right of the Databases tab as shown in Figure 6.20.

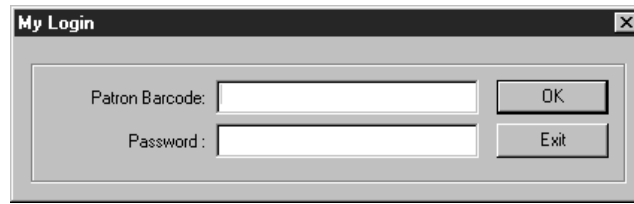
FIGURE 6.20



To access your account:

1. Click the **My Account** tab. This displays the My Login dialog box (Figure 6.21).

FIGURE 6.21



A small dialog box titled "My Login" with a close button (X) in the top right corner. It contains two input fields: "Patron Barcode:" and "Password:". To the right of the "Patron Barcode:" field is an "OK" button, and to the right of the "Password:" field is an "Exit" button.

***Tip:** Individual user IDs and passwords are assigned and modified in patron records. See "Working with Patron Records" on page 5-32 for more information.*

2. In the **Patron Barcode** box, type the barcode from your library card. If your patron record has a password assigned to it, type your password in the **Password** box (if not, no password is required). Then click **OK**. This displays the My Account tab with your transactions listed (Figure 6.22).

FIGURE 6.22



The M3 OPAC interface shows the "My Account" tab selected. The header includes the M3 logo, "Your Library Name", and buttons for "Reset", "Bulletin Board", and "Help". Below the header are tabs for "Search", "Results", "Bookbag", "Databases", and "My Account". The main content area is titled "Open Transactions" and features a "Database" dropdown menu set to "Library". A table displays the following transactions:

Title	Author	Call Number	Type	Due Date
Sports firsts /	Clark, Patrick.	REF 796 CLA	Loan	1/12/03
Storm in the night /	Stolz, Mary.	E STD	Loan	1/12/03

On the right side of the screen are buttons for "Current", "Historical", and "My Info". At the bottom, a message reads: "Please remember to logout, either by clicking Reset or by switching to another tab." The "mandarin LIBRARY AUTOMATION" logo is in the bottom right corner.

The buttons provide the following options:

- **Current** – View your open, or current, transactions.
- **Historical** – View your closed, or historical, transactions.
- **My Info** – View personal information that the library has on file for you, such as name, address, and telephone number.

USING THE RESET BUTTON

The Reset button in the OPAC header bar clears all information stored in the Search, Results, and Bookbag tabs during a search session. It also returns all settings to their default positions.

Although the OPAC automatically resets after a few minutes without activity, it is a good idea to click **Reset** before beginning a search session to clear any information from a previous user. Click it again after completing a search session to ensure privacy.

The amount of elapsed time prior to an automatic reset can be modified by a system administrator. (See “Appendix A: Customizing the OPAC .ini Files” on page A-1.)

USING THE BULLETIN BOARD

The Bulletin Board is a simple way for library administrators to deliver information to patrons. The Bulletin Board button can be linked to a local HTML file or a Web page. A preconfigured HTML file (BulletinBoard.html) is included with M3 and can be modified using any HTML editor.

Many libraries use the Bulletin Board button to link to the library home page or pages containing public service announcements. Because the button connects to a page created in HTML format, the bulletin board can include graphics as well as text.

Using the Preconfigured Bulletin Board

If the preconfigured Bulletin Board was not set up during M3 installation, it can be configured by a system administrator at any time. To do so:

1. On the taskbar, click the **Start** button, select **Programs**, select **Mandarin M3**, select **Utilities**, and then click **Setup Bulletin Board**.
2. In the Choose Setup Language dialog box, select the desired language and click **OK**. This determines the language of the Bulletin Board setup only.
3. In the Welcome dialog box, click **Next** to begin the setup.
4. In the Choose Destination Location dialog box, either:
 - Click **Next** to save the file BulletinBoard.html into the default folder location on your hard disk (C:\Program Files\Mandarin M3).
 - OR**
 - Click **Browse** and navigate to the desired folder location. When the desired folder has been selected, click **OK**, and then click **Next**.
5. In the Bulletin Board Configuration dialog box, type your library's name, a greeting, and your library's hours in the appropriate boxes. Then click **Next**.
6. Click **Finish** to complete the setup. This Bulletin Board can now be accessed by clicking the **Bulletin Board** button in the OPAC window (example shown in Figure 6.23).

Note: If you installed M3 v1.1 prior to installing v1.6, your default path is C:\Program Files\SIRS Mandarin\M3.

FIGURE 6.23

Note: To add text or graphics to this Bulletin Board, open the file *BulletinBoard.html* (located in your M3 directory) in an HTML editor. Modify as desired.



Linking to an HTML File or Web Page

Configuring the Bulletin Board button to link to another HTML file or a Web page is performed in the M3Opac.ini file.

These instructions are also outlined in "Bulletin Board settings" on page A-3 in "Appendix A: Customizing the OPAC .ini Files."

Note: If you installed M3 v1.1 prior to installing v1.6, your default path is **C:\Program Files\SIRS Mandarin\M3**.

1. Using a simple text editor such as Notepad or WordPad, open the M3Opac.ini file (the default path is **C:\Program Files\Mandarin M3**).
2. Under Bulletin Board settings:
 - A. Change **Use_External_Browser=0** to **Use_External_Browser=1**.
 - B. Change **Source=LOCAL**, where LOCAL is the path to the Web page you want to link to.

For example, **Source= http://www.franklinhs.org/library**

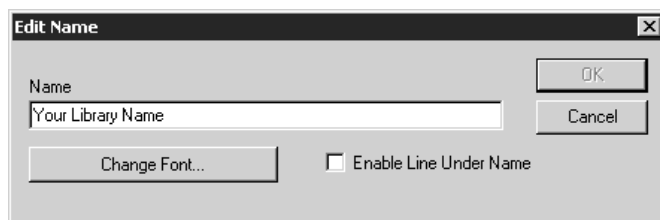
MODIFYING THE OPAC HEADER

Permission to modify the OPAC header is established in the Group Editor module. See your system administrator for assistance.

To display your library name in the header bar of the OPAC:

1. Right-click in the header bar, then click **Edit Name**. This displays the Login dialog box.
2. Type your user name in the **Login Name** box, your password in the **Password** box, and then click **OK**. This displays the Edit Name dialog box (Figure 6.24).

FIGURE 6.24



3. In the **Name** box, type the name you want to display in the header bar.
4. To change the font of the title, click **Change Font**. Modify settings as desired, then click **OK**.
5. If you want a dividing line to appear between the header bar and the tabs, select the **Enable Line Under Name** check box. Otherwise, no line will display.
6. Click **OK**. The new name displays in the header bar.

DISPLAYING COVER IMAGES IN THE OPAC

To display cover images in the OPAC, you must import the images into your M3 database and enable them in the M3Opac.ini file. The images can then be viewed in the OPAC in the Search Results, Record Details, Bookbag Record List, and Bookbag Record Details windows.

Importing Cover Images

The M3 Picture Manager utility allows you to import multiple image files and automatically link the images to the appropriate bibliographic records. This utility can be accessed through the Cataloging module. For instructions, see “Using M3 Picture Manager” beginning on page 4-50.

To add an image to one record at a time, see “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-37.

Enabling Cover Images

To enable the display of cover images in the OPAC:

1. Using a simple text editor such as Notepad or WordPad, open the M3Opac.ini file (the default path is **C:\Program Files\Mandarin M3**).
2. In the entry **Display Cover Images=0**, change the **0** to **1**.
3. Save the file. This feature will be available the next time you start the OPAC.

***Note:** If you installed M3 v1.1 prior to installing v1.6, your default path is **C:\Program Files\SIRS Mandarin\M3**.*

CUSTOMIZING THE VISUAL CATALOG

Permission to modify the Visual Catalog is assigned in the Group Editor module. See a system administrator for assistance.

Customization Overview

The Visual Catalog is a keyword search method disguised behind a graphical interface; topic buttons are connected to query buttons, which are linked to predefined search queries. A query button launches a search of the selected databases and returns a list of results.

These graphical buttons can also be configured to launch software applications or Web pages rather than search databases. M3 ships with a default interface that includes several topic and query buttons. M3 also includes over 75 images that can be displayed on the buttons; these can be found in the VisualCatalogResources folder in your M3 directory.

Many Visual Catalog features are easily customized through a password-protected interface accessed from this search method. This interface, Configuration Mode, categorizes the Visual Catalog graphical interface into the following main components:

- Topic Component – A topic button that opens a sub-menu of additional buttons. The resulting sub-menu might contain more topic buttons, query buttons, and/or launcher buttons.
- Query Component – A query button linked to a search query, which launches a database search and potentially returns a list of results.
- Launcher Component – A launcher button that launches a software application or opens a Web page.
- Global Options – Options that globally alter the animation, sound, and visual properties on all button menus.

Customization options available through Configuration Mode are:

- Topic buttons can be added, modified, deleted, and moved at any menu level.
- Query buttons can be added, modified, deleted, and moved at any menu level. Additionally, the search query linked to a query button can be modified.
- Launcher buttons can be added, modified, deleted, and moved at any menu level.
- Visual and sound effects can be globally changed and disabled.

All Configuration Mode customization options are explained in the following sections. Other OPAC customizations (such as printing details and reset timing) are entered in the M3Opac.ini file, and should be performed by a system administrator. (See “Appendix A: Customizing the OPAC .ini Files” on page A-1.)

Accessing Configuration Mode

To customize the Visual Catalog, you must access Configuration Mode. To do so:

1. Click the **Search** tab, then click **Visual**. This displays the Visual Catalog Search window (Figure 6.11).
2. Right-click any open area of the data pane. This opens a menu (shown in Figure 6.25).

FIGURE 6.25



Tip: Individual user IDs and passwords are assigned and modified in patron records. See “Working with Patron Records” on page 5-32 for more information.

3. Click **Enter Configuration Mode**. This displays the Login dialog box.
4. Type your user name in the **Login Name** box and your password in the **Password** box. (If the default name and password have not yet been changed, type **admin** in the **Login Name** box and **boca raton** in the **Password** box, all in lower-case characters.) Then click **OK**. This changes the Visual Catalog interface to Configuration Mode, as identified in the tab heading (shown in Figure 6.26).

FIGURE 6.26

**Configuration Mode
identification**



Working with Topic Components

About Topic Components

A topic component consists of a topic button that opens a sub-menu of additional buttons. The sub-menu can contain more topic buttons leading to more sub-menus, query buttons that launch database searches, and/or launcher buttons that access different applications. You can add, modify, and delete a topic component, and reposition a topic button. These procedures are covered in the following sections.

Adding a Topic Component

Adding a topic component consists of adding a topic button, and then adding the desired topic and/or query and/or launcher buttons to the sub-menu attached to the new topic button. A topic component can be added at any menu level.

To add a topic component:

1. Access Configuration Mode as explained beginning on page 6-32.
2. Go to the button menu that is to receive the new topic button.
3. Right-click any open area of the data pane. This opens a shortcut menu (Figure 6.27).

FIGURE 6.27



Note: Only eight buttons can be placed on a Visual Catalog button menu. If the menu already contains eight buttons, you must delete one before you can add a new one.

6-34 Using the M3 Windows OPAC

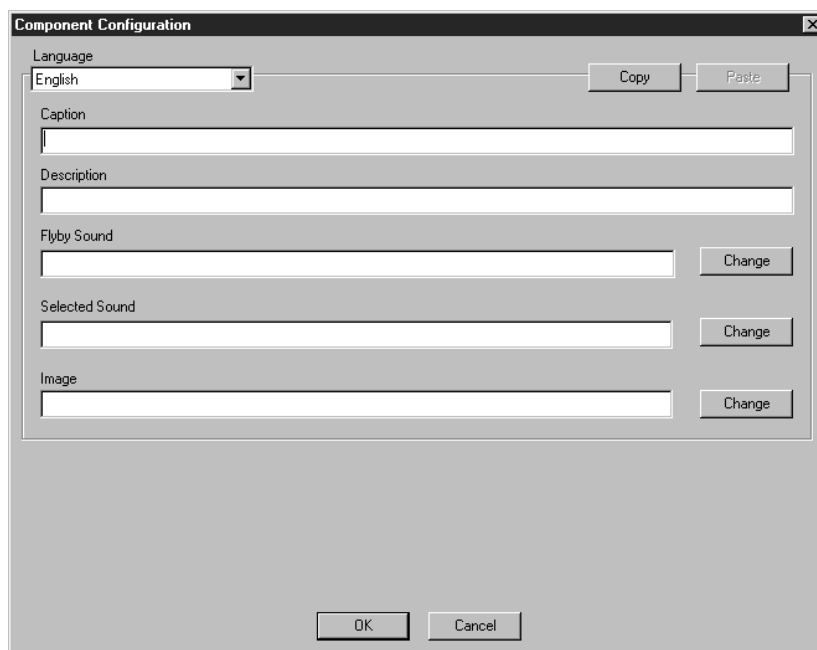
4. Click **New Topic Component**. This places a blank topic button on the button menu.
5. Right-click the new topic button. This opens a button-specific menu (Figure 6.28).

FIGURE 6.28



6. Click **Modify**. This displays the Component Configuration dialog box (Figure 6.29).

FIGURE 6.29

A dialog box titled 'Component Configuration' with a close button (X) in the top right. It contains several fields and buttons: 'Language' (a dropdown menu showing 'English'), 'Caption' (a text box), 'Description' (a text box), 'Flyby Sound' (a text box with a 'Change' button), 'Selected Sound' (a text box with a 'Change' button), and 'Image' (a text box with a 'Change' button'). At the bottom are 'OK' and 'Cancel' buttons. There are also 'Copy' and 'Paste' buttons near the Language dropdown.

An example of a completed Component Configuration dialog box is shown in Figure 6.30.

Tips:

- Entries are only required in the **Language**, **Caption**, and **Image** boxes.
- Use the **Copy** and **Paste** buttons to create matching topics for a different interface language. This is explained in “Creating a Matching Translated Interface” on page 6-47.

7. Complete the boxes in the dialog box to add text, sound, and visual properties to the new button. Press the TAB key to move from box to box.
 - **Language** – Specify the interface language that applies to this new button. If you are offering the OPAC in multiple interface languages, you need to enter a caption and description for each language. (See “Creating a Matching Translated Interface” on page 6-47 for shortcut instructions.)
 - **Caption** – Type the text you want to appear under the button. Keep it short or the text will extend beyond the button frame.
 - **Description** – Type any descriptive text. This appears near the bottom of the button menu when the mouse points to the button.
 - **Flyby Sound** – Select the sound that plays when the mouse points to the button. To select a sound file, either type the path and file name, or click **Change** and navigate to the location of the sound file.

- **Selected Sound** – Select the sound that plays when you click the button. To select a sound file, either type the path and file name, or click **Change** and navigate to the location of the sound file.
 - **Image** – Select the image that appears on the new button. To select an image file, either type the path and file name, or click **Change** and navigate to the location of the image file.
8. When finished, click **OK**. This applies the entries to the new topic button, but does not save those entries. To save your entries, right-click any open area of the data pane, then click **Save Changes**.
 9. Click the new topic button. This displays the empty sub-menu linked to this button. The next step is to add buttons to this sub-menu.
 10. To add topic buttons (that will in turn create deeper levels), repeat steps 2 through 9 in this procedure. To add query buttons, see “Adding a Query Component” on page 6-37. To add launcher buttons, see “Adding a Launcher Component” on page 6-41.
 11. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

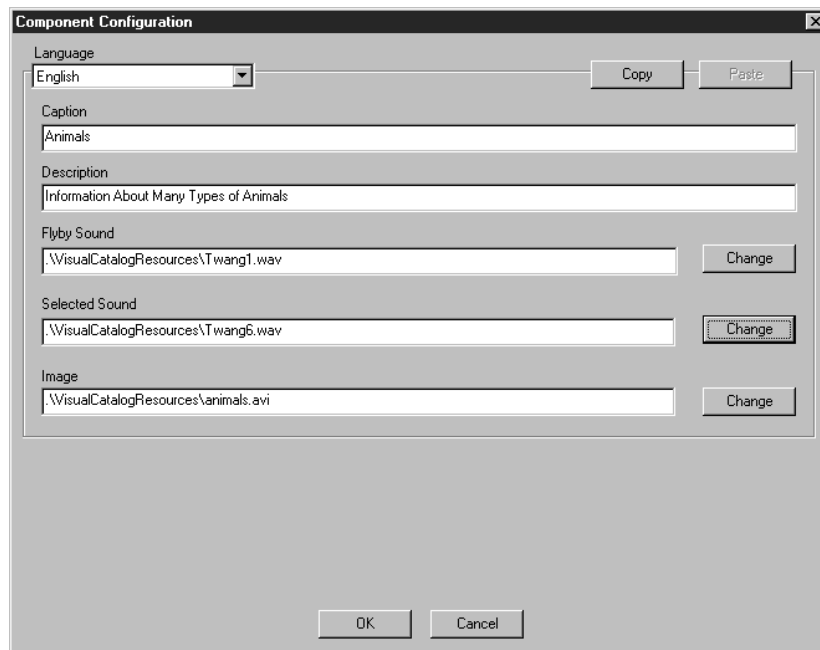
Modifying A Topic Component

A topic component can be modified to change the button caption, description, and visual or sound effects.

To modify a topic component:

1. Access Configuration Mode as explained beginning on page 6-32.
2. Go to the button menu that contains the button to be modified.
3. Right-click the topic button. This opens a button-specific menu (Figure 6.28).
4. Click **Modify**. This displays the Component Configuration dialog box (Figure 6.30) containing properties for this component.

FIGURE 6.30



5. Modify any entries as needed. For information about these options, see step 7 in “Adding a Topic Component” on page 6-34.
6. When finished, click **OK**. This applies the changes to the topic button, but does not save those changes. To save your changes, right-click any open area of the data pane, then click **Save Changes**.
7. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Deleting a Topic Component

A topic component (button and the linked sub-menu system) can be deleted by simply deleting the topic button.

To delete a topic component:

1. Access Configuration Mode as explained beginning on page 6-32.
2. Go to the button menu that contains the topic button to be deleted.
3. Right-click the topic button. This opens a button-specific menu (Figure 6.28).
4. Click **Delete**. This deletes the topic component. If additional menu levels are connected below that sub-menu, they are also deleted.
5. To save your changes, right-click any open area of the data pane, and then click **Save Changes**.

6. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Moving a Topic Component

The procedure to reposition a topic button on the button menu is explained in “Repositioning Buttons on a Button Menu” on page 6-44.

Working with Search Query Components

About Query Components

A query component consists of a query button and the search query linked to the button. When a query button is clicked, the search query is sent, the Results tab becomes active, and the Search Results window appears. You can add, modify, and delete a query component, and reposition a query button. These procedures are covered in the following sections.

Adding a Query Component

Adding a query component consists of adding a query button and defining the query linked to it.

To add a query component:

1. Access Configuration Mode as explained beginning on page 6-32.
2. Go to the button menu that is to receive the new query button.
3. Right-click any open area of the data pane. This opens a shortcut menu (Figure 6.27).
4. Click **New Query Component**. This places a blank query button on the button menu.
5. Right-click the new query button. This opens a button-specific menu (Figure 6.28).
6. Click **Modify**. This displays the Component Configuration dialog box (Figure 6.31).

***Note:** Only eight buttons can be placed on a Visual Catalog button menu. If the menu already contains eight buttons, you must delete one before you can add a new one.*

FIGURE 6.31

An example of a completed Component Configuration dialog box is shown in Figure 6.34.

7. Complete the options in the dialog box to add text, sound, and visual properties to the new button. Press the TAB key to move from box to box. For information about these options, see step 7 on page 6-34.
8. Click **Edit Query**. This displays the Edit Query Definition dialog box (Figure 6.32).

FIGURE 6.32

MARC record field list

Boolean operators

Corresponding keyword box

9. Enter the search query you want this button to submit. To do so:
 - A. In the first MARC record field list, select the field you want to search.
 - B. Type the search query into the corresponding keyword box, as shown in Figure 6.33. The query can be a keyword or multiple keywords joined by Boolean operators AND, OR, and NOT (AND is assumed if no Boolean is typed between keywords). The query recognizes truncation, wildcard character, and phrase search techniques.
 - C. If you want the query to include other MARC fields, repeat steps A and B in the remaining boxes of this dialog box. Be sure to specify the correct Boolean operator between the sets of boxes.

FIGURE 6.33

D. When finished, click **OK**. This closes the Edit Query Definition dialog box. The new query appears above the Edit Query button in the Component Configuration dialog box (see Figure 6.34).

10. When finished, click **OK**. This applies the entries to the new query button, but does not save those entries. To save your entries, right-click any open area of the data pane, then click **Save Changes**.
11. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

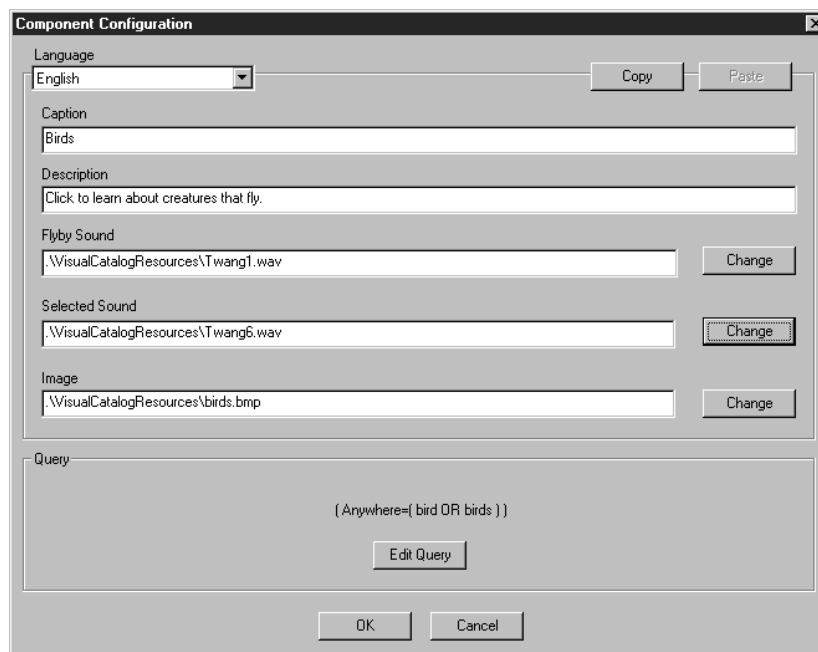
Modifying a Query Component

A query component can be modified to change the button caption, description, visual or sound effects, and search query.

To modify an existing query component:

1. Access Configuration Mode as explained beginning on page 6-32.
2. Go to the button menu that contains the button to be modified.
3. Right-click the query button. This opens a button-specific menu (Figure 6.28).
4. Click **Modify**. This displays the Component Configuration dialog box (Figure 6.34) containing properties for this component.

FIGURE 6.34



5. To modify text, sound, or visual properties, see step 7 on page 6-34. To modify the search query, see steps 8 and 9 in “Adding a Query Component,” beginning on page 6-38.
6. When finished, click **OK**. This applies the changes to the query button, but does not save those changes. To save your changes, right-click any open area of the data pane, then click **Save Changes**.
7. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Deleting a Query Component

A query component (button and the linked search query) can be deleted by simply deleting the query button.

To delete a query component:

1. Access Configuration Mode as explained beginning on page 6-32.
2. Go to the button menu that contains the query component to be deleted.
3. Right-click the query button. This opens a button-specific menu (Figure 6.28).
4. Click **Delete**. This deletes the query component.
5. To save your changes, right-click any open area of the data pane, and then click **Save Changes**.

6. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Moving a Query Component

The procedure to reposition a query button on the button menu is explained in “Repositioning Buttons on a Button Menu” on page 6-44.

Working with Launcher Components

About Launcher Components

A launcher component consists of a launcher button and a link to an application or Web page to be launched by the button. You can add, modify, and delete a launcher component, and reposition a launcher button. These procedures are covered in the following sections.

NOTE: The software to be launched must be Windows compatible.

Adding a Launcher Component

Adding a launcher component consists of adding a launcher button and entering a Web page address or the path/file name of an application to be launched.

To add a launcher component:

1. Access Configuration Mode as explained beginning on page 6-32.
2. Go to the button menu that is to receive the new launcher button.
3. Right-click any open area of the data pane. This opens a shortcut menu (Figure 6.27).
4. Click **New Launcher Component**. This places a blank launcher button on the button menu.
5. Right-click the new launcher button. This opens a button-specific menu (Figure 6.28).
6. Click **Modify**. This displays the Component Configuration dialog box (Figure 6.35).

***Note:** Only eight buttons can be placed on a Visual Catalog button menu. If the menu already contains eight buttons, you must delete one before you can add a new one.*

FIGURE 6.35

An example of a completed Component Configuration dialog box is shown in Figure 6.36.

7. Complete the options in the dialog box to add text, sound, and visual properties to the new button. Press the TAB key to move from box to box. The first six options control text, sound, and visual properties of the button. For information about these options, see step 7 on page 6-34. To complete the last two boxes, which refer to the application or Web page to be launched:
 - **Path To Executable** – To connect to an application, either type the path and file name, or click **Change** and navigate to the location of the application. To connect to a Web page, type the path and file name for your Web browser.
 - **Arguments** – To connect to an application, type any optional arguments or parameters needed to run the application. To connect to a Web page, type the address.
8. When finished, click **OK**. This applies the entries to the new launcher button, but does not save those entries. To save your entries, right-click any open area of the data pane, then click **Save Changes**.
9. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Modifying a Launcher Component

A launcher component can be modified to change the button caption, description, and visual or sound effects, the path and/or file name of the application to be launched, or the address of the Web page to be opened.

To modify an existing launcher component:

1. Access Configuration Mode as explained beginning on page 6-32.
2. Go to the button menu that contains the button to be modified.
3. Right-click the launcher button. This opens a button-specific menu (Figure 6.28).
4. Click **Modify**. This displays the Component Configuration dialog box (Figure 6.36) containing properties for this component.

FIGURE 6.36

5. To modify text, sound, or visual properties, see step 7 on page 6-34. To modify the path or file name in the **Command Line** boxes, see step 7 in “Adding a Launcher Component” on page 6-42.
6. When finished, click **OK**. This applies the changes to the launcher button, but does not save those changes. To save your changes, right-click any open area of the data pane, then click **Save Changes**.
7. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Deleting a Launcher Component

A launcher component (button and link to an application .exe file or Web page) can be deleted by simply deleting the launcher button.

To delete a launcher component:

1. Access Configuration Mode as explained beginning on page 6-32.
2. Go to the button menu that contains the launcher component to be deleted.
3. Right-click the launcher button. This opens a button-specific menu (Figure 6.28).
4. Click **Delete**. This deletes the launcher component.
5. To save your changes, right-click any open area of the data pane, and then click **Save Changes**.
6. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Moving a Launcher Component

The procedure to reposition a launcher button on the button menu is explained in the next section, "Repositioning Buttons on a Button Menu."

Repositioning Buttons on a Button Menu

Any topic, query, or launcher button can be moved to a different position on a button menu. The procedure is the same for all three types of buttons.

To move a button:

1. Access Configuration Mode as explained on page 6-32.
2. Go to the button menu that contains the button to be moved.
3. Right-click the button. This opens a button-specific menu (Figure 6.28).
4. Click **Move Left** or **Move Right**, depending on which way you want to move the button.
5. Repeat steps 3 and 4 until the button reaches the desired position. (A button automatically wraps to the top or bottom level when moved between the fourth and fifth button positions.)
6. To save your entries, right-click any open area of the data pane, then click **Save Changes**.
7. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.

- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Globally Modifying Visual and Sound Effects

From Configuration Mode, you can globally modify, enable, and disable interface visual and sound effects. These changes impact all translated interfaces. To modify effects for a specific button, refer instead to the instructions for modifying topic, query, or launcher components in preceding sections.

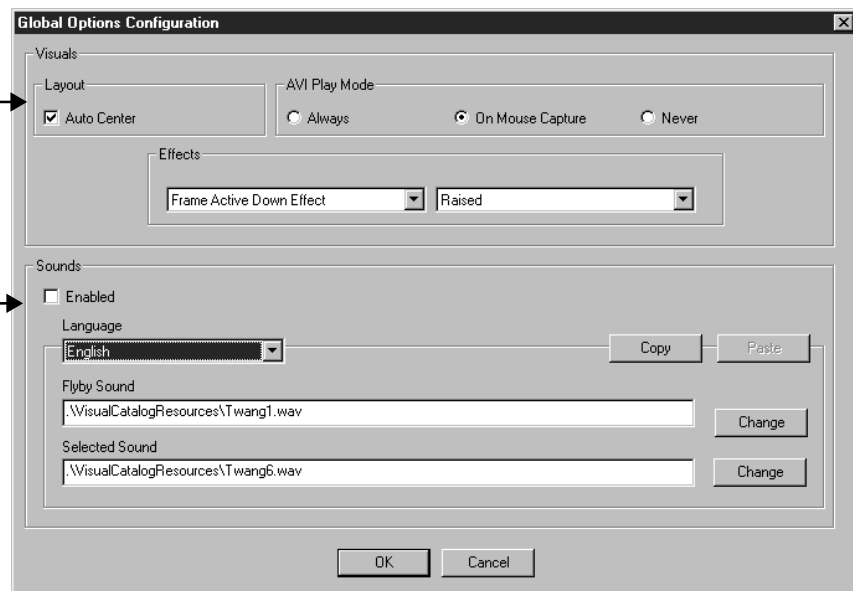
To globally change interface visual or sound effects:

1. Access Configuration Mode as explained beginning on page 6-32.
2. Right-click any open area of the data pane. This opens a shortcut menu (Figure 6.27).
3. Click **Configure Global Options**. This displays the Global Options Configuration dialog box (Figure 6.37).

FIGURE 6.37

Visual options

Sound options



4. Modify one or more of the following options:
 - **Layout** – Controls the button alignment on all button menus. Select the **Auto Center** check box for buttons to appear centered, or clear **Auto Center** for left alignment.
 - **AVI Play Mode** – Controls button animation behavior:
 - Click **Always** for all animations to play continuously.
 - Click **On Mouse Capture** for an animation to play only when the mouse points to the button.
 - Click **Never** to disable all animations.
 - **Effects** – Controls how button frames and button images display on all button menus. To modify, select a button section and button phase in the left list, then select the desired effect in the right list.

The button sections are:

- **Frame** – the outer perimeter of the button
- **Image** – the graphical image within the button

The button phases are:

- **Active Down** – when the button is clicked
- **Active Up** – when the mouse is pointing to the button
- **Inactive** – when the mouse is not pointing to or clicking the button

The right list specifies the available display effects:

- **Raised** – the entire button or image appears to be raised
 - **Recessed** – the entire button or image appears to be recessed
 - **Trench** – a narrow recessed trench outlines the button or image
 - **Wall** – a narrow raised wall outlines the button or image
 - **Enabled** – Controls all Visual Catalog sound effects. Select the **Enabled** check box to enable sound effects, or clear to disable.
 - **Language** – Identifies the language interface of the global sound effects. This only applies if you offer the OPAC in multiple interface languages and want to use different sound effects for the different interface languages. If your institution offers multiple languages, you must complete a separate Global Options Configuration dialog box for each interface language. To do so, see steps 11 through 15 in the next section, “Creating a Matching Translated Interface.”
 - **Copy/Paste** – Used only when you need to create a separate Global Options Configuration dialog box for a different interface language. This is explained in the next section, “Creating a Matching Translated Interface.”
 - **Flyby Sound** – Identifies the sound that plays when the mouse points at a button. A default flyby sound is entered. To select a sound file, either type the path and file name, or click **Change** and navigate to the location of the sound file.
 - **Selected Sound** – Identifies the sound that plays when a button is clicked. A default sound is entered. To select a sound file, either type the path and file name, or click **Change** and navigate to the location of the sound file.
5. When finished, click **OK**. This applies the changes, but does not save them. To save your changes, right-click any open area of the data pane, then click **Save Changes**.
 6. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

***Tip:** If you are the system administrator for your institution and are familiar with the file system of the M3 OPAC, there is another way to create a parallel interface. For information, contact Mandarin Tech Support.*

Creating a Matching Translated Interface

The Visual Catalog interface can be offered to patrons in other interface languages. Each language requires its own set of global options and topic/query/launcher components; this creates a parallel translated interface.

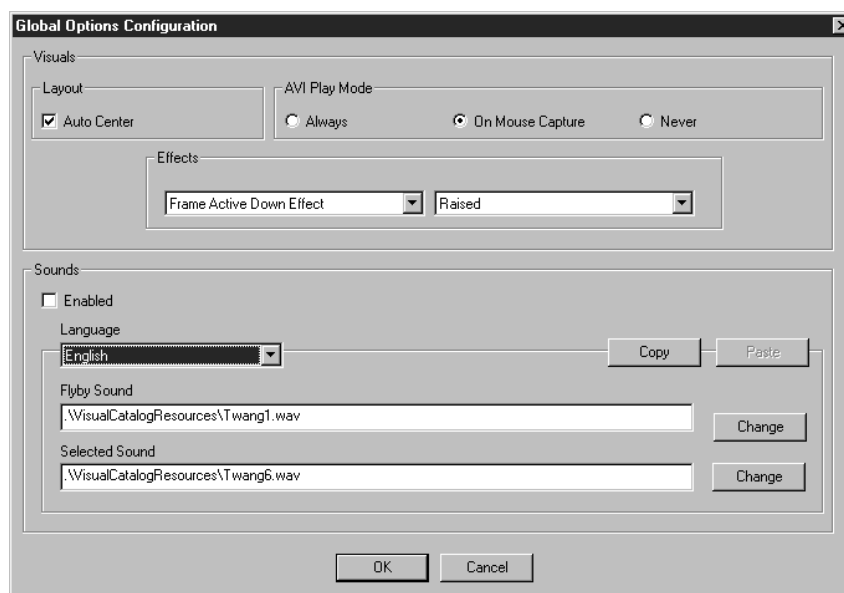
A shortcut feature, **Copy/Paste**, makes it easy to create a parallel interface. The Copy and Paste buttons appear in every Component Configuration dialog box and in the Global Options Configuration dialog box.

NOTE: The Visual Catalog ships with a default set of English topic components and query components. Before creating a parallel translated interface, make sure the English version has been customized to meet your library's needs; this saves customization time.

To create a parallel translated interface:

1. At the main button menu level, access Configuration Mode as explained beginning on page 6-32.
2. Click **Languages**, select the interface language you are translating from, and then click **OK**. This is the master interface you will copy from to create the new parallel interface. (In most cases, this is the English interface.)
3. Right-click the first button on the button menu. (It can be a topic button, query button, or launcher button.) This opens a button-specific menu (Figure 6.28).
4. Click **Modify**. This displays the Component Configuration dialog box (Figure 6.36) containing the properties for this component.
5. Click **Copy**.
6. In the **Language** list, select the interface language you are adding.
7. Click **Paste**. This creates a duplicate dialog box containing all the original entries.
8. In the **Caption** and **Description** boxes, type the translated text. Assuming you want to keep all other entries the same between the two languages, click **OK**. This applies the entries to the parallel interface, but does not save those entries.
9. Right-click any open area of the data pane, then click **Save Changes**. This saves your entries, but does not exit Configuration Mode.
10. Repeat steps 3 through 9 for each topic, query, and launcher button in your Visual Catalog. This creates a parallel Component Configuration dialog box for each component.
11. Right-click any open area of the data pane. This opens a shortcut menu (Figure 6.27).
12. Click **Configure Global Options**. This displays the Global Options Configuration dialog box (Figure 6.38).

FIGURE 6.38



13. Click **Copy**.
14. In the **Language** list, select the interface language you are adding.
15. Click **Paste**. This creates a duplicate Global Options Configuration dialog box containing all the original entries. Assuming you want to keep all effects the same between the two languages, click **OK**.
16. Your new parallel language interface is now complete. Right-click any open area of the data pane, and then click **Exit Configuration Mode**. This displays a warning dialog box. Click **Yes** and exit Configuration Mode.
17. To review and use the new parallel interface, click **Languages** on the **Search** tab, and then click the language of the parallel interface you just created. Then click **OK**. This refreshes the Visual Catalog, changing all interface text to the new language.

Modifying a Translated Interface

You can modify a translated topic, query, or launcher component. You can also modify the global sound effects for a translated interface. If you modify an existing interface in one language, you may need to make matching changes in all interface languages offered to your patrons.

Modifying a Translated Component

To modify an existing topic, query, or launcher component:

1. At the main button menu level, access Configuration Mode as explained beginning on page 6-32.
2. Go to the button menu that contains the topic, query, or launcher component to be modified.
3. Right-click the button to be modified. This opens a button-specific menu (Figure 6.28).
4. Click **Modify**. This displays the Component Configuration dialog box containing properties of this component (example shown in Figure 6.36).

5. To modify text, sound, or visual properties, see step 7 on page 6-34. To modify a search query, see steps 8 and 9 beginning on page 6-38. To modify a launcher component link, see step 7 on page 6-42.
6. When finished, click **OK**. This applies the changes, but does not save them.
7. When satisfied with the changes made to the component, save your changes. To do so, right-click any open area of the data pane, then click **Save Changes**. This saves your changes, but does not exit Configuration Mode.
8. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

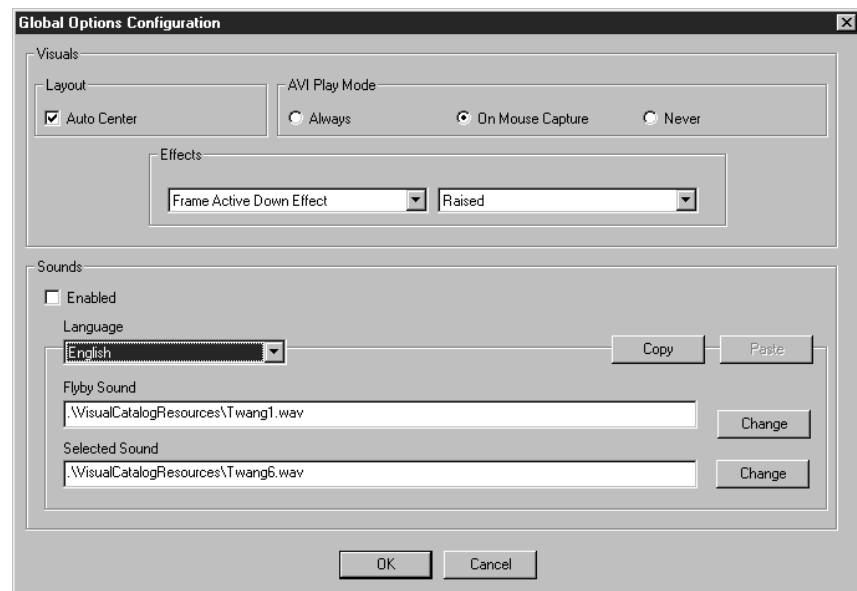
- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Modifying Translated Global Sound Effects

To modify the global sound effects in an existing parallel language interface:

1. At the main button menu level, access Configuration Mode as explained beginning on page 6-32.
2. Right-click any open area of the data pane. This opens a shortcut menu (Figure 6.27).
3. Click **Configure Global Options**. This displays the Global Options Configuration dialog box (Figure 6.39).

FIGURE 6.39



4. In the **Language** list, select the interface language that requires the sound modification.

5. Modify the sound effects as needed. You cannot modify the visual effects for this language only; if you change the visuals, those changes will apply to every interface language offered to patrons.
 - **Flyby Sound** – Identifies the sound that plays when the mouse points at a button. To select a sound file, either type the path and file name, or click **Change** and navigate to the location of the sound file.
 - **Selected Sound** – Identifies the sound that plays when a button is clicked. To select a sound file, either type the path and file name, or click **Change** and navigate to the location of the sound file.
6. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**. This displays a warning dialog box. You can:
 - Click **Yes** to save the changes and exit Configuration Mode.
 - Click **No** to cancel any unsaved changes and exit Configuration Mode.
 - Click **Cancel** to remain in Configuration Mode without saving changes.

Saving and Exiting Configuration Mode

To save and/or exit Configuration Mode:

1. Right-click any open area of the data pane. This opens a shortcut menu (Figure 6.27).
2. Click one of the following:
 - **Save Changes** – This saves your changes, but does not exit Configuration Mode.
 - **Exit Configuration Mode** – This displays a warning dialog box. You can:
 - Click **Yes** to save the changes and exit Configuration Mode.
 - Click **No** to cancel any unsaved changes and exit Configuration Mode.
 - Click **Cancel** to remain in Configuration Mode without saving changes.

USING REPORTTOOL

7

CHAPTER CONTENTS

This chapter describes:

- How to access and run the reports preloaded into M3 (page 7-3)
- How to customize the library name on a preloaded report (page 7-4)
- How to print a report (page 7-5)
- How to download a report to a file (page 7-5)
- How to create a new report (page 7-6)
- How to use the grouping function (page 7-16)
- How to use the join function (page 7-18)

NOTE: The common ReportTool™ functions are described in this M3 Users Guide. The M3 ReportTool module also includes an extensive on-screen Help system. For detailed information not included in this Users Guide, refer to the on-screen ReportTool Help.

ABOUT REPORTTOOL

Notes:

- In a wide area network, Mandarin recommends running reports at the central site only. If individual sites need to run reports, they should be scheduled to run at different times to avoid slowing down the server.
- Deleted records appear in reports until deletions are purged using the M3 Cataloging module.

In M3, reports are generated using ReportTool, a flexible and powerful Windows report generator developed by Zen Software, Inc. More than 850 library-related reports are preloaded into M3. You can run these preloaded reports in their current form, customize the preloaded reports, or create new reports.

During M3 installation, the user must choose to install preloaded reports in one of two categories:

- School – contains more than 850 reports. This includes reports generally used by K-12 schools, public libraries, and universities.
- Public or Academic – contains more than 450 reports generally used by public libraries and universities. This does not include reports generally used by K-12 schools.

The preloaded reports are listed in Tables B.1 through B.14 in “Appendix B: Preloaded Reports” beginning on page B-1. Reports are coded according to type: S (School) or P/A (Public or Academic). Additional reports are created periodically and can be downloaded from the Mandarin Web site at:

<http://www.mlasolutions.com>

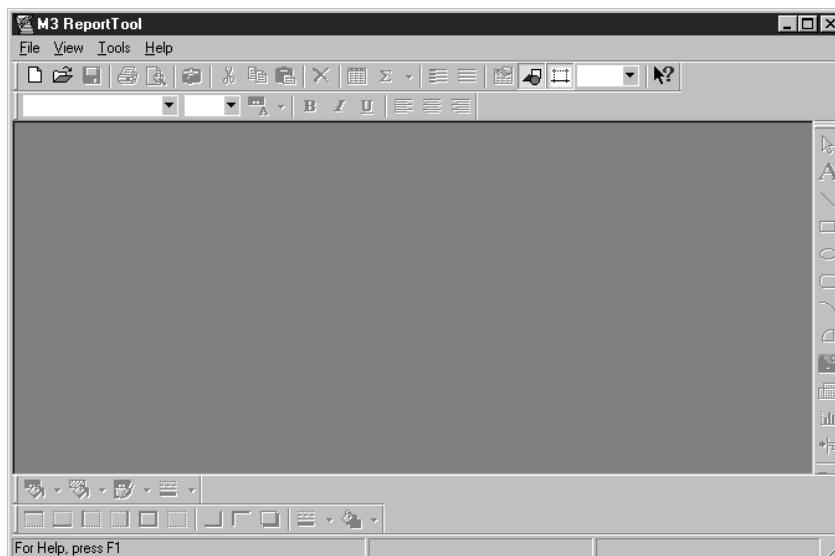
Under **Customer's Corner**, type your customer number, then click **Login**. On this page, you can also request custom reports by clicking the **Request a custom report** link.

STARTING REPORTTOOL

*Note: If you installed M3 v1.1 prior to installing v1.6, select **SIRS Mandarin** and then **M3** (instead of **Mandarin M3**).*

On the taskbar, click the **Start** button, select **Programs**, select **Mandarin M3**, and then click **ReportTool**. This displays the M3 ReportTool window (Figure 7.1).

FIGURE 7.1



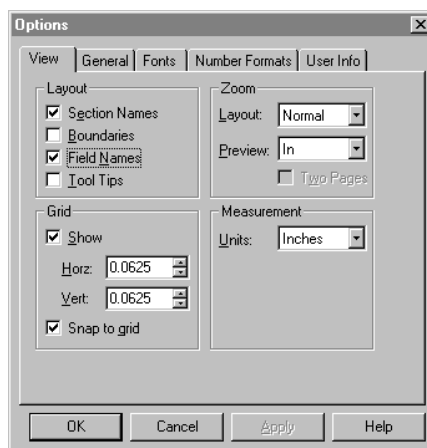
REPORTTOOL SETUP

Before running or creating reports, you should configure several options which will make the report design easier to understand.

To set up ReportTool:

1. On the **Tools** menu, click **Options**. This displays the Options dialog box (Figure 7.2) with the **View** tab displayed.

FIGURE 7.2



2. Under **Layout**, select the **Section Names**, **Boundaries**, **Field Names**, and **Tool Tips** check boxes. These options make the features visible.

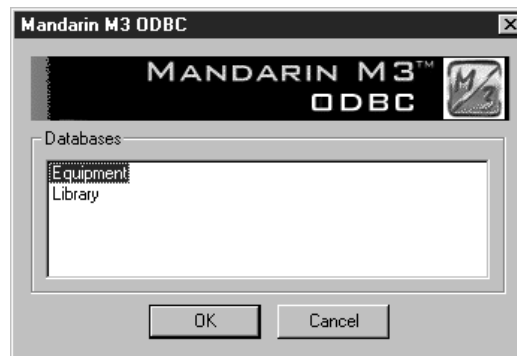
3. Under **Grid**, select the **Show** check box. This option places a grid design on your report.
4. Click **OK** to save your changes.

RUNNING PRELOADED REPORTS

To run a preloaded report:

1. On the **File** menu, click **Open**. This displays the Open dialog box containing a list of available reports.
2. Select the report you want to run, then click **Open**. This displays the Mandarin M3 ODBC dialog box (Figure 7.3).

FIGURE 7.3



3. Select the database for which you want to run the report, then click **OK**. This displays the corresponding report layout screen, which shows where the data fields are positioned on the report page. It does not include your report data at this time.

4. From here you can:

- Compile and print the report. To do so, click **Print** on the **File** menu. In the Print dialog box, adjust the settings as desired, and then click **OK**. After the data is compiled, the report prints without a preview.

OR

- Compile and preview the report on-screen. To do so, click **Print Preview** on the **File** menu. After the data is compiled, the report displays. The Print Preview toolbar allows you to zoom in and out, skip to the next or previous page, and display two pages at a time. Click **Print** to print the report, or **Close** to exit Preview mode.

NOTES:

- Preloaded reports automatically print with the current date.
- Preloaded reports do not include a library name unless your library has customized the reports. If you want to add your library name to a preloaded report, refer to the next section, “Adding Your Library Name to a Preloaded Report.”

***Tip:** Before printing, verify ReportTool is not running in Preview mode. To do this, verify that the camera icon on the toolbar is not selected.*

ADDING YOUR LIBRARY NAME TO A PRELOADED REPORT

You have the option to add your library's name to the header of a preloaded report. (Otherwise, the report prints without any library name.) To do so:

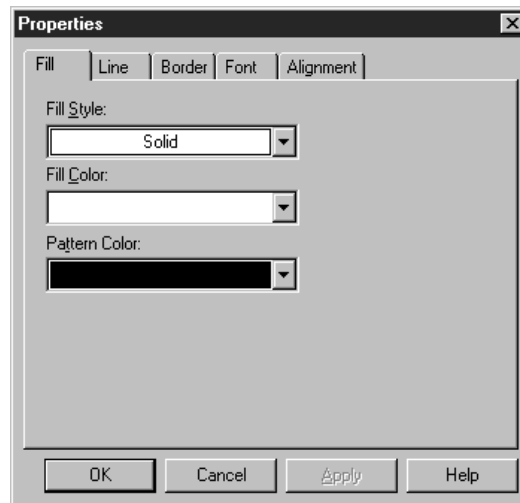
1. On the **File** menu, click **Open**. This displays the Open dialog box.
2. Select the report you want to modify, then click **Open**. This displays the Mandarin M3 ODBC dialog box (Figure 7.3).
3. Select the database for which you want to run the report, then click **OK**. This displays the report layout screen.
4. If the report already contains a text box with an incorrect library name, select the incorrect text and type your library's name in its place. Then skip to step 7.

OR

If the report layout screen does not have an existing library name box, continue to step 5.

5. On the Drawing toolbar (usually positioned along the right of the window), click the **A** symbol.
6. In the Report Header (shown in Figure 7.5), drag the mouse to create a text box (see Figure 7.6). Type your library's name in the text box.
7. To format the appearance of your library's name, right-click in the text box, and then select **Properties** from the menu. This displays the Properties dialog box (Figure 7.4).

FIGURE 7.4



8. Select the font, text alignment, and other properties in the appropriate tabs. When finished, click **OK**.
9. On the **File** menu, click **Save As**. This displays the Save As dialog box. Navigate to the location where you want to save the report.
10. In the **File name** box, type a new name for the report, and then click **Save**. This saves the report.

PREVIEWING A REPORT

Tip: Use the camera icon on the toolbar as a shortcut to **Print Preview**; it speeds up the process if you have repeated previews to perform.

To preview a report to check content and layout:

1. On the **File** menu, click **Print Preview**. This displays the Mandarin M3 ODBC dialog box (Figure 7.3), which lists the available databases.
2. Select the appropriate database, then click **OK**. This displays the report.
3. To navigate the report, use the following buttons:
 - **Print** – prints a preview copy of the report
 - **Next Page** – displays the next page of the report
 - **Prev Page** – displays the previous page of the report
 - **Two Page** – displays the report two pages at a time (if **Two Page** is selected, **One Page** appears on the button)
 - **Zoom In** – enlarges the display of the report
 - **Zoom Out** – reduces the display of the report
 - **Close** – closes the preview and returns to the layout screen

NOTE: Sample data is used in Preview mode. Therefore, a printed preview report should only be used to review field placement and text properties.

PRINTING A REPORT

Note: Before printing, verify ReportTool is not running in Preview mode. To do this, verify that the camera icon on the toolbar is not selected.

To print a report:

1. On the **File** menu, click **Open**. This displays the Open dialog box.
2. Select the report you want to print, then click **Open**. This displays the Mandarin M3 ODBC dialog box (Figure 7.3).
3. Select the database for which you want to run the report, then click **OK**. This displays the report.
4. On the **File** menu, click **Print**. This displays the Print dialog box.
5. Change settings as desired, then click **OK**. This prints the report.

DOWNLOADING A REPORT TO A FILE

To download a report to a file:

1. On the **File** menu, click **Open**. This displays the Open dialog box.
2. Select the report you want to download, then click **Open**. This displays the Mandarin M3 ODBC dialog box (Figure 7.3).
3. Select the database for which you want to run the report, then click **OK**. This displays the report.
4. On the **File** menu, click **Print**. This displays the Print dialog box.
5. Select the **Print to file** check box, then click **OK**. This displays the Print to File dialog box.
6. Navigate to the location where you want to download the report.

7. In the **File name** box, type a name for the report.
8. In the **Save as type** list, select the appropriate file format, then click **Save**. This downloads the report.

CREATING A NEW REPORT – REPORT TUTORIAL

In the ReportTool, creating a new report requires a series of procedures. These procedures are summarized in the following section, “Overview,” and then detailed in the sections that follow.

Overview

- Step 1: Define the report, determining if a similar report exists that you can modify or if you must create a new report
- Step 2: Create a blank report
- Step 3: Add a title to the report
- Step 4: Add style to text on the report
- Step 5: Add the run date to the report
- Step 6: Specify the data source
- Step 7: Add and sort fields on the report

Step 1: Defining the Report

Before beginning, make a list of what the report must accomplish and what information must appear on the final printed report. Then, compare your list to the preloaded report list to determine if a similar report already exists (see Tables B.1 through B.14 in “Appendix B: Preloaded Reports” beginning on page B-1). It is faster to modify an existing report than to create a new one.

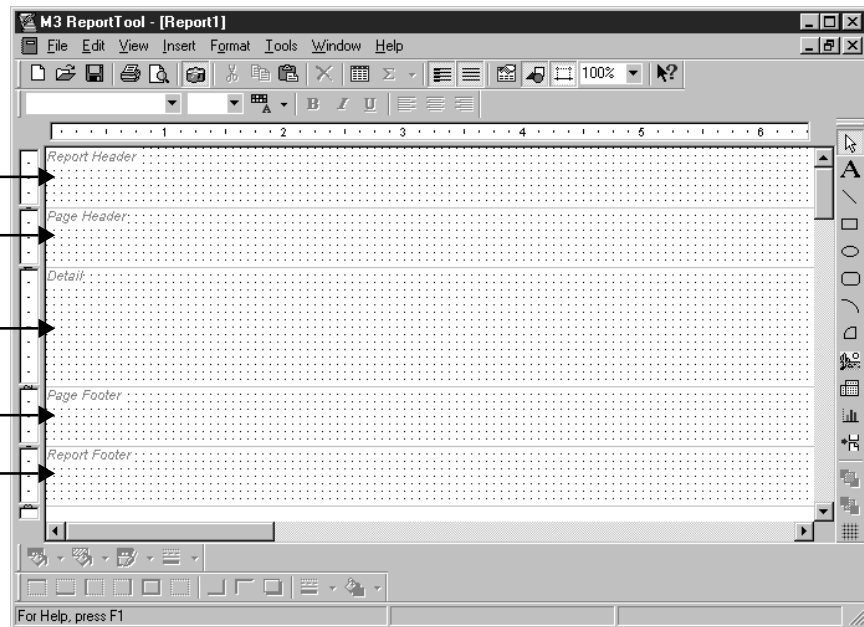
NOTE: When you modify a preloaded report, always save the report under a different name. This will preserve your new report when reports are updated.

Step 2: Creating a Blank Report

To create a new report:

1. Verify that your server (or ZServer module) is running.
2. On the **File** menu, click **New**. This displays the Open dialog box containing a list of available reports.
3. Select **Blank Report**, then click **OK**. The layout for a blank report is displayed in Figure 7.5.

FIGURE 7.5

*Report Header**Page Header**Detail**Page Footer**Report Footer*

The report layout is divided into five sections:

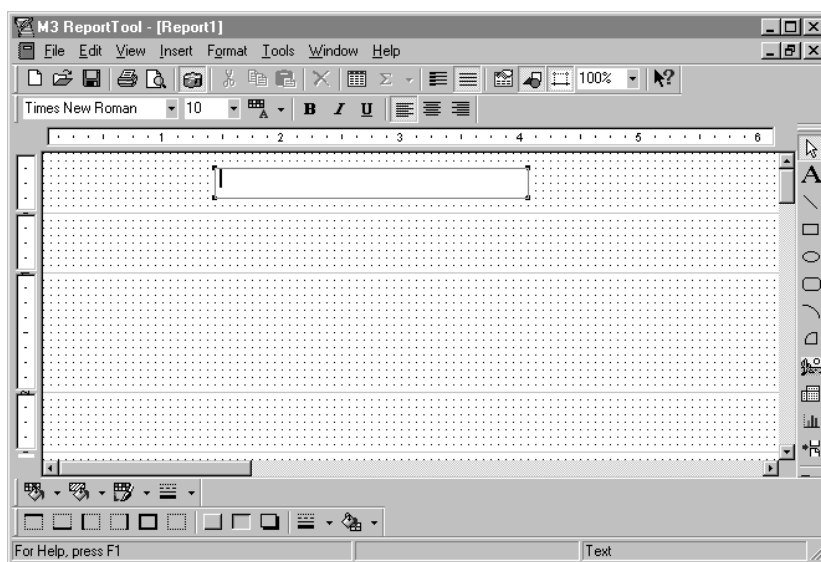
- **Report Header** – Appears at the top of page one of the report. It is not repeated on subsequent report pages.
- **Page Header** – Appears at the top of every page. On page one, it appears below the Report Header.
- **Detail** – Encompasses the body of the report.
- **Page Footer** – Appears at the end of every page. On the last page, it appears above the Report Footer.
- **Report Footer** – Appears at the end of the last page.

Step 3: Adding the Report Title

The report title appears in the Report Header section. To create a title for the report:

1. On the Drawing toolbar, click the A symbol.
2. In the Report Header (shown in Figure 7.5), drag the mouse to create a text box (shown in Figure 7.6).

FIGURE 7.6



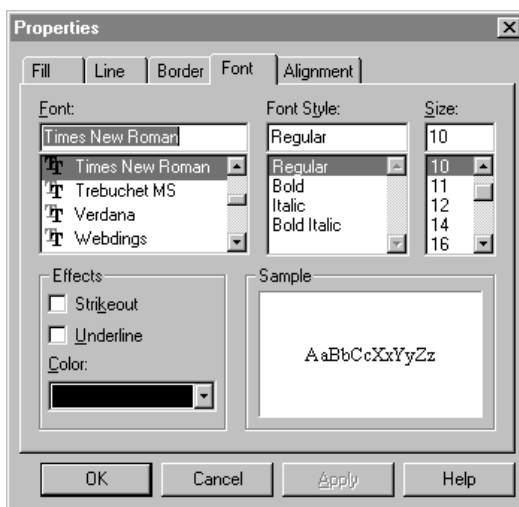
3. In the text box, type the title of your report. When finished, click outside the text box to deselect it.

Step 4: Formatting Text

To modify the text properties of the report title, or any text added to the report:

1. Verify the text box is not selected. To do so, click elsewhere on the report.
2. Right-click in the text box you want to format, then select **Properties** from the menu. This displays the Properties dialog box (Figure 7.7).
- A. To change the font, click the **Font** tab (shown in Figure 7.7). Select the desired font, font style, and size.

FIGURE 7.7



- B. To change the alignment, click the **Alignment** tab. Select left, center, or right alignment, then click **OK**.
3. To resize the text box, select the text box, then drag one of the corners.

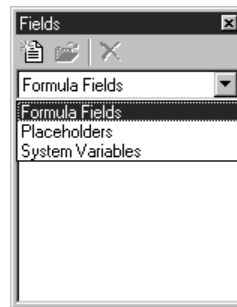
4. To move the text box, click outside the text box to deselect it. Then click on the text box and drag it to the new location.
5. To center a text box or field on a report, click **Align** on the **Format** menu. This displays the Align dialog box. Under **Horizontal**, click **Center**, and then click **OK**.
6. On the **File** menu, click **Print Preview** to view your changes. Click **Close** to exit the Print Preview and return to the report.
7. When finished, click **Save** on the **File** menu.

Step 5: Adding the Report Run Date

To display the date the report was run in the Report Header:

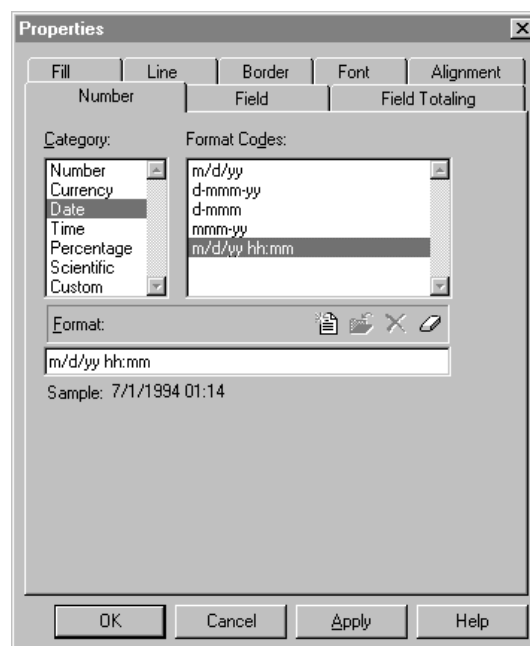
1. On the **Insert** menu, click **Fields**. This displays the Fields window (Figure 7.8).

FIGURE 7.8



2. In the list, select **System Variables**. This displays a list with the following:
 - **PRINTDATE** – prints the current date
 - **PRINTTIME** – prints the current time
 - **PAGE** – prints the current page number
 - **TOTALPAGES** – prints the total number of pages
 - **REPORTNAME** – prints the report file name
3. Drag **PRINTDATE** into the Report Header section, then close the Fields window.
4. Right-click in the new date field, then select **Properties**. This displays the Properties dialog box (Figure 7.4).
 - A. Click the **Field** tab, then click **Date**.
 - B. Click the **Number** tab (shown in Figure 7.9). In the **Category** box, select **Date**. In the **Format Codes** box, select a format.

FIGURE 7.9



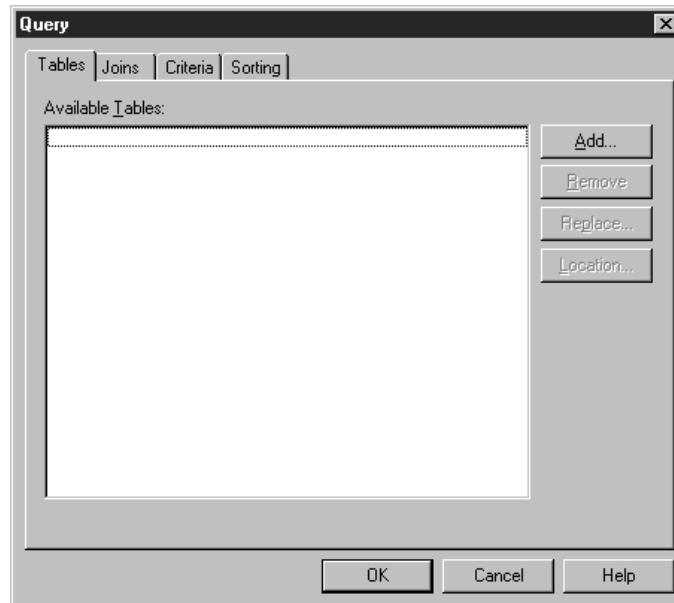
- C. Make any desired text property changes in the **Font** and **Alignment** tabs. (For instructions, see “Step 4: Formatting Text.”) Then click **OK**.
5. To move or resize the new date box, see steps 3 and 4 beginning on page 7-8 for instructions.
6. On the **File** menu, click **Print Preview**.
7. Today's date should be visible on your report. If part of the date is truncated, click **Close** to return to the report layout, and then resize the date box.
8. When finished, click **Save** on the **File** menu.

Step 6: Specifying the Data Source

To specify the database table from which the report will draw data:

1. On the **Tools** menu, click **Query**. This displays the Query dialog box.

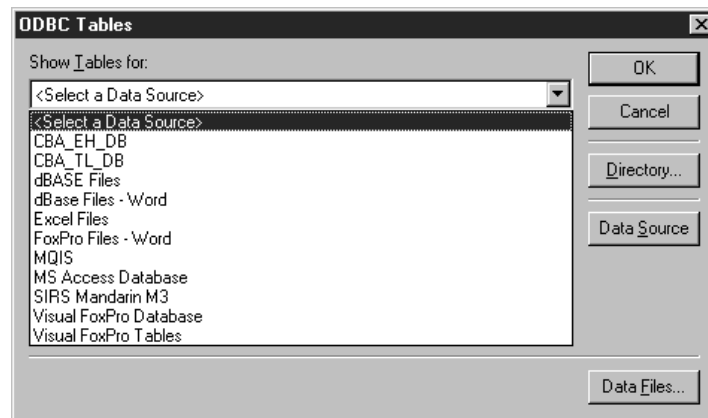
FIGURE 7.10



2. On the **Tables** tab, click **Add**. This displays the ODBC Tables dialog box (Figure 7.11).

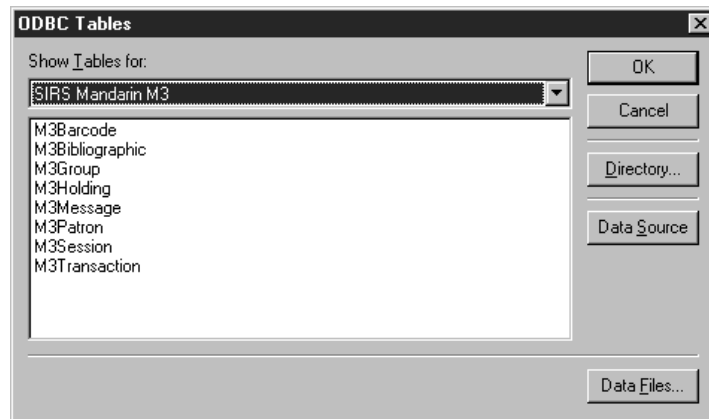
FIGURE 7.11

***Note:** ODBC stands for "Open DataBase Connectivity," a standard by which many commercial database vendors have agreed to abide. ReportTool offers you the choice of using other ODBC-compliant database systems; however, if you choose another system, Mandarin technical support will not be able to help you in case of a problem. Mandarin only guarantees ReportTool will work with the M3 system.*



3. In the **Show Tables for** list, select **SIRS Mandarin M3**. If your library offers multiple database types, the Mandarin M3 ODBC dialog box (Figure 7.3) appears. Select the appropriate database type (usually **Library**), then click **OK**. This displays the ODBC Tables dialog box (Figure 7.12) with M3 data-base table choices listed.

FIGURE 7.12



4. Select the database table you want to use. Your default options are:
 - **M3Barcode** – contains the barcodes used by Circulation
 - **M3Bibliographic** – contains all the MARC bibliographic records
 - **M3Group** – contains all the item and patron groups
 - **M3Holding** – contains all the MARC holding records
 - **M3Message** – contains all the blocking messages used by Circulation
 - **M3Patron** – contains the patron records
 - **M3Session** – contains the session records created by Circulation
 - **M3Transaction** – contains the transaction records created and used by Circulation
5. Click **OK**. This closes the ODBC Tables dialog box, and displays the data-base table name in the **Tables** tab of the Query dialog box.
6. Click **Close** to close the Query dialog box.

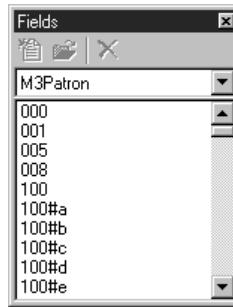
Step 7: Adding and Sorting Fields

Placing Fields onto the Report

To place fields from a database table onto a report:

1. On the **Insert** menu, click **Fields**. This displays the Fields window (Figure 7.13).

FIGURE 7.13



2. The database table you selected in step 4 of “Step 6: Specifying the Data Source” displays. Below it appears a list of field tag numbers and sub-tag codes that represents all the defined fields in a record. In Figure 7.13, an M3 patron record is defined. (For a definition of the fields listed here, see “Obtaining Record Definitions” on page 7-15.)
3. Drag the desired fields from the Fields window into the Detail section of the report you are creating.

NOTE: If you need to enlarge the Detail section, position your cursor over the ruler bar where the bottom margin of the Detail section intersects the ruler bar. When the cursor changes to a double-ended arrow, drag the margin line down to resize.

4. When finished, close the Fields window.
5. To change the text properties and field placement, see “Step 4: Formatting Text” beginning on page 7-8.
6. When finished, click **Save** on the **File** menu.

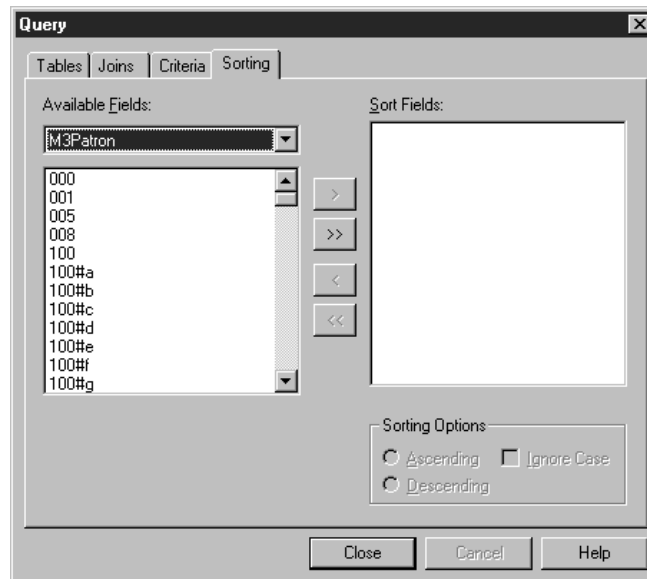
Sorting Field Data

To sort the data in a report by a field:

1. On the **Tools** menu, click **Query**. This displays the Query dialog box (Figure 7.10).
2. Click the **Sorting** tab (shown in Figure 7.14). In the **Available Fields** list, select a database table.

FIGURE 7.14

You can use this dialog box at any time to add, remove, or reorder data sort formulas.



3. Select a field in the left column, then click the > button to move the field to the **Sort Fields** box.
4. Select the field in the **Sort Fields** box. Under **Sorting Options**, click **Ascending** or **Descending**, and then select the **Ignore Case** check box.
5. Repeat steps 3 and 4 for each field you want to sort. The fields will be sorted in the order they appear in the **Sort Fields** box; you can reorder the fields by dragging the field to the appropriate position in the **Sort Fields** box. When finished, click **OK**.
6. On the **File** menu, click **Print Preview**. Data should now display in the order you selected.
7. When finished, click **Save** on the **File** menu.

OBTAINING RECORD DEFINITIONS

To obtain the definition for any record structure used in M3:

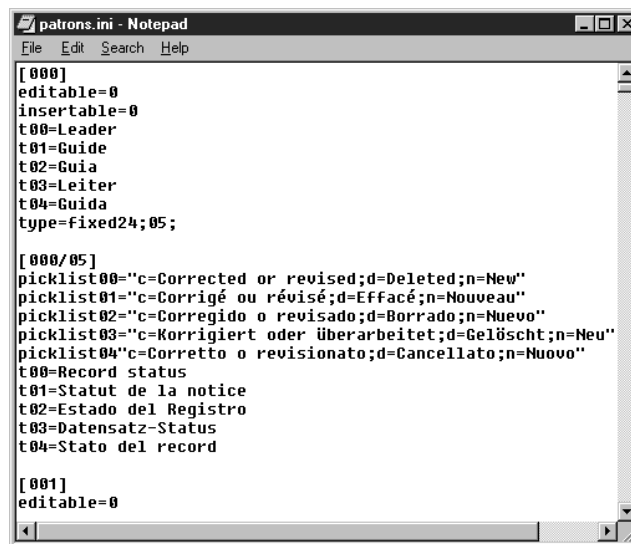
1. Minimize the ReportTool window.
2. Using a simple text editor such as Notepad or WordPad, open the Patrons.ini file (the default path is **C:\Program Files\Mandarin M3\Definition**).

Note: If you installed M3 v1.1 prior to installing v1.6, your default path is **C:\Program Files\SIRS Mandarin\M3\Definition**.

This document and all other .ini files in the Definition folder contain field definitions for all the valid fields in MARC tables for ReportTool. Each field tag is enclosed in brackets; each field definition is preceded by **t00=**. (A sample Patrons.ini file is shown in Figure 7.15.)

NOTE: Within .ini files, **t00** contains English terms, **t01** contains French, **t02** contains Spanish, **t03** contains German, and **t04** contains Italian.

FIGURE 7.15



3. On the **File** menu, click **Print**, and then close the document.
4. Maximize the ReportTool window.

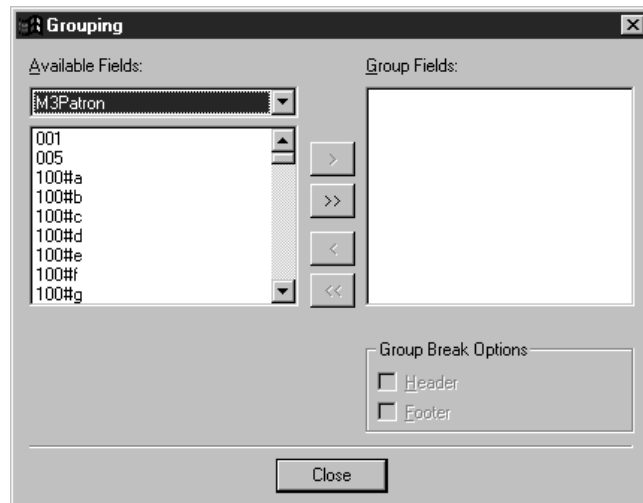
USING THE GROUPING FUNCTION

If you want all records that have the same value for a particular field to be printed together on a report, they need to be grouped. Grouping differs from sorting in that it only prints associated records together on a report; it does not put the records in order. In the following example, we will create a grouping of all patrons in a particular city.

Step 1: Adding a Group

1. On the **Tools** menu, click **Grouping**. This displays the Grouping dialog box (Figure 7.16).

FIGURE 7.16



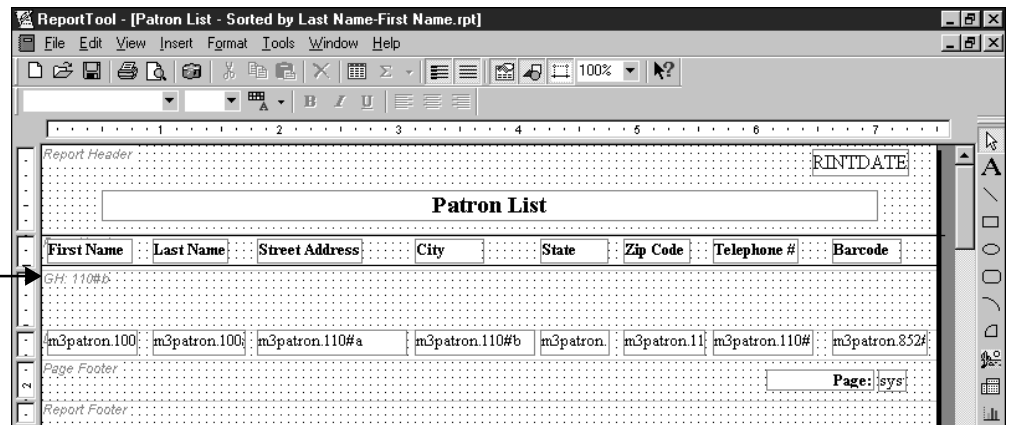
2. Select the field that you want to group in the left column, then click the **>** button to move the field to the **Group Fields** box. In this example, we will select **100#b** (City). When finished, click **Close**.

Step 2: Adding a Group Header

1. On the **Tools** menu, click **Grouping**. This displays the Grouping dialog box (Figure 7.16). **M3Patron.100#b** now appears in the **Group Fields** box.
2. Click **M3Patron.100#b** in the **Group Fields** box. This enables **Group Break Options**. Select the **Header** check box, then click **Close**.
3. The report window now displays the **100#b** field in the Group Header (GH) section as shown in Figure 7.17.

FIGURE 7.17

Group Header section



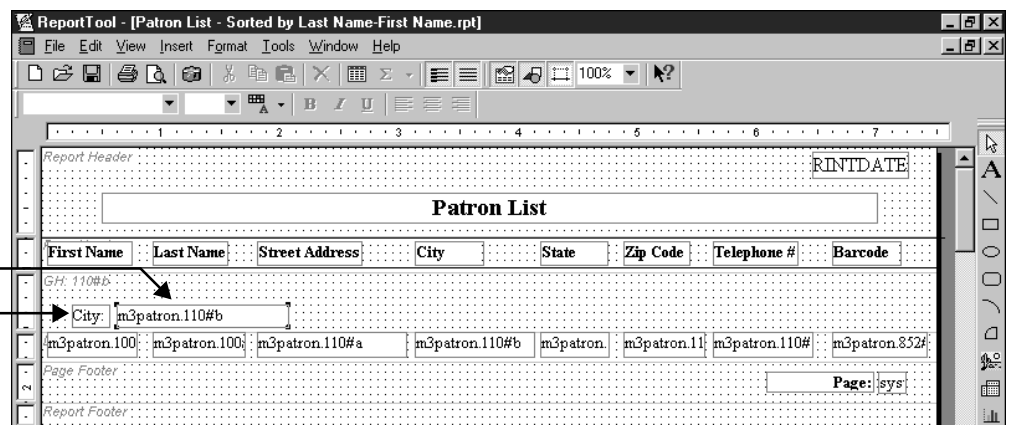
Step 3: Adding a Field and Field Label

1. On the **Insert** menu, click **Fields**. This displays the Fields window (Figure 7.13).
2. Drag **110#b** into the Group Header (GH: 110#b) section of the report, then close the Fields window. This adds the new field.
3. Click the text box that contains the column header **City** and press CTRL+C. This copies the text box.
4. Click in the Group Header section, then click CTRL+V. This pastes the copied text box and adds the new field label.
5. Click in the new **City** text box and type a colon (:) after the word **City**. Align the new text box so that **City** appears as the field label as shown in Figure 7.18

FIGURE 7.18

New field

New field label



6. In order for your report to group and sort properly, you must add the M3Patron.110#b field to your sort criteria. For instructions, see “Step 7: Adding and Sorting Fields” on page 7-13.

USING THE JOIN FUNCTION

The “join” function is used to connect different tables in M3. Any report containing information in more than one table requires a join. For example, since the item Title and Author are stored in the M3Bibliographic table and the Call Number is stored in the M3Holding table, a report containing this information requires a join.

A join can only be performed between tables that contain a field with common data. For example, all records in the M3Bibliographic table contain an ISN number (Control Number), which is contained in M3Bibliographic.001. The M3Holding table also contains an ISN number, which is contained in M3Holding.001. However, these ISN numbers are not equal. The M3Holding table also contains a field which stores the ISN number for the corresponding bibliographic record. The bibliographic ISN is stored in the M3Holding.004 field. Therefore, when creating a join between the bibliographic table and the holding table, the join is **M3Bibliographic.001 >>> M3Holding.004**.

Table 7.1 lists the joins most commonly used when creating reports for M3.

TABLE 7.1

Table 1	Table 2	Join/Usage
M3Bibliographic	M3Holding	M3Bibliographic.001 >>> M3Holding.004 Connects the bibliographic table to the holding table and creates a list of items containing call number (holding) and Title/Author (bibliographic). (Both fields in the join contain the bibliographic ISN.)
M3Holding	M3Group	M3Holding.991a >>> M3Group.001 Connects the holding table to the group table and creates a list of holding records that indicate the Item Group name. (Both fields in the join contain the group ISN.)
M3Patron	M3Group	M3Patron.991a >>> M3Group.001 Connects the holding table to the group table and creates a list of patron records that indicate the Patron Group name. (Both fields in the join contain the group ISN.)
M3Transaction	M3Holding	M3Transaction.010#l >>> M3Holding.001 Connects the transaction table to the holding table and creates a list of transactions that contains information from the holding table. (Both fields in the join contain the holding ISN.)
M3Transaction	M3Bibliographic	Transaction.010#n >>> M3Bibliographic.001 Connects the transaction table to the bibliographic table and creates a list of transactions that contains information from the bibliographic table. (Both fields in the join contain the bibliographic ISN.)
M3Transaction	M3Patron	M3Transaction.010#m >>> M3Patron.001 Connects the transaction table to the patron table and creates a list of transactions that contains information from the patron table. (Both fields in the join contain the patron ISN.)

USING M3 INVENTORY

8

CHAPTER CONTENTS

This chapter describes:

- How to conduct a full inventory (page 8-4)
- How to conduct a partial inventory (page 8-9)
- How to enter additional barcodes after the barcode records have been uploaded (page 8-13)
- How to remove barcodes during the inventory process (page 8-14)
- How to print and save inventory results (page 8-14)
- How to export a barcode list of inventory results (page 8-15)
- How to open a previously saved inventory session or report (page 8-15)

ABOUT M3 INVENTORY

Using M3 Inventory, you can conduct a full or partial inventory of your library's holdings. A full inventory involves scanning the entire collection during one time period. A partial inventory involves scanning portions of the collection at any time throughout the year. Both types of inventory are explained in this chapter.

Conducting an inventory with M3 requires only a few basic steps. First, the items to be inventoried need to be scanned. Then the scanning results need to be uploaded into the M3 Inventory module. If conducting a partial inventory, the range limits of the corresponding holdings need to be entered. Lastly, the "Do Inventory" procedure must be run to compare the scanned barcodes to the corresponding holdings database.

When M3 Inventory compares the scanning results to the contents of the holdings database, it groups and categorizes any differences as Newly Found, Missing, Invalid Barcodes, Misplaced, Loaned Shelved, No Barcode, Duplicate Barcode, or Out of Range(s) Items. Once the results are compiled, you can print the results lists needed to reconcile your inventory.

STARTING M3 INVENTORY

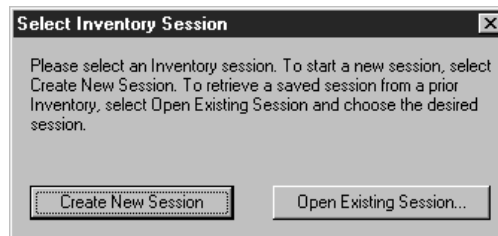
If desired, you can run the M3 Inventory module while other M3 modules are open. However, to ensure accurate inventory results, you should not circulate or catalog items while the collection is being scanned.

To start the M3 Inventory module:

***Note:** If you installed M3 v1.1 prior to installing v1.6, select **SIRS Mandarin** and then **M3** (instead of **Mandarin M3**).*

1. On the taskbar, click the **Start** button, select **Programs**, select **Mandarin M3**, and then click **Inventory**. This displays the Inventory Login dialog box.
2. Type your user ID in the **Login Name** box, your password in the **Password** box, and then click **OK**. This displays the Select Inventory Session window (Figure 8.1).

FIGURE 8.1



3. Click **Create New Session** or **Open Existing Session**.
 - If you click **Create New Session**, the main M3 Inventory window displays (Figure 8.2), ready for you to conduct an inventory.
 - If you click **Open Existing Session**, the Open dialog box displays. Navigate to the inventory session file you want to open, then click **OK**. This opens the session in the main M3 Inventory window (Figure 8.2).

INVENTORY WINDOW FEATURES

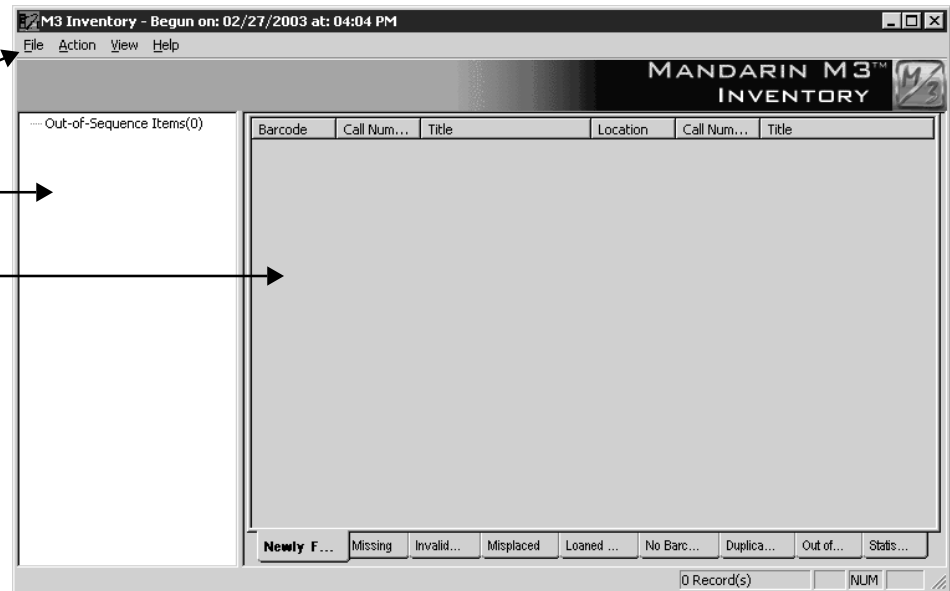
All M3 Inventory functions can be accessed from the main Inventory window. The Inventory window (Figure 8.2) is divided into three parts: the Inventory menu bar, the Barcode pane (left pane), and the Inventory pane (right pane).

FIGURE 8.2

Inventory menu bar

Barcode pane

Inventory pane



- **Inventory menu bar** – Contains the File, Action, View, and Help menus:
 - File menu – Allows you to open and save sessions, add and remove a barcode or a barcode file, upload barcodes from the scanner, open or save an inventory report, export barcodes, print reports, and configure the print setup.
 - Action menu – Allows you to run the Do Inventory procedure, clear all lists, mark items, run reports, and access Inventory Options.
 - View menu – Allows you to change the language of the interface, view a summary of inventory statistics, and turn the status bar on and off.
 - Help menu – Allows you to access Inventory Help topics and connect to the Mandarin Web page.
- **Barcode pane** – Displays the barcode files you are working with.
- **Inventory pane** – Displays the results of your inventory procedure. It is divided into nine tabs, corresponding to the results of the barcode scanning. These tabs are: **Newly Found**, **Missing**, **Invalid Barcode**, **Misplaced**, **Loaned Shelved**, **No Barcode**, **Duplicate Barcode**, **Out of Range(s)**, and **Statistics**.

NOTE: Media type icons display in the Inventory pane in all tabs (except Invalid Barcodes and Statistics) alongside items that have a media type assigned. For information on assigning media types, see “Appendix E: Configuring Media Type Icons” on page E-1. To disable these icons, change each **HasIcons** entry in the InventoryDisplay.ini file (located in the Inventory folder in your M3 directory) from **1** to **0**, then restart the Inventory module. (NOTE: There are eight HasIcons entries in this file, one for each tab except Statistics.)

SELECTING AN INTERFACE LANGUAGE

In M3 Inventory, you can specify the interface language. This affects screen elements such as names of windows, buttons, and text boxes; it does not affect the language of the records in your database.

To select an interface language:

1. On the **View** menu, click **Languages**. This displays a sub-menu with the languages available for selection.
2. Click the language you want to use. This refreshes your Inventory interface to display the selected language.

CONDUCTING A FULL INVENTORY

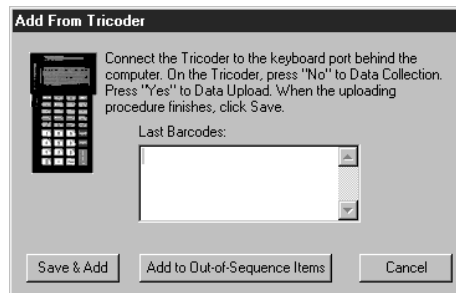
To conduct a full inventory:

1. Scan the barcode of each item on the shelves, following shelflist order. Use a barcode scanner such as a tricoder.

NOTE: A tricoder can hold an average of 6,000 scanned barcodes at a time. Once that capacity is reached, the information needs to be uploaded into the inventory file. It may take several scanning and uploading sessions to build the inventory data.

2. Upload the scanned barcode records (for the shelved items) from the barcode scanner to M3 Inventory. To do so:
 - A. On the **File** menu, click **Upload From Reader**. (Or, right-click while pointing to the Barcode pane to access a shortcut menu.) This displays the Add From Tricoder window (Figure 8.3).

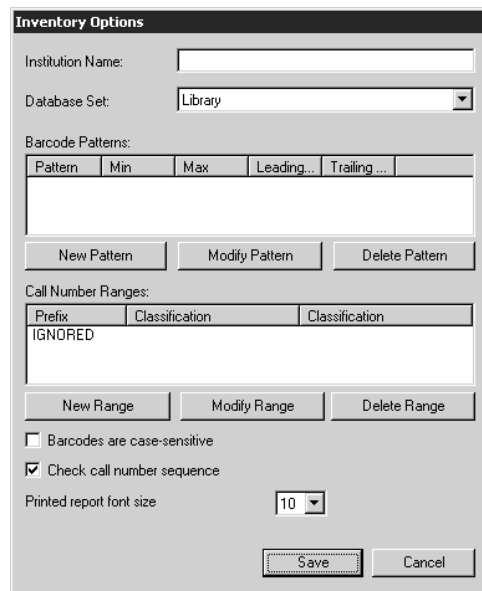
FIGURE 8.3



- B. Follow the instructions in the window, then click **Save & Add**. This displays the Save As dialog box.
 - C. Navigate to the location where you want to store the barcode file. If you are going to upload multiple barcode files, you may want to create a new folder for the files.
 - D. In the **File name** box, type a name for the barcode file you are uploading, and then click **Save**. This saves the file and adds the barcodes to the current inventory. (If you need to upload multiple times to scan the entire collection, be sure to designate different names for each upload file to avoid overwriting data.)
3. Scan the barcode of each item that is out-of-sequence (that is, items not on the shelves, such as items on carts).

4. Upload the scanned barcode records (for the out-of-sequence items) from the barcode scanner to M3 Inventory. To do so:
 - A. On the **File** menu, click **Upload From Reader**. (Or, right-click while pointing to the Barcode pane to access a shortcut menu.) This displays the Add From Tricoder window (Figure 8.3).
 - B. Click **Add to Out-of-Sequence Items**. This adds the items to the out-of-sequence list without creating a file. A misplaced item check is not performed on the out-of-sequence list.
5. On the **Action** menu, click **Inventory Options**. This displays the Inventory Options window (Figure 8.4).

FIGURE 8.4

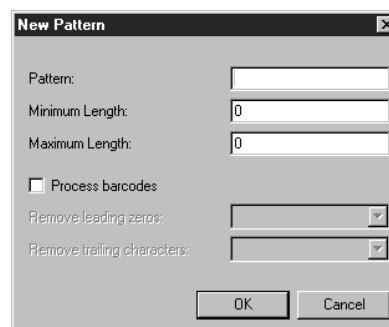


The **Inventory Options** dialog box contains the following sections:

- Institution Name:** A text input field.
- Database Set:** A dropdown menu currently showing "Library".
- Barcode Patterns:** A table with columns: Pattern, Min, Max, Leading..., and Trailing... Below the table are buttons: New Pattern, Modify Pattern, and Delete Pattern.
- Call Number Ranges:** A table with columns: Prefix, Classification, and Classification. The first row contains the text "IGNORED". Below the table are buttons: New Range, Modify Range, and Delete Range.
- ☐ Barcodes are case-sensitive
- ☒ Check call number sequence
- Printed report font size:** A dropdown menu currently showing "10".
- Buttons:** Save and Cancel.

6. In the **Database Set** list, select the database containing the holdings that are now being inventoried.
7. (Optional Step) You can configure the Inventory module to recognize a specific pattern of characters, a certain barcode length, or both. If any scanned barcodes deviate from this character and/or length specification, the deviant barcodes are highlighted in the barcode listing. To do so:
 - A. Click **New Pattern**. This displays the New Pattern dialog box (Figure 8.5).

FIGURE 8.5

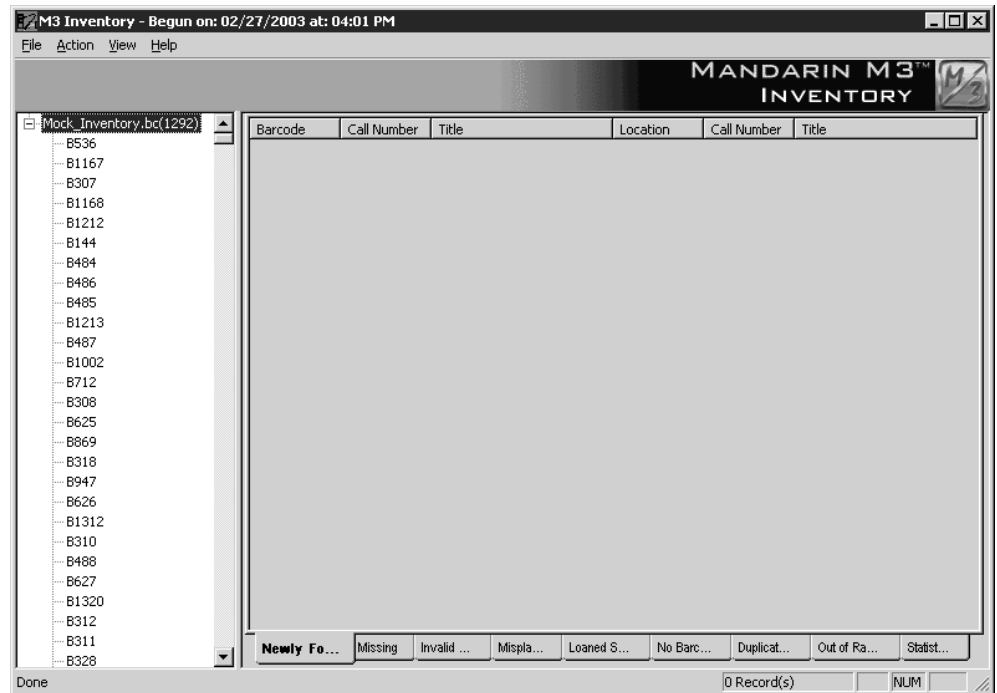


The **New Pattern** dialog box contains the following fields and options:

- Pattern:** A text input field.
- Minimum Length:** A text input field with "0" entered.
- Maximum Length:** A text input field with "0" entered.
- ☐ Process barcodes
- Remove leading zeros:** A dropdown menu.
- Remove trailing characters:** A dropdown menu.
- Buttons:** OK and Cancel.

- B. To set up a character pattern, type the pattern in the **Pattern** box. For example, if all barcodes involved in this full inventory begin with the same three characters, type those three characters here.
 - C. To set up a length pattern:
 - In the **Minimum Length** box, type the minimum number of characters in the barcode pattern.
 - In the **Maximum Length** box, type the maximum number of characters in the barcode pattern.
 - D. Click **OK** to return to the Inventory Options window, where your pattern entries display in the **Barcode Patterns** box.
 - E. Select the **Barcodes are case-sensitive** check box to locate the exact text of the barcode. For example, if you select this check box and search for B200, you only find occurrences of B200. You will not find an occurrence of b200.
 - F. Select the **Check call number sequence** check box to check for and report any barcodes that are not in the sequence being searched.
 - G. Click **Save**.
8. Create the barcode file. To do so:
- A. On the **File** menu, click **Add Barcode File**. This displays the Open dialog box.
 - B. Navigate to the location where you stored the barcode records files. Double-click the file name. (If you uploaded multiple barcode record files, double-click one of the files. Then repeat this step for each barcode record file you uploaded.) This imports the data into the M3 Inventory module and creates a file in M3 Inventory. The file name appears in the Barcode pane in the main Inventory window (Figure 8.6).
 - C. The total number of barcodes imported is displayed to the right of the name of the newly created file. Click the plus (+) sign to expand the file and view the list of barcodes entered.

FIGURE 8.6



9. Run the **Do Inventory** procedure. To do so:

- A. On the **Action** menu, click **Do Inventory**. M3 Inventory compares the barcode information to the corresponding holdings data. When finished, a dialog box (Figure 8.7) displays with a summary of the inventory results.

FIGURE 8.7



- B. Click **OK** to close the dialog box and return to the main Inventory window. M3 Inventory places the appropriate information in each of the nine tabs in the Inventory pane:
 - **Newly Found** – Lists items present in this barcode upload, but previously flagged as missing. (NOTE: To change the status of all newly found items to “Normal,” click **Mark Newly Found Items** on the **Action** menu. At the confirmation prompt, click **OK**.)
 - **Missing** – Lists all items missing from this barcode upload. If the item has a Location (852#a), the Location appears before the call number.
 - **Invalid Barcodes** – Lists items that do not belong in the collection or have the wrong barcode length.

***Note:** If you return a missing item while an inventory is in progress, the item will not be reported as “missing.”*

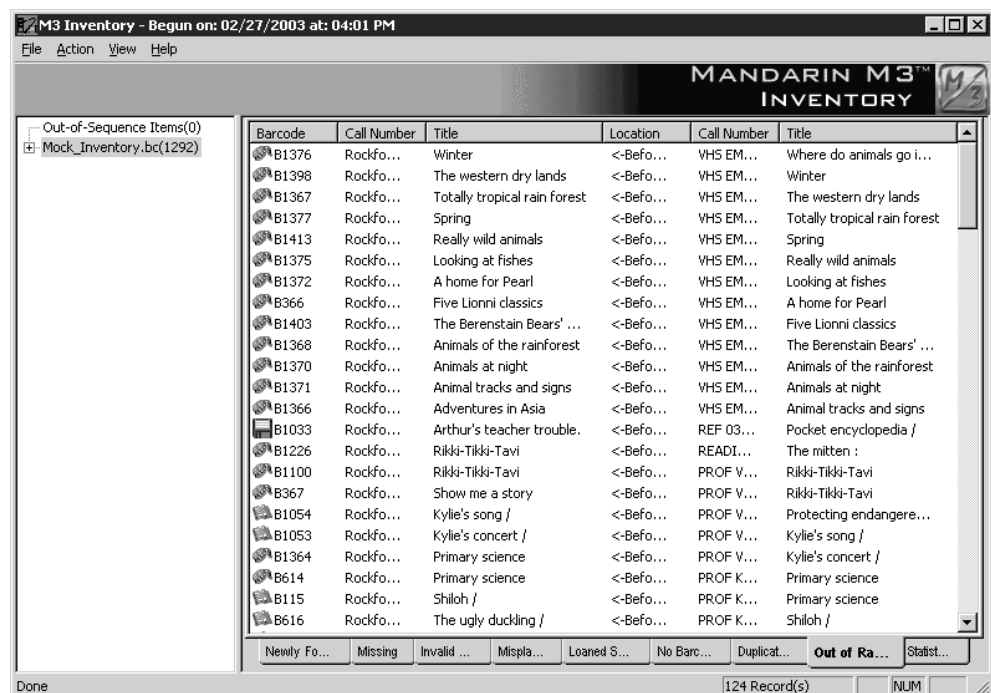
8-8 Using M3 Inventory

- **Misplaced** – Lists items that are in the wrong shelf position.
- **Loaned Shelved** – Lists items that have an availability status of loaned, but are actually on the shelf.
- **No Barcode** – Lists items that have no barcode on file in the catalog.
- **Duplicate Barcode** – Lists items that have duplicate barcodes.
- **Out of Range(s)** – Lists items that are not in the inventory call number range, but are in the barcode upload in shelflist order.
- **Statistics** – Displays a summary of the current inventory results, as well as statistics regarding this inventory.

- C. Click any tab to view the corresponding information. In Figure 8.8, the **Out of Range(s)** tab is selected. This information can be printed or saved to a file, if desired. (See “Printing and Saving Results” on page 8-14.)

FIGURE 8.8

Tip: Media type icons display in all tabs (except Statistics) alongside items that have a media type assigned. For more information, see “Inventory pane” on page 8-3.



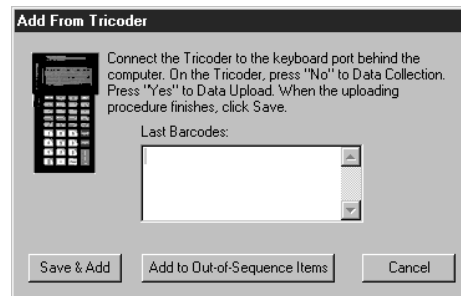
10. To place a “missing” status in the corresponding holding records of all items listed in the Missing tab:
- A. Click the **Missing** tab. Some items may display in black and some in red. Black signifies the item was listed as missing in a previous inventory. Red signifies the item was listed as missing during this inventory.
 - B. On the **Action** menu, click **Mark Missing Items**. At the confirmation prompt, click **OK**. This turns all red items to black and places a status of “missing” in the corresponding holding records.

CONDUCTING A PARTIAL INVENTORY

To conduct a partial inventory:

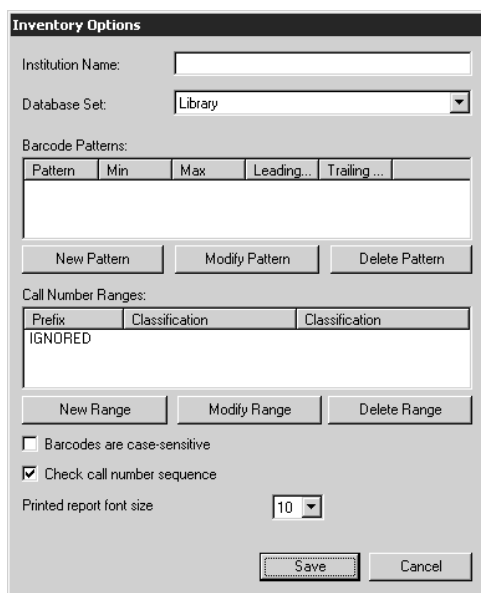
1. Scan the barcode of each item on the shelves to be inventoried at this time, following shelflist order. Use a barcode scanner such as a tricoder.
2. Upload the scanned barcode records (for the shelved items) from the barcode scanner to M3 Inventory. To do so:
 - A. On the **File** menu, click **Upload From Reader**. (Or, right-click while pointing to the Barcode pane to access a shortcut menu.) This displays the Add From Tricoder window (Figure 8.9).

FIGURE 8.9



- B. Follow the instructions in the window, then click **Save & Add**. This displays the Save As dialog box.
 - C. Navigate to the location where you want to store the barcode file. If you are going to upload multiple barcode files, you may want to create a new folder for the files.
 - D. In the **File name** box, type a name for the barcode file you are uploading, and then click **Save**. This saves the file and adds the barcodes to the current inventory. (If you need to upload multiple times, be sure to designate different names for each upload file to avoid overwriting data.)
3. Scan the barcode of each item to be inventoried that is out-of-sequence (that is, items not on the shelves, such as items on carts).
4. Upload the scanned barcode records (for the out-of-sequence items) from the barcode scanner to M3 Inventory. To do so:
 - A. On the **File** menu, click **Upload From Reader**. (Or, right-click while pointing to the Barcode pane to access a shortcut menu.) This displays the Add From Tricoder window (Figure 8.9).
 - B. Click **Add to Out-of-Sequence Items**. This adds the items to the out-of-sequence list without creating a file. A misplaced item check is not performed on the out-of-sequence list.
5. On the **Action** menu, click **Inventory Options**. This displays the Inventory Options window (Figure 8.10).

FIGURE 8.10

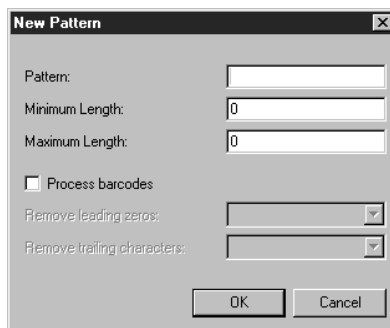


The **Inventory Options** dialog box contains the following fields and controls:

- Institution Name:** A text input field.
- Database Set:** A dropdown menu currently showing "Library".
- Barcode Patterns:** A table with columns: Pattern, Min, Max, Leading..., and Trailing....
- Buttons:** "New Pattern", "Modify Pattern", and "Delete Pattern" are located below the barcode patterns table.
- Call Number Ranges:** A table with columns: Prefix, Classification, and Classification.
- Buttons:** "New Range", "Modify Range", and "Delete Range" are located below the call number ranges table.
- Checkboxes:**
 - ☐ Barcodes are case-sensitive
 - ☒ Check call number sequence
- Printed report font size:** A dropdown menu currently showing "10".
- Buttons:** "Save" and "Cancel" are at the bottom right.

6. In the **Database Set** list, select the database containing the holdings that are now being inventoried.
7. (Optional Step) You can configure the Inventory module to recognize a specific pattern of characters, a certain barcode length, or both. If any scanned barcodes deviate from this character and/or length specification, the deviant barcodes are highlighted in the barcode listing. To do so:
 - A. Click **New Pattern**. This displays the New Pattern dialog box (Figure 8.11).

FIGURE 8.11



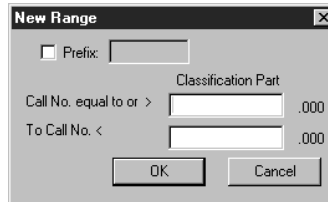
The **New Pattern** dialog box contains the following fields and controls:

- Pattern:** A text input field.
- Minimum Length:** A text input field with "0" entered.
- Maximum Length:** A text input field with "0" entered.
- Checkboxes:**
 - ☐ Process barcodes
- Remove leading zeros:** A dropdown menu.
- Remove trailing characters:** A dropdown menu.
- Buttons:** "OK" and "Cancel" are at the bottom right.

- B. To set up a character pattern, type the pattern in the **Pattern** box. For example, if all barcodes involved in this partial inventory begin with the same three characters, type those three characters here.
- C. To set up a length pattern:
 - In the **Minimum Length** box, type the minimum number of characters in the barcode pattern.
 - In the **Maximum Length** box, type the maximum number of characters in the barcode pattern.

- D. Click **OK** to return to the Inventory Options window, where your pattern entries display in the **Barcode Patterns** box.
8. Click **New Range**. This displays the New Range dialog box (Figure 8.12), where you specify the range of call numbers involved in this partial inventory. The range of holdings you specify here is compared to the barcodes you uploaded from the barcode scanner. If your barcode files cover multiple ranges, you can specify multiple ranges in this dialog box.

FIGURE 8.12



- A. In the **Call No. equal to or >** box, type the beginning range. (You are only typing the classification part of the call number, as designated in MARC field 852#h.)
- B. In the **To Call No. <** box, type the ending range. The ending range should be the first increment of one after the classification range you want to include. (You are only typing the classification part of the call number, as designated in MARC field 852#h.)

Example: You want to inventory all holdings with an 800 classification part. To do so, the correct entries are 800 in the **Call No. equal to or >** box and 900 in the **To Call No. <** box. This ensures that all 800 holdings up to but not including 900 are included (everything through 899.999). If you had typed 899 in the **To Call No. <** box, any 899.+ numbers would be unintentionally left out.

- C. (Optional Step) Within the specified call number range, you can advise the Inventory module to compare barcodes to holdings that have a specific prefix or that have no prefix in MARC field 852#k.
 - If you want to compare barcodes to holdings with or without a prefix, do not select the **Prefix** check box.
 - If you want to compare barcodes to holdings that have no prefix, select the **Prefix** check box and do not type anything in the **Prefix** box.
 - If you want to compare barcodes to holdings with a certain prefix, select the **Prefix** check box and type the desired prefix in the **Prefix** box.
- D. Click **OK** to return to the Inventory Options window, where your range entries display in the **Call Number Ranges** box.
9. Click **Save** to save your entries in the Inventory Options window.
10. Create the barcode file. To do so:
 - A. On the **File** menu, click **Add Barcode File**. This displays the Open dialog box.

- B. Navigate to the location where you stored the barcode records files. Double-click the file name. (If you uploaded multiple barcode record files, double-click one of the files. Then repeat this step for each barcode record you uploaded.) This imports the data into the M3 Inventory module and creates a file in M3 Inventory. The file name appears in the Barcode pane in the main Inventory window.
 - C. The total number of barcodes imported is displayed to the right of the name of the newly created file. Click the plus (+) sign to expand the file and see the list of barcodes entered.
11. Run the **Do Inventory** procedure. To do so:
- A. On the **Action** menu, click **Do Inventory**.

NOTE: If there is a discrepancy of more than 3,000 barcode entries, a message appears asking if you want to proceed. This happens when:

- You are trying to run a partial inventory and did not set the appropriate call number range. Make sure you have set the correct call number range in the Inventory Options window. See step 8 on page 8-11 for instructions.
- Your scanning devices may not have functioned properly or you may have missed a large number of items during the scanning process. To resolve the problem, check the barcode scanner. If it appears to be functioning properly, scan the items again.

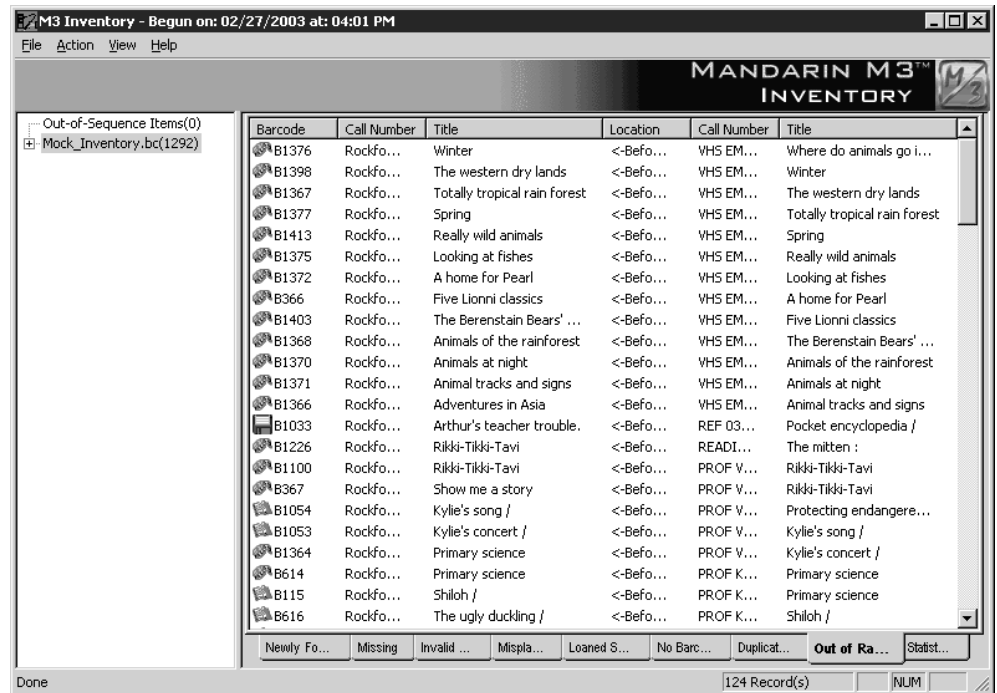
To proceed, click **Continue**; otherwise, click **Cancel**. M3 Inventory compares the uploaded barcode data to the specified range of call numbers in the corresponding holdings data.

Note: If you return a missing item while an inventory is in progress, the item will not be reported as "missing."

- B. When the inventory comparison is complete, a dialog box (shown in Figure 8.7) displays with a summary of the inventory results. The results include the number of Newly Found, Missing, Invalid Barcode, Misplaced, Loaned Shelved, No Barcode, Duplicate Barcode, and Out of Range(s) Items. Details appear in the corresponding tabs in the main Inventory window. For more information on these tabs, see step 9B beginning on page 8-7.
- C. Click any tab to view the corresponding information. In Figure 8.13, the **Out of Range(s)** tab is selected. This information can be printed or saved to a file, if desired. (See "Printing and Saving Results" on page 8-14.)

FIGURE 8.13

Tip: Media type icons display in all tabs (except Statistics) alongside items that have a media type assigned. For more information, see “Inventory pane” on page 8-3.



12. To place a “missing” status in the corresponding holding records of all items listed in the Missing tab:
 - A. Click the **Missing** tab. Some items may display in black and some in red. Black signifies the item was listed as missing in a previous inventory. Red signifies the item was listed as missing during this inventory.
 - B. On the **Action** menu, click **Mark Missing Items**. At the confirmation prompt, click **OK**. This turns all red items to black and places a status of “missing” in the corresponding holding records.

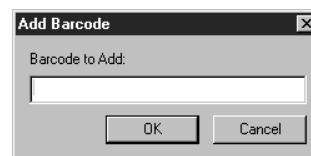
ENTERING ADDITIONAL BARCODES

You can add more barcodes to your inventory after the scanned barcode records have been uploaded. If you have already run the **Do Inventory** procedure, you must run it again after adding the extra barcodes to update the results.

To add a barcode:

1. On the **File** menu, click **Add Barcode**. This displays the Add Barcode dialog box (Figure 8.14).

FIGURE 8.14



2. In the **Barcode to Add** box, type the barcode number (or scan the barcode), and then click **OK**. This adds the barcode to the **Out-of-Sequence Items** folder in the Barcodes pane (within the main Inventory window). Repeat for each desired barcode.
3. The total number of barcodes entered this way display to the right of the folder name. To review the list of barcodes entered, click the plus (+) sign to expand the folder.

REMOVING BARCODES

You can remove a barcode or barcode file at any time during the inventory process. Removing barcodes in this manner does not remove the barcodes from the M3 system or from the scanned barcode file. Instead, it removes the barcodes from the Barcode pane in the main Inventory window and, therefore, from the inventory results. If you remove barcodes after you have run the **Do Inventory** procedure, you must run **Do Inventory** again to update the inventory results.

Removing a Barcode

1. In the Barcode pane of the main Inventory window, select the barcode you want to remove.
2. On the **File** menu, click **Remove Barcode**. This removes the barcode from the inventory procedure.

Removing a Barcode File

1. In the Barcode pane of the main Inventory window, select the file you want to remove.
2. On the **File** menu, click **Remove Barcode File**. This removes the barcode file from the inventory procedure.

PRINTING AND SAVING RESULTS

***Note:** To change the font size on a report, select a size in the **Printed report font size** box in the Inventory Options window (see Figure 8.4). The default font size is 10 point.*

To print inventory results displayed in any of the tabs:

1. Click the tab containing the information to be printed.
2. On the **File** menu, click **Print Setup**. This displays the Print Setup dialog box. Change settings if desired, then click **OK**.
3. On the **File** menu, click **Print [List Type] List**. This displays the Print dialog box. Change settings if desired, then click **OK**.

To save inventory results to a file:

1. On the **File** menu, click **Save Inventory Report**. This displays the Save As dialog box.
2. Navigate to the location where you want to save the inventory report.
3. In the **File name** box, type a name for the file, or accept the default name **M3Inventory Report [current date and time]**.
4. Click **Save**. This saves the inventory report.

To save an inventory session to a file:

On the **File** menu, click **Save Session**. This saves the session as **M3Inventory Session [current date]** to the same location where you initially saved the barcode file.

OR

1. On the **File** menu, click **Save Session As**. This displays the Save As dialog box.
2. Navigate to the location where you want to save the session.
3. In the **File name** box, type a name for the file, or accept the default name **M3Inventory Session [current date]**.
4. Click **Save**. This saves the inventory session.

EXPORTING BARCODES

You can export the barcodes in any of the inventory tabs (except the No Barcode tab) to a file. The export function only exports the barcodes in the tab you are currently viewing.

To export barcodes:

***Tip:** Make sure you are viewing the specific inventory tab for the barcode export you want to perform.*

1. Click the inventory tab from which you want to export barcodes. This displays the corresponding barcode list.
2. On the **File** menu, click **Export [List Type] List**. This displays the Save As dialog box.
3. Navigate to the location where you want to save the barcodes.
4. In the **File name** box, type a name for the file, or accept the default name **BarcodeFile [current date and time]**.
5. Click **Save**. This exports the barcodes.

OPENING A PREVIOUS SESSION OR REPORT

To open a previously saved inventory session or report:

1. On the **File** menu, click **Open Session** or **Open Inventory Report**, depending on the type of file you want to open. This displays the Open dialog box.
2. Navigate to the file you want to open, then click **Open**. This opens the file in the main Inventory window. Proceed with the inventory as desired.

NOTES

USING M3 SERVER

9

CHAPTER CONTENTS

This chapter describes:

- The features of the M3 Server Monitor window (page 9-2)
- How to add and delete ports (page 9-9)
- How to view the log file and change its size (page 9-11)
- How to clear the log file (page 9-12)

ABOUT M3 SERVER

M3 Server is a connectivity tool that allows the M3 system to search your Mandarin catalog database. It also acts as a usage monitoring tool, allowing administrators to view server information, port statistics, and database usage.

SYSTEM REQUIREMENTS FOR MICROSOFT WINDOWS

If you are using Windows NT 4.0, you must install the Microsoft Desktop Update Component, which comes with Microsoft Internet Explorer 4.0. If you do not have the Microsoft Desktop Component on your system:

- Install Microsoft Internet Explorer 6.0 from your M3 CD. The install will check for the Desktop Update Component and install it if it is not already present.

OR

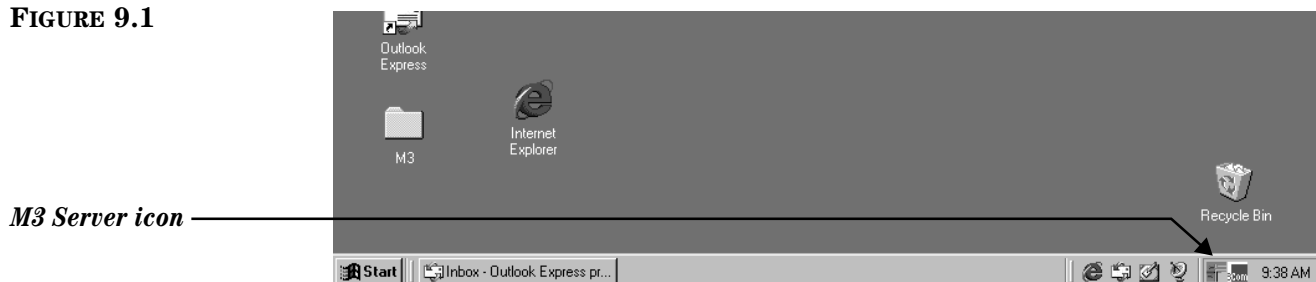
- Install Microsoft Internet Explorer 4.0 with the Microsoft Desktop Component. Then, if desired, install a newer version of Microsoft Internet Explorer.

MONITOR WINDOW FEATURES

To open the Mandarin M3 Server Monitor window in your Web browser:

1. On the taskbar, click the **M3 Server** icon (shown in Figure 9.1).

FIGURE 9.1



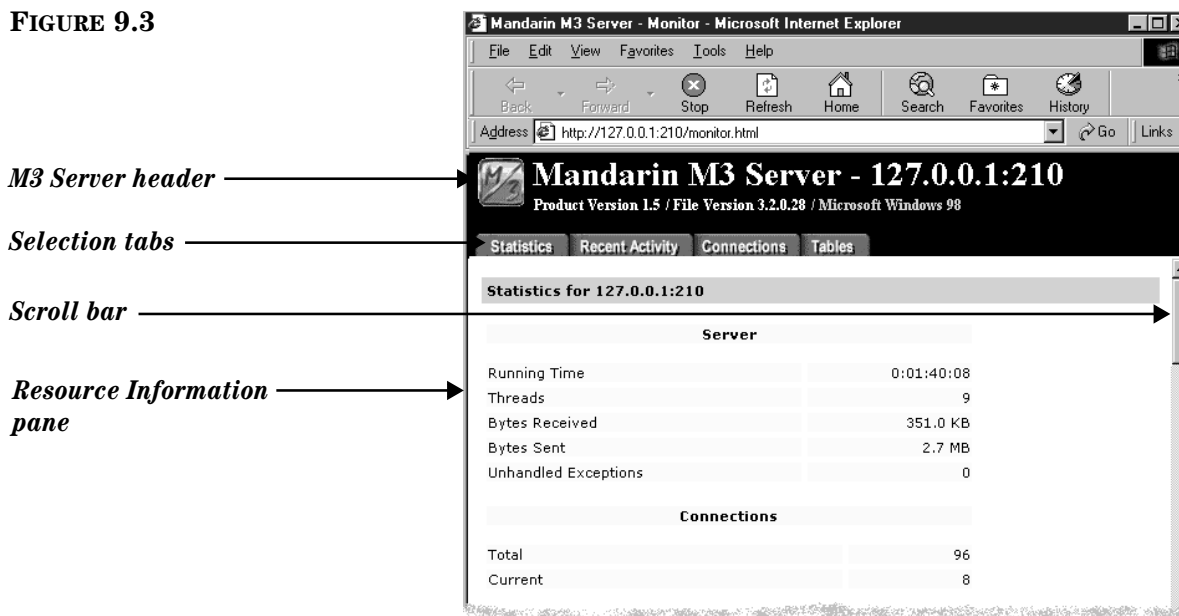
2. This displays the **M3 Server** menu (Figure 9.2). Select **Monitor**, then click the port number you want to display. For this example, 210 will be used.

FIGURE 9.2



3. This displays the Login dialog box. Type your user ID in the **Login Name** box, your password in the **Password** box, and then click **OK**. This displays the Monitor window (Figure 9.3).

FIGURE 9.3



- **M3 Server header** – Displays the IP address and port number being viewed, as well as the M3 Server version number and the current operating system.

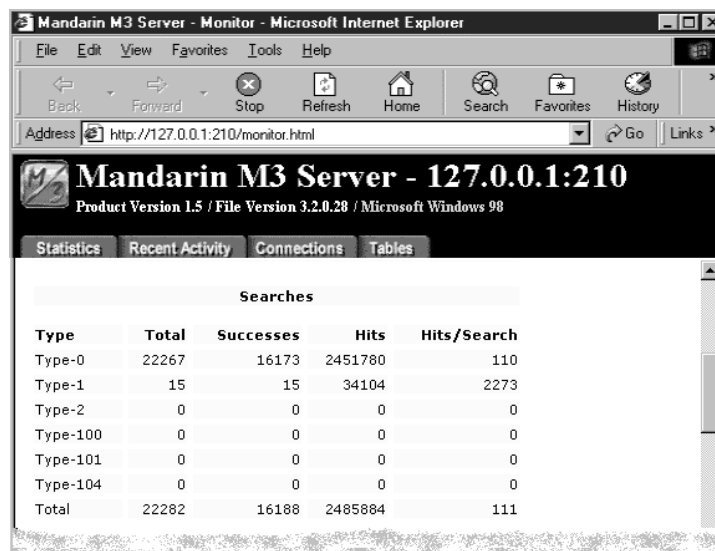
- **Selection tabs** – Use the four tabs to move between Statistics, Recent Activity, Connections, and Tables.
- **Resource Information pane** – Displays information related to the selected tab.

Statistics Tab

This tab (Figure 9.3) displays information related to the selected server, such as port details, usage statistics, and recent activity. All information described will not immediately display; use the scroll bar to navigate through the window.

- **Server** (shown in Figure 9.3) – The technical statistics on system performance for the port.
 - **Running Time** – The amount of time M3 Server has been listening to the port.
 - **Threads** – The number of resources dedicated to client requests.
 - **Bytes Received** – The number of bytes of information received by the port.
 - **Bytes Sent** – The number of bytes of information the M3 Server has sent to the clients.
 - **Unhandled Exceptions** – The number of unanticipated error conditions that have been encountered with the M3 Server. On occasion, the M3 Server may shut down in an attempt to fix itself.
- **Connections** (shown in Figure 9.3) – The statistical data on connections through the port.
 - **Total** – The number of connections that occurred on the port.
 - **Current** – The number of connections that are currently active.

FIGURE 9.4



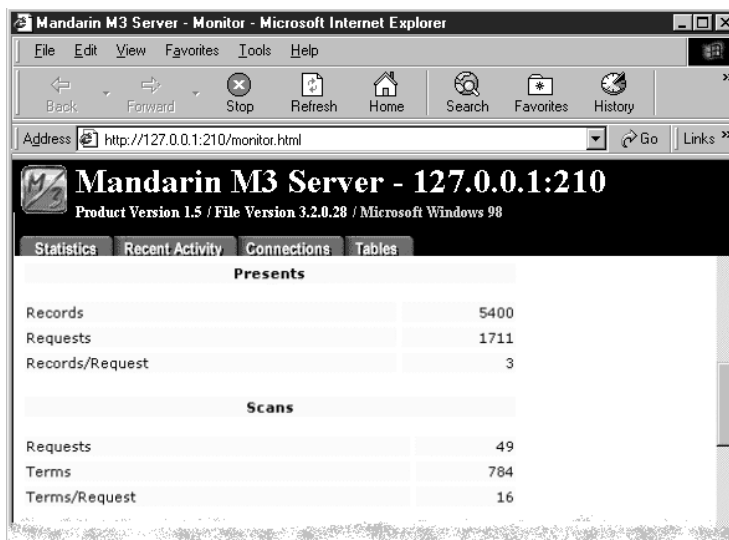
9-4 Using M3 Server

Tip: Use the scroll bar to navigate through the window.

Note: The M3 Server recognizes the client searches as Type-0, Type-1, or Type-101 Z39.50 search types. For information on the additional search types reported, refer to www.niso.org/z3950.html.

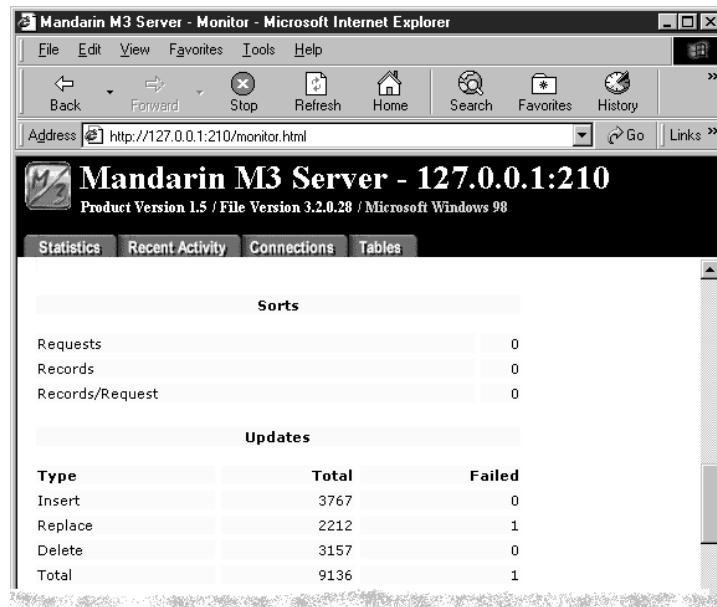
- **Searches** (shown in Figure 9.4) – The number of searches that occurred through the port.
 - **Type** – The Z39.50 search type category. The M3 Clients report statistics through Type-0, Type-1, and Type-101 searches.
 - **Successes** – The number of successful searches performed through the port.
 - **Hits** – The number of successful hits or matches for the search.
 - **Hits/Search** – The average number of hits or matches in each search performed through the port.

FIGURE 9.5



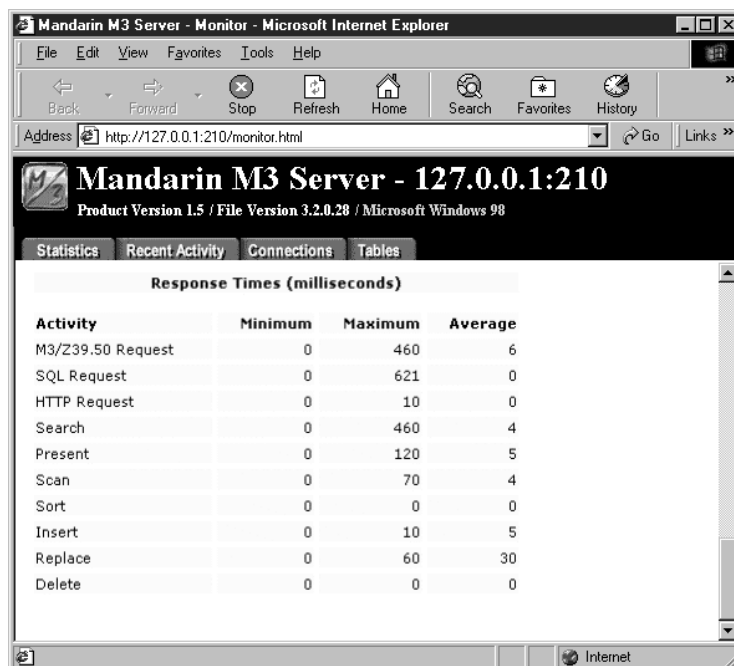
- **Presents** (shown in Figure 9.5) – The number of records the M3 Server provided in response to the client requests.
 - **Records** – The number of records presented by the M3 Server.
 - **Requests** – The number of requests received for records.
 - **Records/Request** – The average number of records per request that occurred through the port.
- **Scans** (shown in Figure 9.5) – The number of whole field index scan requests and processes performed.
 - **Requests** – The number of scan requests received.
 - **Terms** – The number of entries returned.
 - **Terms/Request** – The average number of entries returned per request.

FIGURE 9.6



- **Sorts** (shown in Figure 9.6) – The number of sorts requested and the number of records sorted.
 - **Requests** – The number of sorts requested.
 - **Records** – The number of records sorted.
 - **Records/Request** – The average number of records sorted per request.
- **Updates** (shown in Figure 9.6) – The number of new, modified, and purged records. The total number of requests and failures for each Update Type is listed.
 - **Insert** – The number of new records added.
 - **Replace** – The number of edited records.
 - **Delete** – The number of records that have been removed or purged.
 - **Total** – The total number of updates that have occurred.

FIGURE 9.7



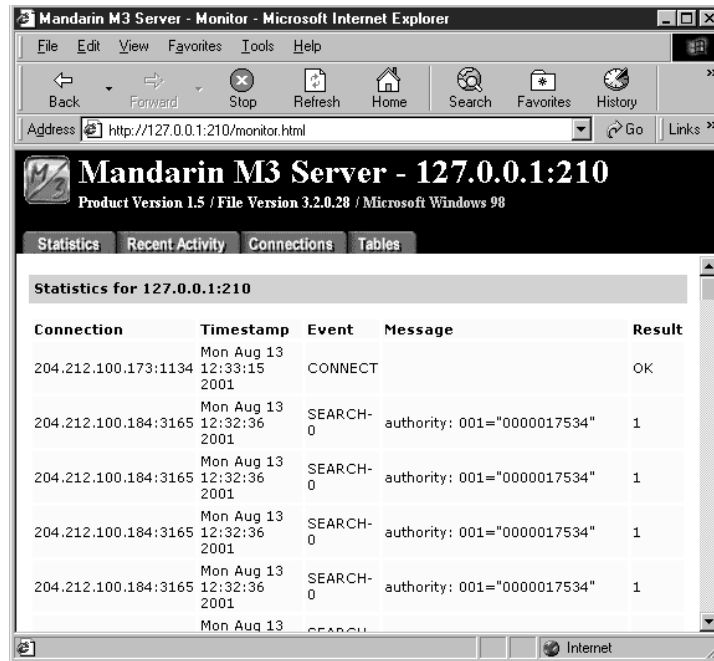
Tip: To refresh the pane, click **Refresh** on your browser.

- **Response Time (milliseconds)** (shown in Figure 9.7) – The response time for each activity performed by the M3 Server reported in milliseconds.
 - **Activity** – The response time for each M3 Server action is monitored and reported in milliseconds.
 - **Minimum** – The minimum response time for the action.
 - **Maximum** – The maximum response time for the action.
 - **Average** – The average response time for the action.

Recent Activity Tab

This tab (Figure 9.8) displays recent activity for the selected port, including the sites that connected, the connection date and time, the event performed, any messages, and the result. The Resource Information pane can display up to 1,024 lines of activity. All activity is written to the log file.

FIGURE 9.8

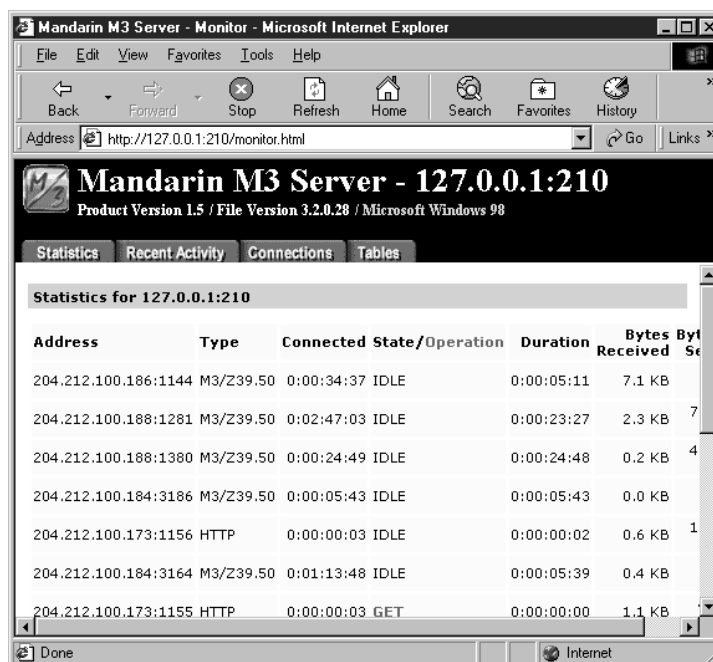


- **Connection** – The TCP/IP address and port number of each client site that has recently connected.
- **Timestamp** – The date and time of each event.
- **Event** – The occurrence types.
 - **Connect** – Occurs when a client connects to a port.
 - **Search** – Occurs when a client completes a search on a port. **Search** lists the database search, along with the Z39.50 query in the Message column. It also displays the number of matching records or an error number in the Result column.
 - **Disconnect** – Occurs when a client disconnects from a port.
- **Message** – Additional information regarding the event.
- **Result** – The result for the event, if any.

Connections Tab

This tab (Figure 9.9) displays the current connections to the server.

FIGURE 9.9

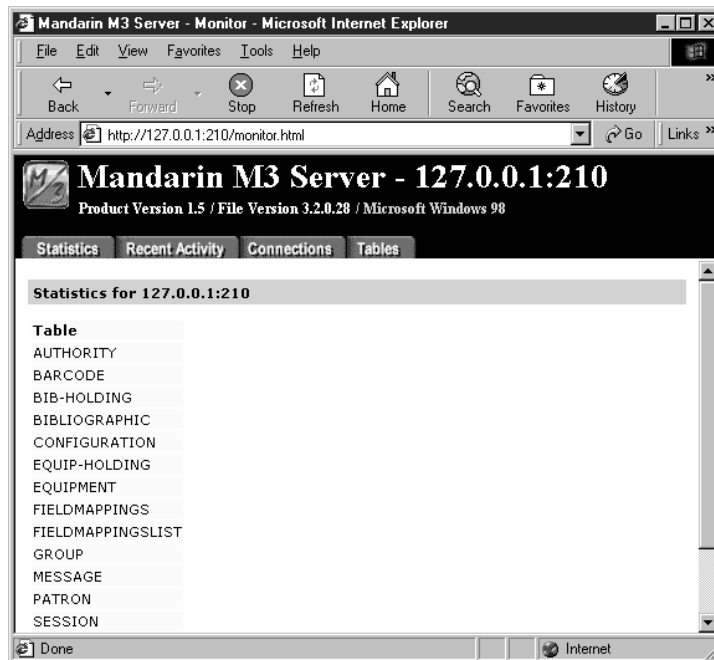


- **Address** – The TCP/IP address and port number of each client site that is currently connected.
- **Type** – The type of connection made.
- **Connected** – The length of time the connection has been open.
- **State** – The status of the connection. States include (but are not limited to) Idle, Processing, Delivery, and Closing.
- **Operation** – The operation currently in process by the M3 Server for this connection. Operations include (but are not limited to) Initialize, Search, Present, Sort, and Scan.
- **Duration** – The length of time the connection has been in the current State or Operation.
- **Bytes Received** – The number of bytes of information received through this connection.
- **Bytes Sent** – The number of bytes of information the M3 Server has sent to this connection.

Tables Tab

This tab (Figure 9.10) displays a list of the tables being used by the M3 system.

FIGURE 9.10



PORT CUSTOMIZATION

M3 Server listens to a TCP/IP port for connections from client sites. The default port number is 210.

Adding a Port

Multiple port numbers are useful if your library has multiple sites and you need to track usage statistics by site.

To add a port:

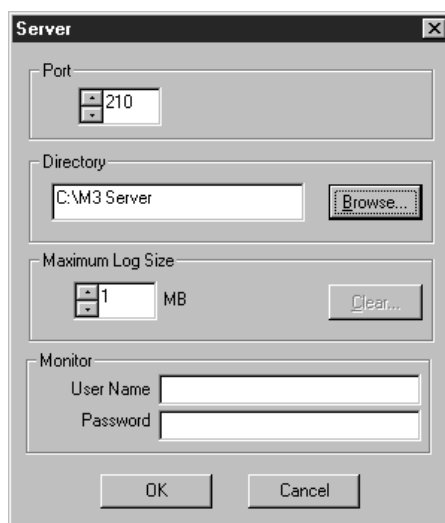
1. On the taskbar, click the **M3 Server** icon (shown in Figure 9.1).
2. On the **M3 Server** menu (Figure 9.2), click **Options**. This displays the Options dialog box (Figure 9.11).

FIGURE 9.11



3. Click **Insert**. This displays the Server dialog box (Figure 9.12).

FIGURE 9.12



4. In the **Port** box, type or select a port number.
NOTE: Port numbers can range from 1 to 65,535. Some port numbers are reserved for other TCP/IP server connections, such as 80 for WWW/HTTP and 21 for FTP.
5. In the **Directory** box, type the path to the server directory, or click **Browse** and navigate to the path. (It should default to the correct name.)
6. In the **Maximum Log Size** box, type or select a log size.
7. In the **User Name** and **Password** boxes, type the login information to be used for accessing this port.
8. When finished, click **OK**.
9. In the Options dialog box, click **Apply** to save your changes. This displays a confirmation dialog box; click **Yes** to add the port.
10. In the Options dialog box, click **OK**.

Deleting a Port

To delete a port:

1. On the taskbar, click the **M3 Server** icon (shown in Figure 9.1).
2. On the **M3 Server** menu (Figure 9.2), click **Options**. This displays the Options dialog box (Figure 9.11).
3. Select the port you want to delete, then click **Delete**.
4. In the Options dialog box, click **Apply** to save your changes. This displays a confirmation dialog box; click **Yes** to delete the port.
5. In the Options dialog box, click **OK**.

WORKING WITH THE LOG FILE

The log file contains information about the activity of every port; it contains the same information as the Resources Information pane. The default log size is 1 MB.

Viewing the Log File

To open the log file:

1. On the **File** menu, click **Exit** to close the M3 Server.
2. Using a simple text editor such as Notepad or WordPad, open the log.txt file (the default path is **C:\M3 Server**).

Modifying the Log File Size

You can increase or decrease the maximum log file size. If you do not want this file to log activity, set the size to 0 MB.

To modify the log file size:

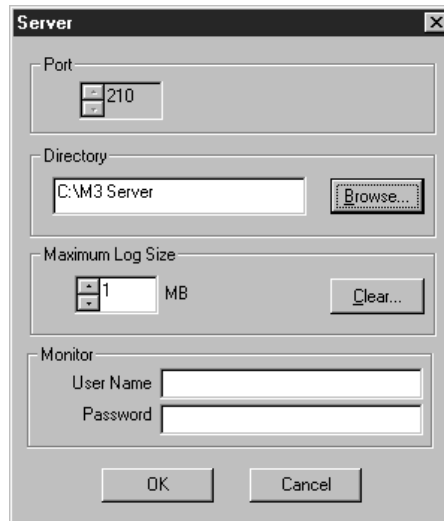
1. On the taskbar, click the **M3 Server** icon (shown in Figure 9.1).
2. On the **M3 Server** menu (Figure 9.2), click **Options**. This displays the Options dialog box (Figure 9.13).

FIGURE 9.13



3. Select the port containing the log file you want to modify, then click **Edit**. This displays the Server dialog box for this port (Figure 9.14).

FIGURE 9.14



4. In the **Maximum Log Size** box, type or select a log size.
5. When finished, click **OK**.
6. In the Options dialog box, click **Apply** to save your changes. This displays a confirmation dialog box. Click **Yes** to modify the log size now, or **No** to modify the log size the next time the server is started.
7. In the Options dialog box, click **OK**.

Clearing the Existing Log

To clear the existing log file:

1. On the taskbar, click the **M3 Server** icon (shown in Figure 9.1).
2. On the **M3 Server** menu (Figure 9.2), click **Options**. This displays the Options dialog box (Figure 9.13).
3. Select the port containing the log file you want to clear, then click **Edit**. This displays the Server dialog box for this port (Figure 9.14).
4. When finished, click **Clear**. This displays a confirmation dialog box; click **Yes** to delete the log file. (A new log file is created the next time the M3 Server is started.)
5. In the Options dialog box, click **OK**.

USING THE M3 WEB OPAC

10

CHAPTER CONTENTS

Note: This document describes how to use the M3 Web OPAC on a Windows-based computer. If you use a Macintosh® computer, the procedures are the same, but some functions (such as printing or saving) may vary slightly.

This chapter describes:

- How to install the M3 Web OPAC™ (page 10-2)
- How to configure the Web OPAC for your library (page 10-3)
- How to configure the Visual Search (page 10-10)
- Understanding the features of the Web OPAC (page 10-13)
- How to conduct a search using the Web OPAC (page 10-15)
- How to work with search results (page 10-19)
- How to use the My Bookbag and My Account tabs (pages 10-24 and 10-25)

M3 WEB OPAC OVERVIEW

The M3 Web OPAC (Online Public Access Catalog) is an interface that allows patrons to search your library collection from any computer with a Web browser. Patrons can specify the interface language, the databases, and the indexes to be searched. Patrons can work with search results in a variety of brief and expanded formats.

The Web OPAC offers three different search methods:

- **Standard Search** – A basic keyword search method that allows the patron to select an index to be searched. This method recognizes Boolean logic, truncation, and phrase searches.
- **Enhanced Search** – A more advanced search method that offers search flexibility and options. Patrons can enter simple or complex queries, search by material type, and use index browsing.
- **Visual Search** – An easy point-and-click graphical search method. Patrons click colorful buttons to narrow their searches from broad topics to more defined sub-topics, ultimately reaching search results.

The following Web OPAC features enhance the search session:

- The Bookbag allows a patron to set aside selected records throughout the course of the search session. These records can then be saved, printed, or e-mailed.
- Authority Control users can view “See” and “See Also” references if there are more appropriate headings used by the library than the one searched for, or if there are other headings related to the search that may also be useful.

10-2 Using the M3 Web OPAC

- The Shelf Browse function quickly locates records with a call number similar to that of a selected record. This is equivalent to looking at items to the left or right of a specific item on a library shelf.
- The Index Browser displays when a patron's search returns no results, allowing the patron to choose a new search from valid search terms (this can be disabled by a system administrator). It can also be invoked when conducting an Enhanced Search if a patron wants to browse the list of valid search terms.
- An Interlibrary Loan (ILL) request system allows authorized users at cooperating libraries to e-mail loan requests.
- The Reset feature returns the user to the default Web OPAC search page. If the user was signed in, he or she will be automatically signed out.
- The Bulletin Board links to a Web page or file that the library wants patrons to view.

INSTALLING THE WEB OPAC

System Requirements

The minimum and recommended system requirements for M3 are outlined in Table 2.1 on page 2-1. In addition, recommendations for the Web OPAC are shown below in Tables 10.1 and 10.2.

TABLE 10.1

Web Browsers	
Windows-based computer	Macintosh computer
Microsoft Internet Explorer 5.5 SP2 or later Netscape 6.0 or later (for searching and other patron functions) Netscape 7.0 or later (for configuration) Mozilla 1.0 or later	Netscape 6.0 or later (for Mac OS 9) Netscape 7.1 or later (for Mac OS X) Mozilla 1.0 or later Microsoft Internet Explorer 5.1 or later

TABLE 10.2

Memory		
	Minimum	Recommended
Server	256 MB RAM	512 MB RAM
Workstation	64 MB RAM	128 MB RAM

***Note:** For proper installation, you must be logged into the server with full Administrator rights.*

Installation Procedure

1. Quit all programs and exit the server.
2. At the server, insert the M3 Web OPAC CD into the CD-ROM drive.
3. Navigate to your CD-ROM drive (**D:** on most computers) and double-click **Setup.exe**.
4. In the Welcome dialog box, click **Next**.

Note: If you already have a version of the Web OPAC (or Web Gateway) installed, the default location is where M3 Server is currently installed.

Note: The first time you install the Web OPAC, your system will reindex; this may take a while.

5. In the License Agreement dialog box, review the agreement and click **Yes** to accept and continue the installation. Or, click **No** to discontinue.
6. In the Choose Destination Location dialog box, either:
 - Click **Next** to install the server into the default folder location on your hard disk (C:\M3 Server).
 - OR**
 - Click **Browse** and navigate to the desired folder location. When the desired folder has been selected, click **OK**, and then click **Next**.
7. In the Start Copying Files dialog box, review the settings you have chosen. If you want to change any settings, click **Back**. If you are satisfied with the settings, click **Next**.
8. In the Setup Complete dialog box, click **Finish**.

NOTE: During installation, the Web OPAC creates a **Configure Web OPAC** desktop shortcut, which launches the OPAC Setup page.

CONFIGURING THE WEB OPAC

Tip: To change the user name and password from the default settings, see step 5C on page 10-10.

1. On your desktop, double-click the **Configure Web OPAC** icon. This displays the Enter Network Password dialog box.
2. Type **admin** in the **User Name** box, **boca raton** in the **Password** box, and then click **OK**. This opens the OPAC Setup page.
3. Under **Installations**, type a name in the box (omitting spaces) and click **Create**. This opens the Configuration page (Figure 10.1).

FIGURE 10.1

Tip: These links take you to sections on the Configuration page and other setup sections that are not on the Configuration page (**Sort Formulas**, **Material Types**, and **Record Icons**; these sections are explained in steps 4F through 4K beginning on page 10-7).

The screenshot shows the 'Mandarin M3 OPAC Setup - OPACConfig' page in a Microsoft Internet Explorer browser window. The address bar shows 'http://localhost:210/m3/apps/m3opac-setup?command=editInstallation&installation=OPACConfig'. The page has a navigation bar with links: [Back](#), [M3 Configuration](#), [Library Settings](#), [Options](#), [Style](#), [Change Username/Password](#), [Sort Formulas](#), [Material Types](#), and [Record Icons](#). The main content area is titled 'M3 Configuration' and contains several input fields: 'Host' (205.162.172.150), 'Port' (8400), 'Database' (configuration), 'Site Key' (generic), and 'Organization Key'. Below this is the 'Library Settings' section with fields for 'Icon URL' (with 'Upload...' and 'Browse...' buttons), 'Title' (My Library), 'Subtitle', and 'Bulletin Board URL' (http://www.m3solutions.com). A note at the bottom of the Bulletin Board URL field says '(Leave blank to disable "Bulletin Board")'. The status bar at the bottom indicates 'Local intranet'.

4. Complete each section as desired.

A. **M3 Configuration:**

- **Host** – Type the IP address of your server.
- **Port** – Type the port you are connecting to.
- **Database** – Accept the default entry unless your library situation requires you to specify a database.
- **Site Key** – Accept the default entry unless your library situation requires you to specify a site key.
- **Organization Key** – If you are using a scoped database, type your organization key.

B. **Library Settings:**

- **Icon URL** – Navigate to the image you want to display in the Web OPAC header. To do so:
 - To use a saved image, click **Upload**. In the Icon Upload dialog box, click **Browse**. Navigate to the image and click **Open**. Click **OK** in the Icon Upload dialog box.
 - To use an image that you have already uploaded into the Web OPAC, click **Browse**. This displays a list of images. To select an image, click the image name in the box on the right and then click **OK**.
- **Title** – Type the title you want to display in the Web OPAC header, such as your library name.
- **Subtitle** – Type a subtitle to appear under the title in the Web OPAC header, if desired.
- **Bulletin Board URL** – Type the address of the Web page (for example, <http://www.lincolnhighschool.edu>) or the path of the file (for example, <C:/bulletinboard.htm>) you want to display when a patron clicks the Bulletin Board link. If this option is left blank, the link will not be available.
- **Librarian E-mail Address** – Type the e-mail address that will receive e-mail when a patron sends an e-mail through the “Contact Your Librarian” links. If this option is left blank, the links will not be available.
- **Library E-mail Address** – Type the e-mail address that will appear in the “From” field in notification e-mails sent by the library.
- **Library E-mail “No Reply-To”** – Type the e-mail address that will receive e-mails if patrons reply to notification e-mails sent by the library.

C. **Options:**

- **Functionality:**
 - **Session Timeout** – Select the desired number of minutes the Web OPAC can remain idle before it automatically resets.

Note: Images can be .bmp, .jpg, .gif, or .png files.

- **Session Timeout Cancel** – Select the desired number of seconds that a timeout warning will display, allowing the patron to extend the session before the Web OPAC automatically resets.
- **Default Search** – Select the search type you want to display when the patron initially logs on the Web OPAC.
- **Standard Search, Enhanced Search, and Visual Search** – Click **off** to disable any of these search types.
- **Standard Search Default** – Choose the index that will be selected by default on the Standard Search page. Click **Anywhere**, or click **First Configurable Attribute** to use the first attribute in the search configuration (as set in Configuration Editor).
- **Popup Index Browser for No Results** – The Index Browser page displays when a patron's search returns no results, allowing the patron to choose a new search from valid search terms. Click **off** to disable the Index Browser page.
- **My Bookbag** – This option allows patrons to save search results. Click **off** to disable the My Bookbag tab.
- **Saving Bookbag to Disk** – This option allows patrons to save the list of items in their Bookbag to a disk.
- **E-Mailing Bookbag** – This option allows patrons to e-mail the list of items in their Bookbag.
- **Persistent Bookbag** – This option saves all items placed in the Bookbag if a patron signs on anytime during his or her session. If the patron never signs on, all items in the Bookbag are deleted when the Web OPAC resets. Click **off** to disable Persistent Bookbag. (For more information, see "Using the My Bookbag tab" on page 10-24.)
- **My Account** – This option allows patrons to view information about their account, such as current and past transactions. Click **off** to disable the My Account tab.
My Info, Current Transactions, History, and Change Sign In/Password – Click **off** to disable any of these My Account features.
- **Renewals** – This option enables the links that allow patrons to renew items. Click **on** to enable these links; click **on when logged in with Renewal access** to enable these links only when the patron is logged in with the appropriate permissions; or click **off** to disable these links.
- **Cancel Reserves/Holds** – This option enables the links that allow patrons to cancel reserves or holds they placed on items. Click **on** to enable these links; click **on when logged in with Reserve access** to enable these links only when the patron is logged in with the appropriate permissions; or click **off** to disable these links.

***Note:** To configure the amount of time items will be saved in the Persistent Bookbag, see step 5B on page 10-10.*

***Note:** Access permissions are granted in the Group Editor module. For more information, see "Using M3 Group Editor" on page 3-1.*

- **Reserve Links** – This option enables the links that allow patrons to reserve items. Click **on** to enable these links; click **on when logged in with Reserve access** to enable these links only when the patron is logged in with the appropriate permissions; or click **off** to disable these links.
- **Booking** – This option enables the links that allow patrons to book items, such as equipment or a conference room. Click **on** to enable these links; click **on when logged in with Booking access** to enable these links only when the patron is logged in with the appropriate permissions; or click **off** to disable these links.
- **ILL Links** – This option enables the links that allow patrons to request an interlibrary loan. Click **on** to enable these links; click **on when logged in with ILL access** to enable these links only when the patron is logged in with the appropriate permissions; or click **off** to disable these links.
- **ILL bcc** – This option allows you to indicate an e-mail address that will receive a “blind carbon copy” of each ILL request, if desired.
- **Languages:**
 - **Default Language** – Select the language you want to display by default when a patron logs on the Web OPAC.
 - **Spanish, French, and German** – Click **off** to disable any of these languages.
- **Results:**
 - **Default Record Format** – Select the format that will display by default on the Results page.
 - **Default Record Format (Details)** – Select the format that will display by default on the Details page.
 - **Default Sort Formula** – Select the sort formula that will display by default on the Results and Bookbag pages.
- **Enrichment:**
 - **Covers** – If you want to display cover images, click **Local** to use images in your local picture table, or **Syndetics** if you have a subscription to Syndetic Solutions.
 - **Details** – If you have a subscription to Syndetic Solutions, click **Syndetics** to display detailed content data about your items. This content data will display on the Details page.
 - **Amazon Links** – These links allow the patron to connect to Amazon.com to view editorial and customer reviews, related items, copies available for purchase, and more. Click **off** to disable these links.
 - **Amazon Associate ID** – Having an Amazon Associate ID allows you to earn commission on items purchased by patrons who connect to the Amazon Web site via your Amazon links. If you enabled Amazon links and have an ID, type it here.

D. **Style:**

- **Preview** – As you make changes in the Style section, a preview of your changes displays. Some changes may require you to click **Update** below the preview before they are visible.
- **General** – Select the fonts and colors you want to display in the OPAC window.
- **Objects, Header, and Footer** – Select the colors you want to display in these areas. You can type a color name in each text box (such as **red** or **white**), if desired.

***Tip:** Click **Restore Default** to set the color or font back to the default color or font.*

STYLE NOTE FOR MACINTOSH USERS:

If you are using Microsoft Internet Explorer as your Web browser, your style changes may not be visible immediately if your cache is set to **once per session**, which is the default setting; you will have to restart Microsoft Internet Explorer to view style changes. To avoid this, change your cache setting:

- 1) In the Web browser toolbar, click **Preferences**. This displays the Internet Explorer Preferences dialog box.
 - 2) Expand the **Web Browser** folder and click **Advanced**.
 - 3) Under **Cache**, select **Always** for the **Update pages** setting.
 - 4) Click **OK**. The Web OPAC will now display style changes immediately after they are made.
-

- E. When finished with the **Style** section, be sure to click **Save** at the bottom of the Configuration page. This returns you to the OPAC Setup page. The name of the configuration you created is listed under **Installations**. Click **Edit** next to the name, then click the **Sort Formulas** link at the top of the page to proceed to the **Sort Formulas** section.

F. **Sort Formulas:**

Indicate the sort formulas you want to be available in the Search Results and Bookbag pages. Eight default formulas (with their language translations) are provided.

Adding a Sort Formula

- 1) Scroll down to the bottom of the page. In the **ID** box, type the ID for the new formula, and then click **Add**. This adds a new entry to the page (Figure 10.2).

FIGURE 10.2

Tip: To add a secondary sort to an existing formula, follow steps 3 through 7 in the empty gray box below the desired formula.

- 2) Type the language translations in the **Name** boxes, if desired.
- 3) In the **Source** box, type the field and subfield data for the sort formula.
- 4) In the **Order** box, select **Ascending** or **Descending**.
- 5) In the **Case** box, select **Sensitive** or **Insensitive**.
- 6) In the **Missing Value** box, type the value to use when there is no data in the record that corresponds to the key.
- 7) When finished, click the **Add** button to the right of the entry, and then click **Save** at the bottom of the page.

Modifying, Moving, or Deleting a Sort Formula

- To modify an entry for a sort formula, enter the new information as desired. Then click **Save** at the bottom of the page.
- To move a sort formula (therefore changing its priority), click the corresponding **Move Up** or **Move Down** button until the formula is in the desired position on the page (with the top being the first key). Then click **Save** at the bottom of the page.

NOTE: If an item matches more than one media type, the matching icon that is closest to the top of the page will display for the item.

- To delete a sort formula, click the corresponding **Delete** button. Then click **Save** at the bottom of the page.

- G. When finished with the **Sort Formulas** section, clicking **Save** at the bottom of the page returns you to the Configuration page (Figure 10.1). Click the **Material Types** link at the top of the page to proceed to the **Material Types** section.

H. Material Types:

Indicate the material types that you want to display in the **Material Types** list on the Enhanced Search page. Sixteen default material types (with their language translations) are provided.

- To add a material type, scroll down to the blank entry at the bottom of the page. Enter the information for the new type. When finished, click **Add**, and then click **Save** at the bottom of the page.

Tip: The **Query** box displays the field and subfield used to match an item to a material type.

- To delete a material type, click the corresponding **Delete** button, and then click **Save** at the bottom of the page.
- I. When finished with the **Material Types** section, clicking **Save** at the bottom of the page returns you to the Configuration page (Figure 10.1). Click the **Record Icons** link at the top of the page to proceed to the **Record Icons** section.
- J. **Record Icons:**

***Note:** Icons can be .bmp, .jpg, .gif, or .png files.*

Indicate the media type icons you want to display next to items in the Search Results, Details, and Bookbag pages.

Adding an Icon

- 1) Scroll down to the blank entry at the bottom of the page. In the large box, type the field, position, and code used to match this icon to a material type.
- 2) Select the icon that will display. To do so:
 - To use a saved icon, click **Upload**. In the Icon Upload dialog box, click **Browse**. Navigate to the icon and click **Open**. Click **OK** in the Icon Upload dialog box.
 - To use one of the default icons included with the Web OPAC, or an icon that you have already uploaded into the Web OPAC, click **Browse**. This displays a list of icons. To select an icon, click the icon name in the box on the right and then click **OK**.
- 3) When finished, click **Add**, and then click **Save** at the bottom of the page.

Modifying, Moving, or Deleting an Icon

- To modify the field, position, and/or code, type the new entry over the existing entry. Then click **Save** at the bottom of the page.
- To modify the icon that will display, follow step 2 in the preceding section, “Adding an Icon.” Then click **Save** at the bottom of the page.
- To move an icon (therefore changing its priority), click the corresponding **Move Up** or **Move Down** button until the icon is in the desired position on the page. Then click **Save** at the bottom of the page.

NOTE: If an item matches more than one media type, the matching icon that is closest to the top of the page will display for the item.

- To delete an icon, click the corresponding **Delete** button. Then click **Save** at the bottom of the page.
- K. When finished with the **Record Icons** section, clicking **Save** at the bottom of the page returns you to the Configuration page (Figure 10.1). Click the **Back** link at the top of the page to go to the OPAC Setup page.

NOTE: To create another configuration (for example, to have different configurations for an upper school and a lower school), repeat steps 3 and 4, and then proceed to step 5.

5. Complete the remaining entries on the OPAC Setup page. These settings apply to all configurations.
 - A. The **IP Address Routing** entries are used to direct traffic from a group of computers to a particular installation. In each box in the first row, specify the numbers or ranges of the machines you want to direct to this installation. For example, to direct all machines with IPs beginning with **204** or **205**, enter **204-205.0-255.0-255.0-255**. In the list to the right, select the name of the configuration you created, and then click **Save**.

NOTE: If you have additional configurations, repeat step A in the next row of boxes, but click **Add** before clicking **Save**. Repeat as needed.
 - B. Under **Persistent Bookbag Retention**, enter the number of days you want patrons' persistent bookbags to be saved. Then click **Update**.
 - C. Under **Change User name/Password**, change the default user name ("admin") and password ("boca raton") if desired. Then click **Update**.
6. Now that the OPAC setup is complete, you can:
 - Launch the Web OPAC by clicking the name of the configuration under **Installations**.
 - Create a desktop shortcut that will launch the Web OPAC with this configuration by dragging the configuration name to the desktop.
 - Modify this configuration in the future by returning to this page and clicking **Edit** next to the name of the configuration.

For more information on the persistent bookbag, see "Using the My Bookbag tab" on page 10-24.

CUSTOMIZING THE VISUAL SEARCH

Note: *There is no limit to the number of components you can display on the Visual Search page.*

You can customize the Visual Search by creating new components and modifying or deleting the default components.

Creating Components

1. Launch the Web OPAC and sign in. (For instructions on signing in, see "Signing in to the Web OPAC" on page 10-14.) This displays the default search page.
2. If Visual Search is not the default search, click **Visual Search**.
3. Click **Enter Configuration Mode** (below the tabs).
4. In the **Configure** list at the top of the page, select the type of component you want to create. This displays the configuration page for that component type. For instructions on creating each type of component, see the following sections, "Creating a Topic Component," "Creating a Query Component," and "Creating a Link Component."

Creating a Topic Component

The Topic Component Configuration dialog box is shown in Figure 10.3.

FIGURE 10.3

To change the language of the options in this dialog box, select a different language in the language list.

1. In the **Caption** box, type the caption that will appear under the component.
2. In the **Description** box, type the description that will appear when the mouse points to the component.
3. In the **Image** box, select the image that will display on the component. Do one of the following:
 - To use a saved image, click **Upload**. In the Image Upload dialog box, click **Browse**. Navigate to the image and click **Open**. Click **OK** in the Image Upload dialog box.
 - To use one of the images included with the Web OPAC, or an image that you have already uploaded into the Web OPAC, click **Browse**. This displays a list of images. To select an image, click the image name in the box on the right and then click **OK**.
4. When finished in the Topic Component Configuration dialog box, click **OK**.

Creating a Query Component

The Query Component Configuration dialog box is shown in Figure 10.4.

FIGURE 10.4

To change the language of the options in this dialog box, select a different language in the language list.

Boolean operator —

Index —

Keyword box —

1. In the **Caption** box, type the caption that will appear under the component.
2. In the **Description** box, type the description that will appear when the mouse points to the component.
3. In the **Image** box, select the image that will display on the component. Do one of the following:
 - To use a saved image, click **Upload**. In the Image Upload dialog box, click **Browse**. Navigate to the image and click **Open**. Click **OK** in the Image Upload dialog box.
 - To use one of the images included with the Web OPAC, or an image that you have already uploaded into the Web OPAC, click **Browse**. This displays a list of images. To select an image, click the image name in the box on the right and then click **OK**.
4. In the **Query** boxes, enter the search query you want the component to run. To do so:
 - A. In the first index list, select an index to search in (such as **Title** or **Author**). In the keyword box below, type the keyword to search for. If you want to further narrow the search, proceed to step B. Otherwise, skip to step 5.
 - B. In the first Boolean operator list, select an operator. In the corresponding index list, select the index. In the keyword box below, type the keyword.
 - C. Repeat step B in the other Boolean operator lists, index lists, and keyword boxes, if desired.
5. When finished in the Query Component Configuration dialog box, click **OK**.

Creating a Link Component

The Link Component Configuration dialog box is shown in Figure 10.5.

FIGURE 10.5

To change the language of the options in this dialog box, select a different language in the language list.

1. In the **Caption** box, type the caption that will appear under the component.
2. In the **Description** box, type the description that will appear when the mouse points to the component.

3. In the **Image** box, select the image that will display on the component. Do one of the following:
 - To use a saved image, click **Upload**. In the Image Upload dialog box, click **Browse**. Navigate to the image and click **Open**. Click **OK** in the Image Upload dialog box.
 - To use one of the images included with the Web OPAC, or an image that you have already uploaded into the Web OPAC, click **Browse**. This displays a list of images. To select an image, click the image name in the box on the right and then click **OK**.
4. In the **URL** box, type the URL of the Web page you want to be launched by the component (for example, <http://www.nasa.gov>).
5. When finished in the Link Component Configuration dialog box, click **OK**.

Modifying and Deleting Components

For instructions on entering Configuration Mode, follow steps 1 through 3 in "Creating Components" on page 10-10.

In Configuration Mode, select an option in the **Configure** list directly above the component you want to modify. Your choices are:

- **Modify** – Selecting this option displays the Component Configuration dialog box corresponding to the type of component you are modifying (Figure 10.3, Figure 10.4, or Figure 10.5). Make changes as desired, then click **OK**.
- **Delete** – Selecting this option deletes the component from the Visual Search page.
- **Move Left** and **Move Right** – Selecting one of these options moves the component one position to the left or right on the Visual Search page.

Exiting Configuration Mode

When finished configuring the Visual Search, click **Exit Configuration Mode** (below the tabs) to return to the Visual Search page.

GETTING STARTED

Patrons can launch your library's Web OPAC from their Web browser by entering the Web address in their browser's Address bar, selecting a link from your library's Web site, or using a shortcut on the desktop.

Web OPAC Features

When a patron launches the Web OPAC, the default search appears (the Standard Search page is shown in Figure 10.6). Some features may have been modified or disabled by your system administrator.

FIGURE 10.6

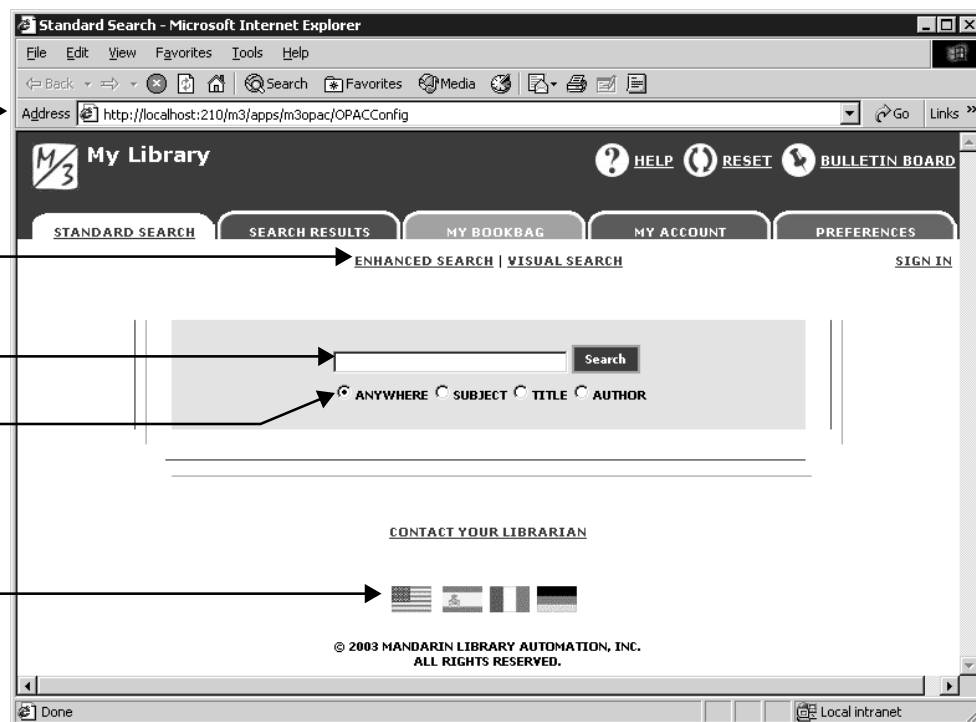
Address bar

Search links

Keyword box

Indexes

Language flags



- **Search links** – Allow you to access the other search types. The three default search types are Standard, Enhanced, and Visual.
- **Keyword box** – Allows you to type one or more keywords for which to search.
- **Indexes** – Allow you to specify the index you want to search.
- **Language flags** – Allow you to select a different language for the Web OPAC display. This does not affect the language of the information in the database records. The available languages may have been changed by a system administrator.

Signing in to the Web OPAC

***Note:** Some features require patrons to have access permissions, which are granted in the OPAC Access tab of M3 Group Editor. See “OPAC Access Tab” on page 3-9.*

In order to perform tasks that require the Web OPAC to identify you (such as accessing your saved Bookbag, using the My Account tab, or reserving items), you must sign in. To do so:

1. Click the **Sign In** link that appears on the right side of most pages in the Web OPAC.
2. Type your login name or patron barcode in the **Login Name/Barcode** box.
3. In the **Password** box, type your password.
4. Click **Sign In**.

NOTE: When finished with your session, click **Sign Out** or **Reset** to ensure your privacy.

Preferences Tab

The Preferences tab allows you to choose which databases you want to search (if additional databases are available; these are configured by the system administrator). You can also enable or disable the display of cover images next to items in the Results and Bookbag pages, if cover images are available (your system administrator may have disabled this option).

1. Under **Search Databases**, select the database(s) you want to search.
2. Under **Display Cover Images**, click **Yes** or **No**.
3. Click **Submit**.

SEARCHING WITH THE WEB OPAC

The Web OPAC offers three different search methods: Standard, Enhanced, and Visual. These are described in the following sections.

Conducting a Standard Search

1. If Standard Search is not already active, click the **Standard Search** link. This displays the Standard Search page (Figure 10.6).
2. Type one or more keywords in the keyword box.
3. Below the keyword box, select an index to search in (such as **Title** or **Author**).
4. Click **Search**.

NOTE: If no matches are found, the Index Browser page displays (if enabled by your system administrator). This page lists the indexed entries for the selected index and takes you to the closest alphabetical match for your keywords. Double-click an entry to search for it.

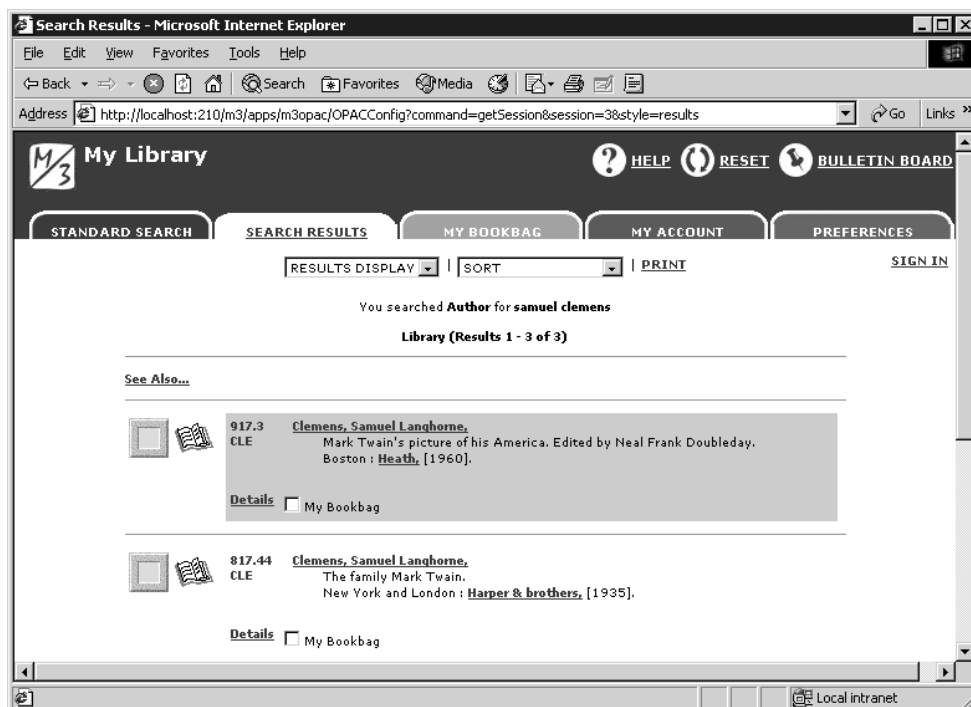
The Search Results page (Figure 10.7) displays the list of search results. See “Working with the Search Results Page” on page 10-19 for more information.

Search Tips:

- You can apply the truncation asterisk (*) to the beginning and/or end of a keyword; the wildcard question mark (?) character within a keyword (wom?n); and quotation marks (" ") around a phrase.
- You can use the **AND**, **OR**, and **NOT** Boolean operators to connect keywords in a keyword box. Be sure to type operators in capital letters.

FIGURE 10.7

***Note:** Your system administrator may have disabled some of the options shown here.*



Conducting an Enhanced Search

1. If Enhanced Search is not already active, click the **Enhanced Search** link. This displays the Enhanced Search page (Figure 10.8).

FIGURE 10.8

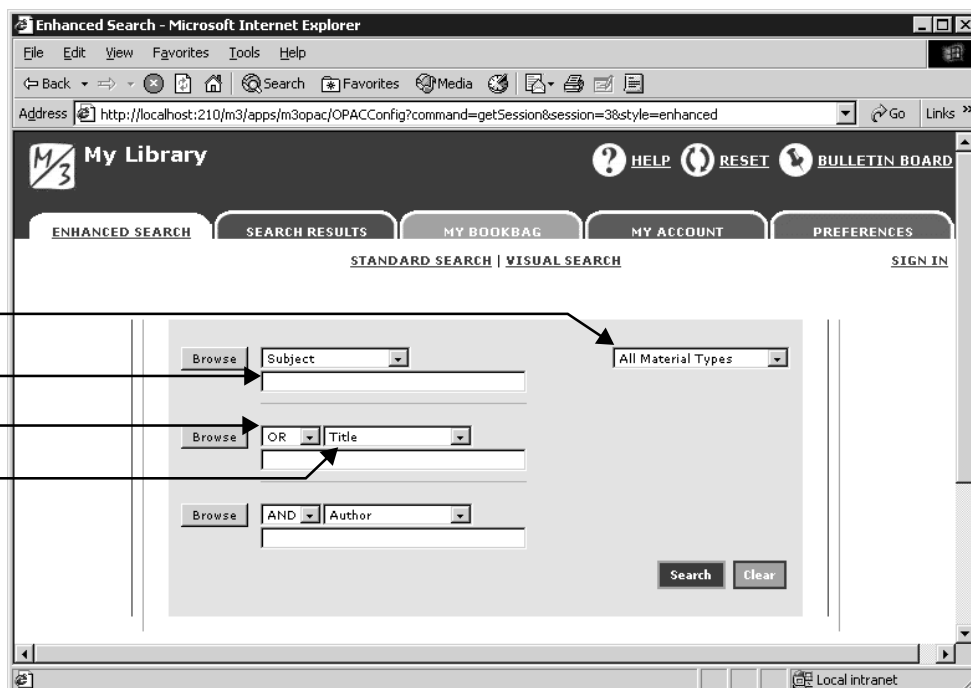
***Note:** Your system administrator may have disabled some of the options shown here.*

Material Types list

Keyword box

Boolean operator

Index



Search Tip: You can apply the truncation asterisk (*) to the beginning and/or end of a keyword; the wildcard question mark (?) character within a keyword (wom?n); and quotation marks (" ") around a phrase.

- You can use the AND, OR, and NOT Boolean operators to connect keywords in a keyword box. Be sure to type operators in capital letters.

2. Type your search query into one or more of the three keyword boxes. To use different indexes or Boolean operators, select a different index or operator in the appropriate list.

NOTE: You can also click a **Browse** button and select a search term. For instructions, see "Using Index Browse" on page 10-17.

3. Limit your search by selecting a material type (such as **Book** or **DVD**) in the **Material Types** list, if desired.
4. Click **Search**.

NOTE: If no matches are found, the Index Browser page displays (if enabled by your system administrator). This page lists the indexed entries for the selected index and takes you to the closest alphabetical match for your keywords. Double-click an entry to search for it.

The Search Results page (Figure 10.7) displays the list of search results. See "Working with the Search Results Page" on page 10-19 for more information.

Using Index Browse

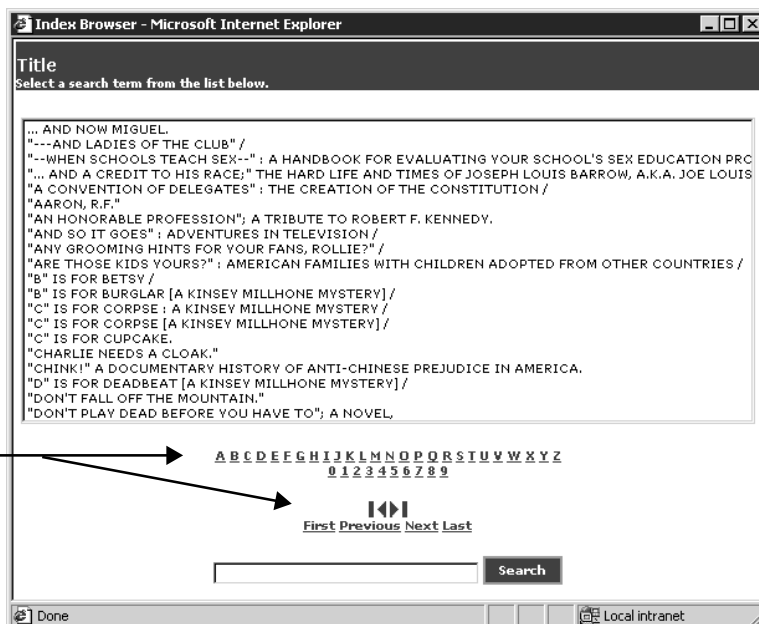
Many MARC fields in the M3 system have been indexed, enabling patrons to review and select search terms from existing data using Index Browse. This is particularly useful to patrons who are unsure of the search they want to enter. To use Index Browse:

1. If Enhanced Search is not already active, click the **Enhanced Search** link. This displays the Enhanced Search page (Figure 10.8).
2. In the first index list, select an index to search in (such as **Title** or **Author**). Then click the **Browse** button to the left. This displays the indexed entries (Figure 10.9).

NOTE: If the MARC field has not been indexed and therefore cannot be browsed, the corresponding Browse button is not available.

FIGURE 10.9

Navigation tools



3. Navigate through the list to locate an entry to use as a search term. To browse for a specific entry, type a term in the keyword box at the bottom of the page and click **Search**; the list moves to the closest alphabetical match. When the desired entry is located, double-click it. This returns you to the Enhanced Search window and places the selected term in the keyword box.
4. Enter other search terms in the remaining keyword boxes, if desired. When finished, click **Search**. The Search Results page (Figure 10.7) displays the list of search results. See “Working with the Search Results Page” on page 10-19 for more information.

Conducting a Visual Search

The Visual Search method provides patrons with an easy point-and-click graphical search method. From a patron’s perspective, a search consists of clicking a topic component and then clicking a related sub-topic component; this generates a list of search results. In actuality, it is a keyword search method disguised behind a graphical interface—topic components are connected to query components, which are linked to predefined search queries. A query component launches a search of the selected database and returns a list of results.

These graphical components can also be configured as link components, which launch external Web pages instead of search queries. Link components are optional and are not included in the default interface.

1. If Visual Search is not already active, click the **Visual Search** link. This displays the Visual Search page, which contains a menu of topic, query, and/or link components. The default component menu (Figure 10.10) consists of only topic components.

FIGURE 10.10



***Tip:** Topic, query, and link components look the same. The result of selecting them is what makes them different.*

- A topic component opens a sub-menu.
- A query component returns search results.
- A link component opens a Web page.

2. Click a component (only the graphic is a hyperlink). This either accesses a sub-menu page or launches an external Web page.
3. If a sub-menu page appears, continue clicking the desired components (narrowing the search) until you reach the last menu level. This launches a search query and displays the search results on the Search Results page (Figure 10.7). (If you click a link component, it will launch a Web page instead of a search query.)

Working with the Search Results Page

Once a search query is sent, the Search Results page appears (Figure 10.11) listing all the records matching the query.

FIGURE 10.11

Note: Your system administrator may have disabled some of the options shown here.

Results Display list

Sort list

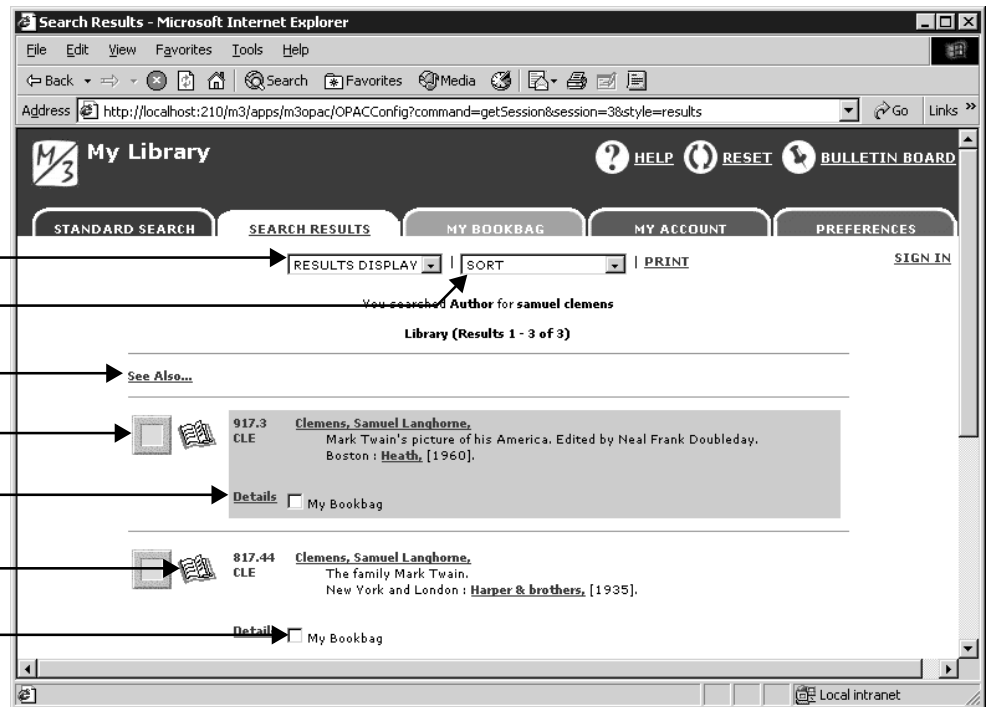
Cross-Reference

Availability icon

Details link

Media type icon

My Bookbag check box



Tip: You can click any links in the record to conduct a related search. In Figure 10.11, the links shown for the author and publisher would launch a search for other titles by this author or publisher.

The Search Results page displays a maximum of 10 brief records at a time. To view the rest of the results list, click the horizontal scroll bar or any of the navigational links at the bottom of the page. The options available on the Search Results page are described in the following sections; these options may have been modified by your system administrator.

Changing the Display Format

To select a different format for the records displayed, select a display format in the **Results Display list** (Figure 10.12).

FIGURE 10.12

This list may have been modified by your system administrator.



Sorting the Record List

To sort the records displayed by a different sort formula, select a sort order in the **Sort** list (Figure 10.13).

FIGURE 10.13

This list may have been modified by your system administrator.



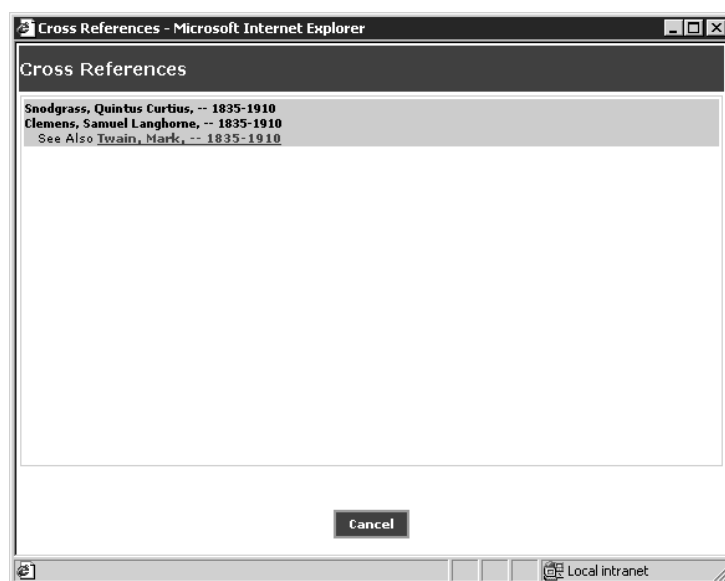
Printing Search Results

To print the Search Results page, click the **Print** link. Depending on your Web browser, you may also be able to click the printer icon on the toolbar or **Print** on the **File** menu.

Using See and See Also Cross-References

If you are using a version of M3 that supports Authority Control, a **See** link displays if there are more appropriate headings used by your library than the one you searched for; a **See Also** link displays if there are other headings related to your search that may also be useful. Click the **See** or **See Also** link to display the Cross References window (Figure 10.14), which lists the alternate or related headings. Click a link (such as **Twain, Mark, 1835-1910**) to see search results for that heading.

FIGURE 10.14



Determining Availability

To determine an item's availability, refer to the color of the square or star-shaped icon next to the record. Green signifies available and red signifies unavailable.

If you are working in a scoped environment, a star-shaped icon indicates that the item can be found at the local site; records located at other sites will have a square icon. In a non-scoped environment, the icon will always be a square.

Identifying Media Type

To identify the media type for a listed record, refer to the media type icon. For example, a “book” represents a book record. For a complete list of media type icons, see “Determining Item Media Type” on page 6-18.

Viewing Record Details

To view more information about a specific record, click the **Details** link. This opens the Details page containing the expanded bibliographic record and item location information. See “Working with the Details Page” on page 10-21 for more information.

Adding Records to the Bookbag

To add specific records to the Bookbag for later viewing, printing, or e-mailing, select the corresponding **My Bookbag** check box. To view the contents of the Bookbag, click the **My Bookbag** tab. For more information on the Bookbag, see “Using the My Bookbag tab” on page 10-24.

Returning to the Search Page

To return to a blank search page:

- Click the **Search** tab (the tab will display **Standard Search** or **Enhanced Search**, depending on the type of search you last performed).

OR

- Click **Back** or an equivalent function on the toolbar.

Working with the Details Page

The Details page (Figure 10.15) provides item details as well as information on the number of and availability of copies.

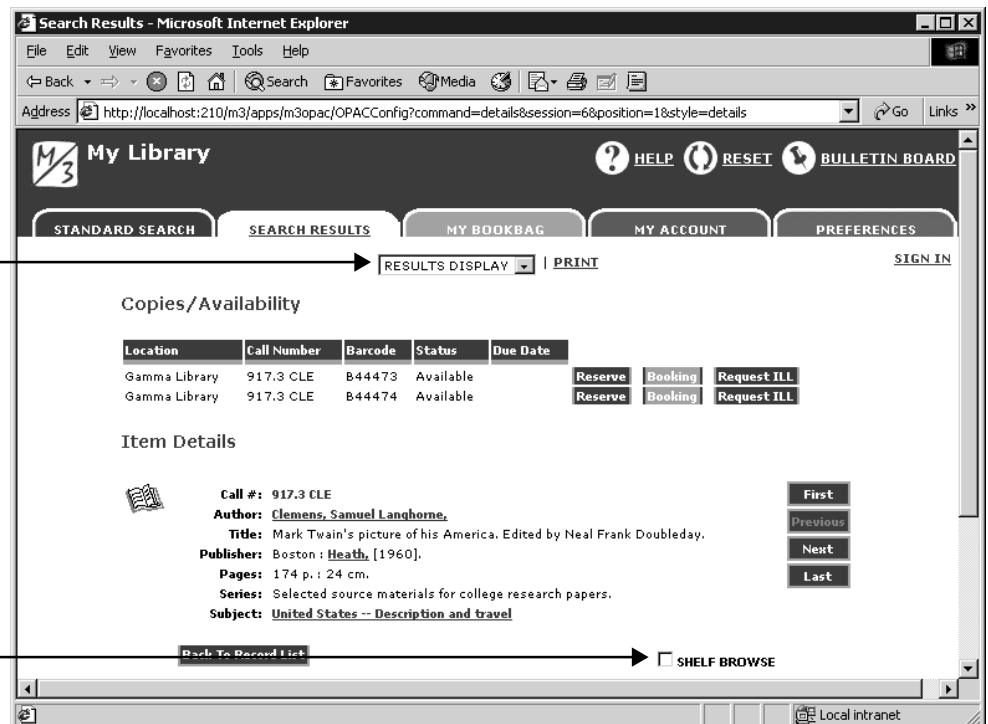
FIGURE 10.15

Note: Your system administrator may have disabled some of the options shown here.

Results Display list

*Tip: Under **Item Details**, click a link to conduct a related search. The links shown here for **Author** and **Subject** would launch a search for other titles by this author or in this subject.*

Shelf Browse check box



Tip: You can click **First**, **Previous**, **Next**, or **Last** to access other records in the Search Results without having to return to the Search Results page.

The Details page is accessed from the Search Results page (Figure 10.11) by clicking the desired item's **Details** link. The options available on the Details page are described in the following sections; these options may have been modified by your system administrator.

Changing the Display Format

To select a different format for the records displayed, select a display format in the **Results Display** list (Figure 10.12).

Printing the Details

To print the Details page, click the **Print** link. In the Print dialog box, change settings if desired, then click **Print**. NOTE: Depending on your Web browser, you may also be able to click the printer icon on the toolbar or **Print** on the **File** menu.

Reserving Items

You must be signed in to the Web OPAC and have the proper permission in order to reserve items; for instructions on signing in, see "Signing in to the Web OPAC" on page 10-14.

1. Under **Copies/Availability**, click **Reserve**. (If multiple copies are available, click the **Reserve** button that corresponds to the desired copy.)
2. On the confirmation page, click **OK**.

Booking Items

You must be signed in to the Web OPAC and have the proper permission in order to book items; for instructions on signing in, see "Signing in to the Web OPAC" on page 10-14.

1. Under **Copies/Availability**, click **Booking**. (If multiple items are available, click the **Booking** button that corresponds to the desired item.) This displays the Booking page.
2. Enter the start and end date of the booking period in the boxes, and then click **Submit**.
3. On the confirmation page, click **OK**.

Requesting an Interlibrary Loan (ILL)

If the desired item is held at another location, you can submit a loan request to that location. You must be signed in to the Web OPAC and have the proper permission in order to request an ILL; for instructions on signing in, see "Signing in to the Web OPAC" on page 10-14.

1. Under **Copies/Availability**, click **Request ILL**. (If multiple copies are available, click the **Request ILL** button that corresponds to the desired copy.) This displays the ILL Request page (Figure 10.16).

Note: The Web OPAC can be configured to send e-mail notifications when reserved items become available. For instructions, see "Sending E-Mail Notifications for Items on Hold" on page 5-16.

FIGURE 10.16

2. In the **Lending Library** box, the library that has the copy appears.
3. In the **Requesting Library** box, your library location appears.
4. In the **Submitter Name** box, type your name.
5. In the **Submitter E-mail** box, type your e-mail address.
6. In the **Need by Date** boxes, enter the date you would like to receive the item by.
7. In the **Item Information** section, verify that the correct item is listed.
8. If you have additional information to send to the requesting library regarding your request, type it in the **Comments** box.
9. If you would like to send a “carbon copy” of this e-mail request to an e-mail address, type the address in the **CC** box.
10. Click **Submit**. On the confirmation page, click **OK**.

Using Shelf Browse

Shelf Browse allows a patron to find records with call numbers similar to that of the displayed record. This is similar to looking at items to the left or right of a selected copy on a library shelf.

1. Select the **Shelf Browse** check box below the record.
2. After the page refreshes, you can click **Previous** or **Next** to move backward or forward in shelflist order.

Returning to the Record List

To return to the Search Results page, click **Back to Record List**.

Using the My Bookbag tab

The Bookbag is a place to temporarily store records during a search session. This enables the patron to return to the selected records for additional review or batch printing.

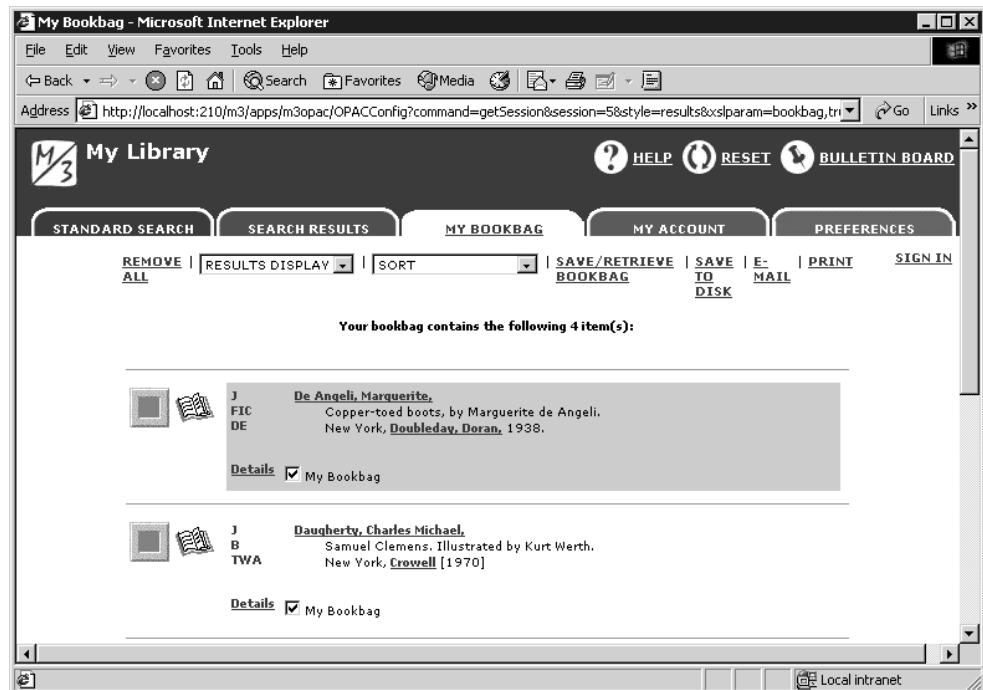
***Note:** The amount of time items will be saved in the Persistent Bookbag is configured on the OPAC Setup page. See step 5B on page 10-10 for more information.*

If the system administrator enabled the **Persistent Bookbag** feature, all items placed in the Bookbag will be saved between sessions if the patron signs in anytime during his or her session. If the patron never signs in (or this feature is not enabled), all items in the Bookbag are deleted when the Web OPAC resets.

To access records placed in the Bookbag during the current search session, click the **My Bookbag** tab. This opens the Bookbag page (Figure 10.17).

FIGURE 10.17

***Note:** Your system administrator may have disabled some of the options shown here.*



The following options are available on the Bookbag page (these options may have been modified by your system administrator).

- To remove records from the Bookbag:
 - To remove all records, click the **Remove All** link.
 - To remove one record, clear the **My Bookbag** check box that corresponds to the record.
- To select a different format for the records displayed, select a display format in the **Results Display** list (Figure 10.12).
- To sort the records displayed by a different sort formula, select a sort order in the **Sort** list (Figure 10.13).

***Note:** The amount of time items will be saved in the Persistent Bookbag is configured on the OPAC Setup page. See step 5B on page 10-10 for more information.*

- To retrieve records previously saved to the Bookbag, click the **Save/Retrieve Bookbag** link. (If you have not already signed in, you will be prompted to do so; for instructions, see “Signing in to the Web OPAC” on page 10-14.) This displays the previously saved records and any newly added records, and will save these records for a predetermined amount of time.
- To save the records to a disk, click the **Save to Disk** link. In the File Download dialog box, click **Save**. Navigate to the location where you want to save the file. Type a name in the **File name** box, and then click **Save**. This saves the Bookbag as an HTML document.
- To e-mail the list of records, click the **E-mail** link. On the E-mail page, type your e-mail address in the **To** box. In the **Comments** box, type comments if desired, then click **Send**. On the confirmation page, click **OK**.
- To print the page, click the **Print** link. In the Print dialog box, change settings if desired, then click **Print**. NOTE: Depending on your Web browser, you may also be able to click the printer icon on the toolbar or **Print** on the **File** menu.
- To display details about a record, click the corresponding **Details** link.
- To return to a blank Search page, click the **Search** tab (the tab will display **Standard Search** or **Enhanced Search**, depending on the type of search you last performed). Or, click **Back** or an equivalent function on the toolbar.

Using the My Account Tab

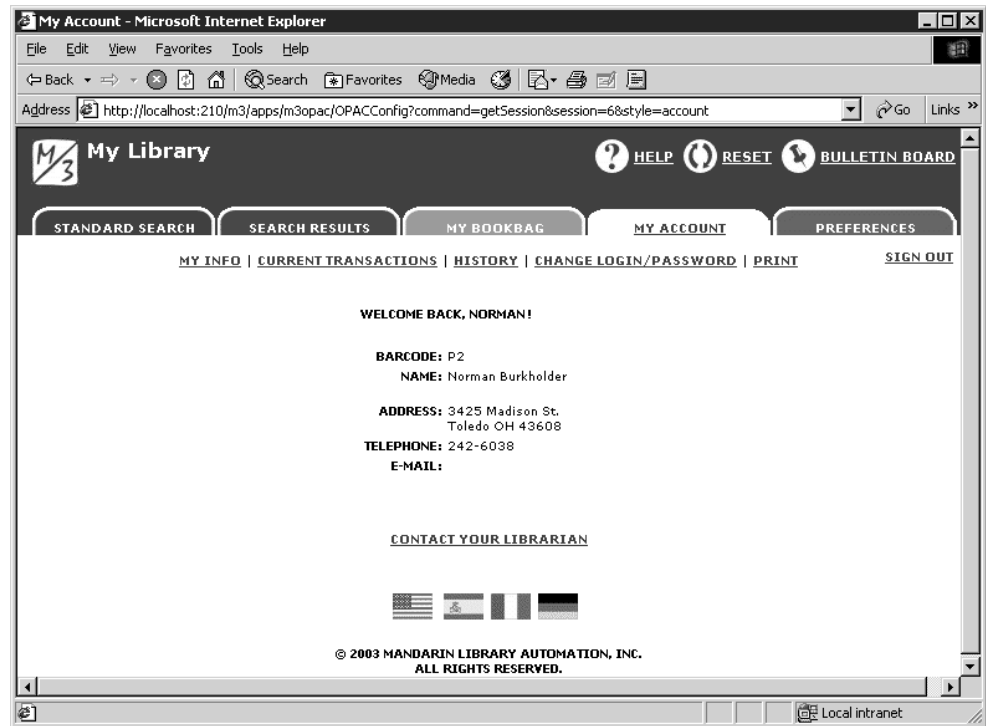
The My Account tab is an optional tab that allows patrons to view information about their accounts. If the system administrator enabled this tab and all of its features, patrons can view information including their current transactions, past transactions, and personal information that is on record with the library. They can also renew items they have on loan as well as cancel reserve, hold, and booking requests.

Viewing Your Account Information

1. Click the **My Account** tab. (If you have not already signed in, you will be prompted to do so; for instructions, see “Signing in to the Web OPAC” on page 10-14.) This displays the My Account page (Figure 10.18).

FIGURE 10.18

Note: Your system administrator may have disabled some of the options shown here.



Tip: Click the **Print** link to print the page you are viewing.

2. Click the following links to access your information:

- **My Info** – Lists your personal information, such as address and telephone number, that the library has on file
- **Current Transactions** – Lists your open transactions
- **History** – Lists your transaction history
- **Change Login/Password** – Allows you to change your login information

Renewing Items

1. In the **My Account** tab, click the **Current Transactions** link.
2. Click the **Renew** button that corresponds to the item you want to renew.
3. On the confirmation page, click **OK**.

Canceling a Reserve, Hold, or Booking Request

1. In the **My Account** tab, click the **Current Transactions** link.
2. Click the **Cancel** button that corresponds to the item you want to cancel.
3. On the confirmation page, click **OK**.

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APPENDIX A: CUSTOMIZING THE OPAC .INI FILES

A

CONTENTS

The M3 OPAC has default settings that work with most configurations. However, you may choose to customize the OPAC .ini files to work with your own system configuration preferences. This appendix describes:

- How to modify the M3Opac.ini file
- How to modify the SortFormulas.ini file
- How to modify the Summaries.ini file

Warning:

The following information is only for the use of system administrators. If you do not possess a comprehensive understanding of configuration files, do not attempt to change the .ini files. Improper procedures could affect the OPAC. Before you proceed, it is suggested that you make a complete backup of these files.

MODIFYING THE M3OPAC.INI FILE

The M3Opac.ini file controls several general configuration aspects of the M3 OPAC. To modify the M3Opac.ini file:

Note: If you installed M3 v1.1 prior to installing v1.6, your default path is **C:\Program Files\SIRS Mandarin\M3**.

1. Using a simple text editor such as Notepad or WordPad, open the M3Opac.ini file (the default path is **C:\Program Files\Mandarin M3**).
2. In the M3Opac.ini file, make the desired customizations.
3. When finished, save the file. The customized configuration becomes active the next time you start the M3 OPAC.

Contents of the M3Opac.ini File

Table A.1 contains some of the common customizable fields. The left column of the table lists the information contained in the M3Opac.ini file. The right column provides an explanation of the left column entries.

NOTE: The values shown in the left column are the default settings.

TABLE A.1

Contents of M3Opac.ini file	Explanation
SEARCH TAB settings	
DefaultSearchScreen=STANDARD	Controls the default search method. This can be changed to ENHANCED or VISUAL.
DATABASES SCREEN settings	
AllowSearchSetSwitching=TRUE	Controls whether the Database Type list appears on the Databases tab.
SEARCH RESULTS RECORD LIST SCREEN settings	
Retrieve_Availability_Status=1	Controls whether the availability colors appear in the check boxes in the Search Results and Record Details windows (0=disabled and 1=enabled).
Toggle_Availability_Status_Retrieval=1	Controls whether the Availability legend appears in the Search Results window (0=disabled and 1=enabled).
Save_Holdings=0 Print_Holdings=0	Controls the ability to save or print holdings information in the Search Results and Bookbag Record List windows (0=disabled and 1=enabled).
Display_Cover_Images=0	Controls whether cover images display in the Search Results and Record Details windows (0=disabled and 1=enabled).
No_Result_Browse=1	Controls whether the Browse window appears when a search returns no results (0=disabled and 1=enabled).
BOOKBAG SCREEN setting	
Scan_Barcode=0	Controls whether the Enter Barcode option appears (0=disabled and 1=enabled).
PATRON HISTORY SCREEN settings	
Patron_Tab_Visible=0	Controls whether the My Account tab appears (0=disabled and 1=enabled).
APPLICATIONS settings	
WebBrowser= C:\progra~1\intern~1\iexplore.exe	Designates the Web browser the OPAC will use. Type the path and file name to the Web browser program you are using.
Email=C:\Program Files \Outlook Express\msimn.exe	Designates the email program the OPAC will use. Type the path and file name to the email program you are using.
APPLICATION RESET settings	
Application_Reset_Mode-On=1	Controls whether the OPAC reset function is enabled (0=disabled and 1=enabled).
Minutes_To_Reset=3	Controls the number of minutes before an automatic OPAC reset occurs.

Contents of M3Opac.ini file	Explanation
Display_Warning=1	Controls whether a warning is displayed before the reset occurs (0=disabled and 1=enabled).
Seconds_To_Cancel=20	Controls the number of seconds before the Reset Warning message automatically disappears and the OPAC system resets.
BULLETIN BOARD settings	
Use_External_Browser=0	Controls whether the Bulletin Board uses an external browser to link to the page to be displayed (0=disabled and 1=enabled).
Source=LOCAL	Where LOCAL is the default bulletin board file in the M3 directory. The local default file is "BulletinBoard.html." Instead of "LOCAL," this also can be the full path to any Web page. Formats include: • http:// • https:// • file:///
WWW HOTSPOTS settings	
Use_External_Browser=0	Controls whether the OPAC uses an external browser for any URLs listed in the Search Results window (0=disabled and 1=enabled).

Contents of M3Opac.ini file	Explanation
PRINTING settings	
<Header> • 0=Mandarin M3 OPAC • Justification=Center <Footer> • 0=Page%CURRENT_PAGE • Justification=Center	Controls elements and formats of the printed header and footer. You can use any of the following variables. The default variables are: • %CURRENT_PAGE - Current page. • Justification - Controls where the information will appear (Center, Left, Right). In addition, you can include any of these variables in the header and footer: • %APP_NAME - Current name of the program. • %SECOND - Current time's seconds. • %MINUTE - Current time's minutes. • %STANDARD_HOUR - Current time's hour in standard format (two 12-hour cycles per day). • %AM_PM_INDICATOR - Indicates before noon or after noon for STANDARD_HOUR format. (Text for these indicators is located in the Timestamp.ini file.) • %HOUR - Current time's hour in military format (i.e., one 24-hour cycle per day). • %NUMERIC_DAY - The number of the current day of the month ranging from 1 to 31. • %ALPHA_DAY - The name of the current day of the week. (Text for these names is located in the Timestamp.ini file.) • %NUMERIC_MONTH - Current month listed numerically, from 1 (January) to 12 (December). • %ALPHA_MONTH - The name of the current month. (Text for these names is located in the Timestamp.ini file.) • %YEAR - Current year calculated by the computer and displayed as a four-digit number.
<Limits> Pages=0	Controls the number of pages a patron can print. If pages=0, there is no limit to the number of pages a patron can print. If pages>0, then the limit is equal to that number.
REPORT settings	
<Names>	Maps language keys to language dependent report formats.
<Attribute_Set_Identifier>	Specifies the attribute set identifier of the attribute set with which a report format is to be associated.
<Format_String>	Contains the format strings that dictate the type of and layout of the data on the report. Also specifies whether the report is to be language dependent on the OPAC.

MODIFYING THE SORTFORMULAS.INI FILE

The SortFormulas.ini file controls the formulas by which record lists are sorted in the M3 OPAC. These formulas apply to sorting records in the Search Results Record List, Bookbag Record List, and the Open Transactions and Closed Transactions lists in the My Account tab. To modify the SortFormulas.ini file:

Note: If you installed M3 v1.1 prior to installing v1.6, your default path is C:\Program Files\SIRS Mandarin\M3.

1. Using a simple text editor such as Notepad or WordPad, open the SortFormulas.ini file (the default path is **C:\Program Files\Mandarin M3**).
2. In the SortFormulas.ini file, make the desired customizations.
3. When finished, save the file. The customized configuration becomes active the next time you start the M3 OPAC.

Adding New Sort Formulas

If a sort formula you want to use is not listed in the SortFormulas.ini file, you can add a new sort formula. To do so:

1. In the SortFormulas.ini file, locate the heading **[sort_formula]**.
2. Highlight the entire section (down to the next **[sort_formula]** heading) to select it, then press CTRL+C. This copies the text.
3. On the line before the next **[sort_formula]** heading, press CTRL+V. This pastes the copied text.
4. In the new **serial_number=** entry, delete the number that appears after the equal (=) sign and type the number of this new sort formula (for example, if five sort formulas are currently listed, type **6**).
5. In the **0=** entry, delete the existing text and type the name of the new sort formula. In the four lines that follow, type language translations as needed (1=French, 2=Spanish, 3=German, 4=Italian).
6. Under the heading **<default>**, type any options you want to specify for this sort formula. For an explanation of available options, see the instructions under **[sort_formula] <default>** in the SortFormulas.ini file.
7. Under the heading **<key>**, type the identification number of the sort key by which you want to sort. You can select multiple keys, if desired. The available sort keys are listed under the **[sort_key]** heading in the file. To create a new sort key, see the following section, "Adding New Sort Keys."
8. When finished, save the file. The new sort formula becomes active the next time you start the M3 OPAC.

Adding New Sort Keys

If a sort key you want to use is not listed in the SortFormulas.ini file, you can add a new sort key. To do so:

1. In the SortFormulas.ini file, locate the heading **[sort_key]**.
2. Highlight the entire section (down to the next **[sort_key]** heading) to select it, then press CTRL+C. This copies the text.
3. On the line before the next **[sort_key]** heading, press CTRL+V. This pastes the copied text.

4. In the new **serial_number=** entry, delete the number that appears after the **=** sign and type the number of this new sort key (for example, if five sort keys are currently listed, type **6**).
5. In the **0=** entry, delete the existing text and type the name of the new sort key. In the four lines that follow, type language translations as needed (1=French, 2=Spanish, 3=German, 4=Italian).
6. Under the heading **<options>**, type any options you want to specify for this sort key. For an explanation of available options, see the instructions under **[sort_key] <options>** in the SortFormulas.ini file.
7. When finished, save the file. The new sort key becomes active the next time you start the M3 OPAC.

Automatic Sorting

The OPAC can be configured to automatically sort the Search Results Record List by a default formula. To do so:

1. In the SortFormulas.ini file, locate the formula by which you want to sort (**Call Number**, **Title**, and so on). For this example, we will use **Title**.
2. Under the heading **[sort_formula]**, locate the **[identification]** section with the entry **0=Title**. This is the **Title** sort formula.
3. In this sort formula, locate the **<default>** section. After the entry **missing_keys_last=1**, type **auto=1** on a new line.
4. Save the file, then restart the OPAC. The next time a search is conducted, the Search Results Record List will automatically sort by the specified formula.

MODIFYING THE SUMMARIES.INI FILE

In the M3 OPAC, the Summaries.ini file allows configuration of the Holdings box in the Search Results Record Details window. You can choose the fields that are listed and the order they display on screen. To modify the Summaries.ini file:

Note: If you installed M3 v1.1 prior to installing v1.6, your default path is C:\Program Files\SIRS Mandarin\M3.

1. Using a simple text editor such as Notepad or WordPad, open the Summaries.ini file (C:\Program Files\Mandarin M3).
2. In the Summaries.ini file, make the desired customizations.
3. When finished, save the file. The customized configuration becomes active the next time you start the M3 OPAC.

Adding a New Field

If a field you want to display is not listed in the Summaries.ini file, you can add a new field. To do so:

1. In the Summaries.ini file, locate the heading [summary_column].
2. Highlight the entire section (down to the next [summary_column] heading) to select it, then press CTRL+C. This copies the text.
3. On the line before the next [summary_column] heading, press CTRL+V. This pastes the copied text.
4. In the new **serial_number=** entry, type the number of this new summary column (for example, if 10 summary columns are currently listed, type 11).
5. In the **0=** entry, type a new name for the column. In the four lines that follow, type language translations as needed (1=French, 2=Spanish, 3=German, 4=Italian).
6. In the **linking_identifier=** entry, type a code to reference the table storing the data (for example, **b**=bibliographic, **h**=holding, or **e**=equipment).
7. In the **<format>** section, in the **0=** entry, type the field and subfield in which the data is stored (for example, **852c**).
8. Locate the heading [summary_layout] for the type of linking identifier being modified (holdings, BIB1, or e (equipment)).
9. Highlight a **<column>** section (consisting of three lines) to select it, then press CTRL+C. This copies the text.
10. At the desired location, press CTRL+V. This pastes the copied text to create a new column that will display the data.
11. In the new **id=** entry, type the number you entered in step 4.
12. In the new **width=** entry, type a new column width, if needed.
13. When finished, save the file. The new field displays the next time you start the M3 OPAC.

NOTES

APPENDIX B: PRELOADED REPORTS

B

Tables B.1 through B.14 list reports that are preloaded into M3. For information on using these reports, see “Using ReportTool” beginning on page 7-1.

M3 reports adhere to the following naming convention:

[Report Category]-[Type of Report]([Report Criteria])

For example: **Item-List(ByAuthorForSelectedLocation)**

Reports are divided into the following categories: Bib & Item Lists, Bill Letters, Booking Reports, Cards & Labels, Equipment Lists & Forms, Fine Letters, Fine Lists, Fine Notices, Overdue Letters, Overdue Lists, Overdue Notices, Patron Lists, Statistical Reports, and Transactions Lists.

Reports are coded according to type: **School (S)** or **Public or Academic (P/A)**.

BIB & ITEM LISTS

Bibliographic reports (Bib-List) list bibliographic records. Item reports (Item-List) list holding records and include pertinent information from the corresponding bibliographic record. Lists are available for deleted records, but not purged records. Lists in shelflist order are sorted by call number, title, and author.

TABLE B.1

Bib & Item Lists

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Bib-List(MarkedForDeletion)	List of bibliographic records that are marked for deletion.
S, P/A	Bib-List(MarkedForDeletionWithHoldings)	List of bibliographic records that are marked for deletion and their attached holdings.
S, P/A	Item-List(AdditionsForSelectedDateOrRange)	List of items entered during a selected date or date range.
S, P/A	Item-List(AdditionsByGroupForSelectedDateOrRange)	List of items entered during a selected date or date range, sorted by group.
S, P/A	Item-List(AdditionsByLocationForSelectedDateOrRange)	List of items entered during a selected date or date range, sorted by location.
S, P/A	Item-List(AdditionsBySpecGroupForSelectedDateOrRange)	List of items entered during a selected date or date range, sorted by special reserve group.
S, P/A	Item-List(AdditionsForSelectedGroupAndDateOrRange)	List of items for a selected group that were entered during a selected date or date range.
S, P/A	Item-List(AdditionsForSelectedLocationAndDateOrRange)	List of items for a selected location that were entered during a selected date or date range.

Bib & Item Lists (Continued)

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Item-List(AdditionsWithSummaryFor SelectedDateOrRange)	List of items entered during a selected date or date range with summary information.
S, P/A	Item-List(All-ByAuthor)	List of all items, sorted by author.
S, P/A	Item-List(All-ByBarcode)	List of all items, sorted by barcode.
S, P/A	Item-List(All-ByISN)	List of all items, sorted by ISN.
S, P/A	Item-List(All-ByPubDate)	List of all items, sorted by publication date.
S, P/A	Item-List(All-ByTitle)	List of all items, sorted by title.
S, P/A	Item-List(All-ForSelectedISNRange)	List of items for a selected ISN range.
S, P/A	Item-List(ByAuthorForSelectedLocation)	List of items for a selected location, sorted by author.
S, P/A	Item-List(ByBarcodeForSelectedLocation)	List of items for a selected location, sorted by barcode.
S, P/A	Item-List(ByISNForSelectedLocation)	List of items for a selected location, sorted by ISN.
S, P/A	Item-List(ByPubDateForSelectedDewey# OrRange)	List of items for a selected Dewey Decimal number or selected Dewey Decimal range, sorted by publication date.
S, P/A	Item-List(ByPubDateForSelectedLocation)	List of items for a selected location, sorted by publication date.
S, P/A	Item-List(ByTitleForBib245kContentSearch)	List of items containing a selected word or phrase for Bib.245#k (Form), sorted by title.
S, P/A	Item-List(ByTitleForBib440aContentSearch)	List of items containing a selected word or phrase for Bib.440#a (Series Title), sorted by title.
S, P/A	Item-List(ByTitleForBib490aContentSearch)	List of items containing a selected word or phrase for Bib.490#a (Series Statement), sorted by title.
S, P/A	Item-List(ByTitleForSelectedBib245h)	List of items matching a selected Bib.245#h (Medium), sorted by title.
S, P/A	Item-List(ByTitleForSelectedGroup)	List of items for a selected group, sorted by title.
S, P/A	Item-List(ByTitleForSelectedLocation)	List of items for a selected location, sorted by title.
S, P/A	Item-List(ByTitleForSelectedPrefix)	List of items for a selected prefix, sorted by title.
S, P/A	Item-List(ByTitleForSelectedSpecGroup)	List of items for a selected special reserve group, sorted by title.
S, P/A	Item-List(Deleted-All)	List of deleted items.
S, P/A	Item-List(Deleted-AllWithPrice)	List of deleted items with item price.
S, P/A	Item-List(DeletedByCallNumber)	List of deleted items, sorted by call number.
S, P/A	Item-List(DeletedByGroup)	List of deleted items, sorted by group.
S, P/A	Item-List(DeletedByLocation)	List of deleted items, sorted by location.
S, P/A	Item-List(DeletedBySpecResGroup)	List of deleted items, sorted by special reserve group.
S, P/A	Item-List(DeletedByTitle)	List of deleted items, sorted by title.
S, P/A	Item-List(DeletedForSelected#OfDaysWith Price)	Item list with price of items deleted during a selected past number of days.
S, P/A	Item-List(DeletedForSelectedGroup)	List of deleted items in a selected group.
S, P/A	Item-List(DeletedForSelectedLocation)	List of deleted items for a selected location.
S, P/A	Item-List(ForSelectedDewey#OrRange)	List of items for a selected Dewey Decimal number or Dewey Decimal range.
S, P/A	Item-List(MessagesByTitle)	Item messages, sorted by title.

Bib & Item Lists (Continued)

S=School P/A= Public or Academic			Report Name	Description
S, P/A			Item-List(MessagesByTitleForSelected Location)	Item messages for a selected location, sorted by title.
S, P/A			Item-List(MessagesInShelflistOrder)	Item messages sorted in shelflist order.
S, P/A			Item-List(MessagesInShelflistOrderFor SelectedLocation)	Item messages for a selected location, sorted in shelflist order.
S, P/A			Item-List(NotCirculatedByLocationFor Selected#OfDays)	List of items not circulated for a selected number of days, sorted by location.
S, P/A			Item-List(NotCirculatedForSelected# OfDays)	List of items not circulated for a selected number of days, sorted by call number.
S, P/A			Item-List(NotCirculatedForSelected# OfDays&Location)	List of items for a selected location not circulated for a selected number of days.
S, P/A			Item-List(ProjectedMediumByTitle)	List of items with a projected medium, sorted by title.
S, P/A			Item-List(ProjectedMediumByTitleAnd Location)	List of items with a projected medium, sorted by title and location.
S, P/A			Item-List(ProjectedMediumByTitle ForSelectedLocation)	List of items with a projected medium for a selected location, sorted by title.
S, P/A			Item-List(SerialsByTitle)	List of serial items, sorted by title.
S, P/A			Item-List(SerialsByTitleAndLocation)	List of serial items, sorted by title and location.
S, P/A			Item-List(SerialsByTitleForSelected Location)	List of serial items for a selected location, sorted by title.
S, P/A			Item-List(Shelflist)	Shelflist of all items.
S, P/A			Item-List(ShelflistByLocation)	Shelflist of all items, sorted by location.
S, P/A			Item-List(Shelflist-ClaimedNeverHad)	Shelflist of items with Claimed Never Had status.
S, P/A			Item-List(Shelflist-ClaimedNeverHad ForSelectedLocation)	Shelflist of items for a selected location with Claimed Never Had status.
S, P/A			Item-List(Shelflist-ClaimedReturned)	Shelflist of items with Claimed Returned status.
S, P/A			Item-List(Shelflist-ClaimedReturned ForSelectedLocation)	Shelflist of items for a selected location with Claimed Returned status.
S, P/A			Item-List(ShelflistForBib245kContent Search)	Shelflist of items containing selected word or phrase in Bib.245#k (Form), sorted in shelflist order.
S, P/A			Item-List(ShelflistForBib440aContent Search)	Shelflist of items containing selected word or phrase in Bib.440#a (Series Title), sorted in shelflist order.
S, P/A			Item-List(ShelflistForBib490aContent Search)	Shelflist of items containing selected word or phrase in Bib.490#a (Series Statement), sorted in shelflist order.
S, P/A			Item-List(ShelflistForSelectedBib245h)	Shelflist of items matching selected Bib.245#h (Medium), sorted in shelflist order.
S, P/A			Item-List(ShelflistForSelectedGroup)	Shelflist of items for a selected group.
S, P/A			Item-List(ShelflistForSelectedLocation)	Shelflist of items for a selected location.
S, P/A			Item-List(ShelflistForSelectedPrefix)	Shelflist of items for a selected prefix.
S, P/A			Item-List(ShelflistForSelectedSpecRes Group)	Shelflist of items for a selected special reserve group.
S, P/A			Item-List(Shelflist-ItemStatus)	Shelflist of items with a selected item status.
S, P/A			Item-List(Shelflist-ItemStatusForSelected Location)	Shelflist of items for a selected location with a selected item status.
S, P/A			Item-List(Shelflist-ProjectedMedium)	Shelflist of items with a projected medium.

Bib & Item Lists (Continued)

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Item-List(Shelflist-ProjectedMediumBy Location)	Shelflist of items with a projected medium, sorted by location.
S, P/A	Item-List(Shelflist-ProjectedMediumFor SelectedLocation)	Shelflist of items for a selected location with a projected medium.

BILL LETTERS

Bill letters are sent to patrons with items in an overdue status. All bill letters allow the user to specify the number of days that items are overdue (“cut-off date”) as a criteria in creating the letters; items due more than this number of days will be billed. These letters list the overdue item and the replacement cost of the item; payment is requested. Selected bill letters allow a surcharge to be added to the cost. An example of the desired format for standard price-currency is “p9.95usd”.

TABLE B.2

Bill Letters

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Bill-Ltr(All)	Bill letters for all patrons.
S	Bill-Ltr(ByGrade)	Bill letters for all patrons, sorted by grade.
S	Bill-Ltr(ByGrade-ForSelectedLocation)	Bill letters for patrons of a selected location, sorted by grade.
S	Bill-Ltr(ByHomeroom)	Bill letters for all patrons, sorted by homeroom.
S	Bill-Ltr(ByHomeroom-ForSelectedLocation)	Bill letters for patrons of a selected location, sorted by homeroom.
S	Bill-Ltr(ByTeacher)	Bill letters for all patrons, sorted by teacher.
S	Bill-Ltr(ByTeacher-ForSelectedLocation)	Bill letters for patrons of a selected location, sorted by teacher.
S	Bill-Ltr(ForSelectedGrade)	Bill letters for patrons of a selected grade.
S, P/A	Bill-Ltr(ForSelectedGroup)	Bill letters for patrons of a selected group.
S	Bill-Ltr(ForSelectedHomeroom)	Bill letters for patrons of a selected homeroom.
S	Bill-Ltr(ForSelectedLocation&Grade)	Bill letters for patrons of a selected location and selected grade.
S, P/A	Bill-Ltr(ForSelectedLocation&Group)	Bill letters for patrons of a selected location and selected group.
S	Bill-Ltr(ForSelectedLocation&Homeroom)	Bill letters for patrons of a selected location and selected homeroom.
S	Bill-Ltr(ForSelectedLocation&Teacher)	Bill letters for patrons of a selected location and selected teacher.
S, P/A	Bill-Ltr(ForSelectedLocation)	Bill letters for patrons of a selected location.

Bill Letters (Continued)

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Bill-Ltr(ForSelectedPatron)	Bill letter for a specific patron.
S	Bill-Ltr(ForSelectedTeacher)	Bill letters for patrons of a selected teacher.
S, P/A	Bill-Ltr(WithPrice&DesignatedSurcharge)	Bill letters for all patrons with a designated surcharge added for every item.
S	Bill-Ltr(WithPrice&DesignatedSurcharge ForSelectedGrade)	Bill letters for patrons of a selected grade with a designated surcharge added for every item.
S, P/A	Bill-Ltr(WithPrice&DesignatedSurcharge ForSelectedGroup)	Bill letters for patrons of a selected group with a designated surcharge added for every item.
S	Bill-Ltr(WithPrice&DesignatedSurcharge ForSelectedHomeroom)	Bill letters for patrons of a selected homeroom with a designated surcharge added for every item.
S, P/A	Bill-Ltr(WithPrice&DesignatedSurcharge ForSelectedLocation)	Bill letters for patrons of a selected location with a designated surcharge added for every item.
S, P/A	Bill-Ltr(WithPrice&DesignatedSurcharge ForSelectedPatron)	Bill letter for a selected patron with a designated surcharge added for every item.
S	Bill-Ltr(WithPrice&DesignatedSurcharge ForSelectedTeacher)	Bill letters for patrons of a selected teacher with a designated surcharge added for every item.

BOOKING REPORTS

Booking reports list library equipment (such as overhead and slide projectors, VCRs, TVs, and so on) and items (such as reference books or any other library item) that are booked for future use. When running booking reports on equipment (Booked-Equipment), select the equipment database; when running booking reports on items (Booked-Items), select the library database.

TABLE B.3

Booking Reports

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Booked-Equipment(All)	List of all booked equipment.
S, P/A	Booked-Equipment(ForSelectedDate)	List of booked equipment for a selected date.
S, P/A	Booked-Equipment(ForSelectedDateRange)	List of booked equipment for a selected date range.
S, P/A	Booked-Equipment(ForSelectedLocation)	List of booked equipment for a selected location.
S, P/A	Booked-Equipment(ForSelectedLocation& Date)	List of booked equipment for a selected location and selected date.
S, P/A	Booked-Equipment(ForSelectedLocation& DateRange)	List of booked equipment for a selected location and selected date range.
S, P/A	Booked-Equipment(ForSelectedLocation& Month)	List of booked equipment for a selected location and selected month.
S, P/A	Booked-Equipment(ForSelectedMonth)	List of booked equipment for a selected month.
S, P/A	Booked-Equipment(ThisMonth)	List of booked equipment for this month.

Booking Reports (Continued)

S=School P/A= Public or Academic			Report Name	Description
S, P/A			Booked-Equipment(ThisMonthForSelected Location)	List of booked equipment for this month at a selected location.
S, P/A			Booked-Equipment(Today)	List of booked equipment for today.
S, P/A			Booked-Equipment(TodayForSelected Location)	List of booked equipment for today at a selected location.
S, P/A			Booked-Items(All)	List of all booked items.
S, P/A			Booked-Items(ForSelectedDate)	List of booked items for a selected date.
S, P/A			Booked-Items(ForSelectedDateRange)	List of booked items within a selected date range.
S, P/A			Booked-Items(ForSelectedLocation)	List of booked items for a selected location.
S, P/A			Booked-Items(ForSelectedLocation&Date)	List of booked items for a selected location and selected date.
S, P/A			Booked-Items(ForSelectedLocation&Date Range)	List of booked items for a selected location and selected date range.
S, P/A			Booked-Items(ForSelectedLocation&Month)	List of booked items for a selected location and selected month.
S, P/A			Booked-Items(ForSelectedMonth)	List of booked items for a selected month.
S, P/A			Booked-Items(ThisMonth)	List of booked items for this month.
S, P/A			Booked-Items(ThisMonthForSelected Location)	List of booked items for this month at a selected location.
S, P/A			Booked-Items(Today)	List of booked items for today.
S, P/A			Booked-Items(TodayForSelectedLocation)	List of booked items for today at a selected location.

CARDS & LABELS

Cards and labels print barcodes, spine labels, book pocket cards, multi-page forms, address labels, and index cards. Most card and label names contain a dash followed by a number, which signifies that the report was created to run on special stock (the number is an Avery stock number unless otherwise indicated). When creating cards or labels for equipment, select the equipment database.

TABLE B.4

Cards & Labels

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Card-BC(Patron-All)-5388	Patron barcodes for all patrons.
S	Card-BC(PatronForSelectedGrade)-5388	Patron barcodes for patrons of a selected grade.
S, P/A	Card-BC(PatronForSelectedGroup)-5388	Patron barcodes for patrons of a selected group.
S	Card-BC(PatronForSelectedHomeroom)-5388	Patron barcodes for patrons of a selected homeroom.
S, P/A	Card-BC(PatronForSelectedPatron)-5388	Patron barcodes for a selected patron.
S	Card-BC(PatronForSelectedTeacher)-5388	Patron barcodes for patrons of a selected teacher.
S, P/A	Card-BookPocket(Item-All)	Book pockets for all items.
S, P/A	Card-BookPocket(Item-ForSelectedDateOrRange)	Book pockets for all items entered on a selected date or within a selected date range.
S, P/A	Card-Rolodex(Patron2x4)-5385	2" x 4" Rolodex cards for all patrons.
S, P/A	Card-Rolodex(Patron3x5)-5386	3" x 5" Rolodex cards for all patrons.
S, P/A	Card-Shelf(Item-3x5ForSelectedDateOrRange)-5388	Shelflist on 3" x 5" cards for all items entered on a selected date or within a selected date range.
S, P/A	Label-BC(Equipment-All)-5160	Barcodes for all items in the equipment database.
S, P/A	Label-BC(EquipmentByName)-5160	Barcodes for all items in the equipment database, sorted by name.
S, P/A	Label-BC(Equipment-ForSelectedLocation)-5160	Barcodes for equipment items for a selected location.
S, P/A	Label-BC(Item-All)-5160	Barcodes for all items.
S, P/A	Label-BC(Item-30SelectedWithDetail)-5161	Up to 30 selected item barcodes with detail such as barcode number, author, title, and call number.
S, P/A	Label-BC(ItemForSelected852#z)-5160	Barcodes for items with a selected subfield 852#z (Public Note).
S, P/A	Label-BC(ItemForSelectedDateOrRange)-5160	Barcodes for items entered on a selected date or within a selected date range.
S, P/A	Label-BC(Item-WithTitle&CallNumber)-5160	Barcodes with title and call number for all items.
S, P/A	Label-BC(Item-WithTitleAuthor&Call#ForSelectedDateOrRange)-5160	Barcodes with title and call number for items entered on a selected date or date range.
S, P/A	Label-BC(Patron-All)-5160	Barcodes for all patrons.
S, P/A	Label-BC(Patron-30Selected)-5160	Barcodes for 30 selected patrons.
S, P/A	Label-BC(PatronByBarcodeForSelectedDateOrRange)-5160	Barcodes for patrons entered on a selected date or date range, sorted by barcode number.
S	Label-BC(PatronByGrade)-5160	Barcodes for all patrons, sorted by grade.

Cards & Labels (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Label-BC(PatronByHomeroom)-5160	Barcodes for all patrons, sorted by homeroom.
S	Label-BC(PatronByHomeroom)-5167	Barcodes for all patrons, sorted by homeroom.
S, P/A	Label-BC(PatronByPatronForSelectedDateOrRange)-5160	Barcodes for patrons entered on a selected date or date range, sorted by patron name.
S	Label-BC(PatronByTeacher)-5160	Barcodes for all patrons, sorted by teacher.
S	Label-BC(Patron-ForSelectedGrade)-5160	Barcodes for patrons of a selected grade.
S, P/A	Label-BC(Patron-ForSelectedGroup)-5160	Barcodes for patrons of a selected group.
S	Label-BC(Patron-ForSelectedHomeroom)-5160	Barcodes for patrons of a selected homeroom.
S, P/A	Label-BC(Patron-ForSelectedPatron)-5160	Patron barcode for a selected patron.
S	Label-BC(Patron-ForSelectedTeacher)-5160	Barcodes for patrons of a selected teacher.
S, P/A	Label-Book&Spine(Item-ForSelectedDateOrRange)Gaylord-LSL03	Book and spine labels for all items entered on a selected date or date range.
S, P/A	Label-Info(EquipmentByName)-5160	Informational labels for all equipment, sorted by name.
S, P/A	Labels-Address(Patron-All)-5160	Address labels for all patrons.
S	Labels-Address(PatronForSelectedGrade)-5160	Patron address labels for patrons of a selected grade.
S, P/A	Labels-Address(PatronForSelectedGroup)-5160	Patron address labels for patrons of a selected group.
S	Labels-Address(PatronForSelectedHomeroom)-5160	Patron address labels for patrons of a selected homeroom.
S, P/A	Labels-Address(PatronForSelectedLocation)-5160	Patron address labels for patrons of a selected location.
S	Labels-Address(PatronForSelectedTeacher)-5160	Patron address labels for patrons of a selected teacher.
S, P/A	Label-Spine(1x1.5-All)	1" x 1.5" spine labels for all items.
S, P/A	Label-Spine(Item1x1.5-ForSelectedDateOrRange)	1" x 1.5" spine labels for items entered on a selected date or date range.
S, P/A	Label-Spine(Item-AllLandscape)-Brodart55-395-014	Spine labels for all items; paper orientation is landscape.
S, P/A	Label-Spine(Item-AllPortrait)-Brodart55-395-014	Spine labels for all items; paper orientation is portrait.
S, P/A	Label-Spine(Item-ForSelectedDateOrRangeLandscape)-Brodart55-395-014	Spine labels for items entered on a selected date or date range; paper orientation is landscape.
S, P/A	Label-Spine(Item-ForSelectedDateOrRangePortrait)-Brodart55-395-014	Spine labels for items entered on a selected date or date range; paper orientation is landscape.

EQUIPMENT LISTS & FORMS

Equipment lists and forms include equipment items and verification forms. Items must be in the equipment database and the equipment database must be selected in order for the items to be included in equipment reports.

TABLE B.5

Equipment Lists & Forms

S=School P/A= Public or Academic			Report Name	Description
P/A			Equipment-List(All)	List of all items in the equipment database.
S			Equipment-List(All)-School	List of all items in the equipment database.
P/A			Equipment-List(ByGroup)	List of equipment items, sorted by group.
S			Equipment-List(ByGroup)-School	List of equipment items, sorted by group.
S, P/A			Equipment-List(ByGroupForSelected Location)	List of equipment items for a selected location, sorted by group.
P/A			Equipment-List(ByLocation)	List of equipment items, sorted by location.
S			Equipment-List(ByLocation)-School	List of equipment items, sorted by location.
S, P/A			Equipment-List(ByRoom)	List of equipment items, sorted by room.
S, P/A			Equipment-List(ByRoomForSelected Location)	List of equipment items for a selected location, sorted by room.
P/A			Equipment-List(Deleted-All)	List of equipment items that have been deleted.
S			Equipment-List(Deleted-All)-School	List of equipment items that have been deleted.
P/A			Equipment-List(Deleted-ByLocation)	List of equipment items that have been deleted, sorted by location.
S			Equipment-List(Deleted-ByLocation)-School	List of equipment items that have been deleted, sorted by location.
P/A			Equipment-List(Deleted-ForSelected Location)	List of equipment items for a selected location that have been deleted.
S			Equipment-List(Deleted-ForSelected Location)-School	List of equipment items for a selected location that have been deleted.
P/A			Equipment-List(ForSelectedGroup)	List of equipment for a selected group.
S			Equipment-List(ForSelectedGroup)-School	List of equipment for a selected group.
P/A			Equipment-List(ForSelectedLocation)	List of equipment for a selected location.
S			Equipment-List(ForSelectedLocation)-School	List of equipment for a selected location.
P/A			Equipment-List(ForSelectedLocation& Group)	List of equipment for a selected location and selected group.
S			Equipment-List(ForSelectedLocation& Group)-School	List of equipment for a selected location and selected group.
S, P/A			Equipment-List(ForSelectedLocation& Room)	List of equipment for a selected location and selected room.
S, P/A			Equipment-List(ForSelectedRoom)	List of equipment for a selected room.
S, P/A			Equipment-LoanList(All)	List of equipment on loan.
S, P/A			Equipment-LoanListForSelectedLocation	List of equipment on loan for a selected location.
S, P/A			Equipment-OverdueList(All)	List of overdue equipment.
S, P/A			Equipment-OverdueListForSelectedLocation	List of overdue equipment for a selected location.

Equipment Lists & Forms (Continued)

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Equipment-VerificationForm(ByLocation)	Equipment Verification forms, sorted by location.
S, P/A	Equipment-VerificationForm(ByRoom)	Equipment Verification forms, sorted by room.
S, P/A	Equipment-VerificationForm(ByRoomFor SelectedLocation)	Equipment Verification forms for a selected location, sorted by room.
S, P/A	Equipment-VerificationForm(ForSelected Location)	Equipment Verification forms for a selected location.
S, P/A	Equipment-VerificationForm(ForSelected Location&Room)	Equipment Verification forms for a selected location, sorted by room.
S, P/A	Equipment-VerificationForm(ForSelected Room)	Equipment Verification forms for a selected room.

FINE LETTERS

Fine letters are sent to patrons who have returned items but have outstanding fines due. One fine letter is created for each patron. Generating fine letters on a consistent day and at a consistent time will ensure accuracy and eliminate repetition.

TABLE B.6

Fine Letters

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Fine-Ltr(All)	Letters for all patrons with overdue items.
S, P/A	Fine-Ltr(LessThan1Week)	Letters for patrons with items overdue by one to six days.
S, P/A	Fine-Ltr(1-2Wks)	Letters for patrons with items overdue by seven to 13 days.
S, P/A	Fine-Ltr(2-3Wks)	Letters for patrons with items overdue by 14 to 20 days.
S, P/A	Fine-Ltr(3+Wks)	Letters for patrons with items overdue by at least 21 days.
S	Fine-Ltr(ByGrade)	Letters for all patrons with overdue items, sorted by grade.
S	Fine-Ltr(ByGrade-LessThan1Wk)	Letters for patrons with items overdue by one to six days, sorted by grade.
S	Fine-Ltr(ByGrade-1-2Wks)	Letters for patrons with items overdue by seven to 13 days, sorted by grade.
S	Fine-Ltr(ByGrade-2-3Wks)	Letters for patrons with items overdue by 14 to 20 days, sorted by grade.
S	Fine-Ltr(ByGrade-3+Wks)	Letters for patrons with items overdue by at least 21 days, sorted by grade.
S	Fine-Ltr(ByGradeForSelectedLocation)	Letters for patrons of a selected location with overdue items, sorted by grade.

Fine Letters (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Fine-Ltr(ByGradeForSelectedLocation-LessThan1Wk)	Letters for patrons of a selected location with items overdue by one to six days, sorted by grade.
S	Fine-Ltr(ByGradeForSelectedLocation-1-2Wks)	Letters for patrons of a selected location with items overdue by seven to 13 days, sorted by grade.
S	Fine-Ltr(ByGradeForSelectedLocation-2-3Wks)	Letters for patrons of a selected location with items overdue by 14 to 20 days, sorted by grade.
S	Fine-Ltr(ByGradeForSelectedLocation-3+Wks)	Letters for patrons of a selected location with items overdue by at least 21 days, sorted by grade.
S	Fine-Ltr(ByHomeroom)	Letters for all patrons with overdue items, sorted by homeroom.
S	Fine-Ltr(ByHomeroom-LessThan1Wk)	Letters for patrons with items overdue by one to six days, sorted by homeroom.
S	Fine-Ltr(ByHomeroom-1-2Wks)	Letters for patrons with items overdue by seven to 13 days, sorted by homeroom.
S	Fine-Ltr(ByHomeroom-2-3Wks)	Letters for patrons with items overdue by 14 to 20 days, sorted by homeroom.
S	Fine-Ltr(ByHomeroom-3+Wks)	Letters for patrons with items overdue by at least 21 days, sorted by homeroom.
S	Fine-Ltr(ByHomeroomForSelectedLocation)	Letters for patrons of a selected location with overdue items, sorted by homeroom.
S	Fine-Ltr(ByHomeroomForSelectedLocation-LessThan1Wk)	Letters for patrons of a selected location with items overdue by one to six days, sorted by homeroom.
S	Fine-Ltr(ByHomeroomForSelectedLocation-1-2Wks)	Letters for patrons of a selected location with items overdue by seven to 13 days, sorted by homeroom.
S	Fine-Ltr(ByHomeroomForSelectedLocation-2-3Wks)	Letters for patrons of a selected location with items overdue by 14 to 20 days, sorted by homeroom.
S	Fine-Ltr(ByHomeroomForSelectedLocation-3+Wks)	Letters for patrons of a selected location with items overdue by at least 21 days, sorted by homeroom.
S	Fine-Ltr(ByTeacher)	Letters for all patrons with overdue items, sorted by teacher.
S	Fine-Ltr(ByTeacher-LessThan1Wk)	Letters for patrons with items overdue by one to six days, sorted by teacher.
S	Fine-Ltr(ByTeacher-1-2Wks)	Letters for patrons with items overdue by seven to 13 days, sorted by teacher.
S	Fine-Ltr(ByTeacher-2-3Wks)	Letters for patrons with items overdue by 14 to 20 days, sorted by teacher.
S	Fine-Ltr(ByTeacher-3+Wks)	Letters for patrons with items overdue by at least 21 days, sorted by teacher.
S	Fine-Ltr(ByTeacherForSelectedLocation)	Letters for patrons of a selected location with overdue items, sorted by teacher.
S	Fine-Ltr(ByTeacherForSelectedLocation-LessThan1Wk)	Letters for patrons of a selected location with items overdue by one to six days, sorted by teacher.
S	Fine-Ltr(ByTeacherForSelectedLocation-1-2Wks)	Letters for patrons of a selected location with items overdue by seven to 13 days, sorted by teacher.
S	Fine-Ltr(ByTeacherForSelectedLocation-2-3Wks)	Letters for patrons of a selected location with items overdue by 14 to 20 days, sorted by teacher.
S	Fine-Ltr(ByTeacherForSelectedLocation-3+Wks)	Letters for patrons of a selected location with items overdue by at least 21 days, sorted by teacher.

Fine Letters (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Fine-Ltr(ForSelectedGrade)	Letters for patrons of a selected grade with overdue items.
S	Fine-Ltr(ForSelectedGrade-LessThan1Wk)	Letters for patrons of a selected grade with items overdue by one to six days.
S	Fine-Ltr(ForSelectedGrade-1-2Wks)	Letters for patrons of a selected grade with items overdue by seven to 13 days.
S	Fine-Ltr(ForSelectedGrade-2-3Wks)	Letters for patrons of a selected grade with items overdue by 14 to 20 days.
S	Fine-Ltr(ForSelectedGrade-3+)	Letters for patrons of a selected grade with items overdue by at least 21 days.
S	Fine-Ltr(ForSelectedGrade&RangeOfDays)	Letters for patrons of a selected grade with items overdue by a selected range of days.
S, P/A	Fine-Ltr(ForSelectedGroup)	Letters for patrons of a selected group with overdue items.
S, P/A	Fine-Ltr(ForSelectedGroup-LessThan1Wk)	Letters for patrons of a selected group with items overdue by one to six days.
S, P/A	Fine-Ltr(ForSelectedGroup-1-2Wks)	Letters for patrons of a selected group with items overdue by seven to 13 days.
S, P/A	Fine-Ltr(ForSelectedGroup-2-3Wks)	Letters for patrons of a selected group with items overdue by 14 to 20 days.
S, P/A	Fine-Ltr(ForSelectedGroup-3+Wks)	Letters for patrons of a selected group with items overdue by at least 21 days.
S, P/A	Fine-Ltr(ForSelectedGroup&RangeOfDays)	Letters for patrons of a selected group with items overdue by a selected range of days.
S	Fine-Ltr(ForSelectedHomeroom)	Letters for patrons of a selected homeroom.
S	Fine-Ltr(ForSelectedHomeroom-LessThan1Wk)	Letters for patrons of a selected homeroom with items overdue by one to six days.
S	Fine-Ltr(ForSelectedHomeroom-1-2Wks)	Letters for patrons of a selected homeroom with items overdue by seven to 13 days.
S	Fine-Ltr(ForSelectedHomeroom-2-3Wks)	Letters for patrons of a selected homeroom with items overdue by 14 to 20 days.
S	Fine-Ltr(ForSelectedHomeroom-3+Wks)	Letters for patrons of a selected homeroom with items overdue by at least 21 days.
S	Fine-Ltr(ForSelectedHomeroom&RangeOfDays)	Letters for patrons of a selected homeroom with items overdue by a selected range of days.
S, P/A	Fine-Ltr(ForSelectedLocation)	Letters for patrons of a selected location with overdue items.
S, P/A	Fine-Ltr(ForSelectedLocation-LessThan1Wk)	Letters for patrons of a selected location with items overdue by one to six days.
S, P/A	Fine-Ltr(ForSelectedLocation-1-2Wks)	Letters for patrons of a selected location with items overdue by seven to 13 days.
S, P/A	Fine-Ltr(ForSelectedLocation-2-3Wks)	Letters for patrons of a selected location with items overdue by 14 to 20 days.
S, P/A	Fine-Ltr(ForSelectedLocation-3+Wks)	Letters for patrons of a selected location with items overdue by at least 21 days.
S, P/A	Fine-Ltr(ForSelectedLocation&RangeOfDays)	Letters for patrons of a selected location with items overdue by a selected range of days.

Fine Letters (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Fine-Ltr(ForSelectedLocation&Grade)	Letters for patrons of a selected location and selected grade with overdue items.
S	Fine-Ltr(ForSelectedLocation&Grade-LessThan1Wk)	Letters for patrons of a selected location and selected grade with items overdue by one to six days.
S	Fine-Ltr(ForSelectedLocation&Grade-1-2Wks)	Letters for patrons of a selected location and selected grade with items overdue by seven to 13 days.
S	Fine-Ltr(ForSelectedLocation&Grade-2-3Wks)	Letters for patrons of a selected location and selected grade with items overdue by 14 to 20 days.
S	Fine-Ltr(ForSelectedLocation&Grade-3+Wks)	Letters for patrons of a selected location and selected grade with items overdue by at least 21 days.
S	Fine-Ltr(ForSelectedLocationGrade&RangeOfDays)	Letters for patrons of a selected location and selected grade with items overdue by a selected range of days.
S, P/A	Fine-Ltr(ForSelectedLocation&Group)	Letters for patrons of a selected location and selected group with overdue items.
S, P/A	Fine-Ltr(ForSelectedLocation&Group-LessThan1Wk)	Letters for patrons of a selected location and selected group with items overdue by one to six days.
S, P/A	Fine-Ltr(ForSelectedLocation&Group-1-2Wks)	Letters for patrons of a selected location and selected group with items overdue by seven to 13 days.
S, P/A	Fine-Ltr(ForSelectedLocation&Group-2-3Wks)	Letters for patrons of a selected location and selected group with items overdue by 14 to 20 days.
S, P/A	Fine-Ltr(ForSelectedLocation&Group-3+Wks)	Letters for patrons of a selected location and selected group with items overdue by at least 21 days.
S, P/A	Fine-Ltr(ForSelectedLocationGroup&RangeOfDays)	Letters for patrons of a selected location and selected group with items overdue by a selected range of days.
S	Fine-Ltr(ForSelectedLocation&Homeroom)	Letters for patrons of a selected location and selected homeroom with overdue items.
S	Fine-Ltr(ForSelectedLocation&Homeroom-LessThan1Wk)	Letters for patrons of a selected location and selected homeroom with items overdue by one to six days.
S	Fine-Ltr(ForSelectedLocation&Homeroom-1-2Wks)	Letters for patrons of a selected location and selected homeroom with items overdue by seven to 13 days.
S	Fine-Ltr(ForSelectedLocation&Homeroom-2-3Wks)	Letters for patrons of a selected location and selected homeroom with items overdue by 14 to 20 days.
S	Fine-Ltr(ForSelectedLocation&Homeroom-3+Wks)	Letters for patrons of a selected location and selected homeroom with items overdue by at least 21 days.
S	Fine-Ltr(ForSelectedLocationHomeroom&RangeOfDays)	Letters for patrons of a selected location and selected homeroom with items overdue by a selected range of days.
S	Fine-Ltr(ForSelectedLocation&Teacher)	Letters for patrons of a selected location and selected teacher with overdue items.
S	Fine-Ltr(ForSelectedLocation&Teacher-LessThan1Wk)	Letters for patrons of a selected location and selected teacher with items overdue by one to six days.
S	Fine-Ltr(ForSelectedLocation&Teacher-1-2Wks)	Letters for patrons of a selected location and selected teacher with items overdue by seven to 13 days.
S	Fine-Ltr(ForSelectedLocation&Teacher-2-3Wks)	Letters for patrons of a selected location and selected teacher with items overdue by 14 to 20 days.
S	Fine-Ltr(ForSelectedLocation&Teacher-3+Wks)	Letters for patrons of a selected location and selected teacher with items overdue by at least 21 days.

Fine Letters (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Fine-Ltr(ForSelectedLocationTeacher&RangeOfDays)	Letters for patrons of a selected location and selected teacher with items overdue by one to six days.
S, P/A	Fine-Ltr(For Selected Patron)	Letter for a selected patron with overdue items.
S, P/A	Fine-Ltr(ForSelectedRangeOf Days)	Letters for patrons with items overdue by a selected range of days.
S	Fine-Ltr(ForSelectedTeacher)	Letters for patrons of a selected teacher with overdue items.
S	Fine-Ltr(ForSelectedTeacher-LessThan1Wk)	Letters for patrons of a selected teacher with items overdue by one to six days.
S	Fine-Ltr(ForSelectedTeacher-1-2Wks)	Letters for patrons of a selected teacher with items overdue by seven to 13 days.
S	Fine-Ltr(ForSelectedTeacher-2-3Wks)	Letters for patrons of a selected teacher with items overdue by 14 to 20 days.
S	Fine-Ltr(ForSelectedTeacher-3+Wks)	Letters for patrons of a selected teacher with items overdue by at least 21 days.
S	Fine-Ltr(ForSelectedTeacher&RangeOfDays)	Letters for patrons of a selected teacher with items overdue by a selected range of days.

FINE LISTS

Fine lists include patrons who have outstanding fines. With the lists that include a “Selected Range Of Days,” the user can generate lists that correspond to the Fine Letter or Fine Notices that have been generated. Lists in shelflist order are sorted by call number, title, and author.

TABLE B.7

Fine Lists

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Fine-List(All-ByTitle)	List of all overdue items, sorted by title.
S, P/A	Fine-List(All-InShelflistOrder)	List of all overdue items, in shelflist order.
S, P/A	Fine-List(All-InShelflistOrderForSelected Location)	List of overdue items for a selected location, in shelflist order.
S	Fine-List(ByGrade&Patron)	List of all overdue items, sorted by grade and then by patron.
S	Fine-List(ByGrade&PatronForSelected Location)	List of overdue items for a selected location, sorted by grade and then by patron.
S	Fine-List(ByGrade&PatronForSelected Location&RangeOfDays)	List of items of a selected location, overdue by a selected range of days, sorted by grade and then by patron.
S	Fine-List(ByGrade&PatronForSelected RangeOfDays)	List of items overdue by a selected range of days, sorted by grade and then by patron.

Fine Lists (Continued)

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Fine-List(ByGroup&Patron)	List of all overdue items, sorted by group and then by patron.
S, P/A	Fine-List(ByGroup&PatronForSelected Location)	List of overdue items for a selected location, sorted by group and then by patron.
S, P/A	Fine-List(ByGroup&PatronForSelected Location&RangeOfDays)	List of items for a selected location, overdue by a selected range of days, sorted by group and then by patron.
S, P/A	Fine-List(ByGroup&PatronForSelected RangeOfDays)	List of items overdue by a selected range of days, sorted by group and then by patron.
S	Fine-List(ByHomeroom&Patron)	List of all overdue items, sorted by homeroom and then by patron.
S	Fine-List(ByHomeroom&PatronForSelected Location)	List of overdue items for a selected location, sorted by homeroom and then by patron.
S	Fine-List(ByHomeroom&PatronForSelected Location&RangeOfDays)	List of items for a selected location, overdue by a selected range of days, sorted by homeroom and then by patron.
S	Fine-List(ByHomeroom&PatronForSelected RangeOfDays)	List of items overdue by a selected range of days, sorted by homeroom and then by patron.
P/A	Fine-List(ByLocation&Patron)	List of all overdue items, sorted by location and then by patron.
S	Fine-List(ByLocation&Patron)-School	List of all overdue items, sorted by location and then by patron.
P/A	Fine-List(ByLocation&PatronForSelected RangeOfDays)	List of items overdue by a selected range of days, sorted by location and then by patron.
S	Fine-List(ByLocation&PatronForSelected RangeOfDays)-School	List of items overdue by a selected range of days, sorted by location and then by patron.
S, P/A	Fine-List(ByPatron)	List of all overdue items, sorted by patron.
S	Fine-List(ByPatronForSelectedGrade)	List of overdue items for a selected grade, sorted by patron.
S	Fine-List(ByPatronForSelectedGrade& RangeOfDays)	List of items for a selected grade, overdue by a selected range of days, sorted by patron.
S, P/A	Fine-List(ByPatronForSelectedGroup)	List of overdue items for a selected group, sorted by patron.
S, P/A	Fine-List(ByPatronForSelectedGroup& RangeOfDays)	List of items for a selected group, overdue by a selected range of days, sorted by patron.
S	Fine-List(ByPatronForSelectedHomeroom)	List of overdue items for a selected homeroom, sorted by patron.
S	Fine-List(ByPatronForSelectedHomeroom& RangeOfDays)	List of items for a selected homeroom, overdue by a selected range of days, sorted by patron.
P/A	Fine-List(ByPatronForSelectedLocation)	List of overdue items for a selected location, sorted by patron.
S	Fine-List(ByPatronForSelectedLocation)-School	List of overdue items for a selected location, sorted by patron.
P/A	Fine-List(ByPatronForSelectedLocation& RangeOfDays)	List of items for a selected location, overdue by a selected range of days, sorted by patron.
S	Fine-List(ByPatronForSelectedLocation& RangeOfDays)-School	List of items for a selected location, overdue by a selected range of days, sorted by patron.

Fine Lists (Continued)

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Fine-List(ByPatronForSelectedRangeOfDays)	List of items overdue by a selected range of days, sorted by patron.
S	Fine-List(ByPatronForSelectedTeacher)	List of overdue items for a selected teacher, sorted by patron.
S	Fine-List(ByPatronForSelectedTeacher&RangeOfDays)	List of items for a selected teacher, overdue by a selected range of days, sorted by patron.
S	Fine-List(ByTeacher&Patron)	List of all overdue items, sorted by teacher and then by patron.
S	Fine-List(ByTeacher&PatronForSelectedLocation)	List of overdue items for a selected location, sorted by teacher and then by patron.
S	Fine-List(ByTeacher&PatronForSelectedLocation&RangeOfDays)	List of items for a selected location, overdue by a selected range of days, sorted by teacher and then by patron.
S	Fine-List(ByTeacher&PatronForSelectedRangeOfDays)	List of items overdue by a selected range of days, sorted by teacher and then by patron.
S, P/A	Fine-List(ByTitleForSelectedLocation)	List of overdue items for a selected location, sorted by title.
S, P/A	Fine-List(ByTitleForSelectedLocation&RangeOfDays)	List of items for a selected location, overdue by a selected range of days, sorted by title.
S, P/A	Fine-List(ByTitleForSelectedRangeOfDays)	List of items overdue by a selected range of days, sorted by title.
S, P/A	Fine-List(ForSelectedPatron)	List of overdue items for a selected patron.
S, P/A	Fine-List(InShelflistOrderForSelectedLocation&RangeOfDays)	List of items for a selected location, overdue by a selected range of days, in shelflist order.
S, P/A	Fine-List(InShelflistOrderForSelectedRangeOfDays)	List of items overdue by a selected range of days, in shelflist order.

FINE NOTICES

Fine notices are distributed to patrons who have returned items but have outstanding fines. One fine notice is created for each item having an outstanding fine. Notices are printed four per page and can be separated for distribution. Unlike fine letters, fine notices do not contain address information. Generating fine notices on a consistent day and at a consistent time will ensure accuracy and eliminate repetition.

TABLE B.8

Fine Notices

S=School P/A= Public or Academic			Report Name	Description
S, P/A			Fine-Ntc(All)4ppg	Notices for all patrons with overdue items.
S, P/A			Fine-Ntc(LessThan1Wk)4ppg	Notices for patrons with items overdue by one to six days.
S, P/A			Fine-Ntc(1-2Wks)4ppg	Notices for patrons with items overdue by seven to 13 days.
S, P/A			Fine-Ntc(2-3Wks)4ppg	Notices for patrons with items overdue by 14 to 20 days.
S, P/A			Fine-Ntc(3+Wks)4ppg	Notices for patrons with items overdue by at least 21 days.
S, P/A			Fine-Ntc(ForSelectedRangeOfDays)4ppg	Notices for patrons with items overdue by a selected range of days.
S			Fine-Ntc(ByGrade)4ppg	Notices for all patrons with overdue items, sorted by grade.
S			Fine-Ntc(ByGrade-LessThan1Wk)4ppg	Notices for patrons with items overdue by one to six days, sorted by grade.
S			Fine-Ntc(ByGrade-1-2Wks)4ppg	Notices for patrons with items overdue by seven to 13 days, sorted by grade.
S			Fine-Ntc(ByGrade-2-3Wks)4ppg	Notices for patrons with items overdue by 14 to 20 days, sorted by grade.
S			Fine-Ntc(ByGrade-3+Wks)4ppg	Notices for patrons with items overdue by at least 21 days, sorted by grade.
S			Fine-Ntc(ByGradeForSelectedLocation)4ppg	Notices for patrons of a selected location with overdue items, sorted by grade.
S			Fine-Ntc(ByGradeForSelectedLocation)-LessThan1Wk)4ppg	Notices for patrons of a selected location with items overdue by one to six days, sorted by grade.
S			Fine-Ntc(ByGradeForSelectedLocation-1-2Wks)4ppg	Notices for patrons of a selected location with items overdue by seven to 13 days, sorted by grade.
S			Fine-Ntc(ByGradeForSelectedLocation-2-3Wks)4ppg	Notices for patrons of a selected location with items overdue by 14 to 20 days, sorted by grade.
S			Fine-Ntc(ByGradeForSelectedLocation-3+Wks)4ppg	Notices for patrons of a selected location with items overdue by at least 21 days, sorted by grade.
S			Fine-Ntc(ByGradeForSelectedLocation&RangeOfDays)4ppg	Notices for patrons of a selected location with items overdue by a selected range of days, sorted by grade.
S			Fine-Ntc(ByHomeroom)4ppg	Notices for all patrons with overdue items, sorted by homeroom.
S			Fine-Ntc(ByHomeroom-LessThan1Wk)4ppg	Notices for patrons with items overdue by one to six days, sorted by homeroom.

Fine Notices (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Fine-Ntc(ByHomeroom-1-2Wks)4ppg	Notices for patrons with items overdue by seven to 13 days, sorted by homeroom.
S	Fine-Ntc(ByHomeroom-2-3Wks)4ppg	Notices for patrons with items overdue by 14 to 20 days, sorted by homeroom.
S	Fine-Ntc(ByHomeroom-3+Wks)4ppg	Notices for patrons with items overdue by at least 21 days, sorted by homeroom.
S	Fine-Ntc(ByHomeroomForSelectedRangeOfDays)4ppg	Notices for patrons with items overdue by a selected range of days, sorted by homeroom.
S	Fine-Ntc(ByHomeroomForSelectedLocation)4ppg	Notices for patrons of a selected location with overdue items, sorted by homeroom.
S	Fine-Ntc(ByHomeroomForSelectedLocation-LessThan1Wk)4ppg	Notices for patrons of a selected location with items overdue by one to six days, sorted by homeroom.
S	Fine-Ntc(ByHomeroomForSelectedLocation-1-2Wks)4ppg	Notices for patrons of a selected location with items overdue by seven to 13 days, sorted by homeroom.
S	Fine-Ntc(ByHomeroomForSelectedLocation-2-3Wks)4ppg	Notices for patrons of a selected location with items overdue by 14 to 20 days, sorted by homeroom.
S	Fine-Ntc(ByHomeroomForSelectedLocation-3+Wks)4ppg	Notices for patrons of a selected location with items overdue by at least 21 days, sorted by homeroom.
S	Fine-Ntc(ByHomeroomForSelectedLocation&RangeOfDays)4ppg	Notices for patrons of a selected location with items overdue by a selected range of days, sorted by homeroom.
S	Fine-Ntc(ByTeacher)4ppg	Notices for all patrons with overdue items, sorted by teacher.
S	Fine-Ntc(ByTeacher-LessThan1Wk)4ppg	Notices for patrons with items overdue by one to six days, sorted by teacher.
S	Fine-Ntc(ByTeacher-1-2Wks)4ppg	Notices for patrons with items overdue by seven to 13 days, sorted by teacher.
S	Fine-Ntc(ByTeacher-2-3Wks)4ppg	Notices for patrons with items overdue by 14 to 20 days, sorted by teacher.
S	Fine-Ntc(ByTeacher-3+Wks)4ppg	Notices for patrons with items overdue by at least 21 days, sorted by teacher.
S	Fine-Ntc(ByTeacherForSelectedRangeOfDays)4ppg	Notices for patrons with items overdue by a selected range of days, sorted by teacher.
S	Fine-Ntc(ByTeacherForSelectedLocation-LessThan1Wk)4ppg	Notices for patrons of a selected location with items overdue by one to six days, sorted by teacher.
S	Fine-Ntc(ByTeacherForSelectedLocation-1-2Wks)4ppg	Notices for patrons of a selected location with items overdue by seven to 13 days, sorted by teacher.
S	Fine-Ntc(ByTeacherForSelectedLocation-2-3Wks)4ppg	Notices for patrons of a selected location with items overdue by 14 to 20 days, sorted by teacher.
S	Fine-Ntc(ByTeacherForSelectedLocation-3+Wks)4ppg	Notices for patrons of a selected location with items overdue by at least 21 days, sorted by teacher.
S	Fine-Ntc(ByTeacherForSelectedLocation&RangeOfDays)4ppg	Notices for patrons of a selected location with items overdue by a selected range of days, sorted by teacher.
S	Fine-Ntc(ForSelectedGrade)4ppg	Notices for patrons of a selected grade with overdue items.
S	Fine-Ntc(ForSelectedGrade-LessThan1Wk)4ppg	Notices for patrons of a selected grade with items overdue by one to six days.

Fine Notices (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Fine-Ntc(ForSelectedGrade-1-2Wks)4ppg	Notices for patrons of a selected grade with items overdue by seven to 13 days.
S	Fine-Ntc(ForSelectedGrade-2-3Wks)4ppg	Notices for patrons of a selected grade with items overdue by 14 to 20 days.
S	Fine-Ntc(ForSelectedGrade-3+Wks)4ppg	Notices for patrons of a selected grade with items overdue by at least 21 days.
S	Fine-Ntc(ForSelectedGrade&RangeOfDays)4ppg	Notices for patrons of a selected grade with items overdue by a selected range of days.
S, P/A	Fine-Ntc(ForSelectedGroup)4ppg	Notices for patrons of a selected group with overdue items.
S, P/A	Fine-Ntc(ForSelectedGroup-LessThan1Wk)4ppg	Notices for patrons of a selected group with items overdue by one to six days.
S, P/A	Fine-Ntc(ForSelectedGroup-1-2Wks)4ppg	Notices for patrons of a selected group with items overdue by seven to 13 days.
S, P/A	Fine-Ntc(ForSelectedGroup-2-3Wks)4ppg	Notices for patrons of a selected group with items overdue by 14 to 20 days.
S, P/A	Fine-Ntc(ForSelectedGroup-3+Wks)4ppg	Notices for patrons of a selected group with items overdue by at least 21 days.
S, P/A	Fine-Ntc(ForSelectedGroup&RangeOfDays)4ppg	Notices for patrons of a selected group with items overdue by a selected range of days.
S	Fine-Ntc(ForSelectedHomeroom)4ppg	Notices for patrons of a selected homeroom with overdue items.
S	Fine-Ntc(ForSelectedHomeroom-LessThan1Wk)4ppg	Notices for patrons of a selected homeroom with items overdue by one to six days.
S	Fine-Ntc(ForSelectedHomeroom-1-2Wks)4ppg	Notices for patrons of a selected homeroom with items overdue by seven to 13 days.
S	Fine-Ntc(ForSelectedHomeroom-2-3Wks)4ppg	Notices for patrons of a selected homeroom with items overdue by 14 to 20 days.
S	Fine-Ntc(ForSelectedHomeroom-3+Wks)4ppg	Notices for patrons of a selected homeroom with items overdue by at least 21 days.
S	Fine-Ntc(ForSelectedHomeroom&RangeOfDays)4ppg	Notices for patrons of a selected homeroom with items overdue by a selected range of days.
S, P/A	Fine-Ntc(ForSelectedLocation)4ppg	Notices for patrons of a selected location with overdue items.
S, P/A	Fine-Ntc(ForSelectedLocation-LessThan1Wk)4ppg	Notices for patrons of a selected location with items overdue by one to six days.
S, P/A	Fine-Ntc(ForSelectedLocation-1-2Wks)4ppg	Notices for patrons of a selected location with items overdue by seven to 13 days.
S, P/A	Fine-Ntc(ForSelectedLocation-2-3Wks)4ppg	Notices for patrons of a selected location with items overdue by 14 to 20 days.
S, P/A	Fine-Ntc(ForSelectedLocation-3+Wks)4ppg	Notices for patrons of a selected location with items overdue by at least 21 days.
S, P/A	Fine-Ntc(ForSelectedLocation&RangeOfDays)4ppg	Notices for patrons of a selected location with items overdue by a selected range of days.
S	Fine-Ntc(ForSelectedLocation&Grade)4ppg	Notices for patrons of a selected location and selected grade with overdue items.
S	Fine-Ntc(ForSelectedLocation&Grade-LessThan1Wk)4ppg	Notices for patrons of a selected location and selected grade with items overdue by one to six days.

Fine Notices (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Fine-Ntc(ForSelectedLocation&Grade-1-2Wks)4ppg	Notices for patrons of a selected location and selected grade with items overdue by seven to 13 days.
S	Fine-Ntc(ForSelectedLocation&Grade-2-3Wks)4ppg	Notices for patrons of a selected location and selected grade with items overdue by 14 to 20 days.
S	Fine-Ntc(ForSelectedLocation&Grade-3+Wks)4ppg	Notices for patrons of a selected location and selected grade with items overdue by at least 21 days.
S	Fine-Ntc(ForSelectedLocationGrade&RangeOfDays)4ppg	Notices for patrons of a selected location with items overdue by a selected range of days.
S, P/A	Fine-Ntc(ForSelectedLocation&Group)4ppg	Notices for patrons of a selected location and selected group with overdue items.
S, P/A	Fine-Ntc(ForSelectedLocation&Group-LessThan1Wk)4ppg	Notices for patrons of a selected location and selected group with items overdue by one to six days.
S, P/A	Fine-Ntc(ForSelectedLocation&Group-1-2Wks)4ppg	Notices for patrons of a selected location and selected group with items overdue by seven to 13 days.
S, P/A	Fine-Ntc(ForSelectedLocation&Group-2-3Wks)4ppg	Notices for patrons of a selected location and selected group with items overdue by 14 to 20 days.
S, P/A	Fine-Ntc(ForSelectedLocation&Group-3+Wks)4ppg	Notices for patrons of a selected location and selected group with items overdue by at least 21 days.
S, P/A	Fine-Ntc(ForSelectedLocationGroup&RangeOfDays)4ppg	Notices for patrons of a selected location and selected group with items overdue by a selected range of days.
S	Fine-Ntc(ForSelectedLocation&Homeroom)4ppg	Notices for patrons of a selected location and selected homeroom with overdue items.
S	Fine-Ntc(ForSelectedLocation&Homeroom-LessThan1Wk)4ppg	Notices for patrons of a selected location and selected homeroom with items overdue by one to six days.
S	Fine-Ntc(ForSelectedLocation&Homeroom-1-2Wks)4ppg	Notices for patrons of a selected location and selected homeroom with items overdue by seven to 13 days.
S	Fine-Ntc(ForSelectedLocation&Homeroom-2-3Wks)4ppg	Notices for patrons of a selected location and selected homeroom with items overdue by 14 to 20 days.
S	Fine-Ntc(ForSelectedLocation&Homeroom-3+Wks)4ppg	Notices for patrons of a selected location and selected homeroom with items overdue by at least 21 days.
S	Fine-Ntc(ForSelectedLocationHomeroom&RangeOfDays)4ppg	Notices for patrons of a selected location and selected homeroom with items overdue by a selected range of days.
S	Fine-Ntc(ForSelectedLocation&Teacher)4ppg	Notices for patrons of a selected location and selected teacher with overdue items.
S	Fine-Ntc(ForSelectedLocation&Teacher-LessThan1Wk)4ppg	Notices for patrons of a selected location and selected teacher with items overdue by one to six days.
S	Fine-Ntc(ForSelectedLocation&Teacher-1-2Wks)4ppg	Notices for patrons of a selected location and selected teacher with items overdue by seven to 13 days.
S	Fine-Ntc(ForSelectedLocation&Teacher-2-3Wks)4ppg	Notices for patrons of a selected location and selected teacher with items overdue by 14 to 20 days.
S	Fine-Ntc(ForSelectedLocation&Teacher-3+Wks)4ppg	Notices for patrons of a selected location and selected teacher with items overdue by at least 21 days.
S	Fine-Ntc(ForSelectedLocationTeacher&RangeOfDays)4ppg	Notices for patrons of a selected location and selected teacher with items overdue by a selected range of days.
S, P/A	Fine-Ntc(ForSelectedPatron)4ppg	Notice for a selected patron for overdue items.
S	Fine-Ntc(ForSelectedTeacher)4ppg	Notices for patrons of a selected teacher with overdue items.

Fine Notices (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Fine-Ntc(ForSelectedTeacher-LessThan1Wk)4ppg	Notices for patrons of a selected teacher with items overdue by one to six days.
S	Fine-Ntc(ForSelectedTeacher-1-2Wks)4ppg	Notices for patrons of a selected teacher with items overdue by seven to 13 days.
S	Fine-Ntc(ForSelectedTeacher-2-3Wks)4ppg	Notices for patrons of a selected teacher with items overdue by 14 to 20 days.
S	Fine-Ntc(ForSelectedTeacher-3+Wks)4ppg	Notices for patrons of a selected teacher with items overdue by at least 21 days.
S	Fine-Ntc(ForSelectedTeacher&RangeOfDays)4ppg	Notices for patrons of a selected teacher with items overdue by a selected range of days.

OVERDUE LETTERS

Overdue letters are sent to patrons with items that have exceeded the due date. Overdue letters do not include a fine amount unless specified in the report criteria. Generating overdue letters on a consistent day and at a consistent time will ensure accuracy and eliminate repetition.

TABLE B.9

Overdue Letters

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Overdue-Ltr(All)	Letters for all patrons with overdue items.
S, P/A	Odue-Ltr(WithEstimatedFine-All-5DayWk)	Letters for all patrons with overdue items including estimated fines. Fines are calculated using a 5-day rental week.
S, P/A	Odue-Ltr(WithEstimatedFine-All-7DayWk)	Letters for all patrons with overdue items including estimated fines. Fines are calculated using a 7-day rental week.
S, P/A	Overdue-Ltr(LessThan1Wk)	Letters for patrons with items overdue by one to six days.
S, P/A	Overdue-Ltr(1-2Wks)	Letters for patrons with items overdue by seven to 13 days.
S, P/A	Overdue-Ltr(2-3Wks)	Letters for patrons with items overdue by 14 to 20 days.
S, P/A	Overdue-Ltr(3+Wks)	Letters for patrons with items overdue by at least 21 days.
S, P/A	Overdue-Ltr(ForSelectedRangeOfDays)	Letters for patrons with items overdue by a selected range of days.
S	Overdue-Ltr(ByGrade)	Letters for all patrons with overdue items, sorted by grade.
S	Overdue-Ltr(ByGrade-LessThan1Wk)	Letters for patrons with items overdue by one to six days, sorted by grade.

Overdue Letters (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Overdue-Ltr(ByGrade-1-2Wks)	Letters for patrons with items overdue by seven to 13 days, sorted by grade.
S	Overdue-Ltr(ByGrade-2-3Wks)	Letters for patrons with items overdue by 14 to 20 days, sorted by grade.
S	Overdue-Ltr(ByGrade-3+Wks)	Letters for patrons with items overdue by at least 21 days, sorted by grade.
S	Overdue-Ltr(ByGradeForSelectedRangeOfDays)	Letters for patrons with items overdue by a selected range of days, sorted by grade.
S	Overdue-Ltr(ByGradeForSelectedLocation)	Letters for patrons of a selected location with overdue items, sorted by grade.
S	Overdue-Ltr(ByGradeForSelectedLocation-LessThan1Wk)	Letters for patrons of a selected location with items overdue by one to six days, sorted by grade.
S	Overdue-Ltr(ByGradeForSelectedLocation-1-2Wks)	Letters for patrons of a selected location with items overdue by seven to 13 days, sorted by grade.
S	Overdue-Ltr(ByGradeForSelectedLocation-2-3Wks)	Letters for patrons of a selected location with items overdue by 14 to 20 days, sorted by grade.
S	Overdue-Ltr(ByGradeForSelectedLocation-3+Wks)	Letters for patrons of a selected location with items overdue by at least 21 days, sorted by grade.
S	Overdue-Ltr(ByGradeForSelectedLocation&RangeOfDays)	Letters for patrons of a selected location with items overdue by a selected range of days, sorted by grade.
S	Overdue-Ltr(ByHomeroom)	Letters for all patrons with overdue items, sorted by homeroom.
S	Overdue-Ltr(ByHomeroom-LessThan1Wk)	Letters for patrons with items overdue by one to six days, sorted by homeroom.
S	Overdue-Ltr(ByHomeroom-1-2Wks)	Letters for patrons with items overdue by seven to 13 days, sorted by homeroom.
S	Overdue-Ltr(ByHomeroom-2-3Wks)	Letters for patrons with items overdue by 14 to 20 days, sorted by homeroom.
S	Overdue-Ltr(ByHomeroom-3+Wks)	Letters for patrons with items overdue by at least 21 days, sorted by homeroom.
S	Overdue-Ltr(ByHomeroomForSelectedRangeOfDays)	Letters for patrons with items overdue by a selected range of days, sorted by homeroom.
S	Overdue-Ltr(ByHomeroomForSelectedLocation)	Letters for patrons of a selected location with overdue items, sorted by homeroom.
S	Overdue-Ltr(ByHomeroomForSelectedLocation-LessThan1Wk)	Letters for patrons of a selected location with items overdue by one to six days, sorted by homeroom.
S	Overdue-Ltr(ByHomeroomForSelectedLocation-1-2Wks)	Letters for patrons of a selected location with items overdue by seven to 13 days, sorted by homeroom.
S	Overdue-Ltr(ByHomeroomForSelectedLocation-2-3Wks)	Letters for patrons of a selected location with items overdue by 14 to 20 days, sorted by homeroom.
S	Overdue-Ltr(ByHomeroomForSelectedLocation-3+Wks)	Letters for patrons of a selected location with items overdue by at least 21 days, sorted by homeroom.
S	Overdue-Ltr(ByHomeroomForSelectedLocation&RangeOfDays)	Letters for patrons of a selected location with items overdue by a selected range of days, sorted by homeroom.
S	Overdue-Ltr(ByTeacher)	Letters for all patrons with overdue items, sorted by teacher.

Overdue Letters (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Overdue-Ltr(ByTeacher-LessThan1Wk)	Letters for patrons with items overdue by one to six days, sorted by teacher.
S	Overdue-Ltr(ByTeacher-1-2Wks)	Letters for patrons with items overdue by seven to 13 days, sorted by teacher.
S	Overdue-Ltr(ByTeacher-2-3Wks)	Letters for patrons with items overdue by 14 to 20 days, sorted by teacher.
S	Overdue-Ltr(ByTeacher-3+Wks)	Letters for patrons with items overdue by at least 21 days, sorted by teacher.
S	Overdue-Ltr(ByTeacherForSelectedRangeOfDays)	Letters for patrons with items overdue by a selected range of days, sorted by teacher.
S	Overdue-Ltr(ByTeacherForSelectedLocation)	Letters for patrons of a selected location with overdue items, sorted by teacher.
S	Overdue-Ltr(ByTeacherForSelectedLocation-LessThan1Wk)	Letters for patrons of a selected location with items overdue by one to six days, sorted by teacher.
S	Overdue-Ltr(ByTeacherForSelectedLocation-1-2Wks)	Letters for patrons of a selected location with items overdue by seven to 13 days, sorted by teacher.
S	Overdue-Ltr(ByTeacherForSelectedLocation-2-3Wks)	Letters for patrons of a selected location with items overdue by 14 to 20 days, sorted by teacher.
S	Overdue-Ltr(ByTeacherForSelectedLocation-3+Wks)	Letters for patrons of a selected location with items overdue by at least 21 days, sorted by teacher.
S	Overdue-Ltr(ByTeacherForSelectedLocation&RangeOfDays)	Letters for patrons of a selected location with items overdue by a selected range of days, sorted by teacher.
S	Overdue-Ltr(ForSelectedGrade)	Letters for patrons of a selected grade with overdue items.
S	Overdue-Ltr(WithEstimatedFineForSelectedGrade-5DayWk)	Letters for patrons of a selected grade with overdue items including estimated fines. Fines calculated using a 5-day rental week.
S	Overdue-Ltr(WithEstimatedFineForSelectedGrade-7DayWk)	Letters for patrons of a selected grade with overdue items including estimated fines. Fines calculated using a 7-day rental week.
S	Overdue-Ltr(ForSelectedGrade-LessThan1Wk)	Letters for patrons of a selected grade with items overdue by one to six days.
S	Overdue-Ltr(ForSelectedGrade-1-2Wks)	Letters for patrons of a selected grade with items overdue by seven to 13 days.
S	Overdue-Ltr(ForSelectedGrade-2-3Wks)	Letters for patrons of a selected grade with items overdue by 14 to 20 days.
S	Overdue-Ltr(ForSelectedGrade-3+Wks)	Letters for patrons of a selected grade with items overdue by at least 21 days.
S	Overdue-Ltr(ForSelectedGrade&RangeOfDays)	Letters for patrons of a selected grade with items overdue by a selected range of days.
S, P/A	Overdue-Ltr(ForSelectedGroup)	Letters for patrons of a selected group with overdue items.
S, P/A	Overdue-Ltr(ForSelectedGroup-LessThan1Wk)	Letters for patrons of a selected group with items overdue by one to six days.
S, P/A	Overdue-Ltr(ForSelectedGroup-1-2Wks)	Letters for patrons of a selected group with items overdue by seven to 13 days.
S, P/A	Overdue-Ltr(ForSelectedGroup-2-3Wks)	Letters for patrons of a selected group with items overdue by 14 to 20 days.

Overdue Letters (Continued)

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Overdue-Ltr(ForSelectedGroup-3+Wks)	Letters for patrons of a selected group with items overdue by at least 21 days.
S, P/A	Overdue-Ltr(ForSelectedGroup&RangeOfDays)	Letters for patrons of a selected group with items overdue by a selected range of days.
S	Overdue-Ltr(ForSelectedHomeroom)	Letters for patrons of a selected homeroom with overdue items.
S	Odue-Ltr(WithEstimatedFineForSelectedHomeroom-5DayWk)	Letters for patrons of a selected homeroom with overdue items including estimated fines. Fines calculated using a 5-day rental week.
S	Odue-Ltr(WithEstimatedFineForSelectedHomeroom-7DayWk)	Letters for patrons of a selected homeroom with overdue items including estimated fines. Fines calculated using a 7-day rental week.
S	Overdue-Ltr(ForSelectedHomeroom-LessThan1Wk)	Letters for patrons of a selected homeroom with items overdue by one to six days.
S	Overdue-Ltr(ForSelectedHomeroom-1-2Wks)	Letters for patrons of a selected homeroom with items overdue by seven to 13 days.
S	Overdue-Ltr(ForSelectedHomeroom-2-3Wks)	Letters for patrons of a selected homeroom with items overdue by 14 to 20 days.
S	Overdue-Ltr(ForSelectedHomeroom-3+Wks)	Letters for patrons of a selected homeroom with items overdue by at least 21 days.
S	Overdue-Ltr(ForSelectedHomeroom&RangeOfDays)	Letters for patrons of a a selected homeroom with items overdue by a selected range of days.
P/A	Overdue-Ltr(ForSelectedLocation)	Letters for patrons of a selected location with overdue items.
S	Overdue-Ltr(ForSelectedLocation)-School	Letters for patrons of a selected location with overdue items.
S, P/A	Odue-Ltr(WithEstimatedFineForSelectedLocation-5DayWk)	Letters for patrons of a selected location with overdue items including estimated fines. Fines calculated using a 5-day rental week.
S, P/A	Odue-Ltr(WithEstimatedFineForSelectedLocation-7DayWk)	Letters for patrons of a selected location with overdue items including estimated fines. Fines calculated using a 7-day rental week.
P/A	Overdue-Ltr(ForSelectedLocation-LessThan1Wk)	Letters for patrons of a selected location with items overdue by one to six days.
S	Overdue-Ltr(ForSelectedLocation-LessThan1Wk)-School	Letters for patrons of a selected location with items overdue by one to six days.
P/A	Overdue-Ltr(ForSelectedLocation-1-2Wks)	Letters for patrons of a selected location with items overdue by seven to 13 days.
S	Overdue-Ltr(ForSelectedLocation-1-2Wks)-School	Letters for patrons of a selected location with items overdue by seven to 13 days.
P/A	Overdue-Ltr(ForSelectedLocation-2-3Wks)	Letters for patrons of a selected location with items overdue by 14 to 20 days.
S	Overdue-Ltr(ForSelectedLocation-2-3Wks)-School	Letters for patrons of a selected location with items overdue by 14 to 20 days.
P/A	Overdue-Ltr(ForSelectedLocation-3+Wks)	Letters for patrons of a selected location with items overdue by at least 21 days.
S	Overdue-Ltr(ForSelectedLocation-3+Wks)-School	Letters for patrons of a selected location with items overdue by at least 21 days.

Overdue Letters (Continued)

S=School P/A= Public or Academic	Report Name	Description
P/A	Overdue-Ltr(ForSelectedLocation&RangeOfDays)	Letters for patrons of a selected location with items overdue by a selected range of days.
S	Overdue-Ltr(ForSelectedLocation&RangeOfDays)-School	Letters for patrons of a selected location with items overdue by a selected range of days.
S	Overdue-Ltr(ForSelectedLocation&Grade)	Letters for patrons of a selected location and selected grade with overdue items.
S	Overdue-Ltr(ForSelectedLocation&Grade-LessThan1Wk)	Letters for patrons of a selected location and selected grade with items overdue by one to six days.
S	Overdue-Ltr(ForSelectedLocation&Grade-1-2Wks)	Letters for patrons of a selected location and selected grade with items overdue by seven to 13 days.
S	Overdue-Ltr(ForSelectedLocation&Grade-2-3Wks)	Letters for patrons of a selected location and selected grade with items overdue by 14 to 20 days.
S	Overdue-Ltr(ForSelectedLocation&Grade-3+Wks)	Letters for patrons of a selected location and selected grade with items overdue by at least 21 days.
S	Overdue-Ltr(ForSelectedLocationGrade&RangeOfDays)	Letters for patrons of a selected location and selected grade with items overdue by a selected range of days.
P/A	Overdue-Ltr(ForSelectedLocation&Group)	Letters for patrons of a selected location and selected group with overdue items.
S	Overdue-Ltr(ForSelectedLocation&Group)-School	Letters for patrons of a selected location and selected group with overdue items.
P/A	Overdue-Ltr(ForSelectedLocation&Group-LessThan1Wk)	Letters for patrons of a selected location and selected group with items overdue by one to six days.
S	Overdue-Ltr(ForSelectedLocation&Group-LessThan1Wk)-School	Letters for patrons of a selected location and selected group with items overdue by one to six days.
P/A	Overdue-Ltr(ForSelectedLocation&Group-1-2Wks)	Letters for patrons of a selected location and selected group with items overdue by seven to 13 days.
S	Overdue-Ltr(ForSelectedLocation&Group-1-2Wks)-School	Letters for patrons of a selected location and selected group with items overdue by seven to 13 days.
P/A	Overdue-Ltr(ForSelectedLocation&Group-2-3Wks)	Letters for patrons of a selected location and selected group with items overdue by 14 to 20 days.
S	Overdue-Ltr(ForSelectedLocation&Group-2-3Wks)-School	Letters for patrons of a selected location and selected group with items overdue by 14 to 20 days.
P/A	Overdue-Ltr(ForSelectedLocation&Group-3+Wks)	Letters for patrons of a selected location and selected group with items overdue by at least 21 days.
S	Overdue-Ltr(ForSelectedLocation&Group-3+Wks)-School	Letters for patrons of a selected location and selected group with items overdue by at least 21 days.
P/A	Overdue-Ltr(ForSelectedLocationGroup&RangeOfDays)	Letters for patrons of a selected location and selected group with items overdue by a selected range of days.
S	Overdue-Ltr(ForSelectedLocationGroup&RangeOfDays)-School	Letters for patrons of a selected location and selected group with items overdue by a selected range of days.
S	Overdue-Ltr(ForSelectedLocation&Homeroom)	Letters for patrons of a selected location and selected homeroom with overdue items.
S	Overdue-Ltr(ForSelectedLocation&Homeroom-LessThan1Wk)	Letters for patrons of a selected location and selected homeroom with items overdue by one to six days.
S	Overdue-Ltr(ForSelectedLocation&Homeroom-1-2Wks)	Letters for patrons of a selected location and selected homeroom with items overdue by seven to 13 days.
S	Overdue-Ltr(ForSelectedLocation&Homeroom-2-3Wks)	Letters for patrons of a selected location and selected homeroom with items overdue by 14 to 20 days.

Overdue Letters (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Overdue-Ltr(ForSelectedLocation&Homeroom-3+Wks)	Letters for patrons of a selected location and selected homeroom with items overdue by at least 21 days.
S	Overdue-Ltr(ForSelectedLocationHomeroom&RangeOfDays)	Letters for patrons of a selected location and selected homeroom with items overdue by a selected range of days.
S	Overdue-Ltr(ForSelectedLocation&Teacher)	Letters for patrons of a selected location and selected teacher with overdue items.
S	Overdue-Ltr(ForSelectedLocation&Teacher-LessThan1Wk)	Letters for patrons of a selected location and selected teacher with items overdue by one to six days.
S	Overdue-Ltr(ForSelectedLocation&Teacher-1-2Wks)	Letters for patrons of a selected location and selected teacher with items overdue by seven to 13 days.
S	Overdue-Ltr(ForSelectedLocation&Teacher-2-3Wks)	Letters for patrons of a selected location and selected teacher with items overdue by 14 to 20 days.
S	Overdue-Ltr(ForSelectedLocation&Teacher-3+Wks)	Letters for patrons of a selected location and selected teacher with items overdue by at least 21 days.
S	Overdue-Ltr(ForSelectedLocationTeacher&RangeOfDays)	Letters for patrons of a selected location and selected teacher with items overdue by a selected range of days.
S, P/A	Overdue-Ltr(For Selected Patron)	Letter for a selected patron with overdue items.
S, P/A	Odue-Ltr(WithEstimatedFineForSelected Patron-5DayWk)	Letter for a selected patron with overdue items including estimated fines. Fines calculated using a 5-day rental week.
S, P/A	Odue-Ltr(WithEstimatedFineForSelected Patron-7DayWk)	Letter for a selected patron with overdue items including estimated fines. Fines calculated using a 7-day rental week.
S	Overdue-Ltr(ForSelectedTeacher)	Letters for patrons of a selected teacher with overdue items.
S	Odue-Ltr(WithEstimatedFineForSelected Teacher-5DayWk)	Letters for patrons of a selected teacher with overdue items including estimated fines. Fines calculated using a 5-day rental week.
S	Odue-Ltr(WithEstimatedFineForSelected Teacher-7DayWk)	Letters for patrons of a selected teacher with overdue items including estimated fines. Fines calculated using a 7-day rental week.
S	Overdue-Ltr(ForSelectedTeacher-LessThan1Wk)	Letters for patrons of a selected teacher with items overdue by one to six days.
S	Overdue-Ltr(ForSelectedTeacher-1-2Wks)	Letters for patrons of a selected teacher with items overdue by seven to 13 days.
S	Overdue-Ltr(ForSelectedTeacher-2-3Wks)	Letters for patrons of a selected teacher with items overdue by 14 to 20 days.
S	Overdue-Ltr(ForSelectedTeacher-3+Wks)	Letters for patrons of a selected teacher with items overdue by at least 21 days.
S	Overdue-Ltr(ForSelectedTeacher&RangeOfDays)	Letters for patrons of a selected teacher with items overdue by a selected range of days.

OVERDUE LISTS

Overdue lists include patrons who have outstanding loans. With the lists that include a “Selected Range Of Days,” the user can generate lists that correspond to the Overdue Letter or Overdue Notices that have been generated. Lists in shelflist order are sorted by call number, title, and author.

TABLE B.10

Overdue Lists

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Odue-List(All-ByTitle)	List of all patrons with overdue items, sorted by title.
S, P/A	Odue-List(All-InShelflistOrder)	List of all patrons with overdue items, in shelflist order.
S, P/A	Odue-List(All-InShelflistOrderForSelected Location)	List of patrons of a selected location with overdue items, in shelflist order.
S	Odue-List(ByGrade&Patron)	List of all patrons with overdue items, sorted by grade and then by patron.
S	Odue-List(ByGrade&PatronForSelected Location)	List of patrons of a selected location with overdue items, sorted by grade and then by patron.
S	Odue-List(ByGrade&PatronForSelected Location&RangeOfDays)	List of patrons of a selected location with items overdue by a selected range of days, sorted by grade and then by patron.
S	Odue-List(ByGrade&PatronForSelected RangeOfDays)	List of patrons with items overdue by a selected range of days, sorted by grade and then by patron.
S, P/A	Odue-List(ByGroup&Patron)	List of all patrons with overdue items, sorted by group and then by patron.
S, P/A	Odue-List(ByGroup&PatronForSelected Location)	List of patrons of a selected location with overdue items, sorted by group and then by patron.
S, P/A	Odue-List(ByGroup&PatronForSelected Location&RangeOfDays)	List of patrons of a selected location with items overdue by a selected range of days, sorted by group and then by patron.
S, P/A	Odue-List(ByGroup&PatronForSelected RangeOfDays)	List of patrons with items overdue by a selected range of days, sorted by group and then by patron.
S	Odue-List(ByHomeroom&Patron)	List of all patrons with overdue items, sorted by homeroom and then by patron.
S	Odue-List(ByHomeroom&PatronFor SelectedLocation)	List of patrons of a selected location with overdue items, sorted by homeroom and then by patron.
S	Odue-List(ByHomeroom&PatronFor SelectedLocation&RangeOfDays)	List of patrons of a selected location with items overdue by a selected range of days, sorted by homeroom and then by patron.
S	Odue-List(ByHomeroom&PatronFor SelectedRangeOfDays)	List of patrons with items overdue by a selected range of days, sorted by homeroom and then by patron.
P/A	Odue-List(ByLocation&Patron)	List of all patrons with overdue items, sorted by location and then by patron.
S	Odue-List(ByLocation&Patron)-School	List of all patrons with overdue items, sorted by location and then by patron.
P/A	Odue-List(ByLocation&PatronForSelected RangeOfDays)	List of patrons with items overdue by a selected range of days, sorted by location and then by patron.
S	Odue-List(ByLocation&PatronForSelected RangeOfDays)-School	List of patrons with items overdue by a selected range of days, sorted by location and then by patron.
S, P/A	Odue-List(ByPatron)	List of all patrons with overdue items, sorted by patron.

Overdue Lists (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Odue-List(ByPatronForSelectedGrade)	List of patrons of a selected grade with overdue items, sorted by patron.
S	Odue-List(ByPatronForSelectedGrade&RangeOfDays)	List of patrons of a selected grade with items overdue by a selected range of days, sorted by patron.
S, P/A	Odue-List(ByPatronForSelectedGroup)	List of patrons of a selected group with overdue items, sorted by patron.
S, P/A	Odue-List(ByPatronForSelectedGroup&RangeOfDays)	List of patrons of a selected group with items overdue by a selected range of days, sorted by patron.
S	Odue-List(ByPatronForSelectedHomeroom)	List of patrons of a selected homeroom with overdue items, sorted by patron.
S	Odue-List(ByPatronForSelectedHomeroom&RangeOfDays)	List of patrons of a selected homeroom with items overdue by a selected range of days, sorted by patron.
P/A	Odue-List(ByPatronForSelectedLocation)	List of patrons of a selected location with overdue items, sorted by patron.
S	Odue-List(ByPatronForSelectedLocation)-School	List of patrons of a selected location with overdue items, sorted by patron.
P/A	Odue-List(ByPatronForSelectedLocation&RangeOfDays)	List of patrons of a selected location with items overdue by a selected range of days, sorted by patron.
S	Odue-List(ByPatronForSelectedLocation&RangeOfDays)-School	List of patrons of a selected location with items overdue by a selected range of days, sorted by patron.
S, P/A	Odue-List(ByPatronForSelectedRangeOfDays)	List of patrons with items overdue by a selected range of days, sorted by patron.
S	Odue-List(ByPatronForSelectedTeacher)	List of patrons of a selected teacher with overdue items, sorted by patron.
S	Odue-List(ByPatronForSelectedTeacher&RangeOfDays)	List of patrons of a selected teacher with items overdue by a selected range of days, sorted by patron.
S, P/A	Odue-List(ByPatronWithPhone&Price)	List of all patrons with overdue items including phone number and item price, sorted by patron.
S, P/A	Odue-List(ByPatronWithPhone&PriceForSelectedLocation)	List of patrons of a selected location with overdue items including phone number and item price, sorted by patron.
S, P/A	Odue-List(ByPatronWithPhone&PriceForSelectedLocation&RangeOfDays)	List of patrons of a selected location with items overdue by a selected range of days, including phone number and item price, sorted by patron.
S, P/A	Odue-List(ByPatronWithPhone&PriceForSelectedRangeOfDays)	List of all patrons with items overdue by a selected range of days, including phone number and item price, sorted by patron.
S	Odue-List(ByTeacher&Patron)	List of all overdue items, sorted by teacher and then by patron.
S	Odue-List(ByTeacher&PatronForSelectedLocation)	List of patrons of a selected location with overdue items, sorted by teacher and then by patron.
S	Odue-List(ByTeacher&PatronForSelectedLocation&RangeOfDays)	List of patrons of a selected location with items overdue by a selected range of days, sorted by teacher and then by patron.
S	Odue-List(ByTeacher&PatronForSelectedRangeOfDays)	List of patrons with items overdue by a selected range of days, sorted by teacher and then by patron.
S, P/A	Odue-List(ByTitleForSelectedLocation)	List of patrons of a selected location with overdue items, sorted by title.

Overdue Lists (Continued)

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Odue-List(ByTitleForSelectedLocation &RangeOfDays)	List of patrons of a selected location with items overdue by a selected range of days, sorted by title.
S	Odue-List(ByTitleForSelectedLocation &YearOfGraduation)	List of patrons of a selected location and selected graduation year with overdue items, sorted by title.
S, P/A	Odue-List(ByTitleForSelectedRangeOfDays)	List of patrons with items overdue by a selected range of days, sorted by title.
S	Odue-List(ByTitleForSelectedYearOf Graduation)	List of patrons of a selected graduation year with overdue items, sorted by title.
S, P/A	Odue-List(ForSelectedPatron)	List of overdue items for a selected patron.
S, P/A	Odue-List(InShelflistOrderForSelected Location&RangeOfDays)	List of patrons of a selected location with items overdue by a selected range of days, in shelflist order.
S, P/A	Odue-List(InShelflistOrderForSelected RangeOfDays)	List of patrons with items overdue by a selected range of days, in shelflist order.

OVERDUE NOTICES

Overdue notices are distributed to patrons who have outstanding loans. One overdue notice is created for each overdue item. Notices are printed four per page (except for faculty notices, which are printed on a single page) and can be separated for distribution. Unlike overdue letters, overdue notices do not contain address information. Generating overdue notices on a consistent day and at a consistent time will ensure accuracy and eliminate repetition.

TABLE B.11

Overdue Notices

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Overdue-Ntc(All)4ppg	Notices for all patrons with overdue items.
S, P/A	Overdue-Ntc(LessThan1Wk)4ppg	Notices for patrons with items overdue by one to six days.
S, P/A	Overdue-Ntc(1-2Wks)4ppg	Notices for patrons with items overdue by seven to 13 days.
S, P/A	Overdue-Ntc(2-3Wks)4ppg	Notices for patrons with items overdue by 14 to 20 days.
S, P/A	Overdue-Ntc(3+Wks)4ppg	Notices for patrons with items overdue by at least 21 days.
S, P/A	Overdue-Ntc(ForSelectedRangeOfDays) 4ppg	Notices for patrons with items overdue by a selected range of days.
S	Overdue-Ntc(ByGrade)4ppg	Notices for all patrons with overdue items, sorted by grade.
S	Overdue-Ntc(ByGrade-LessThan1Wk)4ppg	Notices for patrons with items overdue by one to six days, sorted by grade.

Overdue Notices (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Overdue-Ntc(ByGrade-1-2Wks)4ppg	Notices for patrons with items overdue by seven to 13 days, sorted by grade.
S	Overdue-Ntc(ByGrade-2-3Wks)4ppg	Notices for patrons with items overdue by 14 to 20 days, sorted by grade.
S	Overdue-Ntc(ByGrade-3+Wks)4ppg	Notices for patrons with items overdue by at least 21 days, sorted by grade.
S	Overdue-Ntc(ByGradeForSelectedRangeOfDays)4ppg	Notices for patrons with items overdue by a selected range of days, sorted by grade.
S	Overdue-Ntc(ByGradeForSelectedLocation)4ppg	Notices for patrons of a selected location with overdue items, sorted by grade.
S	Overdue-Ntc(ByGradeForSelectedLocation-LessThan1Wk)4ppg	Notices for patrons of a selected location with items overdue by one to six days, sorted by grade.
S	Overdue-Ntc(ByGradeForSelectedLocation-1-2Wks)4ppg	Notices for patrons of a selected location with items overdue by seven to 13 days, sorted by grade.
S	Overdue-Ntc(ByGradeForSelectedLocation-2-3Wks)4ppg	Notices for patrons of a selected location with items overdue by 14 to 20 days, sorted by grade.
S	Overdue-Ntc(ByGradeForSelectedLocation-3+Wks)4ppg	Notices for patrons of a selected location with items overdue by at least 21 days, sorted by grade.
S	Overdue-Ntc(ByGradeForSelectedLocation&RangeOfDays)4ppg	Notices for patrons of a selected location with items overdue by a selected range of days, sorted by grade.
S	Overdue-Ntc(ByHomeroom)4ppg	Notices for all patrons with overdue items, sorted by homeroom.
S	Overdue-Ntc(ByHomeroom-LessThan1Wk)4ppg	Notices for patrons with items overdue by one to six days, sorted by homeroom.
S	Overdue-Ntc(ByHomeroom-1-2Wks)4ppg	Notices for patrons with items overdue by seven to 13 days, sorted by homeroom.
S	Overdue-Ntc(ByHomeroom-2-3Wks)4ppg	Notices for patrons with items overdue by 14 to 20 days, sorted by homeroom.
S	Overdue-Ntc(ByHomeroom-3+Wks)4ppg	Notices for patrons with items overdue by at least 21 days, sorted by homeroom.
S	Overdue-Ntc(ByHomeroomForSelectedRangeOfDays)4ppg	Notices for patrons with items overdue by a selected range of days, sorted by homeroom.
S	Overdue-Ntc(ByHomeroomForSelectedLocation)4ppg	Notices for patrons of a selected location with overdue items, sorted by grade.
S	Overdue-Ntc(ByHomeroomForSelectedLocation-LessThan1Wk)4ppg	Notices for patrons of a selected location with items overdue by one to six days, sorted by homeroom.
S	Overdue-Ntc(ByHomeroomForSelectedLocation-1-2Wks)4ppg	Notices for patrons of a selected location with items overdue by seven to 13 days, sorted by homeroom.
S	Overdue-Ntc(ByHomeroomForSelectedLocation-2-3Wks)4ppg	Notices for patrons of a selected location with items overdue by 14 to 20 days, sorted by homeroom.
S	Overdue-Ntc(ByHomeroomForSelectedLocation-3+Wks)4ppg	Notices for patrons of a selected location with items overdue by at least 21 days, sorted by homeroom.
S	Overdue-Ntc(ByHomeroomForSelectedLocation&RangeOfDays)4ppg	Notices for patrons of a selected location with items overdue by a selected range of days, sorted by homeroom.
S	Overdue-Ntc(ByTeacher)4ppg	Notices for all patrons with overdue items, sorted by teacher.

Overdue Notices (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Overdue-Ntc(ByTeacher-LessThan1Wk) 4ppg	Notices for patrons with items overdue by one to six days, sorted by teacher.
S	Overdue-Ntc(ByTeacher-1-2Wks)4ppg	Notices for patrons with items overdue by seven to 13 days, sorted by teacher.
S	Overdue-Ntc(ByTeacher-2-3Wks)4ppg	Notices for patrons with items overdue by 14 to 20 days, sorted by teacher.
S	Overdue-Ntc(ByTeacher-3+Wks)4ppg	Notices for patrons with items overdue by at least 21 days, sorted by teacher.
S	Overdue-Ntc(ByTeacherForSelectedRange OfDays)4ppg	Notices for patrons with items overdue by a selected range of days, sorted by teacher.
S	Overdue-Ntc(ByTeacherForSelected Location)4ppg	Notices for patrons of a selected location with overdue items, sorted by teacher.
S	Overdue-Ntc(ByTeacherForSelected Location-LessThan1Wk)4ppg	Notices for patrons of a selected location with items overdue by one to six days, sorted by teacher.
S	Overdue-Ntc(ByTeacherForSelected Location-1-2Wks)4ppg	Notices for patrons of a selected location with items overdue by seven to 13 days, sorted by teacher.
S	Overdue-Ntc(ByTeacherForSelected Location-2-3Wks)4ppg	Notices for patrons of a selected location with items overdue by 14 to 20 days, sorted by teacher.
S	Overdue-Ntc(ByTeacherForSelected Location-3+Wks)4ppg	Notices for patrons of a selected location with items overdue by at least 21 days, sorted by teacher.
S	Overdue-Ntc(ByTeacherForSelected Location&RangeOfDays)4ppg	Notices for patrons of a selected location with items overdue by a selected range of days, sorted by teacher.
S	Odue-Ntc(Faculty-All)1ppg	Notices for all faculty members with overdue items.
S	Odue-Ntc(Faculty-ForSelectedLocation) 1ppg	Notices for faculty members of a selected location with overdue items.
S	Odue-Ntc(Faculty-ForSelectedLocation& RangeOfDays)1ppg	Notices for faculty members of a selected location with items overdue by a selected range of days.
S	Odue-Ntc(Faculty-ForSelectedRangeOf Days)1ppg	Notices for faculty members with items overdue by a selected number of days.
S	Overdue-Ntc(ForSelectedGrade)4ppg	Notices for patrons of a selected grade with overdue items.
S	Overdue-Ntc(ForSelectedGrade- LessThan1Wk)4ppg	Notices for patrons of a selected grade with items overdue by one to six days.
S	Overdue-Ntc(ForSelectedGrade-1-2Wks) 4ppg	Notices for patrons of a selected grade with items overdue by seven to 13 days.
S	Overdue-Ntc(ForSelectedGrade-2-3Wks) 4ppg	Notices for patrons of a selected grade with items overdue by 14 to 20 days.
S	Overdue-Ntc(ForSelectedGrade-3+Wks) 4ppg	Notices for patrons of a selected grade with items overdue by at least 21 days.
S	Overdue-Ntc(ForSelectedGrade& RangeOfDays)4ppg	Notices for patrons of a selected grade with items overdue by a selected range of days.
S, P/A	Overdue-Ntc(ForSelectedGroup)4ppg	Notices for patrons of a selected group with overdue items.
S, P/A	Overdue-Ntc(ForSelectedGroup- LessThan1Wk)4ppg	Notices for patrons of a selected group with items overdue by one to six days.
S, P/A	Overdue-Ntc(ForSelectedGroup-1-2Wks) 4ppg	Notices for patrons of a selected group with items overdue by seven to 13 days.

Overdue Notices (Continued)

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Overdue-Ntc(ForSelectedGroup-2-3Wks)4ppg	Notices for patrons of a selected group with items overdue by 14 to 20 days.
S, P/A	Overdue-Ntc(ForSelectedGroup-3+Wks)4ppg	Notices for patrons of a selected group with items overdue by at least 21 days.
S, P/A	Overdue-Ntc(ForSelectedGroup&RangeOfDays)4ppg	Notices for patrons of a selected group with items overdue by a selected range of days.
S	Overdue-Ntc(ForSelectedHomeroom)4ppg	Notices for patrons of a selected homeroom with overdue items.
S	Overdue-Ntc(ForSelectedHomeroom-LessThan1Wk)4ppg	Notices for patrons of a selected homeroom with items overdue by one to six days.
S	Overdue-Ntc(ForSelectedHomeroom-1-2Wks)4ppg	Notices for patrons of a selected homeroom with items overdue by seven to 13 days.
S	Overdue-Ntc(ForSelectedHomeroom-2-3Wks)4ppg	Notices for patrons of a selected homeroom with items overdue by 14 to 20 days.
S	Overdue-Ntc(ForSelectedHomeroom-3+Wks)4ppg	Notices for patrons of a selected homeroom with items overdue by at least 21 days.
S	Overdue-Ntc(ForSelectedHomeroom&RangeOfDays)4ppg	Notices for patrons of a selected homeroom with items overdue by a selected range of days.
P/A	Overdue-Ntc(ForSelectedLocation)4ppg	Notices for patrons of a selected location with overdue items.
S	Overdue-Ntc(ForSelectedLocation)4ppg-School	Notices for patrons of a selected location with overdue items.
P/A	Overdue-Ntc(ForSelectedLocation-LessThan1Wk)4ppg	Notices for patrons of a selected location with items overdue by one to six days.
S	Overdue-Ntc(ForSelectedLocation-LessThan1Wk)4ppg-School	Notices for patrons of a selected location with items overdue by one to six days.
P/A	Overdue-Ntc(ForSelectedLocation-1-2Wks)4ppg	Notices for patrons of a selected location with items overdue by seven to 13 days.
S	Overdue-Ntc(ForSelectedLocation-1-2Wks)4ppg-School	Notices for patrons of a selected location with items overdue by seven to 13 days.
P/A	Overdue-Ntc(ForSelectedLocation-2-3Wks)4ppg	Notices for patrons of a selected location with items overdue by 14 to 20 days.
S	Overdue-Ntc(ForSelectedLocation-2-3Wks)4ppg-School	Notices for patrons of a selected location with items overdue by 14 to 20 days.
P/A	Overdue-Ntc(ForSelectedLocation-3+Wks)4ppg	Notices for patrons of a selected location with items overdue by at least 21 days.
S	Overdue-Ntc(ForSelectedLocation-3+Wks)4ppg-School	Notices for patrons of a selected location with items overdue by at least 21 days.
P/A	Overdue-Ntc(ForSelectedLocation&RangeOfDays)4ppg	Notices for patrons of a selected location with items overdue by a selected range of days.
S	Overdue-Ntc(ForSelectedLocation&RangeOfDays)4ppg-School	Notices for patrons of a selected location with items overdue by a selected range of days.
S	Overdue-Ntc(ForSelectedLocation&Grade)4ppg	Notices for patrons of a selected location and selected grade with overdue items.
S	Overdue-Ntc(ForSelectedLocation&Grade-LessThan1Wk)4ppg	Notices for patrons of a selected location and selected grade with items overdue by one to six days.
S	Overdue-Ntc(ForSelectedLocation&Grade-1-2Wks)4ppg	Notices for patrons of a selected location and selected grade with items overdue by seven to 13 days.

Overdue Notices (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Overdue-Ntc(ForSelectedLocation&Grade-2-3Wks)4ppg	Notices for patrons of a selected location and selected grade with items overdue by 14 to 20 days.
S	Overdue-Ntc(ForSelectedLocation&Grade-3+Wks)4ppg	Notices for patrons of a selected location and selected grade with items overdue by at least 21 days.
S	Overdue-Ntc(ForSelectedLocationGrade&RangeOfDays)4ppg	Notices for patrons of a selected location with items overdue by a selected range of days.
P/A	Overdue-Ntc(ForSelectedLocation&Group)4ppg	Notices for patrons of a selected location and selected group with overdue items.
S	Overdue-Ntc(ForSelectedLocation&Group)4ppg-School	Notices for patrons of a selected location and selected group with overdue items.
P/A	Overdue-Ntc(ForSelectedLocation&Group-LessThan1Wk)4ppg	Notices for patrons of a selected location and selected group with items overdue by one to six days.
S	Overdue-Ntc(ForSelectedLocation&Group-LessThan1Wk)4ppg-School	Notices for patrons of a selected location and selected group with items overdue by one to six days.
P/A	Overdue-Ntc(ForSelectedLocation&Group-1-2Wks)4ppg	Notices for patrons of a selected location and selected group with items overdue by seven to 13 days.
S	Overdue-Ntc(ForSelectedLocation&Group-1-2Wks)4ppg-School	Notices for patrons of a selected location and selected group with items overdue by seven to 13 days.
P/A	Overdue-Ntc(ForSelectedLocation&Group-2-3Wks)4ppg	Notices for patrons of a selected location and selected group with items overdue by 14 to 20 days.
S	Overdue-Ntc(ForSelectedLocation&Group-2-3Wks)4ppg-School	Notices for patrons of a selected location and selected group with items overdue by 14 to 20 days.
P/A	Overdue-Ntc(ForSelectedLocation&Group-3+Wks)4ppg	Notices for patrons of a selected location and selected group with items overdue by at least 21 days.
S	Overdue-Ntc(ForSelectedLocation&Group-3+Wks)4ppg-School	Notices for patrons of a selected location and selected group with items overdue by at least 21 days.
P/A	Overdue-Ntc(ForSelectedLocationGroup&RangeOfDays)4ppg	Notices for patrons of a selected location and selected group with items overdue by a selected range of days.
S	Overdue-Ntc(ForSelectedLocationGroup&RangeOfDays)4ppg-School	Notices for patrons of a selected location and selected group with items overdue by a selected range of days.
S	Overdue-Ntc(ForSelectedLocation&Homeroom)4ppg	Notices for patrons of a selected location and selected homeroom with overdue items.
S	Overdue-Ntc(ForSelectedLocation&Homeroom-LessThan1Wk)4ppg	Notices for patrons of a selected location and selected homeroom with items overdue by one to six days.
S	Overdue-Ntc(ForSelectedLocation&Homeroom-1-2Wks)4ppg	Notices for patrons of a selected location and selected homeroom with items overdue by seven to 13 days.
S	Overdue-Ntc(ForSelectedLocation&Homeroom-2-3Wks)4ppg	Notices for patrons of a selected location and selected homeroom with items overdue by 14 to 20 days.
S	Overdue-Ntc(ForSelectedLocation&Homeroom-3+Wks)4ppg	Notices for patrons of a selected location and selected homeroom with items overdue by at least 21 days.
S	Overdue-Ntc(ForSelectedLocationHomeroom&RangeOfDays)4ppg	Notices for patrons of a selected location and selected homeroom with items overdue by a selected range of days.
S	Overdue-Ntc(ForSelectedLocation&Teacher)4ppg	Notices for patrons of a selected location and selected teacher with overdue items.
S	Overdue-Ntc(ForSelectedLocation&Teacher-LessThan1Wk)4ppg	Notices for patrons of a selected location and selected teacher with items overdue by one to six days.

Overdue Notices (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Overdue-Ntc(ForSelectedLocation&Teacher-1-2Wks)4ppg	Notices for patrons of a selected location and selected teacher with items overdue by seven to 13 days.
S	Overdue-Ntc(ForSelectedLocation&Teacher-2-3Wks)4ppg	Notices for patrons of a selected location and selected teacher with items overdue by 14 to 20 days.
S	Overdue-Ntc(ForSelectedLocation&Teacher-3+Wks)4ppg	Notices for patrons of a selected location and selected teacher with items overdue by at least 21 days.
S	Overdue-Ntc(ForSelectedLocationTeacher&RangeOfDays)4ppg	Notices for patrons of a selected location and selected teacher with items overdue by a selected range of days.
S, P/A	Overdue-Ntc(ForSelectedPatron)4ppg	Notice for a selected patron with overdue items.
S	Overdue-Ntc(ForSelectedTeacher)4ppg	Notices for patrons of a selected teacher with overdue items.
S	Overdue-Ntc(ForSelectedTeacher-LessThan1Wk)4ppg	Notices for patrons of a selected teacher with items overdue by one to six days.
S	Overdue-Ntc(ForSelectedTeacher-1-2Wks)4ppg	Notices for patrons of a selected teacher with items overdue by seven to 13 days.
S	Overdue-Ntc(ForSelectedTeacher-2-3Wks)4ppg	Notices for patrons of a selected teacher with items overdue by 14 to 20 days.
S	Overdue-Ntc(ForSelectedTeacher-3+Wks)4ppg	Notices for patrons of a selected teacher with items overdue by at least 21 days.
S	Overdue-Ntc(ForSelectedTeacher&RangeOfDays)4ppg	Notices for patrons of a selected teacher with items overdue by a selected range of days.

PATRON LISTS

Patron lists provide information about patrons and are generated from the library database. The “Public or Academic” reports provide address information, and the “School” reports provide grade, homeroom, and teacher information.

TABLE B.12

Patron Lists

S=School P/A= Public or Academic	Report Name	Description
P/A	Patron-List(ActiveSinceSelectedDate)	List of patrons that have an active status since a selected date.
S	Patron-List(ActiveSinceSelectedDate)-School	List of patrons that have an active status since a selected date.
P/A	Patron-List(AdditionsByType(100#e)ForSelectedMonth)	List of patrons entered for a selected month, sorted by type (field 100#e).
S	Patron-List(AdditionsByType(100#e)ForSelectedMonth)-School	List of patrons entered for a selected month, sorted by type (field 100#e).

Patron Lists (Continued)

S=School P/A= Public or Academic			Report Name	Description
P/A			Patron-List(AdditionsForSelectedDateOr Range)	List of patrons entered for a selected date or selected date range.
S			Patron-List(AdditionsForSelectedDateOr Range)-School	List of patrons entered for a selected date or selected date range.
P/A			Patron-List(All)	List of all patrons.
S			Patron-List(All)-School	List of all patrons.
S, P/A			Patron-List(ByCity)	List of all patrons, sorted by city.
S			Patron-List(ByGrade)	List of all patrons, sorted by grade.
P/A			Patron-List(ByGroup)	List of all patrons, sorted by group.
S			Patron-List(ByGroup)-School	List of all patrons, sorted by group.
S, P/A			Patron-List(ByGroupForSelectedLocation)	List of patrons of a selected location, sorted by group.
S			Patron-List(ByHomeroom)	List of all patrons, sorted by homeroom.
P/A			Patron-List(ByLocation)	List of all patrons, sorted by location.
S			Patron-List(ByLocation)-School	List of all patrons, sorted by location.
S, P/A			Patron-List(BySpecResGroup)	List of all patrons, sorted by special reserve group.
S, P/A			Patron-List(BySpecResGroupForSelected Location)	List of patrons of a selected location, sorted by special reserve group.
S, P/A			Patron-List(ByZipCode)	List of all patrons, sorted by zip code.
P/A			Patron-List(Deleted-All)	List of patrons that are marked for deletion.
S			Patron-List(Deleted-All)-School	List of patrons that are marked for deletion.
P/A			Patron-List(Deleted-ByGroup)	List of patrons that are marked for deletion, sorted by group.
S			Patron-List(Deleted-ByGroup)-School	List of patrons that are marked for deletion, sorted by group.
P/A			Patron-List(Deleted-ByGroupForSelected Location)	List of patrons of a selected location that are marked for deletion, sorted by group.
S			Patron-List(Deleted-ByGroupForSelected Location)-School	List of patrons of a selected location that are marked for deletion, sorted by group.
P/A			Patron-List(Deleted-ByLocation)	List of patrons that are marked for deletion, sorted by location.
S			Patron-List(Deleted-ByLocation)-School	List of all patrons that are marked for deletion, sorted by location.
P/A			Patron-List(Deleted-BySpecResGroup)	List of patrons that are marked for deletion, sorted by special reserve group.
S			Patron-List(Deleted-BySpecResGroup)-School	List of patrons that are marked for deletion, sorted by special reserve group.
P/A			Patron-List(Deleted-BySpecResGroupFor SelectedLocation)	List of patrons of a selected location that are marked for deletion, sorted by special reserve group.
S			Patron-List(Deleted-BySpecResGroupFor SelectedLocation)-School	List of patrons of a selected location that are marked for deletion, sorted by special reserve group.
P/A			Patron-List(Deleted-ForSelectedGroup)	List of patrons of a selected group that are marked for deletion.
S			Patron-List(Deleted-ForSelectedGroup)-School	List of patrons of a selected group that are marked for deletion.

Patron Lists (Continued)

S=School P/A= Public or Academic	Report Name	Description
P/A	Patron-List(Deleted-ForSelectedLocation)	List of patrons of a selected location that are marked for deletion.
S	Patron-List(Deleted-ForSelectedLocation)-School	List of patrons of a selected location that are marked for deletion.
P/A	Patron-List(Deleted-ForSelectedLocation&Group)	List of patrons of a selected location and selected group that are marked for deletion.
S	Patron-List(Deleted-ForSelectedLocation&Group)-School	List of patrons for a selected location and selected group that are marked for deletion.
P/A	Patron-List(Deleted-ForSelectedLocation&SpecResGroup)	List of patrons of a selected location and selected special reserve group that are marked for deletion.
S	Patron-List(Deleted-ForSelectedLocation&SpecResGroup)-School	List of patrons of a selected location and selected special reserve group that are marked for deletion.
S, P/A	Patron-List(Deleted-ForSelectedSpecResGroup)	List of patrons of a selected special reserve group that are marked for deletion.
S, P/A	Patron-List(ExpiredCard-All)	List of patrons with expired library cards.
S, P/A	Patron-List(ExpiredCard-ForSelectedLocation)	List of patrons of a selected location with expired library cards.
S, P/A	Patron-List(ExpiringCardForSelectedDateRange)	List of patrons with library cards that will expire during a selected date range.
S, P/A	Patron-List(ExpiringCardForSelectedLocation&DateRange)	List of patrons of a selected location with library cards that will expire during a selected date range.
P/A	Patron-List(ForSelectedCity)	List of patrons of a selected city.
S	Patron-List(ForSelectedGrade)	List of patrons of a selected grade.
S	Patron-List(ForSelectedGroup)	List of patrons of a selected group.
P/A	Patron-List(ForSelectedGroup)-School	List of patrons of a selected group.
S	Patron-List(ForSelectedHomeroom)	List of patrons of a selected homeroom.
S	Patron-List(ForSelectedLocation&Grade)	List of patrons of a selected location and selected grade.
S, P/A	Patron-List(ForSelectedLocation&Group)	List of patrons of a selected location and selected group.
S	Patron-List(ForSelectedLocation&Homeroom)	List of patrons of a selected location and selected homeroom.
S, P/A	Patron-List(ForSelectedLocation&SpecResGroup)	List of patrons of a selected location and selected special reserve group.
S	Patron-List(ForSelectedLocation&Teacher)	List of patrons for a location and selected teacher.
P/A	Patron-List(ForSelectedLocation)	List of patrons for a selected location.
S	Patron-List(ForSelectedLocation)-School	List of patrons for a selected location.
P/A	Patron-List(ForSelectedSpecResGroup)	List of patrons for a selected special reserve group.
S	Patron-List(ForSelectedSpecResGroup)-School	List of patrons for a selected special reserve group.
S	Patron-List(ForSelectedTeacher)	List of patrons for a selected teacher.
S, P/A	Patron-List(ForSelectedZipCode)	List of patrons for a selected zip code.
P/A	Patron-List(InactiveSinceSelectedDate)	List of patrons in inactive status since a selected date.
S	Patron-List(InactiveSinceSelectedDate)-School	List of patrons in inactive status since a selected date.
S, P/A	Patron-List(MessagesByPatron)	List of patrons with messages attached.

Patron Lists (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Patron-List(MessagesForSelectedGrade)	List of patrons of a selected grade with messages attached.
S	Patron-List(MessagesForSelected Homeroom)	List of patrons of a selected homeroom with messages attached.
S, P/A	Patron-List(MessagesForSelected Location)	List of patrons of a selected location with messages attached.
S	Patron-List(MessagesForSelected Teacher)	List of patrons of a selected teacher with messages attached.

STATISTICAL REPORTS

Statistical reports include statistics for the following areas: circulation, fines, in-house circulation, loans (including hourly), renewals, and transactions.

TABLE B.13

Statistical Reports

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Stats-Circulation(Item)	Circulation statistics for all items.
S, P/A	Stats-Circulation(Item-ForSelectedGroup)	Circulation statistics for items of a selected group.
S, P/A	Stats-Circulation(Item-ForSelectedLocation)	Circulation statistics for items of a selected location.
S, P/A	Stats-Circulation(Patron)	Circulation statistics for all patrons.
S	Stats-Circulation(Patron-ByGrade)	Circulation statistics for all patrons, sorted by grade.
S	Stats-Circulation(Patron-ByGradeFor SelectedLocation)	Circulation statistics for patrons of a selected location, sorted by grade.
S, P/A	Stats-Circulation(Patron-ByGroup)	Circulation statistics for all patrons, sorted by group.
S, P/A	Stats-Circulation(Patron-ByGroupFor SelectedLocation)	Circulation statistics for patrons of a selected location, sorted by group.
S	Stats-Circulation(Patron-ByHomeroom)	Circulation statistics for all patrons, sorted by home-room.
S	Stats-Circulation(Patron-ByHomeroom ForSelectedLocation)	Circulation statistics for patrons of a selected location, sorted by homeroom.
S, P/A	Stats-Circulation(Patron-ByLocation)	Circulation statistics for all patrons, sorted by location.
S	Stats-Circulation(Patron-ByTeacher)	Circulation statistics for all patrons, sorted by teacher.
S	Stats-Circulation(Patron-ByTeacherFor SelectedLocation)	Circulation statistics for patrons of a selected location, sorted by teacher.
S	Stats-Circulation(Patron-ForSelectedGrade)	Circulation statistics for patrons of a selected grade.
S	Stats-Circulation(Patron-ForSelected Homeroom)	Circulation statistics for patrons of a selected home-room.
S, P/A	Stats-Circulation(Patron-ForSelected Location)	Circulation statistics for patrons of a selected location.

Statistical Reports (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Stats-Circulation(Patron-ForSelected Teacher)	Circulation statistics for patrons of a selected teacher.
S, P/A	Stats-Fine(Paid&ForgivenForSelectedDate)	Statistics for fines paid and forgiven for a selected date.
S, P/A	Stats-Fine(Paid&ForgivenForSelectedDate Range)	Statistics for fines paid and forgiven for a selected date range.
S, P/A	Stats-Fine(Paid&ForgivenForSelected Location&Date)	Statistics for fines paid and forgiven for a selected location and selected date.
S, P/A	Stats-Fine(Paid&ForgivenForSelected Location&Month)	Statistics for fines paid and forgiven for a selected location and selected month.
S, P/A	Stats-Fine(Paid&ForgivenForSelected Location&Year)	Statistics for fines paid and forgiven for a selected location and selected year.
S, P/A	Stats-Fine(Paid&ForgivenForSelected Month)	Statistics for fines paid and forgiven for a selected month.
S, P/A	Stats-Fine(Paid&ForgivenForSelected Year)	Statistics for fines paid and forgiven for a selected year.
S, P/A	Stats-Fine(Paid&ForgivenThisMonth)	Statistics for fines paid and forgiven this month.
S, P/A	Stats-Fine(Paid&ForgivenThisMonthFor SelectedLocation)	Statistics for fines paid and forgiven for a selected location this month.
S, P/A	Stats-Fine(Paid&ForgivenThisYear)	Statistics for fines paid and forgiven this year.
S, P/A	Stats-Fine(Paid&ForgivenThisYearFor SelectedLocation)	Statistics for fines paid and forgiven for a selected location this year.
S, P/A	Stats-Fine(Paid&ForgivenToday)	Statistics for fines paid and forgiven today.
S, P/A	Stats-Fine(Paid&ForgivenTodayFor SelectedLocation)	Statistics for fines paid and forgiven today for a selected location.
S, P/A	Stats-InHouseCirculation(ForSelectedDate)	In-house circulation statistics for a selected date.
S, P/A	Stats-InHouseCirculation(ForSelected Month)	In-house circulation statistics for a selected month.
S, P/A	Stats-InHouseCirculation(ForSelected RangeOfDates)	In-house circulation statistics for a selected date range.
S, P/A	Stats-InHouseCirculation(ForSelectedYear)	In-house circulation statistics for a selected year.
S, P/A	Stats-Loan(ByGroupForCurrentYear)	Loan statistics for this year, sorted by group.
S, P/A	Stats-Loan(ByGroupForSelectedDate)	Loan statistics for a selected date, sorted by group.
S, P/A	Stats-Loan(ByGroupForSelectedDate Range)	Loan statistics for a selected date range, sorted by group.
S, P/A	Stats-Loan(ByGroupForSelectedMonth)	Loan statistics for a selected month, sorted by group.
S, P/A	Stats-Loan(ByGroupForSelectedYear)	Loan statistics for a selected year, sorted by group.
S, P/A	Stats-Loan(Dewey1Digit-ForSelectedDate)	Loan statistics for Dewey 1s for a selected date.
S, P/A	Stats-Loan(Dewey1Digit-ForSelectedDate Range)	Loan statistics for Dewey 1s for a selected date range.
S, P/A	Stats-Loan(Dewey1Digit-ForSelectedMonth)	Loan statistics for Dewey 1s for a selected month.
S, P/A	Stats-Loan(Dewey1Digit-ForSelectedYear)	Loan statistics for Dewey 1s for a selected year.
S, P/A	Stats-Loan(Dewey1Digit-ThisMonth)	Loan statistics for Dewey 1s for this month.
S, P/A	Stats-Loan(Dewey1Digit-ThisYear)	Loan statistics for Dewey 1s for this year.
S, P/A	Stats-Loan(Dewey1Digit-Today)	Loan statistics for Dewey 1s for today.

Statistical Reports (Continued)

S=School P/A= Public or Academic			Report Name	Description
S, P/A			Stats-Loan(DeweyTens-ForSelectedDate)	Loan statistics for Dewey 10s for a selected date.
S, P/A			Stats-Loan(DeweyTens-ForSelectedDate Range)	Loan statistics for Dewey 10s for a selected date range.
S, P/A			Stats-Loan(DeweyTens-ForSelectedMonth)	Loan statistics for Dewey 10s for a selected month.
S, P/A			Stats-Loan(DeweyTens-ForSelectedYear)	Loan statistics for Dewey 10s for a selected year.
S, P/A			Stats-Loan(DeweyTens-ThisMonth)	Loan statistics for Dewey 10s for this month.
S, P/A			Stats-Loan(DeweyTens-ThisYear)	Loan statistics for Dewey 10s for this year.
S, P/A			Stats-Loan(DeweyTens-Today)	Loan statistics for Dewey 10s for today.
S, P/A			Stats-Loan(DeweyHundreds-ForSelected Date)	Loan statistics for Dewey 100s for a selected date.
S, P/A			Stats-Loan(DeweyHundreds-ForSelected DateRange)	Loan statistics for Dewey 100s for a selected date range.
S, P/A			Stats-Loan(DeweyHundreds-ForSelected Month)	Loan statistics for Dewey 100s for a selected month.
S, P/A			Stats-Loan(DeweyHundreds-ForSelected Year)	Loan statistics for Dewey 100s for a selected year.
S, P/A			Stats-Loan(DeweyHundreds-ThisMonth)	Loan statistics for Dewey 100s for this month.
S, P/A			Stats-Loan(DeweyHundreds-ThisYear)	Loan statistics for Dewey 100s for this year.
S, P/A			Stats-Loan(DeweyHundreds-Today)	Loan statistics for Dewey 100s for today.
S, P/A			Stats-Loan(HourlyForSelectedDate)	Hourly loan statistics for a selected date.
S, P/A			Stats-Loan(HourlyForSelectedDateRange)	Hourly loan statistics for a selected date range.
S, P/A			Stats-Loan(HourlyForSelectedMonth)	Hourly loan statistics for a selected month.
S, P/A			Stats-Loan(HourlyForSelectedYear)	Hourly loan statistics for a selected year.
S, P/A			Stats-Loan(HourlyThisMonth)	Hourly loan statistics for this month.
S, P/A			Stats-Loan(HourlyThisYear)	Hourly loan statistics for this year.
S, P/A			Stats-Loan(HourlyToday)	Hourly loan statistics for today.
S, P/A			Stats-Loan&Renew(Dewey1sByPrefixAnd ClassForSelectedDate)	Loan and renewal statistics for Dewey 1s items for a selected date, sorted by prefix and class.
S, P/A			Stats-Loan&Renew(Dewey1sByPrefixAnd ClassForSelectedDateRange)	Loan and renewal statistics for Dewey 1s items for a selected date range, sorted by prefix and class.
S, P/A			Stats-Loan&Renew(Dewey1sByPrefixAnd ClassForSelectedMonth)	Loan and renewal statistics for Dewey 1s items for a selected month, sorted by prefix and class.
S, P/A			Stats-Loan&Renew(Dewey1sByPrefixAnd ClassForSelectedYear)	Loan and renewal statistics for Dewey 1s items for a selected year, sorted by prefix and class.
S, P/A			Stats-Loan&Renew(Dewey1sByPrefixAnd ClassForThisMonth)	Loan and renewal statistics for Dewey 1s items for this month, sorted by prefix and class.
S, P/A			Stats-Loan&Renew(Dewey1sByPrefixAnd ClassForThisYear)	Loan and renewal statistics for Dewey 1s items for this year, sorted by prefix and class.
S, P/A			Stats-Loan&Renew(Dewey1sByPrefixAnd ClassForToday)	Loan and renewal statistics for Dewey 1s items for today, sorted by prefix and class.
S, P/A			Stats-Loan&Renew(Dewey10sByPrefixAnd ClassForSelectedDate)	Loan and renewal statistics for Dewey 10s items for a selected date, sorted by prefix and class.
S, P/A			Stats-Loan&Renew(Dewey10sByPrefixAnd ClassForSelectedDateRange)	Loan and renewal statistics for Dewey 10s items for a selected date range, sorted by prefix and class.

Statistical Reports (Continued)

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Stats-Loan&Renew(Dewey10sByPrefixAndClassForSelectedMonth)	Loan and renewal statistics for Dewey 10s items for a selected month, sorted by prefix and class.
S, P/A	Stats-Loan&Renew(Dewey10sByPrefixAndClassForSelectedYear)	Loan and renewal statistics for Dewey 10s items for a selected year, sorted by prefix and class.
S, P/A	Stats-Loan&Renew(Dewey10sByPrefixAndClassForThisMonth)	Loan and renewal statistics for Dewey 10s items for this month, sorted by prefix and class.
S, P/A	Stats-Loan&Renew(Dewey10sByPrefixAndClassForThisYear)	Loan and renewal statistics for Dewey 10s items for this year, sorted by prefix and class.
S, P/A	Stats-Loan&Renew(Dewey10sByPrefixAndClassForToday)	Loan and renewal statistics for Dewey 10s items for today, sorted by prefix and class.
S, P/A	Stats-Loan&Renew(Dewey100sByPrefixAndClassForSelectedDate)	Loan and renewal statistics for Dewey 100s items for a selected date, sorted by prefix and class.
S, P/A	Stats-Loan&Renew(Dewey100sByPrefixAndClassForSelectedDateRange)	Loan and renewal statistics for Dewey 100s items for a selected date range, sorted by prefix and class.
S, P/A	Stats-Loan&Renew(Dewey100sByPrefixAndClassForSelectedMonth)	Loan and renewal statistics for Dewey 100s items for a selected month, sorted by prefix and class.
S, P/A	Stats-Loan&Renew(Dewey100sByPrefixAndClassForSelectedYear)	Loan and renewal statistics for Dewey 100s items for a selected year, sorted by prefix and class.
S, P/A	Stats-Loan&Renew(Dewey100sByPrefixAndClassForThisMonth)	Loan and renewal statistics for Dewey 100s items for this month, sorted by prefix and class.
S, P/A	Stats-Loan&Renew(Dewey100sByPrefixAndClassForThisYear)	Loan and renewal statistics for Dewey 100s items for this year, sorted by prefix and class.
S, P/A	Stats-Loan&Renew(Dewey100sByPrefixAndClassForToday)	Loan and renewal statistics for Dewey 100s items for today, sorted by prefix and class.
S, P/A	Stats-Transaction(ForSelectedDate)	Transaction statistics for a selected date.
S, P/A	Stats-Transaction(ForSelectedDateRange)	Transaction statistics for a selected date range.
S, P/A	Stats-Transaction(ForSelectedMonth)	Transaction statistics for a selected month.
S, P/A	Stats-Transaction(ForSelectedYear)	Transaction statistics for a selected year.
S, P/A	Stats-Transaction(ForThisMonth)	Transaction statistics for this month.
S, P/A	Stats-Transaction(ForThisYear)	Transaction statistics for this year.
S, P/A	Stats-Transaction(ForToday)	Transaction statistics for today.

TRANSACTIONS LISTS

Transactions lists include items on hold, returned via in-house circulation, loaned, renewed, and reserved.

TABLE B.14

Transactions Lists

S=School P/A= Public or Academic	Report Name	Description
S, P/A	Hold-List(All-ByTitle)	List of items on hold, sorted by title.
S, P/A	Hold-List(All-InShelflistOrder)	List of items on hold, in shelflist order.
S, P/A	Hold-List(All-InShelflist OrderForSelected Location)	List of items on hold for a selected location, in shelflist order.
S, P/A	Hold-List(ByPatron)	List of items on hold, sorted by patron.
S, P/A	Hold-List(ByTitleForSelectedLocation)	List of items on hold for a selected location, sorted by title.
S, P/A	Hold-List(ForSelectedDate)	List of items on hold for a selected date.
S, P/A	Hold-List(ForSelectedLocation&Date)	List of items on hold for a selected location and selected date.
S, P/A	Hold-List(ForSelectedPatron)	List of items on hold for a selected patron.
S, P/A	InHouseCirc-List(ByTitleForSelectedDate)	List of in-house circulation for a selected date, sorted by title.
S, P/A	InHouseCirc-List(ByTitleForSelected Location)	List of in-house circulation for a selected location, sorted by title.
S, P/A	InHouseCirc-List(ByTitleForSelected Location&Date)	List of in-house circulation for a selected location and selected date, sorted by title.
S, P/A	InHouseCirc-List(ByTitleForToday)	List of in-house circulation for today, sorted by title.
S, P/A	Loan-List(All-ByTitle)	List of items on loan, sorted by title.
S, P/A	Loan-List(All-InShelflistOrder)	List of items on loan, in shelflist order.
S, P/A	Loan-List(All-InShelflistOrderForSelected Location)	List of items on loan for a selected location, in shelflist order.
S	Loan-List(ByGrade&Patron)	List of items on loan, sorted by grade and then by patron.
S	Loan-List(ByGrade&PatronForSelected Location)	List of items on loan, sorted by group and then by patron.
S, P/A	Loan-List(ByGroup&Patron)	List of items on loan for a selected location, sorted by group and then by patron.
S, P/A	Loan-List(ByGroup&PatronForSelected Location)	List of items on loan for a selected location, sorted by grade and then by patron.
S	Loan-List(ByHomeroom&Patron)	List of items on loan, sorted by homeroom and then by patron.
S	Loan-List(ByHomeroom&PatronForSelected Location)	List of items on loan for a selected location, sorted by homeroom and then by patron.
P/A	Loan-List(ByLocation&Patron)	List of items on loan, sorted by location and then by patron.
S	Loan-List(ByLocation&Patron)-School	List of items on loan, sorted by location and then by patron.
S, P/A	Loan-List(ByPatron)	List of items on loan, sorted by patron.

Transactions Lists (Continued)

S=School P/A= Public or Academic	Report Name	Description
S	Loan-List(ByPatronForSelectedGrade)	List of items on loan for a selected grade, sorted by patron.
S, P/A	Loan-List(ByPatronForSelectedGroup)	List of items on loan for a selected group, sorted by patron.
S	Loan-List(ByPatronForSelectedHomeroom)	List of items on loan for a selected homeroom, sorted by patron.
P/A	Loan-List(ByPatronForSelectedLocation)	List of items on loan for a selected location, sorted by patron.
S	Loan-List(ByPatronForSelectedLocation)-School	List of items on loan for a selected location, sorted by patron.
S	Loan-List(ByPatronForSelectedTeacher)	List of items on loan for a selected teacher, sorted by patron.
S, P/A	Loan-List(ByPatronWithPhone&Price)	List of items on loan with patron's phone and item price, sorted by patron.
S, P/A	Loan-List(ByPatronWithPhone&PriceForSelectedLocation)	List of items on loan for a selected location with patron's phone and item price, sorted by patron.
S	Loan-List(ByTeacher&Patron)	List of items on loan, sorted by teacher and then by patron.
S	Loan-List(ByTeacher&PatronForSelectedLocation)	List of items on loan for a selected location, sorted by teacher and then by patron.
S, P/A	Loan-List(ByTitleForSelectedLocation)	List of items on loan for a selected location, sorted by title.
S, P/A	Loan-List(ForSelectedDate)	List of items on loan for a selected date.
S, P/A	Loan-List(ForSelectedLocation&Date)	List of items on loan for a selected location and selected date.
S, P/A	Loan-List(ForSelectedPatron)	List of items on loan for a selected patron.
S, P/A	Renewal-List(All-ByTitle)	List of all renewals, sorted by title.
S, P/A	Renewal-List(All-InShelflistOrder)	List of all renewals, in shelflist order.
S, P/A	Renewal-List(All-InShelflistOrderForSelectedLocation)	List of renewals for a selected location, in shelflist order.
S, P/A	Renewal-List(ByPatron)	List of all renewals, sorted by patron.
S, P/A	Renewal-List(ByTitleForSelectedLocation)	List of renewals for a selected location, sorted by title.
S, P/A	Renewal-List(ForSelectedDate)	List of renewals for a selected date.
S, P/A	Renewal-List(ForSelectedLocation&Date)	List of renewals for a selected location and selected date.
S, P/A	Renewal-List(ForSelectedPatron)	List of renewals for a selected patron.
S, P/A	Reserve-List(All-ByTitle)	List of all reserves, sorted by title.
S, P/A	Reserve-List(ByPatron)	List of all reserves, sorted by patron.
S, P/A	Reserve-List(ByTitleForSelectedLocation)	List of reserves for a selected location, sorted by title.
S, P/A	Reserve-List(ForSelectedDate)	List of reserves for a selected date.
S, P/A	Reserve-List(ForSelectedPatron)	List of reserves for a selected patron.

APPENDIX C: M3 PATRON RECORD DEFINITION

C

Table C.1 provides the standard M3 patron record definition. This definition is used in M3 versions 1.01 through 1.6.

TABLE C.1

USMARC Field Tag	Field Name	M2.X Field Tag
001	Control Number	
005	Date and Time of Latest Transaction	
008	Creation Date	
100	Personal Information	
100#a	First Name	032
100#b	Middle Name	
100#c	Last Name	031
100#d	Title (Mr., Mrs., Ms., and so on)	033
100#e	Type	020
100#f	Gender	067
100#g	Category	063
100#k	Date of Birth	064
100#n	Name known by (Nickname)	
100#s	ID or Social Security Number	071, 072, 074, 075
110	Primary Address	
110#a	Primary Address 1	043 (occ 1)
110#b	City	044
110#c	State or Province	045
110#d	Country	
110#e	Postal or Zip Code	046
110#f	Neighborhood	
110#g	Alternate Contact Person	
110#h	County	
110#k	Telephone	048, 034
110#l	Fax	
110#m	Electronic Mail	

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USMARC Field Tag	Field Name	M2.X Field Tag
110#n	Primary Address 2 (P.O. Box)	043 (occ 2)
110#o	Primary Address 3 (RR#, RFD, and so on)	043 (occ 3)
111	Secondary Address (same subfields as 110)	
112	Alternate Address (same subfields as 110)	
113	Additional Address (same subfields as 110)	
120	Contact Information	
120#a	Telephone	
120#b	Fax	
120#c	Electronic Mail	
200	Friend or Neighbor Personal Information	
200#a	First Name	
200#b	Middle Name	
200#c	Last Name	
210	Friend or Neighbor Address	
210#a	Address	
210#b	City	
210#c	State or Province	
210#d	Country	
210#e	Postal or Zip Code	
220	Friend or Neighbor Contact Information	
220#a	Telephone	
220#b	Fax	
220#c	Electronic Mail	
852	System Information	
852#a	Location (School or Library)	036
852#b	Homeroom	051
852#c	Teacher or Advisor	052
852#d	Department	065
852#f	Patron Language	
852#g	Grade Level	061
852#h	Year of Graduation	062
852#i	ILL Permission	

USMARC Field Tag	Field Name	M2.X Field Tag
852#j	Internet Access permission	
852#k	Rental Permission	
852#l	Parent or Guardian Last Name	041
852#m	Parent or Guardian First Name	042
852#o	Login Name	
852#p	Barcode	010
852#q	Password	
852#z	Note	100
853	Membership Information	
853#a	Date Paid	
853#b	Amount	
853#c	Status	
853#d	Member Since (Sign up date)	091
853#e	Expiry of Membership	095
990	Message	
990#a	Message ISN	
990#b	Message Formula	
990#c	Location Assigned	
991	Groups Information	
991#a	Standard Group	
991#b	Reserve Group	
993	Statistics	
993#a	Loan Count	
993#b	Hold Count	
993#c	Reserve Count	
993#d	Renewal Count	
993#e	Recall Count	
993#f	ILL Count	
993#g	Booking Count	
993#i	Fines Count	
993#j	Fines Total	
993#k	Fines Forgiven Count	
993#l	Fines Forgiven Total	

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USMARC Field Tag	Field Name	M2.X Field Tag
993#m	Lost Count	
993#n	Lost Total	
993#o	Lost Forgiven Count	
993#p	Lost Forgiven Total	
993#q	Damaged Count	
993#r	Damaged Total	
993#s	Damaged Forgiven Count	
993#t	Damaged Forgiven Total	
993#u	Claimed "Never Had" Count	
993#v	Claimed "Returned" Count	
993#w	Claimed "Paid" Count	
993#x	Current Loan Count	
993#y	Current Hold Count	
993#z	Current Reserve Count	
993#1	Current Renewal Count	
993#2	Current Fines Count	
993#3	Last Subject Borrowed	
993#7	Current Due Amount	

APPENDIX D: BIBLIOGRAPHIC RECORD FORMAT FOR RECORDS FROM VENDORS

D

MARC records can be created in various formats. Book vendors that provide MARC records may store the field and subfield information differently than M3. In this case, records would require manipulation after importing to M3. In order to alleviate unnecessary record manipulation, users should request the MARC record profile described below.

MARC21 MicroLIF Protocol

M3 uses the MARC21 MicroLIF Protocol, formerly known as USMARC MicroLIF Protocol. MicroLIF is an abbreviation for Microcomputer Library Interchange Format, a specific implementation of the MARC21 format incorporating library holding information. This format utilizes the MARC21 852 Location field for local holdings information. Each record must have one 852 field for every copy or volume purchased. The configuration of the 852 field should be as shown in Table D.1.

TABLE D.1

MARC 852 Location Field

Description	Subfield	Example
Location	a	YPWG
Sublocation or Collection	b	Reference
Classification Part	h	398.2
Item Part	i	AND
Call Number Prefix	k	REF
Call Number Suffix	m	v.3
Copy Number	t	c.2
Barcode	p	YPWG001234
Price*	9	p19.95usd

*852#9 should contain p, followed by the decimal price, followed by the ISO currency code for the currency with which the item was paid.

NOTE: It is not acceptable for the entire call number to be stored in 852#h; it must be split into the appropriate subfields (h, i, k, m).

Libraries that catalog as part of a district or region should prepare their records in the same manner, with the exception of subfields a and b. In this case, 852#a should contain the district or region code and 852#b should contain the individual library or building code. An example of district or regional cataloging of the 852 field is shown in Table D.2.

TABLE D.2**MARC21 852 Location Field for District/Regional Cataloging**

Description	Subfield	Example
Holding Symbol	a	FEH*
Sublocation or Collection	b	SRS**
Classification Number	h	398.2
Cutter (Author Letters)	i	GRI
Call Number Prefix	k	REF
Call Number Suffix	m	v.3
Barcode	p	SRS0012345
Price	9	p19.95usd

*Abbreviation for Franklin-Essex-Hamilton BOCES School Library System.

**Abbreviation for Salmon River Secondary School.

NOTE: The 852 field formats shown above apply to Mandarin 2.80e and M3 users.

APPENDIX E: CONFIGURING MEDIA TYPE ICONS

E

Tip: If you want icons to display in the OPAC only, they can be disabled in the Inventory module. For more information, see “Inventory pane” on page 8-3.

In order for media type icons to display in the OPAC and Inventory modules, certain codes must be entered into each bibliographic record. Table E.1 lists the appropriate icon for each type of bibliographic record along with the field, position, and codes needed in the record.

If more than one field and position are listed for a record type, enter the fields and positions in the order listed. If more than one code appears for a field and position, choose the one that is appropriate for the record.

TABLE E.1

Record Type	Icon and Image Name	Field and Position	Code and Description
Artifact	 artifact.ico	Field 000, position 6	r = Three-dimensional artifact or naturally occurring object
Book	 book.ico	Field 000, position 6	a = Language material t = Manuscript language material
		Field 000, position 7	a = Monographic component part c = Collection d = Subunit m = Monograph/item
Photo	 camera.ico	Field 000, position 6	k = Two-dimensional nonprojectable graphic
Music cassette	 cassette.ico	Field 000, position 6	j = Musical sound recording
Data CD	 cddata.ico	Field 007, position 00	c = Computer file
		Field 007, position 01	o = Optical disc

E-2 Appendix E: Configuring Media Type Icons

Record Type	Icon and Image Name	Field and Position	Code and Description
Movie, slide	 film.ico	Field 000, position 6	g = Projected medium
Electronic media	 floppydisk.ico	Field 000, position 6	m = Computer file
Journal	 journal.ico	Field 000, position 6	a = Language material
		Field 000, position 7	b = Serial component part s = Serial
Library kit	 kit.ico	Field 000, position 6	o = Kit p = Mixed material
Map	 map.ico	Field 000, position 6	e = Printed map f = Manuscript map
Non-musical sound recording	 microphone.ico	Field 000, position 6	i = Nonmusical sound recording
Music CD	 music.ico	Field 007, position 00	s = Sound recording
		Field 007, position 01	d = Sound disc
Sheet music	 sheetmusic.ico	Field 000, position 6	c = Printed music d = Manuscript music
Video recording	 video.ico	Field 007, position 00	v = Videorecording
Online resource	 www.ico	Field 000, position 6	m = Computer file
		Field 008, position 26	j = Online system or service

GLOSSARY

attributes	Fields within MARC records that can be searched. Each attribute must be attached to an attribute set. <i>See also</i> attribute set.
attribute set	Collection of attributes. The purpose of each attribute set is to define end user searches. The M3 system adheres to the standard Z39.50 attribute set to identify search fields. <i>See also</i> attributes.
Authority Control	Controls the consistency of bibliographic records. This is achieved by managing the headings (names, titles, and subjects) for bibliographic records, as well as the appropriate references from unauthorized and authorized headings to and from other authorized headings. <i>See also</i> authority record, cross-references.
authority record	Record in MARC format which controls the authorized forms of names, titles, and subjects in bibliographic records. <i>See also</i> Authority Control, cross-references.
barcode	Unique identification code assigned to an item or patron. An item barcode typically appears somewhere on the item, and a patron barcode typically appears on the patron's library card.
block	When a message is attached to a patron or item record, it must also be indicated how the message will interrupt (that is, block) the circulation transaction. To do so, a block type is assigned to each message when it is attached to a record. The M3 system includes four block types: • blocking block – The user must select an option in the message dialog box in order to proceed. • information block – The user can bypass this block by clicking anywhere in the window. This is the least intrusive block type. • nudge block – The first time a message with a nudge block appears, the user must select a decision in the message dialog box in order to proceed. Each subsequent time the message appears, the user can click anywhere in the window to proceed. • privilege block – The user must type a password to bypass the message dialog box. This is the most intrusive block type.
blocking block	<i>See</i> block.
Bookbag	Feature in the M3 OPAC and the optional Web Gateway that allows the patron to save item records to a temporary location during a search session.
booking	Method of reserving an item, such as a conference room or a piece of equipment, for a future day and/or time.
Boolean operator	Operators AND, OR, and NOT, used in a search query to link two or more keywords.
Bulletin Board	Feature in the M3 OPAC that can be configured to link to a Web page or HTML file.
circulation period	Period of time that an item can be loaned to a patron in a patron group or a special reserve group. The length of the circulation period is determined by the group the item is assigned to in the Group Editor.

2 Glossary

claimed never had	When a patron reports to the circulation desk that the item in question was never checked out to that patron.
claimed returned	When a patron reports to the circulation desk that the item in question was previously returned by the patron.
cross-references	In versions of M3 that support Authority Control, these appear as links in the Search Results window when a search term is entered that is managed under Authority Control. There are two types of cross-references: • “See” references lead a searcher from an unauthorized heading to an authorized heading. • “See also” references lead a searcher from an authorized heading to another related authorized heading.
delimited record	Bibliographic or patron records in which data fields are separated by a space, tab, punctuation mark, or other character. Delimited records are converted to USMARC format when imported into your M3 system.
Design Mode	In M3 Circulation, the mode that allows the panes in the main Circulation window to be customized. A different configuration can be prepared for each transaction mode. <i>See also</i> transaction modes.
Enhanced Search	One of two keyword search methods available in the M3 OPAC. This method offers search flexibility and options. <i>See also</i> Standard Search.
FTP	File Transfer Protocol. The predetermined format used on the Internet to send files.
fine	Monetary penalty that accrues when an item’s circulation period has expired before the item has been returned to the library. An overdue item generates a fine when the item is returned or claimed as lost. Damaged items can also generate fines.
fixed width record	Bibliographic or patron records in which data fields are limited to a specified number of characters. Fixed width records are converted to USMARC format when imported into your M3 system.
forgive	In M3 Circulation, an action to dismiss the fine for an overdue item. A fine can be partially or completely forgiven.
grace period	Amount of time a loaned item can be checked out beyond the specified circulation period before the item is considered overdue.
grouping	In ReportTool, a function that allows you to visually separate records that have a specific value and display summary data for each group.
Helping Hand	ReportTool’s wizard that can be used to help you create column, row, label, and crosstab reports; it simplifies the creation of reports. This is explained in more detail in M3 ReportTool online Help.
history	<i>See</i> search history.
hold	Method used to set aside a library item for a patron. When an item is checked into the library and therefore available, it is placed on hold. <i>See also</i> reserve.
holding	Any item, book, videocassette, and so on, currently in the library’s inventory. <i>See also</i> item.
holding record	In M3, a MARC record containing information for a specific item in the library’s inventory.
ILL	Interlibrary loan. The optional Web Gateway module includes an ILL request form.

Index Browse	Feature in the M3 OPAC and the optional Web Gateway that allows a patron to review and select a search term from existing field data. A patron can browse a field index (such as subject, title, or author) to select a search term.
information block	<i>See</i> block.
in-house circulation	Return function designed to “return” items that were removed from their shelf locations and left on library tables or desks. It is presumed that the items were used at the library though not checked out.
interface language	Language in which messages and names of windows, dialog boxes, buttons, text boxes, and tabs display. Selecting an interface language does not affect the language of the data in the database being used.
IP address	Numeric Internet Protocol address assigned by the Network Information Center (NIC) that uniquely identifies each computer on the network that uses TCP/IP. The IP address is a 32-bit identifier made up of four groups of numbers, each separated by a period, such as 123.432.154.13.
item	In M3, a library holding such as a book, videocassette, or CD-ROM that has a MARC bibliographic record and associated MARC holding record. Items can be added to and/or removed from an item group via the Group Editor module. A holding record can be assigned to only one item group at a time, but can be included in any number of special reserve groups. <i>See also</i> holding, patron group, special reserve group.
item group	Made up of one or more holding records, an item group is used to control the circulation behavior for items assigned to that item group. A library can create an unlimited number of item groups. Typical item groups are General Collection and Reference Collection. A holding record can be assigned to only one item group at a time.
join	In ReportTool, a function used to establish a relationship between two tables. A join is necessary when composing a report that contains information in more than one table. Each of the tables to be joined must contain a field with common data.
keyword	Single term used in a search query.
launcher component	Component found in the Visual Catalog Search of the M3 OPAC and the optional Web Gateway that consists of a launcher button and a link to an application or Web page to be launched by the button. <i>See also</i> Visual Catalog Search.
layout screen	Design area of a report; includes section breaks that allow for placement of objects and fields.
Library Transactions Mode	Mode in M3 Circulation in which you can view and print circulation statistics for specific transactions.
loaned item	Item that has been checked out by a patron through the library’s circulation system.
MARC	Machine Readable Cataloging. A MARC record includes a description of the item, the main entry and added entries, subject headings, and the classification or call number. (MARC records often contain much additional information.)
message bank	In M3 Circulation, a collection of patron and item messages available for attachment to patron and item records.
nudge block	<i>See</i> block.
OPAC	Online Public Access Catalog. An online bibliography of a library collection that is available to the public.

patron	Person or organization that is categorized by a single patron barcode for a library's circulation system. Patrons can be added to and removed from patron and special reserve groups via the Group Editor. A patron can be assigned to only one patron group at a time, but can be included in any number of special reserve groups. <i>See also</i> patron group, special reserve group.
patron group	Made up of one or more patron records, a patron group is used to specify the circulation permissions for patrons assigned to that group. A library can establish several patron groups such as General Patron, Library Volunteer, and Staff Member. A library can create an unlimited number of patron groups. A patron can only be assigned to one patron group at a time.
phrase search quotes	In searching, the use of quotation marks (" ") to enclose keywords in order to only find instances where the keywords appear together. For example, the keywords "Greek islands" find only occurrences of the two words together, and do not find individual occurrences of Greek or islands .
placeholder	Identifies the position on a report template where database fields subsequently will be placed when a report is created using the template. By using placeholders in a template, you can define the position of data fields prior to creating a report or selecting a database. Placeholders can be created only in a template. However, a report based on a template will inherit the template's placeholders. Placeholders can be used as markers for database, sort, and group fields, as well as in formulas, crosstabs, and charts. This is explained in more detail in the M3 ReportTool online Help.
port	Interface on a computer to which a device is connected. In TCP/IP networks, a port is the beginning or end of a logical connection. Port numbers identify the type of data being transferred by the port. For example, port 210 is used for Z39.50 traffic.
privilege block	<i>See</i> block.
purge records	This command removes all records marked for deletion from the M3 system. Purged records are permanently deleted.
query component	Component found in the Visual Catalog Search of the M3 OPAC and the optional Web Gateway that consists of a query button and the search query linked to the button. When a query button is clicked, the search query is sent and the results are displayed. <i>See also</i> Visual Catalog Search.
registry service	Provides the system administrator with an inside view into the workings of the server. It also allows the administrator to gain remote access and perform system maintenance. It is not related to the Windows registry.
report footer	Summary information at the end of a report, such as grand totals and charts.
report header	Information at the beginning of a report, such as the report title and charts.
reserve	Method used to set aside a library item for a patron. This method is used when the item is currently on loan. When the item is returned and becomes available, this status changes to hold. <i>See also</i> hold.
Reset	Feature in the M3 OPAC that clears the search history for the current search session. The system can be reset on command or configured to reset automatically after a predetermined idle time. <i>See also</i> search history.
search history	Feature in the M3 OPAC that allows the patron to return to an earlier Enhanced Search in the current session.
search query	Grouping of keywords and Boolean operators submitted to search a database.
See, See also	<i>See</i> cross-references.

Shelf Browse	Feature in the M3 OPAC and the optional Web Gateway that allows a patron to view records with a call number similar to that of a selected record. This is similar to looking at items to the left or right of a selected item on a library shelf.
SMTP server	Simple Mail Transfer Protocol. A protocol for sending e-mail messages between servers. Generally used to send messages from a client to a server.
special reserve group	Typically, a temporary group of patrons and items established to accommodate unusual circulation needs. For example, a library might create a four-week special reserve group to restrict certain science books to in-library use by students involved in a chemistry project. A library can create an unlimited number of special reserve groups, and patrons and items can be assigned to multiple special reserve groups. Special reserve group permissions override item group permissions.
Standard Search	One of two keyword search methods available in the M3 OPAC. This basic method is meant for simple searches or novice researchers. <i>See also</i> Enhanced Search.
system variable	Data available for use in a report based on the current date, time, or page number.
table check return	<i>See</i> in-house circulation.
TCP / IP	Transmission Control Protocol/Internet Protocol. The standard format for transmitting data over networks and the Internet.
template	Provides layout and format information to be used when creating bibliographic, holding, and patron records. Also used for reports, as explained in the ReportTool online Help.
temporary items	When creating a new holding record, the record can be designated as temporary. This means that the record will be deleted when the item is returned, and the barcode can be reused. Some librarians use this method to manage periodicals. You can configure Circulation to allow temporary items to remain in the catalog after being returned. Temporary items cannot be placed on reserve.
text field	Field created with ReportTool and made of up alpha or numeric characters.
topic component	Component found in the Visual Catalog Search of the M3 OPAC and the optional Web Gateway that consists of a topic button that opens a sub-menu of additional buttons. The sub-menus consist of query buttons that launch database searches, and/or launcher buttons that open different software applications. <i>See also</i> Visual Catalog Search.
transaction modes	Types of transactions that can be conducted in M3 Circulation. The transaction modes are Loan, Return, Renew, Reserve, Booking, and Status. <i>See also</i> Library Transactions Mode.
truncation	In searching, the use of an asterisk (*) character to designate one or more unspecified characters at the beginning or end of typed text. For example, the keyword farm* finds all terms beginning with farm: farmer , farming , farms , and so on (including farm). Similarly, the keyword *forest* finds all terms that include forest: deforestation , reforestation , and so on.
use attributes	<i>See</i> attribute set.
Visual Catalog Search	Easy point-and-click graphical search method in the M3 OPAC and the optional Web Gateway. It is a keyword search method disguised behind a graphical interface where topic buttons are connected to query buttons, which are linked to pre-defined search queries. The graphical buttons can also be configured to launch software applications. <i>See also</i> topic component, query component, and launcher component.

Webgateway	Interface that allows a library to place its OPAC on the World Wide Web. Patrons use Web browsers to connect to and search the library catalog database.
wildcard	In searching, the use of a question mark character (?) to designate one or more unspecified characters within typed text. For example, the keyword wom?n finds woman , women , and so on.

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