

# Library Manager User Guide

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## Help and Support

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There are a number of ways to obtain assistance in the use of Library Manager:

- Search within the user guide.
- The online help (press F1 to get help on the current screen) or select view help from the Library group of options in administration.
- Training by MUSAC agents: in order to get the most out of MUSAC software, it is recommended that you invest in training from authorised MUSAC training agents.

North Island            [MUSAC Product Specialists](#)  
South Island           [Solutions & Services Ltd](#)

## MUSAC Helpdesk

If you are a MUSAC Library User, you will have access to updates to MUSAC Library Manager and are also entitled to contact our Software Support team for answers to your software questions. For how-to assistance, please contact our agents.

The MUSAC Software Support team operates during normal business hours (8.00–4.45) throughout the school year and during the school holidays. The Support desk is closed over the Christmas-New Year period.

## MUSAC Training

For onsite training please contact our MUSAC product specialist for your region:

[MUSAC Product Specialists \(North Island\)](#)  
[Solutions and Services \(South Island\)](#)

## MUSAC Online

Visit our website for downloading modules and updates as well as obtaining product and other useful information. Our address is:

<http://www.musac.co.nz/>  
Or email us: [support@musac.co.nz](mailto:support@musac.co.nz)

You will need Internet access and a web browser such as Internet Explorer or Firefox. Contact your local Internet Service Provider for further details.

## MUSAC Product Specialists (North Island)

Courier: MUSAC Ltd, Room T1:21, Te Ara Building, Centennial Drive,  
Palmerston North 4410

Phone: 0800 600 159 option 2

Email: [training@musac.co.nz](mailto:training@musac.co.nz)

Web: [www.musac.co.nz](http://www.musac.co.nz)

## Solutions & Services (South Island)

**Note:** Solutions and Services provide training but not Helpdesk support for the South Island, please contact MUSAC for your software support requirements: (phone 0800 600 159).

Email [admin@solutionsandservices.co.nz](mailto:admin@solutionsandservices.co.nz)

Postal : P O Box 33357  
Barrington Mall  
CHRISTCHURCH 8244

Phone: (03) 3316210  
Fax: (03) 3316217

Courier: 99 Rose Street  
Somerville  
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Prepared by MUSAC, **November 2014**

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## How to use this user guide

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This user guide includes both background information and some step by step instructions on how to complete certain tasks. Using F1 you can access a relevant help screen in any part of administration.

Throughout this user guide there are suggestions as to how you may like to use the package. Often these are just that – suggestions. You are free to use the package in a manner that best suits your library environment. As always, we encourage feedback and ideas for future development of MUSAC software. The documentation assumes that you have installed the package using the default installation settings.

Please also note that our software continues to be updated, so you may find that the pictures displayed in the user guide or help file may not appear exactly the same as those you see on screen. In most cases they will be sufficiently similar to be able to follow the instructions.

## Getting Started

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### Welcome

Welcome to MUSAC Library Manager.

### Installing the software

**Please note:** Installation and un-installation instructions for Library Manager are provided in a separate document. Please read these instructions carefully before installing the package. Please also ensure that your workstations meet the minimum requirements for running the software, and have the latest MUSAC System files installed (visit [www.musac.co.nz](http://www.musac.co.nz)).

### Overview of MUSAC Library Manager

MUSAC Library Manager consists of two main application programs, Library Administration (LibAdmin.exe) and Library Searches (LibOPAC.exe). There is also a backup utility (MLMBackup.exe) which can be run separately and is also accessible through Library Administration. These applications can be accessed through the Library Manager program group accessed from the MUSAC Classic side bar, or under the Windows start menu (or from the desktop).

All Library functions (apart from searches) are contained in Library Administration. In order to create a new library database you will need to start Library Administration.

WebOPAC is a separate (optional) installation and provides a web based interface to Library Manager for use on non-PC machines.

# System Requirements and Installation

## Operating System:

Windows 7 or later, with the latest service pack.

## Other Hardware (Optional):

- A Windows compatible printer
- A Barcode scanner (keyboard wedge or USB type). Laser scanners are preferable to LED scanners.

We offer a barcode printing service which can supply you with high quality durable barcodes, or Library Manager prints and uses barcodes in the 3 of 9 format (also called Code 39). For more information on labels, please see Catalogue Reports.

Please see our website <http://www.musac.co.nz/barcode-label> for more information on this service.

# Installing Library Manager

Separate detailed [installation instructions](#) are provided with this user guide on installation – please refer to them before installing (available on our website). This section only gives an overview of installation.

Note that in general it is not recommended that you use an older version of Library Manager with data that has been updated with a newer version. Older versions may not be able to correctly interpret some data within an updated library database. You will have been provided with the following:

Licence file	This is a file encoded specially for your school. A current version can be obtained from the MUSAC website for registered users.
Program setup:	The MUSAC LibraryManager installation (on CD or from Website).
System Files setup:	Common MUSAC System Files (from CD).

The System Files setup needs to be installed on each workstation before you first run the module.



The program setup itself only needs to be installed once (on your network drive). Note that shortcuts will need to be manually added to other workstations.

Updates of the program are available periodically from our website. It is not necessary to re-install the system files on each workstation, this is a one-off step. Please read the accompanying MLM information before installing updates.



WebOPAC installation: Please note that the installation of WebOPAC is more complex than the main package installation. You should be familiar with IIS and have a running IIS installation before attempting to install ([WebOPAC notes](#) available on our website).

## Starting the module for the first time

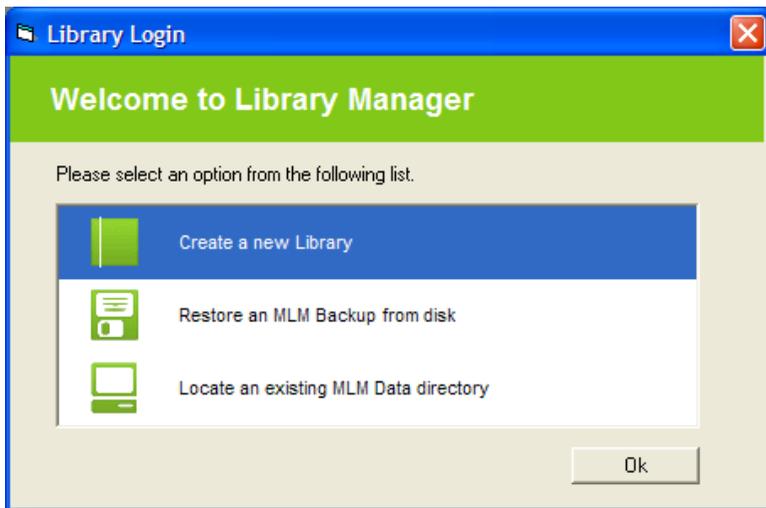
---

After clicking from the MUSAC sidebar, or Start > Programs > MUSAC Library Manager > Library Administration, a splash screen with your school name and version details will display. You'll need to install a school licence file to use Library Manager and the initial file will be supplied to you by MUSAC. This licence file will expire on 1 April of each year at which time you will need to install a current one using the links from the program which connect to our website. Please refer to [Library](#)

[Manager licensing](#) from the Library Manager section of our Document Library.

Follow the instructions provided to enter the licence file.

The following screen appears:



At this point you do not have any library data in the Windows format. Before you can use the package, you must setup a Library database. You have three options:

- Click 'Create a new Library' database. Refer to 'Creating a library' for more details.
- If you have had your data converted from other Library software, or you wish to experiment with a supplied sample library database, then you can Restore an MLM Backup from a pendrive.
- If you have an existing MLM installation or know that your data is stored on a network drive somewhere, you should select the 'Locate an existing MLM data directory' option.

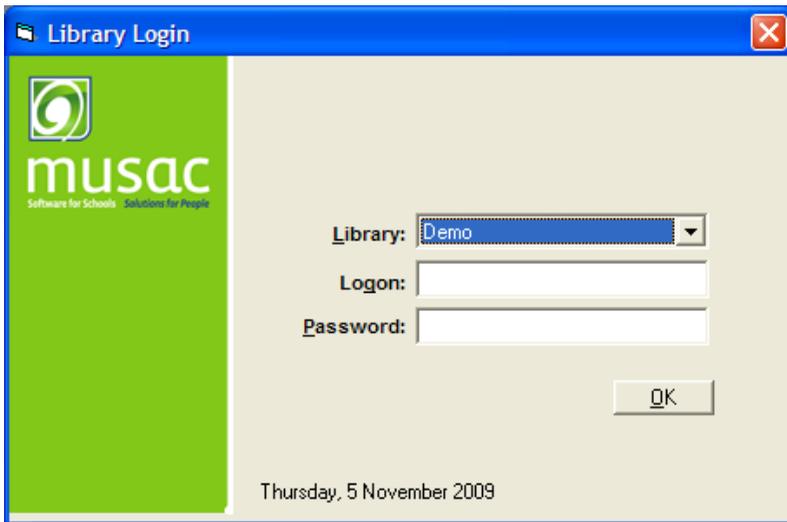
Refer to the Creating a new Library Database section for more details.

**Tip: You can click the 'O' character on the word login to display the above menu on subsequently using Library Manager.**

Once you have a library created, you will be presented with the Login screen.

## Login screen

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The login screen allows you to select the library database you wish to use and identify yourself. Logon names and passwords are specific to the library that you are logging in to – you may have different levels of access depending on the library selected from the list of available libraries.

The default logon is MUSAC, and password for a new library is MUSAC. For obvious security reasons you should change this after creating your own logon.

Library Manager automatically remembers the last library that was logged into.

To learn more about setting up logons, passwords and access refer to the Library Configuration section.

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**If you are unable to remember your password for your library, please contact the MUSAC Support desk 0800 600 159 for assistance.**

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**Hint:** You can click the letter O in the word login on the login screen to display the initial setup screen. This allows you to create a new library or select a location for existing library data.

Logging to a library database

Upon entering your logon name and password, ensure that the date shown is correct and then click on Ok.

### **Selecting a default library for administration**

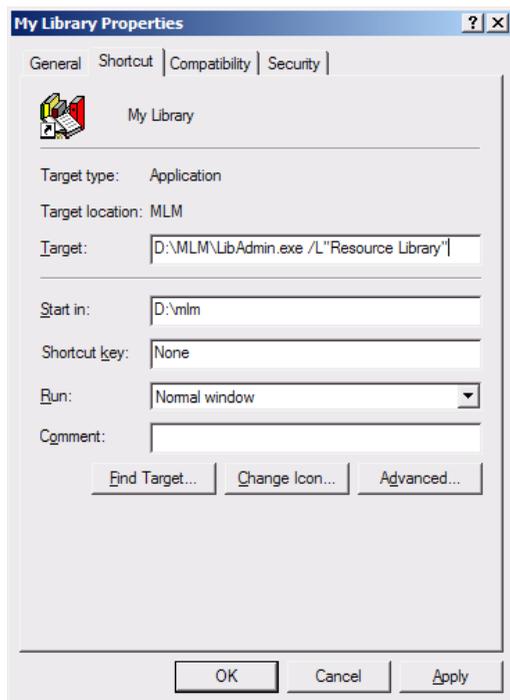
If you have multiple libraries and some Administration users typically use a library database other than the default, you may wish to create a shortcut to have the package to pre-select the required library on the login screen.

To do this, create a shortcut to LibAdmin.exe and add the following to the Target setting:

/L"School Library"

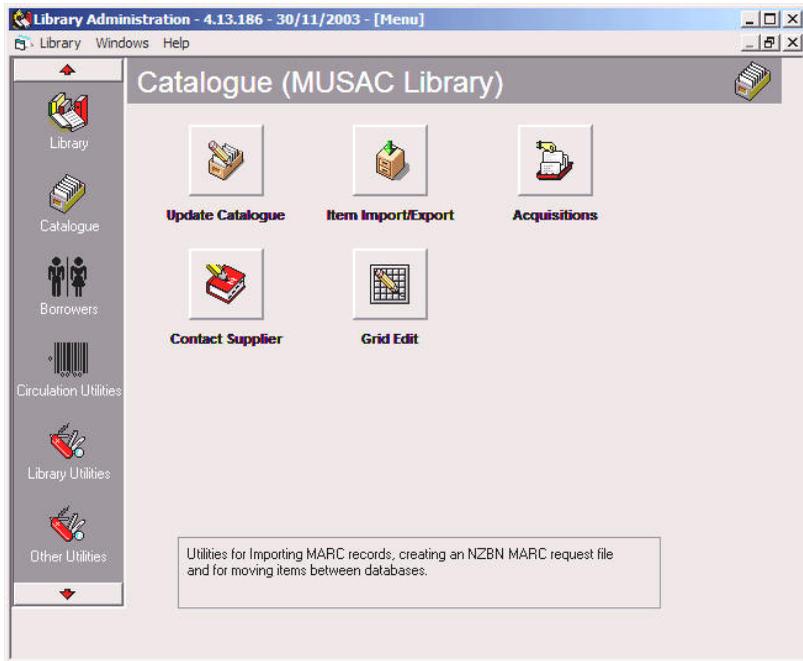
Where "School Library" is the name of the library you wish the shortcut to default to. Note that there must be a space between libadmin.exe and the slash (/).

The following example shows the default library set to "Resource Library".



# The Administration Menu System

---



The menu system in Library Administration has two parts to it. On the left hand side are the groups of menu options that are available. Selecting a group of options will change the available choices on the right hand side. (Note that depending on your access to the library you may not see all available options).

The arrows at the top and bottom of the menu on the left allow you to scroll the displayed group of options up or down.

Moving the mouse over a menu button will give you a description of what that option does. Click a button to access that area of the package.

You can configure which menu options are available to which types of users in Library Configuration.

## Switching Libraries

You can quickly switch between your available libraries by clicking Library -> Switch Library from the menu at the top of Administration. If your logon details match those for the library you are switching into, you will not be prompted for them.

## Library Databases

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This version of MUSAC Library allows you to create as many different libraries as you require. Each library has its own unique name (e.g. Resource Room, Library etc) and you can switch between the different databases using the logon screen. User access and configuration information is unique to each library.

The decision as to whether or not to set up a separate library database for your resource material or another purpose is something that you will need to consider for yourself. You could just have all your resource and library material included in the one database and identify them by location, however this means that searches will include the resource material – something which you may or may not consider desirable.

### **The Library Data directory**

The Library data directory is a shared directory that contains one or more Library Manager databases. By default, this directory is the 'Data' subdirectory with the program installation directory (normally MLM). It is possible to install library Manager on each workstation locally and just access the data across the network. To do this, you will need to ensure that you use a path that is the same on each machine (e.g. M:\LibraryData).

Refer the Login section for information on how to adjust the library data path setting.

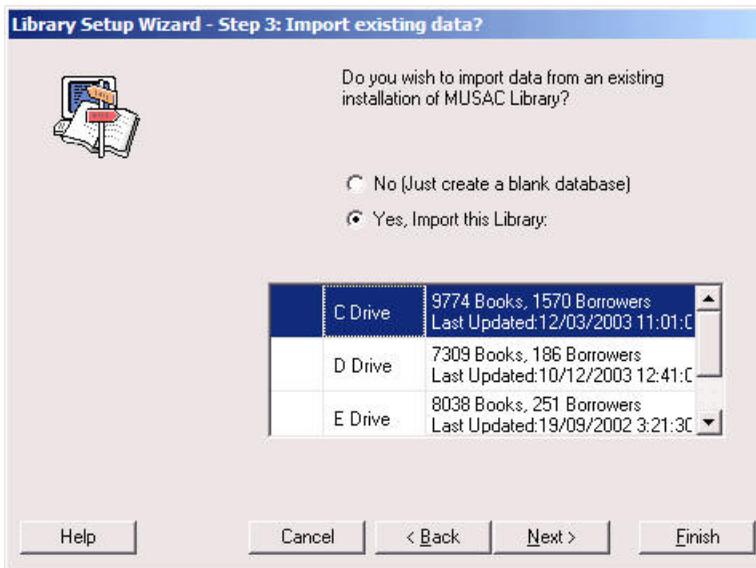
### **Creating a new Library Database**

To create a new library database you use the library setup wizard. This wizard is accessible by selecting from the menu that appears when first logging into the package in the log-in screen

or under 'Other Utilities' in Administration if you are already logged into a database.

## Library Setup Wizard Steps

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In order to use MUSAC Library Manager you will need to create a library database in the Windows format.

### Setting up a new Library database

Most of the steps involved in setting up a library database are self explanatory. On screen instructions will tell you what choices you have available to you and what you should do next.

#### ***Step 1: Library Profile***

The library profile determines some initial configuration settings for the library. These include the choices of available additional fields and various other defaults. You should select the description that best suits your needs. Once the library has been set up you should also verify that the configuration settings selected suit your purposes.

### ***Step 2: Import Existing Data***

You can create a blank database. Converted databases will appear with a tick next to them.

Creating a blank library database will import a default list of publishers, series etc.

### ***Step 3: Library Name***

Choose a meaningful name (Such as Kairakau Primary Library) for the library database being created. This name will appear in the list of available libraries to log onto. You can alter this name later if you wish to, using configuration.

### ***Step 4: Finishing and Importing Data***

The library wizard will now create a new library database and convert your existing library if you have requested so. If you have a large library and/or a slow computer or network, this step may take some time to complete, however it only needs to be completed once.

## Library Configuration

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Configuration settings affect a number of areas of the package. It is important that you are familiar with the options available and how they affect the operation of the package.

Once you have changed configuration details, **remember to press save** to ensure that these changes are applied.

### Library - General

The screenshot shows a software configuration window titled "Library Configuration". On the left is a tree view with categories: Library (General, Calendar, Sounds), Items (Field Defaults, Barcode Format, Editing, Subject Authority), Borrowers (Barcode Format, General), Circulation (General, Colours), Messages (General), OPAC (General, More Options), and Reports (General). The "General" option under "Library" is selected. The main area is titled "General" and contains five input fields: "Library Name" (School Library), "Windows Library Path" (D:\MLM\data), "Package Path" (D:\MLM\), "E-Mail Address" (library@myschool.school.nz), and "SMTP Server" (192.168.0.3).

**Library Name:** This is the name of your library.

**e-mail Address:** This is the address that will be used for replies to e-mail messages generated within the package.

**SMTP server:** You will need to get this information from your computer administrator.

## Library - Calendar

The screenshot displays two main sections in a light beige interface. On the left is the 'Library Calendar' for the year 2003, showing a calendar for December. The days of the week are labeled S, M, T, W, T, F, S. The dates are arranged in a grid, with the 6th, 13th, 20th, and 27th highlighted in blue. Below the calendar is a 'Note for Today' field with a text input box and a dropdown arrow. On the right is the 'Final Due Dates - Year level' section, which is a table with 14 rows (Year 0 to Year 13) and 3 columns. The first column contains year labels, the second column contains due dates (e.g., 30/11/2003 for Year 7 and 8), and the third column contains right-pointing arrows. Below the table is a text instruction: 'Enter a final due date for each year level as required. The above restriction only applies to pupil borrowers.'

**Library Calendar** 2003

December

S	M	T	W	T	F	S
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Note for Today

Press F1 for more information on the Library Calendar.

**Final Due Dates - Year level**

0	0	
1	Year 1	
2	Year 2	
3	Year 3	
4	Year 4	
5	Year 5	
6	Year 6	
7	Year 7	30/11/2003
8	Year 8	30/11/2003
9	Year 9	
10	Year 10	
11	Year 11	
12	Year 12	
13	Year 13	

Enter a final due date for each year level as required. The above restriction only applies to pupil borrowers.

The library calendar allows you to specify which days the library is open. Loan periods will be adjusted forward (if you have the 'use library calendar' setting set in configuration), to fall due on a date the library is open.

You can also use the library calendar to specify last due dates for material (e.g. end of term). Due dates will be brought forward (for the selected borrower type), so that material will be due before the library closes.

You can also enter a note against each day that may indicate something special about that particular date (e.g. library is closed for stocktaking).

On the right hand side, you can specify a different due date for each year level if you wish. Note that the earliest applicable final due date is used, if you have set last due dates on both the left and right hand sides.

## Library - Sounds

### **Feedback:**

You can change which sounds are used to indicate warnings etc within the package. To change these sounds, click on the button below.

Configure Sounds

Once the sounds screen appears, scroll down to 'MUSAC Library Manager' and select the sounds you wish to use for the specified events.

Note: The above settings are specific to this computer and require you to have a sound card installed in your machine.

The message appearing on screen describes these settings. These are useful for circulation activities where your attention may not always be on the screen.

## Items - Defaults

---

### Items - Field defaults

Field Defaults for NEW items are determined by media. Select a media type and field to specify a default.

Media type:  Field:

Field Name	Default Value
Loan Period	14d
Location	Our Library

Global defaults are used unless you have set a corresponding field default for a particular media kind, in which case that default is used.

*These defaults are used when creating NEW items and are not applied to existing items!*

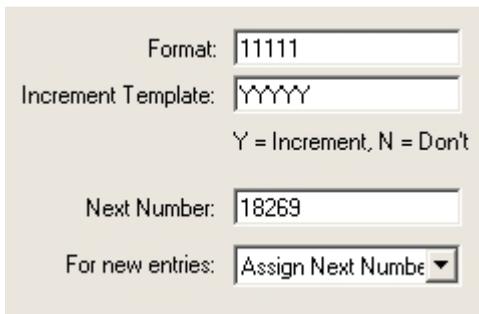
This allows you to set the defaults for newly created items. The defaults applied will be the defaults for the media type 'Global Defaults' unless there is a default listed for the same field under the specific media type. For example you may set the loan period to 14 days for all items (global defaults), except CDROMs which may be set to 7 days. Under the CDROM media you therefore specify 7 days.

If you wish to have the package default to using 'book' type rather than prompt you each time for the media type, you can do this by setting the default for the media field (global defaults).

**Note about added field defaults:** Added fields only appear against the items that you have placed them against. If you wish to always have an added field appear against new items of a

particular media (or all media), then it is just a case of adding the added field to the field defaults (you do not need to have a default value, although you can if you wish).

## Items - Barcode defaults



Format:

Increment Template:

Y = Increment, N = Don't

Next Number:

For new entries:

Here you can enter the defaults to be used when allocating a new barcode. Whether or not these settings are used is determined by the setting under 'For new entries'. You may find it easier to set this to 'Leave blank' and just enter (or scan) the barcode once it has been placed on the book. Using this method ensures that the barcode on the book and the entry in the Accession field of the item match correctly.

## Items - Editing

Display the following screens when editing item details:

<input checked="" type="checkbox"/> Detail	Spellchecker settings
<input checked="" type="checkbox"/> Added Fields	
<input checked="" type="checkbox"/> Notes	
<input checked="" type="checkbox"/> Subjects & Keywords	
<input checked="" type="checkbox"/> Groups	
<input checked="" type="checkbox"/> Attachments	
<input checked="" type="checkbox"/> History	
<input checked="" type="checkbox"/> Financial	

Automatically complete codes

Let me manually set Fiction/Non Fiction

Delay keyword index updates during editing

Automatically uppercase author surname

Automatically calculate the overdue price when altering the purchase price using the following method:

(No Change)

Combine copies in scan mode.

Split Author field

Here you specify the behaviour of the cataloguing screen. You can choose which cataloguing tabs will be displayed.

**Let me manually set Fiction/Non fiction:** This option switches off the automatic determination of the general classification of an item. Usually the package considers a classification beginning with the number to be a Non-Fiction title. Those without a classification or one beginning with a letter are considered to be fiction. Check this box if you wish to set this individually for each item.

**Delay keyword index updates during editing:** Usually this setting is on to prevent the search indexes being updated each time you save a new item and will update them in bulk once you leave the cataloguing area.

**Automatically uppercase author surname:** This setting automatically uppercases the first word entered into the author field. Secondary author surnames are not automatically updated.

**Automatically calculate the overdue price:** This allows you to automatically add a fixed amount (or percentage) to the purchase price when entering a new item.

**Spellchecker settings:** Use this button to alter the settings used by the spellchecker.

**Combine copies in scan mode:** This button groups copies that have the same title/author combination into a single entry in scan mode. This can be useful if you have a resource library where there are many copies of the same item.

**Split author field:** This allows you to enter separate details for each author and define their relationship to the title (e.g. editor, illustrator etc). If you enable this option after entering or importing existing items, the author details will be split on subsequent editing of a given item.

## Items - Subject Authority

Subject Authority to use:

Note: The ability to edit subject linkages is only available if you have selected a subject authority type.

Prompt for verification when adding non approved or unchecked subject entries

Display Non approved and unknown subject terms in different colours  
(i.e. Black = approved, Red = Not Approved, Blue = Unknown)

Click this button to update your subjects list and link to a supplied electronic authority file.

View the list of differences between the subject authority and your subjects listing.

This section allows you to configure a SCIS or TePatakataka subject authority. Refer to the section on subject authorities for more information on these options and their effects.

## Borrower, Circulation & Message Defaults

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### Borrower Defaults

#### Borrowers - Barcode format

**Borrower Numbers:**

Library Number format:

Increment Template:

Y = Increment, N = Don't

Next Number:

For new entries:  ▼

These options work in an identical fashion to the item barcode defaults.

#### Borrowers - General

Display borrower contact details on overdue slips.

Initial tab in borrower editing screen:  ▼

These settings are self descriptive.

# Circulation Defaults

## Circulation - General

Allow circulation on Barcodes only

Allow borrower/item selection from scan mode

Automatically change to Issuing when borrower barcode scanned.

Use calendar to modify due dates

Under daily circulation only show current transaction information.

Disable Interloan circulation facility

Suffix characters to ignore on barcodes: (e.g. '<6' = maximum of 6 characters scanned on barcode.)

Update Overdues:

Warn me if there are new overdues

Number of Reserve slips:

Queue Reserve slips for later printing.

Maximum number of renewals allowed:

Maximum reserves per borrower:

Type	Max. Reserves
Adult	9999
Child	9999
Delete	9999
Leaver	9999
Pupil	5
Staff	9999

**Allow Circulation on Barcodes only:** If this box is checked, entering text that does not match an existing accession number or borrower library number will cause a warning message to appear. This box needs to be unchecked if you wish to be able to circulate item and borrowers by title or surname.

**Allow borrower/item selection from scan mode:** This setting allows you to choose a borrower or item from scan mode even if the 'circulation on barcodes only' option is set. This prevents inadvertent issuing of material to borrowers that can happen without the barcode only option on, but does allow the flexibility of clicking to select a borrower/item from scan mode.

***Automatically change to issuing when a borrower barcode is selected:*** You will probably want this set as it allows you to easily switch back to issuing if you are currently returning material.

***Use library calendar to modify due dates:*** Checking this option will use the library calendar settings to modify the due date to ensure it falls on a day the library is open and is before the final due date allowed for borrowers. This allows you to ensure your items become due at a time that most suits you. During circulation, if an item has had the due date altered due to the calendar settings, the due date will appear highlighted. You should of course ensure that the library calendar is configured properly before you activate this default.

***Under daily circulation only show current transaction information:*** This option defaults to showing only the current transactions (ie. issues and overdues, rather than the full borrower history) when bringing up the borrower history in circulation.

***Disable interloan circulation facility:*** This switches off the facility that is activated by the Interloan status. (i.e. no box will appear asking you to enter or confirm the Interloan item details. Refer to the section on cataloguing for more information about the interloan facility.

***Suffix Characters to ignore on barcodes:*** This option is used for those libraries that have a fixed number appearing as a suffix on the barcodes. The most common example of this would be the 4 digit school number, which although it appears on the barcode is not actually included on the accession number in the package. Entering a sequence of characters here will remove those characters off the end of the barcodes where they exist.

Alternatively entering '<' (without quotes) followed by a number will only read the specified number of characters on the barcode. For example <6 will only read a maximum of 6 characters from your barcodes. Additional characters on the right hand side of the barcode will be ignored. Using '>' has the same effect but removes additional characters from the left hand side of the

barcode (e.g. '>6' will read a maximum of 6 digits from the right hand side of the barcode).

**Update Overdues:** This option allows you to specify how often the package will check and update overdue information against items. By default this is configured to run once a day. However if you issue for periods less than a day, you may wish to increase the frequency of updates. You can also switch the automatic updating of overdues off. In this case you will need to run the 'Update Overdues' option under the circulation area in Library Administration in order to have the circulation status (i.e. returned, out, overdue or misplaced) to be correct.

**Warn me if there are new overdues:** Having this option set will make the package notify you after updating the circulation status, if there are additional overdue items. This can be used in conjunction with the update overdues button to determine if there is material that has been issued for the period and has not been returned (i.e. is overdue at the end of the period).

**Number of reserve slips:** This allows you to specify the number of slips that are printed during circulation.

**Queue Reserve slips for later printing:** This option will prevent a slip being printed when a reserved item is returned during circulation, however it will flag the reserve record to be printed later.

**Maximum number of renewals allowed:** This specifies the number of renewals that a borrower is permitted to have before the system prevents further renewals.

**Maximum number of reserves per borrower:** This option can be used to prevent borrowers reserving too many items.

## Circulation - Colours

Change the circulation screen background colour to the following (depending on the activity)

Activity	Colour
Issuing	Green
Returning	Pink
Reserve	Blue
Renew	Grey

Click the required row to select the desired colour.

You can use this setting to change the background colour in circulation depending on the current circulation activity.

## Message Defaults

This section allows you to change various messages that appear on Library reports and to change the OPAC search names.

The following messages are configurable. Note that these settings are specific to each library database.

Message type:	Your message
Addressee	The Parent/Guardian of:
Logo Text	%REGNAME% %LIBRARYNAME%
Message	Your assistance in the recovery or cost of replacement for the above items would be greatly appreciated. Please contact the school library if you require further information.
Signature	School Librarian
Title	Final Overdue Notice
+ <b>OPAC Search Names</b>	
+ <b>Overdue Slip Messages</b>	
+ <b>Reserve Slip Messages</b>	

The messages are grouped by the sections they relate to. You can collapse/expand the section contents by clicking the -/+ square in the section heading.

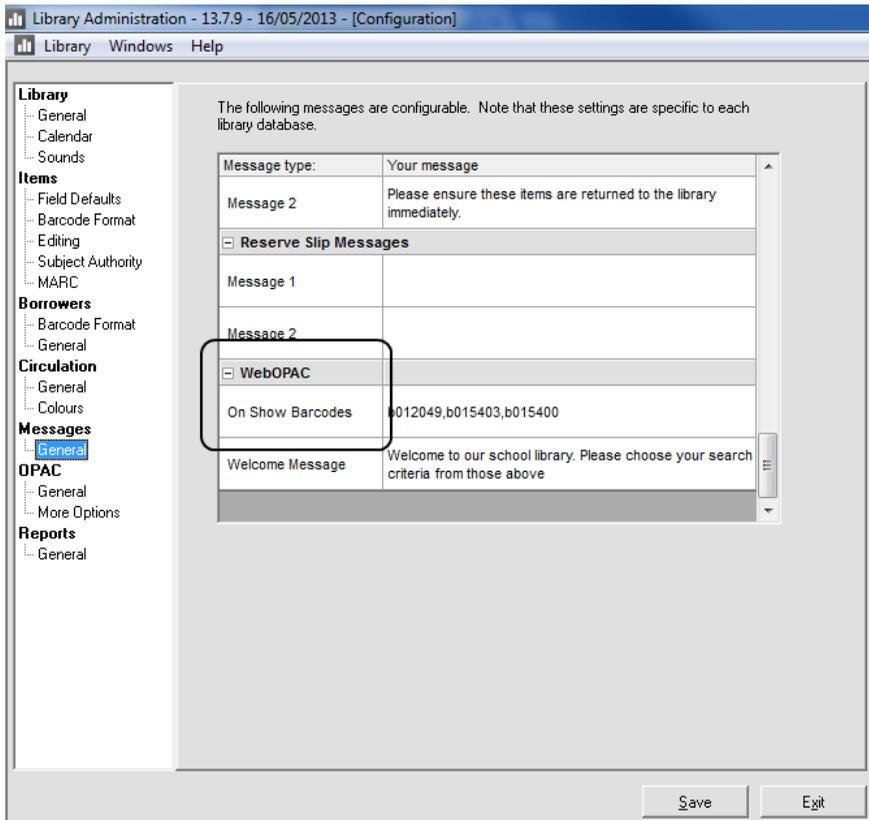
*OPAC Search Names:* Change these entries to change the label used within searches.

*Overdue/Return slip messages:* These entries allow you to customize the message appearing on the slips to suit your library.

*Overdue and Out Lists – Section break message:* This allows you to display a message at the start of each section break. If you split the overdues list and circulate it by class etc, you can enter a custom message that will appear on each page.

*WebOPAC – includes On Show message configuration:*

Note that right at the bottom of the Messages > General screen is the WebOPAC messaging area for the On Show items:



The On Show area in WebOPAC allows for the display of highlighted material from the catalogue (for example Book of the week etc). The list of barcodes for items to display needs to be set under Configuration > Messages > “WebOPAC: On Show Barcodes” setting. This option looks best when the selected items have cover images. The accession number of the item/s you want displayed is entered here, with a comma between them for the On Show items you want displayed.

Remember to click the Save button, once you have made any changes.

## OPAC Defaults and MLM Search Logic

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**Search Options:** These settings  ▼

---

A Keyword Search searches these fields:

- Notes
- Reviews
- Series
- Subjects
- Title

Allow these Actions in OPAC:

- Reserve Titles
- View Borrower History
- View More Detail
- View Reviews
- View See Also Search

Allow these Searches:

- Reading Age Search
- Series Search
- Subjects Search
- Title Search

Default Search Level:  ▼

Default word matching:  ▼

Don't match entries whilst typing.

Run OPAC in full screen

Hilite search terms in Notes/Keywords

Show who has item issued.

Search Filter:

**Note:** OPAC settings can be configured differently for different user types or you can have the same configuration set for all users of the library. If you change the setting (at the top of the screen) to "These settings differ for each user type", then the configuration settings are specified through the users and groups area, not in this configuration screen.

**A keyword search matches these fields:** Tick the fields that you wish to match on keyword searches. Choosing many fields will increase the number of matches in your keyword searches. For example a keyword search for 'London' will return an item that has 'published in London' in the notes, if you choose to search the notes field during a keyword search.

**Display these searches:** Here you can choose to hide some of the searches available within OPAC. By default all searches are displayed.

**Default Search Level:** Most of the searches in OPAC have both a simple and advanced options. You can choose here which of these sets of options displays initially.

**Allow these actions in OPAC:** Here you can specify what your OPAC users can do within OPAC. Check the options you wish them to have access to.

**Default Word Matching:** This setting determines how a Title, Author and keyword search will match against items. This setting will have a significant influence on the quality of the search result. Please read the following section in order to understand the trade off between the exact and similar match options:

**Don't match entries whilst typing:** This switches off the "auto-complete" matching of subject/series/publisher search terms against their respective lists.

**Run OPAC in full screen:** This runs OPAC in full screen mode (removing the taskbar and window title). This has the benefit of discouraging OPAC users from switching to other applications.

**Hilite search terms in notes/keywords:** This option highlights the matching terms in keywords and notes when displaying a matched item.

**Show who has item issued:** Enabling this option results in a magnifying glass appearing on screen next to the items availability status. To display the details of the current borrower for this item, click this icon.

**Set search filter:** This button lets you set the filter that a search will search within. For example you may wish to exclude items with a non current status from searches.

**Compact search database:** This compacts the database that is used to hold temporary search results. As this database is

shared between libraries, it is not included in the regular library compaction.

## **An explanation of the Similar/Exact search logic**

The choice of the word matching setting (similar/exact), can have a significant impact on the number of items returned during a search.

The similar match mode is intended for younger users whose spelling may not be quite accurate. If this mode is used, the package will return a fuzzy search result that will most likely include the items you were looking for even if the spelling is not quite accurate. The flipside of this is that there are more items returned in the search results and there may also be numerous items that do not appear to be anything like what you were searching for. By selecting the similar search match you are effectively saying that your search criteria may include spelling mistakes and you wish to have the package attempt to compensate for this.

The matches in similar mode are based on soundex codes. Similar sounding words will match to the same soundex code (for example 'cowly' and 'cowley' both convert to a soundex code of C4, resulting in a match under the author search in OPAC). The downside of this is that words such as 'clay' and 'cole' also have the same soundex code of C4.

It should also be noted that only entering partial words with the similar match option set will result in even less of a success. For example, the soundex code for 'Co' is 'C' which will result in an author match on 'Jones, C' and not 'Cowley'.

As the Author field is free text entry, it is not easily possible to determine the difference between an Authors surname or first name. The suggested cataloguing practice is to enter the surname in capitals followed by the first name, however MLM does not enforce this. Therefore the author search may return a match based on the authors first name.

The exact search match on the other hand, requires that you be precise about your spelling. For example entering 'Cowly' will not match 'Cowley'.

In summary the advantages and disadvantages of each option:

	Advantages	Disadvantages
Similar	Includes closely sounding matches – taking account of MINOR spelling mistakes.	May also include results that may not appear to match what you're looking for.
Exact	Will not include seemingly incorrect search results.	May not return items that you would expect if the spelling is incorrect.

In order to get the best search result, you need to determine what level of spelling ability your OPAC users have and whether it is better for them to get no search result (if they make a spelling mistake) or to get a broad range of matches, from which they can then select the desired entry. It should be noted that you can switch between similar and exact matches by clicking on the 'Advanced' tab in the search screen and selecting your desired setting.

# User Logons and Security

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## Users and Groups

This area of configuration is used to set up who has access to the package and what they can do.

### Users/Logons

**User Logons for this Library:**

MUSAC  
OPAC User  
Students

Add User Remove User

Select an existing user from the list of user log-ons or click on 'Add New User' to create a new user log-on.

**Details**

Real Name:

User type:

Password:

Confirm Password:

Here you create and edit the logon details for people you wish to have access to the package.

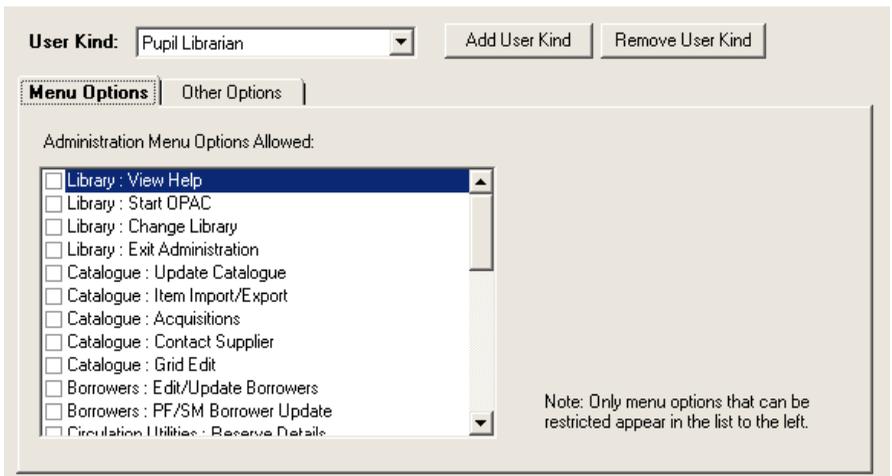
Each user/logon must belong to a group or user kind. There are four default groups (Librarian, Pupil Librarian, Teacher with Library responsibility and OPAC user). The access rights and abilities that users have within the package are determined by the type of user they are rather than the individual user. This makes it simpler to manage access to the package.

Once you have set up your users, you should then check what access each user type has.

## To create a new User logon:

1. Enter 'Users and Groups' under configuration in Administration
2. Click on 'Add User'
3. Enter the users logon name
4. Enter the additional details on the user, including which group they are a member of and their password (you need to enter this twice for verification).
5. Click save.

## User Groups (User Kinds)



User Kind: Pupil Librarian [Add User Kind] [Remove User Kind]

**Menu Options** | Other Options

Administration Menu Options Allowed:

- Library : View Help
- Library : Start OPAC
- Library : Change Library
- Library : Exit Administration
- Catalogue : Update Catalogue
- Catalogue : Item Import/Export
- Catalogue : Acquisitions
- Catalogue : Contact Supplier
- Catalogue : Grid Edit
- Borrowers : Edit/Update Borrowers
- Borrowers : PF/SM Borrower Update
- Circulation Utilities : Reserve Details

Note: Only menu options that can be restricted appear in the list to the left.

User groups determine the access that a person has to the package. The following built-in user kinds are available:

- Librarian(Full access, cannot have any rights removed).
- Teacher with library responsibility

- Student Librarian
- OPAC User(Has no access to administration).

You can also add your own types of users if you wish. Remember that the decision to add a new type of group should be based on roles, not specific users. For example you may have two different permission levels you wish to assign to student librarians (e.g. junior and senior).

## **Other options**

This screen contains additional group specific options:

*Allow only basic circulation options:* This removes the Borrower, Item and OPAC options from the circulation menu.

## **Changing Access options for a group of users**

1. Select the Groups tab under 'Users and Groups' in Configuration under administration.
2. Menu options and actions that are ticked will be accessible to the selected group of users. Click in the checkbox to include/exclude the required options.
3. Click save.

# Passwords

The following override passwords apply for certain activities within the package.

You can also specify which groups of users do not have to enter the override password to complete the requested action. Users at the Librarian level are never asked for override passwords.

**Password Type:**

Settings for the above password

The password is:

The above Password is NOT needed for the following types of users:

Place a check next to the kinds of users who you do NOT want to have to enter the override password selected above.

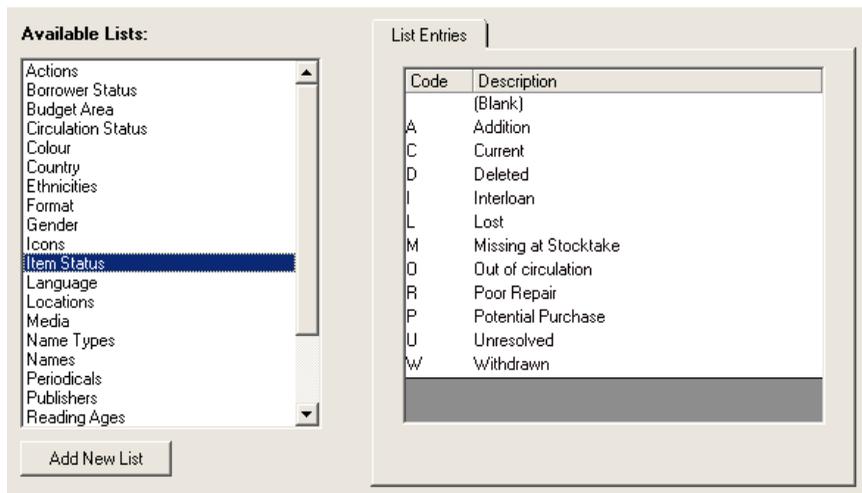
- Librarian
- OPAC User
- Pupil Librarian
- Teacher with Library Responsibility

This screen allows you to specify passwords required for certain activities. You can also set the level of users who do not require a password to be entered (librarian level users never need to enter passwords).

## Lookup Lists and Field Definitions

---

### Editing and setting up lists



This screen displays the regular authority files of subjects, series, publishers etc as well as custom lists that you may have created for use with custom fields. There are also a number of lists that have special purposes within the package – some of which are listed below:

List	Description
Budget Areas:	This list is used for Acquisitions (used with the Budget Area fields).
Icons:	This is a list of Icons that may appear in OPAC to indicate categories of items (e.g. reading level).
Names:	A list of names (authors, illustrators etc).
Name types:	This is used by the author entry field (when split) to specify the association a name has with the item.

Media list:	You may select an Icon to display on the search result list in OPAC. These Icons can give your OPAC users the ability to instantly recognise what type of media an item is.
-------------	---

Highlighting a list on the left hand side will display the members of that list on the right. You can then click 'New Entry' to add an item or 'Edit Entry' to display additional details on the entry. Some lists will give you additional options. For example editing a subject will allow you to add or change the Dewey number associated with that subject.

Some lists can be fully altered, others (such as item status) are not editable. The borrower status list can have additional items added, however you cannot delete existing standard statii.

Clicking on the options in the list entries screen will allow you to delete the selected entry or combine existing list entries into a single entry. For example if you have a number of entries with

slightly different spellings (but which are obviously the same entry), you can ctrl click on each entry you wish to combine. Then select 'combine selected entries' after clicking on the options button. You will then be prompted for the entry you wish to combine these to. This feature is useful for people that may have converted from other library systems which did not have authority lists.

## Creating custom fields

Library Manager allows you to create your own fields in addition to those that already exist within the package. This is useful if you are cataloguing a variety of media types and wish to record information for which there is no corresponding field within the package.

You can also use this section to change the names of fields as they appear on the screens and within reports.

The screenshot shows the 'Field Setup' dialog box. At the top, there are tabs for 'List Setup' and 'Field Setup'. Below the tabs, a message states: 'Below are the fields contained in this library database. To add new fields press 'Add Field'. Note that once a field has been added, it cannot be removed.' Below this message is a 'Field Category' dropdown menu set to '(All fields)'. On the left side, there is a list of fields with 'Author (Item)' selected. On the right side, there are several input fields: 'Display Name' (set to 'Author'), 'Original Name' (set to 'Author'), 'Data Type' (set to 'Short Text'), 'Lookup List' (empty), and 'Description' (set to 'Author(s) of title'). There is also a 'Reset Field Names' button. Below these fields are 'Field Attributes' with checkboxes for 'Display in Reports' and 'Display in Field Search', and a 'Relative Field Width' field set to '50'. At the bottom, there are three buttons: 'Create New Field', 'Remove field', and 'Save'.

Note that although you can change the names of virtually all fields, you should use this feature carefully in order to avoid confusion (e.g. naming two fields with similar names will mean

that you may have difficulty in distinguishing between the two).

**Field Category:** Select the appropriate category of fields you are currently interested in and the list of fields along the left-hand side will be updated to display just those fields.

**Display Name:** This is the name that identifies the field throughout the package. You can change the name to suit your own purposes (e.g. in a music library, Title may become Album and Author become Artist). If you choose to rename fields you should do so carefully in order to avoid confusion.

**Original Name:** This is the original (default) name of the field, when it was first created.

**Data Type:** This indicates the type of information that can be stored in the field. Note that you can only change the data type for added fields and changing the data type will mean any existing information in that field will not be accessible.

**Lookup List:** If the field has a data type of List lookup, then you can specify what list is associated with this field.

**Description:** This gives you a short description of the intended purpose of the field.

**Reset Field Names:** This button will change all display names for fields back to their original values.

**Create New Field:** Allows you to create a new added field that you can use to store information against items.

## How to add a new Field Definition

Before you set up your own fields, you should first check whether or not there is a corresponding additional field already defined within the package. If so, you should use this field as future versions of the package may expect the information to be entered there.

1. From 'Configuration – Fields and Lists – Fields' click on 'Create new field'.
2. Enter the name of the field.
3. Select an appropriate data type for this field. This determines the type of information you can record in the field. If you wish the field to use a lookup list you will need to create that list as well.
4. Optionally enter a description for the field.

## How to change a Field Name

Note that although there is a great deal of flexibility in being able to change the names of fields, you should be careful when doing so, to prevent confusion over what information is recorded in which field.

1. Click on 'Fields and Codes' in administration (configuration).
2. Select the fields tab.
3. Select the appropriate field category and the field you wish to change the name of.
4. Select the field from the list and change its display name.
5. Click on save.

# Borrower Framework

Year	Title	Code	Can borrow?	Item limit	Loan Period
0	Y0	-	Y	2	21d
1	Y1J1	-	Y	2	21d
2	Y2J2	-	Y	2	21d
3	Y3Standard 1	-	Y	2	21d
4	Y4Standard 2	-	Y	2	21d
5	Y5Standard 3	-	Y	2	21d
6	Y6Standard 4	-	Y	2	21d
7	Y7Form 1	-	Y	2	14d
8	Y8Form 2	-	Y	2	14d
9	Y9Form 3	-	Y	2	14d
10	Y10Form 4	-	Y	2	14d
11	Y11Form 5	-	Y	2	14d
12	Y12Form 6	-	Y	2	14d
13	Y13Form7	-	Y	2	14d
14	Adult Pupils	-	Y	2	14d
15		-	Y	2	14d

Here you can specify your year codes and titles.

You can also set the default loan periods and maximum issuable items for each year level.

These defaults can be applied to either all pupils at a particular year level or just those that match the current defaults.

Change defaults by borrower type

The borrower framework describes the manner in which borrowers can be grouped for extraction in reporting and filters. This information is normally imported through the Student Manager borrower update, however you can also enter this information manually if you wish.

## Years and Titles

Under this section you can specify the titles of the scholastic year levels, whether borrowers at this level can borrow items and the default loan periods and issue limits for borrowers. Clicking save will apply these defaults to your borrowers. If you have selected the 'Apply to those not matching default' button then the settings will be applied to all borrowers not just those who had the previous default for this option.

If you have borrowers who have had their borrower limits set to something other than the default limits and periods, you will want to keep the box unchecked. Note that you can also change

the defaults by borrower type using the button at the bottom right of the screen. As there is a cross-over between settings by status and by year level, the actual settings applied to borrowers will be those that you specified last (i.e. by type or level).

Unused year levels can be used for non-pupil borrowers. For example, Staff can be entered at year 14 and community borrowers at year 15.

## **Horizontal Groupings (Form or Class)**

Enter your Form or Class names in the list. The 'Pupil Files' tab is where you set names for Horizontal classes.

## **Vertical Groupings (Group or House)**

Click 'Pupil Files' tab to enter your group or room names in the list.

## **Timetable Options and Option Line Names**

The timetable option lines and timetable options are displayed here. Select the year level you wish to view from the dropdown menu. Option lines are displayed across the screen and the options occurring within an option line are displayed vertically.

You can edit the option line names by clicking on the 'Show option lines' button. A (\*) indicates an active option line and a (.) indicates an inactive line.

This information is generally not entered manually but by using the SM borrower update facility. It is possible to import from Student Manager student email addresses together with preferred surname record (where the option is selected), the student's record matching on student name rather than borrower ID.

## **Student Files Tab**

Here you can set the names of your horizontal and vertical classes.

## Reports Configuration

---

Margin settings for letter type reports:      Top:  mm  
(Note: Enter 0 (zero) to use the default settings for the margins)      Left:  mm

---

Adjust the following settings if you have problems reading barcodes printed through the package.

Barcode bar width ratio       Barcode bar width

Borrower number is sensitive information     

Hide Overdue Price on Overdue reports

Don't scale text size on spine label report

**Margin settings:** The margin settings only apply for letter type reports. The default is around 25mm - if you wish to use different settings, enter the required value in the boxes.

**Barcode width ratio/width:** The smaller the settings for bar ratio and width, the narrower the barcode, however the specific printer and barcode scanner you are using will determine the settings you should be using. Values of 3 for the ratio and 15 for the width should be sufficient for most printer/scanner combinations.

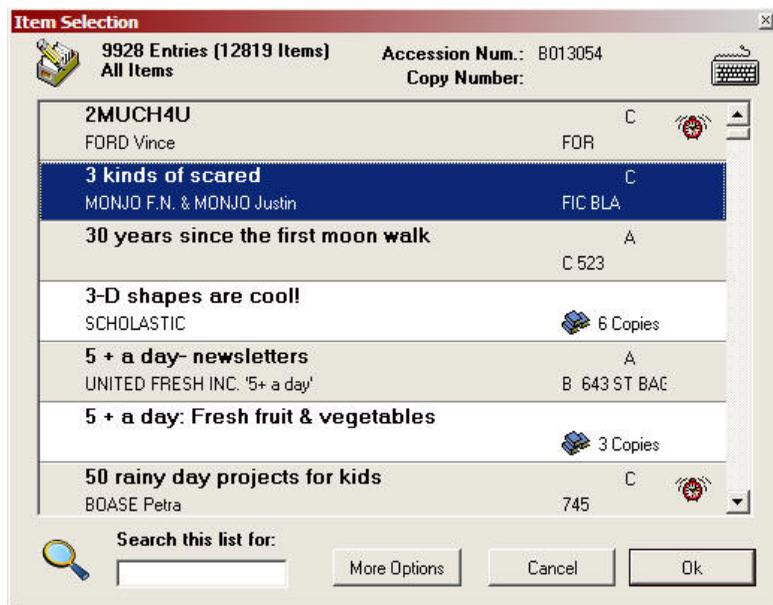
**Barcode settings test:** This report allows you to determine the optimum settings for the barcode report. You enter a sample barcode (or a barcode that you may be having problems scanning) and that barcode will be printed out on a single page using a variety of different settings.

**Borrower number is sensitive information:** Checking this box will remove the borrower number from various reports (e.g. overdue lists) so that a student cannot link a borrower number to an individual borrower. This is useful if your school uses the borrower number/enrolment number for another purpose e.g. Internet access password.

***Hide Overdue price on overdue reports:*** Useful if your overdue price field contains lots of incorrect entries or you just don't want library users to see the price.

***Don't scale text size on spine label report:*** Normally the package resizes the text on the spine label according to how many characters are in the classification field (e.g. a 3 character classification will print larger than a 7 character one). Checking this box will result in all classifications appearing in the same font size.

## Scan Mode: Selecting Items and Borrowers



With the item and borrower scan screen you can do the following:

- Select Items/Borrowers
- Change the status of the selected Item/Borrower
- Filter the view of Items/Borrowers
- Create new filters
- Add new Items or Borrowers to the database
- Change the sort order of the displayed entries

The scan screen shows the number of current entries, and the selected filter. To search for an item by Title or Borrower by surname, just start typing what you are looking for - your search term will appear next to 'Search this list for'. If you wish to search for another item, wait a few seconds for the search term to reset.

## Hints:

- You can click the icon at the top left of the screen to change the display filter.
- Click the keyboard icon at the top right to display a list of keyboard shortcuts.
- You can use the Alt key and the code to change the borrower or item status (e.g. Alt-C = Change item to current status).

Various icons may appear against the entries, such as:



This item has multiple copies.



This item is currently overdue or this borrower has Over-dues.

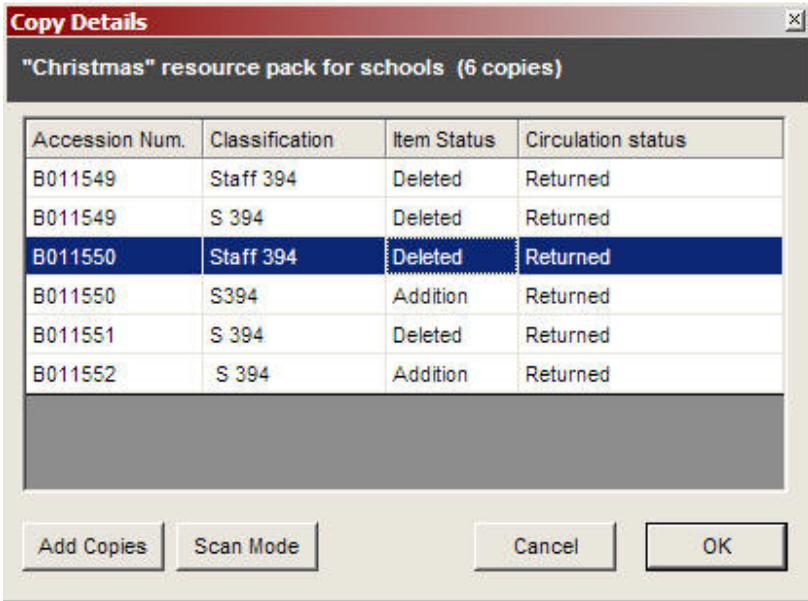


This item is currently issued or this borrower has books out.



This borrower has a note against them.

If there is more than one copy of an item and you have the group copies in scan mode option set, the following screen will appear. Just select the required entry to display the item details. You can also press F6 whilst editing to display the list of copies.



There are additional options under the more options button that allow you to do the following:

- Add a new item/borrower
- Change the current filter
- Define a new filter
- Change the sort order of the entries in the list

## Navigating Items and Borrowers

Both the item and borrower screens include a navigation bar for moving between items and borrowers.



The buttons (in order do the following):

- Move to First entry
- Move to Previous entry (F3)
- Display scan mode (F2)
- Move to next entry (F4)
- Move to Last entry

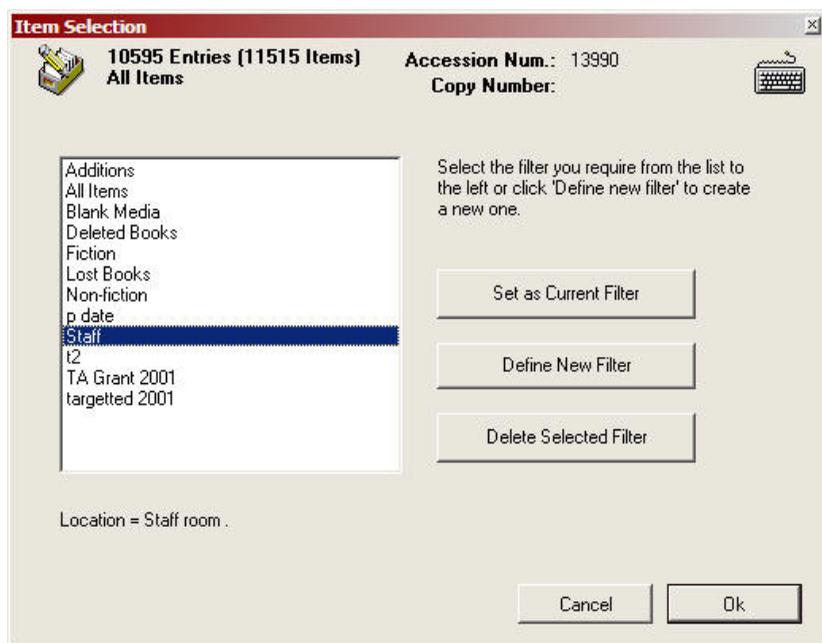
Ctrl-S - Allows you to quickly search for a borrower item by name or barcode.

## Filters

---

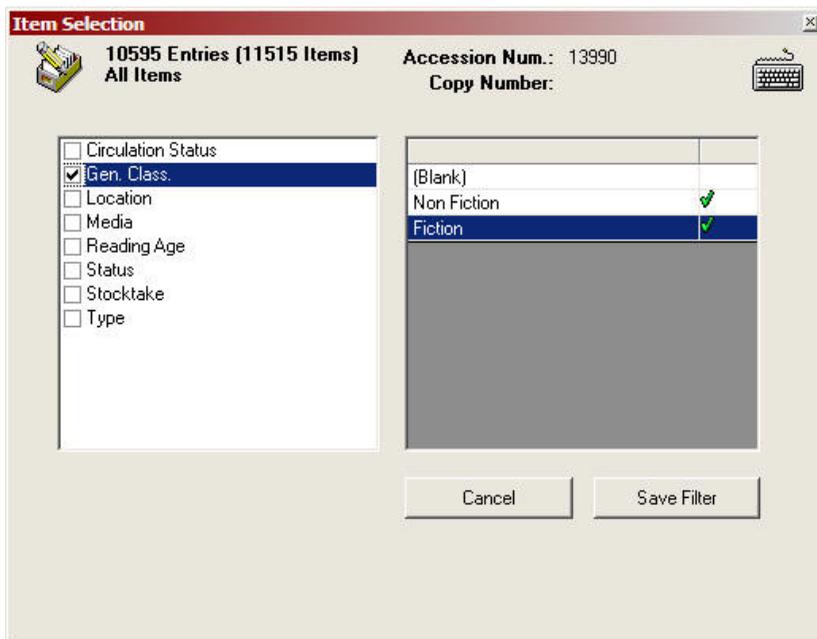
Filters restrict the current view of items or borrowers in the database based on certain attributes and are used in a number of areas of the package including reports and stocktaking. For instance if you have a combined resource room and library database you can create a filter that just shows you items in the resource room or items in the library.

Pressing F2 in the borrower/item selection screen or clicking on 'More Options', then 'Change Filter' will let you access the filter area, where you can then change the current filter or create a new filter to suit your purposes.



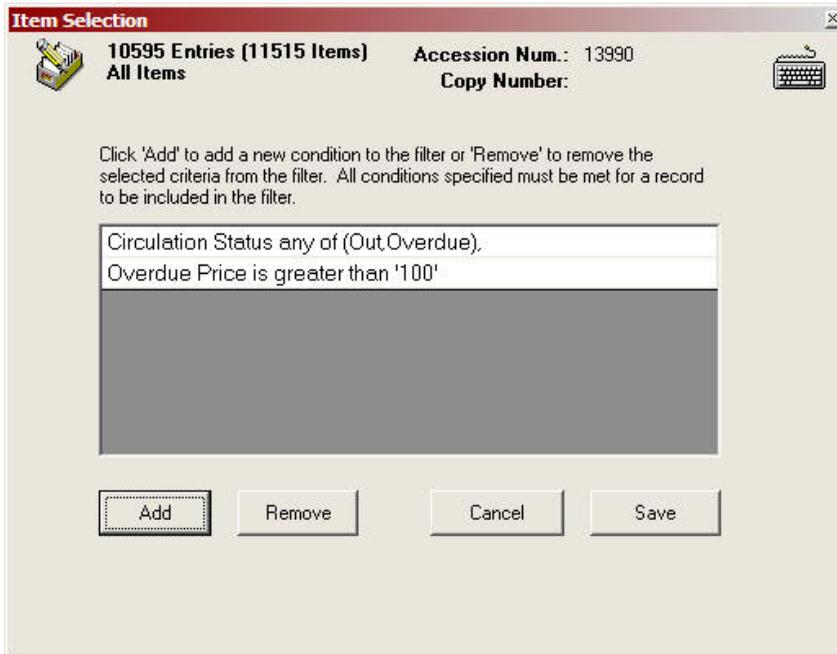
The above screen displays the list of currently defined filters. Selecting a filter will display a description of the filter underneath.

There are two types of item filters - simple and advanced. Simple filters have fewer options but can be created more easily. Simply select the combination of required entries. Note that the filter match is based on ANY of the items in the list on the right but ALL items selected on the left.



The advanced filter (items only) has more flexibility, however it is a bit more complex to set up. You add conditions to the filter by clicking the Add button and choosing the field to select by. All conditions in the list must be met for an item to appear in scan mode.

In the example on the next page, the filter displays all out and overdue items with a replacement value greater than \$100.



## How to select a filter

1. Press F2 (in the item/borrower scan screen) to show the filter options in the Item/Borrower scan screen.
2. Choose the filter you wish to use and click on 'Set current filter'.
3. Selecting a filter and then clicking on the description tab will display a description of the contents of the filter.
4. Press F2 again or click on 'Ok' and your view will now be restricted to the current filter.

Alternatively you can quickly change the current filter by clicking on the Catalogue or Borrower icon in the top left of scan mode.

## How to create a new filter

1. Press F2 to show the list of filters
2. Click on 'Define New Filter', select simple.
3. Enter the name for the filter (as it will appear in the list of available filters)
4. You can now select the criteria that determines what is included in the filter.
  - Having a green tick next to the particular entry means that it will be included in the filter.
  - Note that within a particular field (e.g. status) an item with ANY of the selected options will be included in the filter. Between fields 'and' logic is used. For example if you have selected 'Delete' and 'Lost' for status and 'Our Library' for location, the filter will include items that have either a 'Lost' OR 'Delete' status AND are located in 'our library'.
5. Click on the left hand side to change the field, then select from the list on the right hand side for the entries you wish to include in the filter.
6. Click on 'Save' to add the new filter to the list of available filters.

## Cataloguing

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This section discusses one of the more time consuming but important aspects of library automation.

You will have a significant investment in both time and effort in your library catalogue. In order to make life as easy as possible, you should give careful consideration to how and where cataloguing information is stored so that you can maximise your ability to analyse and extract data from the package in the future. Advice from MUSAC training agents is very important, in order to help you maximise your use of Library Manager.

For example, the notes field is very flexible in that you can enter basically anything you want to, however it is therefore not necessarily easy to extract the information later on. If you frequently store certain types of information in the notes field, you should give careful consideration to storing that information in an added field as this will allow you more flexibility with reporting etc at a later date.

Consistency in cataloguing is also very important. If you have a number of people who may be entering information into the system, you should agree on a common cataloguing philosophy to ensure that the information in the catalogue is consistent across the entire database.

## Building your Library Catalogue

There are a number of ways to build your library catalogue:

- Using records exported from another Windows MUSAC Library Manager Database (not including TePuna or SCIS sourced records).
- From MARC records provided by TePuna or SCIS
- Manually entering Items
- From data stored in another library system or database.

The option you choose will depend on the amount of time and/or money you wish to invest in your catalogue. These options are discussed in detail below:

### **From an existing MUSAC Library Database**

See the 'Library Creation Wizard' for details on creating a new library database.

### **Using records exported from another MUSAC Library Manager Database**

The Windows version of library has the ability to easily export records between two library databases. This option is available under Library Administration -> Cataloguing -> Import/Export.

### **MARC records provided by National Library (TePuna) or SCIS**

MUSAC has an arrangement with the National Library for supplying schools with MARC (MACHINE Readable Catalogue) records from their TePuna database at a reduced cost. If you do not currently have an electronic database of your library contents, then this may be the quickest way to get your library catalogue up and running.

Check service costs per matched title (typically we can match 70%-80% of your titles). We match titles on the basis of an ISBN request file, which can be generated within MLM. This file is forwarded to the National Library for them to match against their database of 10 million plus bibliographic records. Once we have completed the match (which usually takes less than two weeks), you will be sent a MARC import file, which you can then use to add to your existing library catalogue.

The records that the National Library holds are sourced from a number of different places

including public libraries and other bibliographic databases. Although the National Library does have cataloguing standards for records that are contributed to their databases, because of the variety of sources, the information against individual records will vary. **Therefore, before you start entering your request file, please contact MUSAC with 20 or so ISBN numbers so that we can supply you with sample MARC record information. This will help you determine whether or not the information will suit your purposes.**

Once the information has been added to your catalogue, you will still need to enter at least the accession number against each title, so that it can be circulated. However if you compare the cost of manually entering all the information against each title, the MARC request service does compare favourably.

Curriculum Corporation in Australia offer a similar service based on an annual charge. SCIS (Schools Catalogue Information Service) records are entered specifically for school catalogues so the suitability of the records tends to be better than the National Library records.

Please refer to the section on MARC records for more information.

### **Manually Adding Items**

This is the most time consuming method, however it also gives you the greatest flexibility and allows you to enter the details exactly how you would like to. The bulk of the rest of this part of the user guide is concerned with manually cataloguing items.

## **From a Data conversion**

MUSAC has converted data from a wide range of other library packages. Please contact us for further details on what is required and costs involved.

## The Cataloguing Screen

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### **Adding new items to the Catalogue**

Click on the 'Update Catalogue' button from within library administration'. Then click 'More options' and select 'Add Entry'. If you are already in the catalogue details screen, you can select add new item from the options menu.

You will be prompted for the media type of the item that you are adding. The media that you select can determine the field defaults for the new entries you create. See configuration for more information. See MARC Import Facility to add e-books to your catalogue.

If you do not wish to be prompted for a media selection when adding new items, set the media default for items to Book (or whatever you want the default to be) in Items configuration (field defaults).

By default new items will have a status of 'Addition'. If you are using a filter that does not include addition items then they will not appear. This allows you to exclude newly added items from library searches.

Once you have entered the appropriate details on the item (including at least the title), press the 'save' button. The following section contains detailed instructions on the cataloguing fields.

### **Quickly creating Multiple Copies of an item**

If you are entering many copies of an existing item, simply go to the item you wish to create duplicate copies of, and select 'Add copies of this item' from the action menu.

You will be presented with a dialogue box that allows you to enter in the accession numbers of the new items or scan in the barcodes for these items one by one.

Clicking 'Create items' will then proceed to create the duplicate copies of this item with the accession numbers you have specified.

## Catalogue Entry Screen Tabs

The screenshot shows a software interface for entering catalogue data. At the top, there are fields for 'Title' (containing '"Christmas" resource pack for schools'), 'Accession Num.' (B011549), 'Author' (BLAIR CONSULTING LIMITED), and 'Classification' (Staff 394). Below these is a horizontal tab bar with options: 'Detail' (selected), 'Added Fields', 'Notes', 'Subjects & Keywords', 'Groups', 'Attachments', 'History', and 'Financial'. The main area contains two columns of input fields: 'Publisher' (BLAIR CONSULTING LTD), 'Series', 'Type', 'Source' (BLAIR CONSULTING LT4), 'Location' (Resource), 'Media' (BAG SET), 'Reading Age', 'Status' (Deleted), 'ISBN', 'Pub. Year' (2001), 'Loan Period' (21d) with a 'Fixed period' checkbox, 'Copy Number' (1), 'Volume', 'IssueCount' (2), 'Item ID' (13910), and 'Gen. Class.' (Fiction). A red message states: 'There are 6 copies of this item - Press F6 to display copy details.' Below this is a legend: 'F5 = Display lookup list for current field', 'F3 = Previous Item', 'F4 = Next Item', 'F2 = Scan Items'. At the bottom left is a navigation bar with icons for F3, F2, and F4, a 'More Options' button, and 'Save' and 'Exit' buttons.

The item entry screen is composed of a number of tabs, some of which may not appear, depending on your configuration settings (see Configuration – Items). Click on a tab to display the relevant details.

The navigation bar at the bottom left of the screen can be used to move between items. The ordering of items is determined by what appears in scan mode. So depending on which filter you have selected and how you have chosen to sort items, you will see different results.

Note that F2 will bring up scan mode, F3 will move to the previous item and F4 will move to the next.

### Title:

Items should always have a meaningful title. Any leading 'A', 'An' or 'The' can be typed in, however it will be stored separately, so that the titles appear in a sensible alphabetical order within the package.

**Classification:**

The classification field should reflect where the particular item is shelved in the library. For Non Fiction items, the Dewey number is most commonly used, possibly with the first three letters of the author's surname following.

By default Classification entries beginning with numbers are deemed to be Non Fiction, empty classifications and those without numbers are considered Fiction items. You can also manually set the Fiction/Non Fiction flag against each item by changing your configuration settings.

You may like to use 'FIC' for fiction items and 'PIC' for picture books.

**Author:**

The main author is generally entered, with surname first, then followed by additional authors. The initial author's surname is capitalised on exiting the author field. You can enter up to 250 characters in this field.

There is an option to split the entry of author details, so that each author appears separately. More details on this feature are included later in this chapter.

**Accession Number**

For the accession number field (also referred to as the barcode number) each item that you wish to circulate should have an accession number associated with it to allow for unique identification of the item. If an item has an accession number it must be unique.

To search for an arbitrary item in the catalogue by accession number or title, click on 'More Options' then search by Title/Accession number.

## Details tab

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Note: With the following fields (Publisher to Reading age) you can either type in the entry in its entirety or press F5 to display the full list of entries. Entering a partial entry and pausing for a second or so will complete the entry (e.g. typing 'AS' may complete as 'ASHTON SCHOLASTIC').

---

### **Publisher**

Enter the name of the publisher. As publishing houses tend to frequently change their names, you can be as flexible as you wish to be with the name.

### **Series**

Adding this information is a matter of personal choice. It can be helpful when reordering new material.

### **Type**

The type field is not a standard cataloguing item and can be used to identify and analyse aspects of your catalogue that are considered significant. For instance you may have a significant collection of Maori, PacificIsland or New Zealand content that you wish to be able to identify within the catalogue.

Whatever you use this field for, you should use it consistently for that purpose – don't mix other kinds of information in the same field.

Note that it may make more sense to use an added field for information that you may otherwise have recorded here.

### **Source**

Use this field to record information on the supplier of the item. Additional information such as addresses and contact details on the supplier may be entered using the Acquisitions facility. You will most probably include a source called 'donated' to denote donated items. Your sources may not only be the physical

supplier of the items – you may like to use this field to record the source of funds for the purchase of the item.

### **Location**

Record the physical location of the item. Your library may consist of a number of locations (such as Staff Room, Resource Room, Libraryetc).

### **Media**

The media selected on creation of an item will determine field defaults for the item. You can also associate an icon for the media to display on the OPAC search results list (see the configuration section for more details).

### **Reading Age**

Can be used as a reading level or renamed and used for another purpose.

### **Status**

Indicates the availability of the item for circulation:

	Status	Description
A	Addition	Default status for new items
C	Current	Available for circulation
D	Delete	Only items with this status can be deleted from the database
L	Lost	Item is currently lost
R	Poor Repair	Currently being repaired
P	Potential Purchase (acquisition)	Used for Acquisitions management
O	Out of Circulation	Unavailable for circulation – being mended or processed
I	Interloan	Interloan Item
W	Withdrawn	Used for statistical purposes
U	Unresolved	Used for statistical purposes
M	Missing during stocktake	Can be used instead of the Lost status to identify material missing during a stocktake

Note that the item status is different from the circulation status (which can be returned, out, overdue or misplaced).

### **ISBN**

International Standard Book Number. Useful to record for re-ordering purposes. The number can be entered with or without spaces and hyphens between the numbers. Note that the ISBN is not the same as the barcode of the item, although it may include the first 9 characters of the 10 character ISBN.

The ISBN is also important if you wish to update your cataloguing details using a retrospective MARC conversion.

### **Year (of publication)**

This information can be used to distinguish between various editions/versions of a particular title.

### **Loan period**

Loan periods can range up to 999 days, in minute increments. Enter the loan period in one of the following forms:

14 = 14 days

14d = 14 days

1h = 1 hour

45m = 45 minutes

### **Fixed Period**

Usually the loan period can be modified depending on the borrower status and loan period. Checking this flag means that for this item, the loan period will not be altered during circulation.

### **Copy number**

#### **Volume**

#### **Author Code**

These fields can hold short pieces of text (10 characters max).

### **Issue Count:**

This is a count of the number of times an item has been issued since the last time the count was reset.

**Item ID:**

This is used internally within the package to track an item, you cannot alter this field.

**General Classification:**

Indicates whether the given item is fiction or non fiction. Depending on your configuration settings, this value may be determined for you or up to you to set.

## Added Fields tab

Field	Detail
Budget Area	English
Country of Publication	Afghanistan

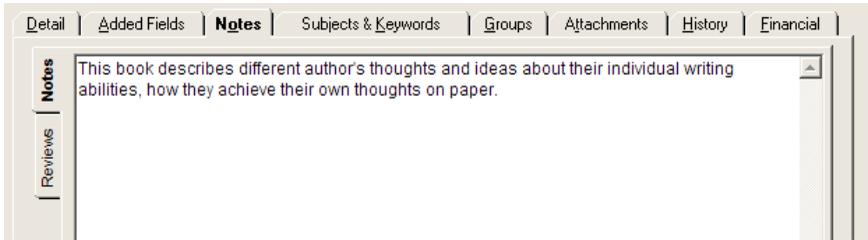
**Add Field:**  DEL = Remove Field, Double-Click to expand text fields.

The Added fields functionality allows you to extend the cataloguing information recorded against items. Under configuration Item – defaults, you can determine which added fields appear automatically against new items based on the media of the item being created. You can also add any added field to any item simply by selecting the field you wish to add from the list of available added fields at the bottom of the screen.

If you require additional room to enter the details, you can double click on the field to expand the box.

For lookup fields, clicking on the field entry will display the list of available list entries.

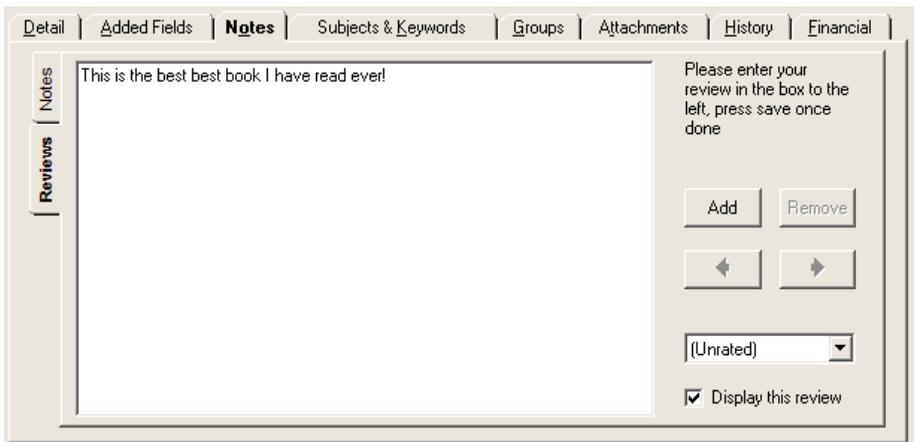
## Notes/Reviews tab



The notes field can be as long as you wish. There are also separate fields for keywords and borrower review information, so you don't need to mix notes with other information.

If you have converted your existing data, the notes, keywords and borrower reviews will all appear in the notes field as it is not possible to determine which is which during the data conversion.

This tab also gives access to the reviews editing area. You can use this area to add your own reviews to an item or to edit/approve reviews previously made through OPAC.



As well as adding a review, you can also give the item a rating.

The display this review checkbox indicates whether or not the review information will be displayed in OPAC. All reviews made through OPAC have this box unchecked. This allows you to verify that the contents of the review are suitable for display before allowing it to be accessed through OPAC.

To approve any reviews that have not currently been approved for display, you can use the facility under the clean up area of the package.

## Subjects and keywords

The screenshot shows a software interface with a tabbed menu at the top. The 'Subjects & Keywords' tab is active. On the left, under 'Subjects:', there is a list box containing the following items: ANIMALS (highlighted), BOOKS, COMPUTERS, DINOSAURS, DOCTORS, FOOD, JOKES, MONSTERS, RIDDLES, and SPORTS. Below the list are two buttons: a plus sign (+) and a minus sign (-). On the right, under 'Keywords:', there is an empty text input box. Below the box, the text reads: 'Enter additional keywords in the box above (each keyword should be separated by a comma). Click 'View all Keywords' to display the full list of keywords for this item.' A button labeled 'View All Keywords' is positioned below this text.

Enter the appropriate subjects for the given item. As you start typing an entry, the package will attempt to complete the entry for you in order.

What you choose to enter as a subject or keyword is largely up to you; however as with all cataloguing information you will want to enter the data in a manner that makes it easy for your library users to locate the items they require.

Click the '+' or '-' buttons to add or remove subject entries against an item. When using the + button or F5, the list of subjects will appear.

Depending on your configuration settings, subject entries may appear in different colours, refer to the section on subject authorities for more information.

Keywords should be separated from each other by a comma. There is no limit to the number of keywords or subjects you can add to an item.

Note that a keyword search can be configured to search other fields as well including title, author, notes etc. Therefore you only need to enter additional keywords that you feel are important and do not already appear in the fields being searched.

The 'View all Keywords' button will display the keywords index information for the current item including their context. Some 'stop words' are not included in this list (such as 'the', 'and' etc). If you have configured the package to delay updating keywords until the catalogue has been updated, this index information will not be correct until the next time the index is updated).

## Groups (Resource kits etc)

The following items are grouped with this Item

Accession Number	Title	Issue Sep.
B008743	"Here I am!" said Smedley	<input type="checkbox"/>
B007537	"Smile!" said Dad	<input checked="" type="checkbox"/>
B014233	"What is that?" said the cat	<input type="checkbox"/>

Buttons: Add Item, Scan & Add, Remove Item(s)

The grouping facility supports the circulation of groups of items. This facility is detailed later in this chapter.

## Item Attachments

Below are the Pictures, Web Pages etc that are associated with this item.  
Press F1 for more information on attachments.

Description	Link
A Picture	D:\Images\Search\cdrom.jpg

Buttons: Add Link..., Remove Link, Display Link

Attachments are a feature that allows you to include electronic 'content' such as pictures and web pages in addition to the

descriptive information already included in the library catalogue. Possible applications of this facility include 'virtual' vertical files or the inclusion of pictures of book covers.

If you are using the package to catalogue and circulate resource items such as cameras or other equipment, you may wish to attach pictures of the item itself to include in your catalogue. In order to view material using this facility, you will need to have either Windows or Microsoft Internet Explorer installed on your machine.

### **Points to note about attachments**

Although it is possible to link to web pages that are actually on the Internet, this is not usually advisable, because in order to view the page you will need to be connected to the internet and the site that contains the page will also need to be accessible. The nature of the World Wide Web is such that pages (and links to them) are changed frequently. Take care linking to external web sites.

A better solution is to download relevant material from the Internet (or create it yourself using tools such as Microsoft Office, Frontpage etc) and save it as files on your local network or hard drive (the Media folder of the current library is the suggested location). This way you can be sure that the documents will always be available to your library users when they wish to access them.

### **Scanning Pictures into the catalogue**

There are many different methods and software packages to do scanning, however the library package does not include functionality to do this. Your scanner would have come with software to operate the scanner and scan images to a file on your hard drive. Please refer to your scanner documentation for additional information.

Once a picture has been scanned to a file on your network or hard drive, you can then attach it to an existing item in the catalogue.

## **Adding Attachments to Items**

From the Attachments tab of the Item Editing Screen, click on 'Add Link'. A dialogue box will appear allowing you to locate the file which you wish to associate with this item.

Select the required file then click on ok.

Enter a sensible description for this particular link. This is the description that will appear in OPAC for your OPAC users to select from.

Click on 'Display link' to view how the link will appear in OPAC.

# History

[Detail](#) | [Added Fields](#) | [Notes](#) | [Subjects & Keywords](#) | [Groups](#) | **History** | [Financial](#)

<p><b>Issue Status:</b> This item is NOT currently issued</p> <p><a href="#">View History</a></p> <p>Click the button above to view additional circulation information on this item</p>	<p><b>Reserves:</b> There are NO reserves for this item.</p> <p><a href="#">View Reserves</a></p> <p>Click the button above to view additional reserve information for copies of this title.</p>
<p><b>RestrictBorrower:</b></p> <p><input type="text"/> Enter a year level restriction e.g &gt;10 etc</p>	

Here you can view the current borrower and access the borrowing history for this particular item. Reserve information associated with this item is also accessible.

## ***Borrower Restriction***

Use this field to limit the circulation of specific items to certain scholastic year levels of borrowers. You can enter a specific year level or use '<' and '>' to specify less than or greater than a particular year level.

## Financial

Detail	Added Fields	Notes	Subjects & Keywords	Groups	Attachments	History	<b>Financial</b>
<b>Purchase Price:</b>	<input type="text" value="7.00"/>						
<b>Overdue Price:</b>	<input type="text" value="0.00"/>						
<b>Purchase Date:</b>	<input type="text" value="19/01/2000"/>						
<b>Disposal Date:</b>	<input type="text" value="31/01/1980"/>						
<b>Accession Date:</b>	19/06/2003 9:47:10 a.m.						
<b>Stocktake:</b>	<input type="text" value="No"/>						

This tab contains the purchase data and pricing information for the item. Enter this information as required. As far as prices are concerned, you should be consistent as to whether or not you use the GST Inclusive or Exclusive amount.

**Purchase price:** The actual amount paid by you for an item. It will be less discount, less any value added component and less GST if appropriate. The amount recorded in this field is relatively important. Note that you should record the purchase price (replacement value) of a donated item if you know the value. When printing the library summary, you can choose to ignore the donated items by selecting the source entries for donated material. Note that if you enter no value here, the item will not affect the average value of your collection as given on the library summary report.

**Overdue Price:** This is the price that shows on the overdue notice and allows you to specify a different price to the purchase price. You will probably want to record a price that adequately reflects the replacement cost of the item. (Note that you can set your configuration settings to automatically add a fixed amount or percentage to the purchase price).

**Purchase Date:** Use the date time picker to select the correct date that the item was purchased. The check box next to the date indicates whether or not the date is actually used.

**Disposal Date:** This field does not need to be set and has no effect on the items record. Specifying a date will not mean that the record will suddenly disappear on that date. The field is purely for informational purposes.

**Accession Date:** This date is not modified and is automatically set to the date and time that the record was added to the system. Note that for records coming from a prior version of MUSAC Library, the accession date will be the date that the record was converted not the date the record was actually added.

**Stocktaken:** This flag indicates whether or not the item has been stocktaken. The 'reset' register option in the stocktake area of the package will set this flag to NO. Returning an item within circulation will set this flag to YES.

## More Options Button

This button gives you access to additional features such as:

**Add new items** – adds another item to the database.

**Add copies of Item** – Allows you to quickly add one or more copies of the current item to the database.

**Search by Title/Accession number/ISBN** – Does just that (you can also use Ctrl-S to quickly search by title/accession number).

**Show in OPAC**– This will display the current item record in OPAC

**Print**– Option to print notes, attachment details etc on the current item.

**Check Spelling** – This checks the spelling of the current field. A quicker option is to just press F9. Spell checker settings can be configured under circulation.

## Editing Author Details

---

You can choose to enter author details as a single field or to use the split author option to keep track of details for each author or person associated with the item. The default is to have a single author field where multiple authors are entered in a single field.

To enable the split author field option, you need to change the 'split author field' setting in configuration (items - editing). Once this setting is enabled, an arrow will appear to the right of the author field in cataloguing. You can view the author details in split form if you click this arrow or press the down arrow key when the cursor is in the author field.

Name	Type
WHITEHOUSE, ELIANE	Author
PUDNEY, W.	

Author  
Cartographer  
Compiler  
Editor  
Illustrator  
Photographer  
Translator

Add Delete Cancel Ok

The split author option allows you to enter the names using the names list and specify the association the person has with the title.

The F5 key can be used to select an existing author from the list. Associated with this field is a lookup list of names and a list of name types (e.g. author, editor, illustrator etc) that are used to specify the linkages between the person and the item. You can also enter additional notes on the person such as brief biographical details.

Note that due to the previous free format entry of the authors field, the information in this field is not automatically converted to separate entries for existing items as inconsistencies in data entry make it impossible to write a process that will correctly handle all the variations in data entry. However once you have entered the author details for an item separately, the package will automatically update the author field to reflect those changes.

### **The Name Type list**

This is a list of the relationship an author has to a given item. The standard list includes Author, Illustrator, Editor, Translator, Compiler, Photographer, Cartographer. You can of course edit and add to this list in configuration.

### **The Names list**

This is the list of author details that can be connected to an item. The author entry appears in the list only once, but the author may appear against many items (and in different contexts - e.g. Bob Smith may be an author for one item, but an illustrator for another).

## **Existing Author information**

If you enable the split author option, the author information is not altered for existing items and will appear exactly the same as it has previously. You can however enter new records or alter existing records to be in the split format.

## Customising Fields and Lists

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In this version of MUSAC Library, as well as being able to rename most of the standard fields you can also create your own cataloguing fields. Each item always has the standard Library fields (Title, Publisher etc) and may have additional fields, depending on how much cataloguing information you wish to record as well as the nature of the item being catalogued. Storing information in additional fields allows you to more easily access this information in other areas of the package. You can also create your own lookup lists to use with these fields (see the Configuration section for more information on creating new fields).

### Standard MUSAC Library fields

These fields may be all the fields you need. You may wish to rename some of these fields to suit your own purposes.

### Added Fields

Added fields may optionally appear against individual items and extend the information that you can catalogue about the item. Some of these added fields are already defined within the package and you can also create your own if you wish.

### Adding additional fields to an Item

You can add additional fields to an item in one of the following ways:

- Under media defaults (configuration), ensure that the fields you wish to add for a particular media type appear in the list. Any new items created with this media type will have this field automatically attached.
- In the added fields tab (item detail screen) select the field you wish to add from the added field box, the selected field will be added to the current item only.

### MUSAC Defined added fields

A range of additional fields are defined within the package. Some of these have particular uses within the package (such as circulation note) and others are intended for recording additional cataloguing information.

Below is a description of some of the added fields that come with the package. To use a particular field with a given item, select the added fields tab in the cataloguing screen and choose the desired field from the 'Add Field' dropdown list. Some of these fields are detailed on the next page:

Added Field	Kind	Lookup list	Note
Action: Issue Note	Text	-	Appears during issuing to notify you of special information about the item being issued.
Action: ????	Text	-	See Above (Note appears during specified action).
Budget Area	List	Budget Area	Used with acquisitions
Covering Type	List	Coverings	Hardback

Curriculum Area, Level, Strand	List	-	Used to catalogue relevant Curriculum details on an item.
Illustration type	List	Illustration types	Black and white, colour etc.
Illustrator	Text	-	Illustrator details. You can also enter illustrator details using the split author option (refer to configuration).
Language	List	Language	Language used for item (e.g. English, German etc)
MARC Record	Text	-	Holds the full original MARC record imported into this MLM item
OPAC Icon 1-4	List	Icons	Determines icon displayed in item detail screen in OPAC. The selection of icons includes the Raeco spine labels and you can also add your own entries if desired by placing icons in the \MLM\Support\Icons directory and adding a new entry to the icons list.
Repair Quality	List	-	
Resource file content	Text	-	Used for storing the contents of a resource file. An item with this added field will prompt you during circulation to specify the contents of the vertical file.

**Note:**

Before creating your own fields, you should ensure that the required field (or similar) does not already appear as a MUSAC defined Added field. If it does, you should use this field in preference to setting up your own field as a future version of the package may use these fields to provide additional features.

Short descriptions of each of the available additional fields are also provided within the package itself (see configuration: Fields and Lists for more information).

It is advisable to carefully consider what you wish to achieve by adding a new field and what type of information you wish to record. Altering a field type (or lookup list) once the field has been defined will have an effect on items that already have data in that field (possibly removing data).

## Resource Files and Interloans

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### Resource (Vertical) files

Any item with the 'Vertical File Content' added field, will trigger during issuing a message prompting you to enter the contents of the vertical file being circulated. A similar message will appear during returning, allowing you to ensure that all the contents of the file (as entered at the time of issue) have been returned. You can also view and edit this information using the 'Vertical File content' added field in the item editing screen.

### Interloan Items

As Interloan items are only in your library for a relatively short period of time, you may not wish to enter all the cataloguing details on the item in advance. You may like to use the following procedure to make circulating these items simpler.

An item with an Interloan item status will prompt you to enter the details of the item being issued at the point of issuing the item. These details are stored in an added field that can be viewed whilst editing the item. During the return process you will be prompted with this information again so you can check that what was issued is the same as what has been returned.

You may have a number of 'dummy' items that have titles such as 'Interloan Item 1', 'Interloan Item 2' etc, each with an interloan status against the item. Some pieces of card can be used to hold the barcodes for these items.

To circulate an item, you select a free Interloan card and issue it to the borrower, thereby triggering the screen for entering the specific details of the Interloan title. Enter these details, insert the card into the book and give it to the borrower.

During the return process you can verify that the correct title has been returned and return the 'dummy' issue card to the box of interloan items.

This Interloan feature can be disabled through configuration.

# Importing/Exporting Library Data

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## Moving Items between Catalogues

### Catalog Information Export/Import

Please select a method for importing or exporting catalog data:

<b>Move items between databases</b>	<b>Build catalog using MARC records</b>
 Export Items From Catalog Export Items from this Library database for Importing into another MUSAC Library database.	 Create MARC Request File Create or update a file of ISBN numbers ready for sending to MUSAC or processing with SCIS.
 Import Items Into Catalog Import MUSAC Library database records created from another MUSAC Library Manager database.	 Import MARC File Import MARC records supplied from Te Puna o SCIS

The facilities under the 'Catalogue – Item Import/Export' button allow you to create or add to your catalogue from a MARC record file or transfer item records between MUSAC Library databases. Possible uses for this facility are merging two separate library databases together or keeping a separate database of deleted catalogue records that you could import at a later date if a particular item was repurchased.

## Transferring Items between library catalogues

1. Click on the 'Item Import/Export' button under the 'Catalogue' group of options.
2. Click on 'Export Items From Library'.
3. Choose the method you wish to use to specify the subset of records to export from the current library database.

4. Now choose the location to save the export file to.
5. Open or create the database, you wish to import to.
6. Click on the 'Item Import/Export' button under the 'Catalogue' group of options.
7. Choose 'Import Items From Export file'.
8. You will be prompted with a series of options on how you wish to import the data, choose the options that you require.
9. The package will now proceed to import items from the import file into the current database.

You can also import the entire contents of a library into another by skipping the export step, opening the library you want to import into and select import -> MLM Library Catalogue.

### **Accelerated Reader Export option**

This option allows you to export the basic catalogue details to a file in the format required for importing into Accelerated Reader.

### **Infomedia Import option**

This option allows you to import from an Infomedia import file. Note that it is possible that Infomedia will change their file format so should you receive error messages regarding an incorrect file format, please contact Infomedia directly.

## MARC Import Facility

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MARC records are the standard record format for moving catalogue details between different library systems. MLM supports both the TePuna (National Library) and SCIS MARC formats.

MUSAC has an arrangement with the National Library to supply MARC records from NZBN to schools at a reduced price. This is one way to quickly build your library catalogue. Please contact MUSAC for additional details before creating your first request.

In general some additional editing work is needed in order to get the records in a form suitable for your particular library. At a minimum you will need to attach an Accession Number (barcode) to each item before circulation.

The specific support for each service is as described below:

### **SCIS (Schools Catalogue Information Service)**

SCIS (a business unit of Curriculum Corporation) provide MARC records on a subscription basis - i.e. you pay a yearly fee and have access to their Web based products. You are NOT charged a per record fee and the records are available for loading into your system more or less instantly.

A subjects authority file is also available from SCIS which provides a more comprehensive list of subjects than the TePatakataka subject headings suitable for use in secondary school libraries. Library Manager detects the type of import file, including the updated RDA format.

You can find out more about SCIS by contacting MUSAC or contacting SCIS directly:

Curriculum Corporation,  
P O Box 177  
Carlton South Victoria 3053  
Australia  
+61 3 9207 9600 (voice)  
+61 3 9639 1616 (Fax)  
e-mail: [sales@curriculum.edu.au](mailto:sales@curriculum.edu.au)

## Creating a MARC request

**Important:** Before making a request for National Library MARC records, you should send us a sample of around 30 ISBN numbers and we will send back the cataloguing information for those records that we hold here at MUSAC. This will give you an idea of the nature of the data supplied. Typically we can provide around 70-80% of the requests supplied.

1. Click on 'Create MARC Request File'. The screen that appears displays a list of MARC request files.
2. Click the Create button to make a new MARC request you will be prompted to either create a blank file (for entering the ISBNs of new items) or to create a retrospective file. Retrospective request files are described in a later section.
3. To edit a particular request, select it in the list and click the edit button.
4. The ISBN entry screen will appear along with any previous numbers you have entered for this request.
5. Enter each ISBN that you wish to request a MARC record for. You do not have to do this all in one session – you can save your requests and return later to add more. You can also just scan the bookland barcode (barcode numbers beginning with 978 and the package will convert the bookland barcode to the corresponding ISBN number).
6. Invalid ISBN numbers are highlighted in yellow and you should correct these before submitting your request as there is no possibility of a match for those numbers.
7. Once you have finished entering your requests, you can then click the save button to copy the request to a floppy disk to send to MUSAC (National Library MARC requests) or copy the file to the clipboard for pasting into SCISWeb.

Before deleting a request, you should wait until the corresponding MARC request file has been returned.

## Loading a MARC request into MLM

**Important:** When loading a MARC request file, the item field defaults set in configuration are applied. You will therefore want to ensure these are correct before loading the MARC file.

1. Click on 'Import MARC File'.
2. Select whether you are using the MARC records to update existing entries in your catalogue (retrospective requests) or to create new entries.
3. Next select the type of request file you are importing. Your selection determines how Library Manager attempts to find the request files (there is no actual difference between the content of the files).
4. National Library MARC files are usually supplied on floppy disk so you would normally select the 'A' drive to import from.
5. SCIS Web files are normally called usmarc.dat or similar. The open file dialog filters the file list to help you locate the correct file.
6. Once the records have been imported you will be notified of the number of requests. The updated RDA format will be automatically detected on import

Certain subjects such as 'Juvenile Fiction' (which appears against numerous National Library MARC records) and 'scisschl' (which signifies a SCIS MARC record) are removed from the record during import.

The full contents of any imported MARC record are also recorded against the item record. You can display the original file by clicking on the 'Display MARC' button at the bottom right of the catalogue entry.

## Using SCISWeb with MLM

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Before using SCISWeb, you will want to create a MARC request file using MLM. Using MLM to create the file allows you to enter/scan bookland barcodes and have the package convert them to ISBN numbers. MLM will also validate the numbers you enter so that it is obvious if you have entered an incorrect ISBN number.

You can also scan your barcodes directly into SCISWeb if your barcode scanner is configured to handle the bookland to ISBN barcode conversion. Please contact your barcode reader supplier or user guide for information on configuring your barcode reader.

### Creating a MARC request

This process is the same as described previously. Once the request file has been created, the simplest option is to 'save' the contents of the request to the clipboard using the Save button.

Alternatively if you do not have Internet access on your cataloguing machine, you can save the contents of the request to a file and take that to a machine that does have access to the Internet.

### Processing the request through SCISWeb

(This information is subject to change - you should consult the SCIS website for additional help).

When you log into SCISWeb, you will get a screen similar to the following:

SCISWeb

Welcome to SCISWeb

Massey University Library

Create orders

Website lists

Licence agreement

Upload order file

SCISWeb Manual

URGENT MESSAGE

SCIS OPAC

SCISWeb profile

Feedback

SCIS Home | SCIS Customer Centre | Change password | Customer profile | News

SCIS is a business unit of Curriculum Corporation Last updated 23-01-2004

To convert your MARC request to an ISBN click the Create Orders button at the top left. Click the text box below 'Enter Orders here' and press Ctrl-V to paste the contents of your request into the box.



## Create orders

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[Enter orders here:](#)

1854345206	▲
0746001517	
0140374663	
0590747703	
1856263177	
090864342X	▼

Process order

Clear order

[SCISWeb Manual](#)

[SCISWeb Menu](#)

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ORDERS TABLE <a href="#">Note</a>			
DATE AND TIME	ORDER FILE	SCIS DATA	RESULTS
27/01/2004 08:49	<a href="#">Order file</a>	<a href="#">usmarc.dat</a>	<a href="#">results</a>

---

Now click the process order button and after a few seconds, your order will appear in the orders table at the bottom of the screen. Click the usmarc.dat entry to download the file to your local machine. If you have previously made requests, you should check that you click the latest file (with the current date and time).

Enter C:\USMARC.DAT when prompted for the location to save the file. (Note that you can save the file anywhere, but you do need to remember where the file is to be able to import it into MLM). The file should be named USMARC.DAT or USMARC2.DAT etc. If you name the file to something else, you may have difficulty finding it when importing it into MLM.

## **Loading the SCIS MARC file into MLM**

Once you have completed the above steps, you can then switch back to library administration and click the Import MARC file button.

Choose the option to ADD records if your request contains material you are adding to the library, alternatively choose the update option for a retrospective catalogue.

You are now prompted as to whether it is a SCIS or National Library MARC file (choose the SCIS option). Then you have a choice as to download from the default location ("[C:\SCISCD\USMARC.DAT](#)" for SCIS Files) or to choose another location on your hard drive or network. Choose the other location option if you gave the file a different name or saved it elsewhere.

## **Catalogue - adding e-Books**

Similarly, assuming your school has an account with an electronic book provider, eg. e-Wheelers where an order can be made and they will provide .mrc files containing a list of available books to your school from their site.

If the electronic book provider supplies the catalogue information, this can be uploaded into MUSAC Library Manager with these details included when searching the catalogue. Within the catalogue there is a URL for an e-book, you can click on it and will be directed to the electronic provider's website.

When students click on a link, there will be more information concerning the book and availability. In relation to downloading, you need to look at details on your chosen electronic provider's website.

If desired you can first search to see if the new title already exists:

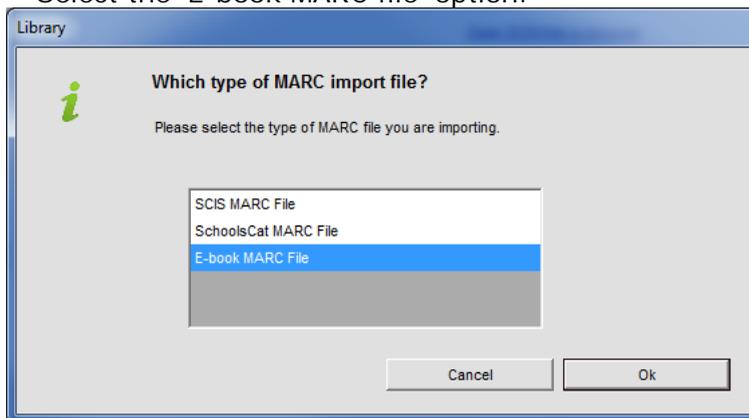
Catalogue > Update Catalogue and use search.

To go ahead and add e-book file(s) to the catalogue:

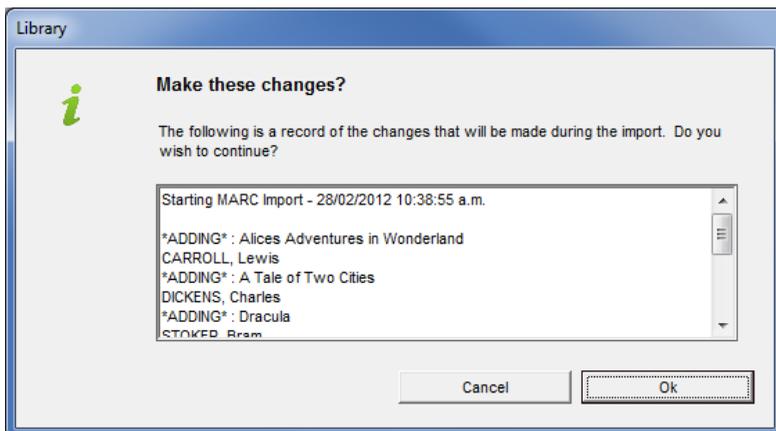
Import MARC file > Create NEW catalogue entries  
(message specifying defaulting to NO accession number allocated – Do you wish to continue importing?)

Yes

Select the 'E-book MARC file' option.



At this point browse to the previously saved new .mrc file and select it, then click 'Open'. A message importing the files is displayed showing the list of titles to be added with a summary total of records added, updated, or unmatched in the process and finally on 'OK', an Import Completed summary.



To search for one of the new titles displaying the new e-book icon in the Media column, open Opac and type in your search.



**Matching Items**    Order by:     Items Found: 1

Title search for "alice in wonderland"

Tag	Media	Title	Classification	In
<input type="checkbox"/>		Alice's Adventures in Wonderland Carroll, Lewis		? A

Press Alt-T to Tag all or Alt-U to untag all.

Click 'Show'.

**Matching Items**    Order by:     Items Found: 10

Title search for "alice"

Tag	Media	Title	Classification	In
<input type="checkbox"/>		Alecia's challenge Diersch, Sandra	DIE	? A
<input checked="" type="checkbox"/>		Alices Adventures in Wonderland Carroll, Lewis		? A
<input type="checkbox"/>		Alices Adventures in Wonderland Carroll, Lewis		? A
<input type="checkbox"/>		Always another hill Holden, Philip	799.2 HOL	✓ C

**Alice's Adventures in Wonderland** 

---

**Author:** Carroll, Lewis

**Classification:** **Accession Num.:**

**Publisher:** Gutenberg (e-books) **ISBN:** GUT11 (ePub)

**Location:** **Pub. Year:** 2008

**Series:** **Overdue Price:** \$.00

**Media:** electronic resource **Status:** Addition, Not Issued

**Type:** **Subjects:**

**Reading Age:**

**Notes and Keywords:**

ePub

'Alice was beginning to get very tired of sitting by her sister on the bank, and of having nothing to do: once or twice she had peeped into the book her sister was reading, but it had no pictures or conversations in it,

 Reserve this Item

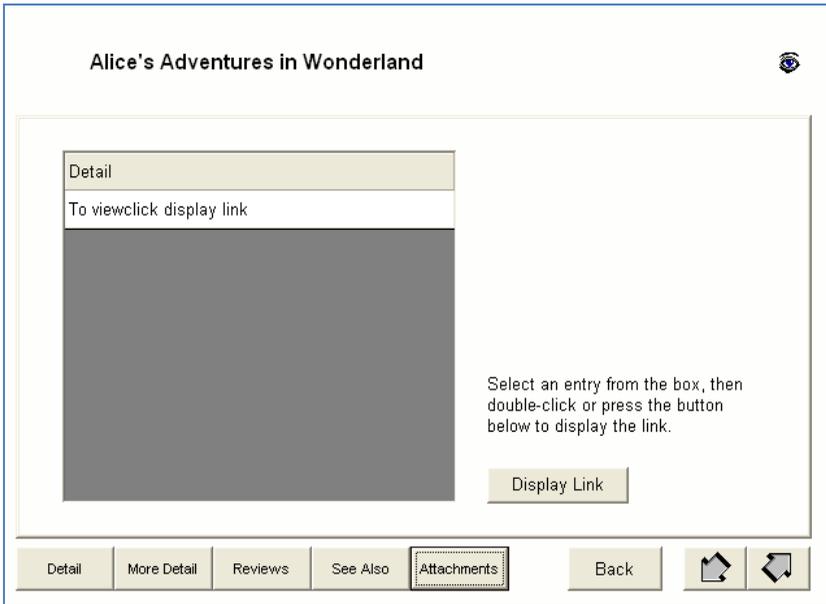
Mouse over field to display full details. Press F9 to display group details.

---

<b>Detail</b>	More Detail	Reviews	See Also	Attachments	Back		
---------------	-------------	---------	----------	-------------	------	---	---

In the Notes and Keywords field the 'ePub' type for electronic, displays. Where this book has been viewed, the eye icon displays on the right.

Click 'Attachments'.



Select 'to viewclick display link'. Click on display Link button and a separate browser window will open with the full details from the electronic book provider available.



Purchases can then be managed through the account pages of their website. Note Library Manager does not have full e-book integration and the management of tracking e-book reading is not available.

In summary, MUSAC provides a direct link from the School's catalogue so that students and staff save time having to navigate the provider's website, going directly to those available through the school. The books are then managed according to the School's provider instructions and services.

## **Acquisitions Management**

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The acquisitions facility has been enhanced to allow you to more easily manage your acquisitions. You can now store contact information against sources as well as a budget area against items to identify the area of your budget that the item comes from. At any point in time you can view how much you have spent towards a particular area (either just acquisitions (or all statii) and items purchased this year (or any year)).

The acquisitions facility allows you to manage details about items you are intending to purchase. Acquisition items are identified by the Potential Purchase (P) status. This documentation uses the terms Potential Purchase and Acquisition interchangeably. Depending on how you run your library you may or may not want to enter in advance the details on items that have been ordered but not received. If you wish to record this information, you may include only basic details about the item at this time and enter additional information when the item arrives and is allocated a barcode.

### **Adding an Acquisition item**

1. Enter the acquisitions area and click on Edit/View Acquisitions
2. Click on 'add' to add a new acquisition.
3. Details are added in a similar fashion to the main editing screen.

You can choose to view either all acquisitions or just those belonging to a particular budget area.

To convert an item from being an Acquisition item to being part of the library, it is simply a matter of changing the item status in scan mode (e.g. Alt-C on a selected entry will change the status to current).

Each item that is added to the library may be placed in a budget area. This allows you to keep track of how much money is spent towards each of these areas during the year.

Budget areas can also be applied to existing library items in the catalogue area by selecting the budget area field under Added fields.

It is also possible to keep track of contact information for your sources. To edit or view this information, select the 'Sources - Contacts' tab from the Acquisitions area.

## **Transferring Acquisitions (Potential Purchases)**

Acquisition items are already stored in the library database, so it is simply a matter of adding an accession number and changing the item status to current in order to indicate that the item is now part of your library (i.e. Alt-C to change the item status to current). You will also be prompted to do this at circulation time if the status of the item is not current.

## **Adding/Editing contact information for sources**

1. Enter the acquisitions area and select the 'Sources – Contacts' tab
2. Select the source for which you wish to enter/edit the contact information
3. Enter/Alter the details and press save.

See also Item Editing

## Subject and Keyword classification in MLM

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Previous versions of MUSAC Library used the NASH (Numerical and Alphabetical subject headings) subject headings as a default list of subject headings for new library catalogues. This list is now superseded by TePatakataka, which updates and expands the subject headings and provides stronger guidance when assigning subjects to items. MLM now includes features that better support using TePatakataka and SCIS as authority files. Certain features within MLM that relied on the old NASH headings have also been removed. This topic gives an overview of those changes.

**Note:** Although some features have been added to support the above changes, there are still some to be added in the future. For example, at present there is no default listing of subjects for a new library and no means of automatically updating the subject authority for TePatakataka. Although you can do this process manually with the tools included in this version of MLM, it is quite possible that the National Library will make available (in electronic form) the subject entries for TePatakataka. If this is the case, MUSAC will include a feature that allows you to apply this authority file against your subject listings.

### Approaches to Subject and Keyword classification

In the past the approach to subject and keyword classification has tended to give a rather large set of results for a keyword search as they were configured to search a significant part of the item and the tendency was to include any conceivable term against the catalogue record to ensure a match.

The problem with this approach is that it is difficult to ascertain which items are strongly related to the search criteria and which are only loosely related when there are so many search results. Many OPAC users would just select the first few available titles in the list and retrieve those books from the shelf which may not necessarily give the best result.

The better approach (and one that is advocated by the National Library with TePatakataka) is to treat subjects and keywords in the following manner:

Subject entries should be strongly related to the item being catalogued (e.g. more than 20% of the resource) and come from an approved list of terms. There should only be a relatively small number of these - rarely more than 10 and certainly not the couple of hundred entries one particular school was adding against their records.

Keywords on the other hand, should be any term that is considered appropriate for the item but is NOT already included as a subject heading and forms a smaller part of the resource being catalogued.

Ideally you won't add the same term to both the keywords and the subjects field. This means that a keyword search will include fewer items, but won't include items that have already been found using a subject search, making it possible to distinguish between items that are strongly or loosely related to the search term.

The perfect search result is one that returns ALL the relevant material and nothing more than that. The traditional approach of entering every possible term as a keyword and having your keyword search all the available fields will frequently result in an unmanageably large list of search results. The same problem applies to subject searches - when it comes to cataloguing, quality is more important than quantity.

For a library catalogue that has subject and keywords classified using the above approach, the Keyword search would be

configured to search only user defined keywords, title and author and NOT subjects, notes or series. The subject search would be the main method of locating material by term and if this is not successful, then a keyword search is used to locate material that is not so strongly related to the search term.

## **The Subject Authority**

MLM has been updated to include the following features with respect to subject authorities.

Note that the features described below only appear if you have specified in configuration that you are using an authority file. (See further on for the details on configuration changes)

## **The Approved term tag**

The subjects list now includes a tag on each entry to indicate whether or not it is an approved authority term. The options are 'Not Known', 'Non Approved' or 'Approved'. Initially all entries in your subjects list will be tagged as 'Not Known'. Over time you can either manually update these to approved or not approved (according to your subject authority i.e. TePatakataka or SCIS).

If an electronic version of the authority is available, this can be used to update the entire list at once using the link subject authority button in Configuration - Items - Subject Authority.

## **Subject linkages**

Each subject may be related to other subject entries in the following ways:

***Preferred term:*** The given term is not approved, this list contains approved terms that should be used instead. This is the same as a Use/Used for relationship in SCIS.

**Related term:** A list of related terms for the current term - also called 'See Also' references

**Narrower term:** This list displays a list of more specific terms and is used by SCIS, but not TePatakataka.

The preferred term subject linkage can also be used to map common misspellings or abbreviated terms to the correct term (e.g. WW2 can be linked to World War II, so that typing WW2 will find the right titles even though WW2 is not used as a subject term).

## Configuration settings for subject authorities

There is an entry in configuration (Items - Subject authority) that allows you to specify which (if any) authority file you are using with your library database. The following choices are available:

**(None): This is the default.** You are not currently using any authority file and will not be prompted to check your subject additions against the subject authority when cataloguing.

**(SCIS Subjects Authority):** You are using the SCIS Subject Authority file.

**(Te Patakataka):** You are using Te Patakataka as an authority.

**Prompt for verification when adding non approved or unchecked subject entries:** This option helps prevent the addition of non approved terms to the subjects list. During cataloguing you will be warned if you add a subject that is not already in the list or in the authority file as an approved term.

**Display Non approved and unknown subject terms in different colours:** This option makes it clearer which subject entries are part of the authority file and which are not. Approved terms appear in black, Non approved terms in red and unknown terms in blue.

***Link Authority file:*** When changing the type of authority, you will be prompted to change the 'approved' status of all your subject entries to unknown. If you have an electronic copy of the subject authority file, then you can choose to link to this file in order to update the approved status of your subjects list.

**Note:** When linking to an electronic authority file, no subject entries are added to your existing list, however the authority file is converted to a format usable by MLM so that future additions to your subject list will be automatically validated against the authority file. The linking process also sets the approved term status against your existing subject entries.

## **Tools to support Subject classification/reclassification within MLM**

If you wish to update your library catalogue to conform to Te Patakataka, the changes you will need to make include the following:

- Updating classification entries against items
- Updating the subject authority
- Updating subject entries against items

If you choose to use a subject authority file, you should select the appropriate authority file within configuration as described in the preceding section. This will enable the features that support your selected authority file.

### **Updating Classifications**

The main tool here is the reclassification wizard which assists with the steps involved. Note that you can also carry out changes using existing features within the package, however the wizard simplifies this process for you.

## **Updating the Subject authority**

The subject picker that is used to add subjects can now be expanded to display and edit additional information such as the linkages between subjects and the approved/non approved term status.

You can also use the 'link authority file' button under configuration to apply an electronic version of your authority file (if available).

## **Updating subject entries against items**

This process involves checking the subjects that are against an item to see if they are suitable for the item. Note that as you update your subject list against the subject authority - making each entry approved/non approved, the details are automatically updated against the individual subject entries on the items. You may wish to combine this process with the reclassification process so that you are physically only handling the item once.

## **The subject authority file Viewer**

When the SCIS/TePatakataka subject authorities are imported into a library, the package records all the entries in a 'shadow' subject authority file. With SCIS this shadow file may contain more than 100,000 terms. In most cases you do not wish to have all of these subjects appear in your subjects list. The shadow file is however used to link terms even if those terms do not appear in your subjects list. This way you get the benefit of having the full list of subjects in the system without having to have a huge subject list. For any subject to appear against an item it must be in your subjects list.

To view the full list of subjects from the subject authority file when adding a new entry in the subject listing, click the 'Click to Browse Authority List' text in the edit screen.

Please edit the entry details

Description: [Click to Browse Authority List](#)  
Watchdogs

Short Description (Code):  
[Empty text box]

Dewey Number:  
[Empty text box]

Is this term approved? (Not Known)

Cancel Save

Linked Subject Terms

Related Preferred Narrower

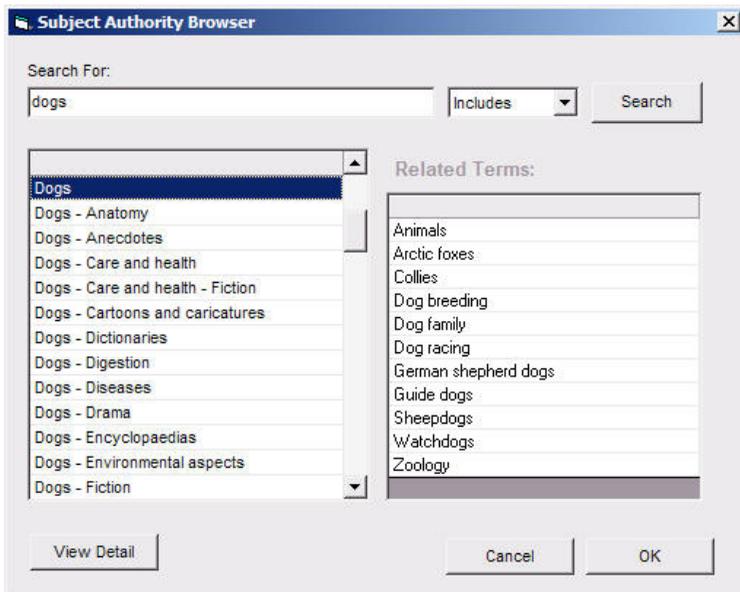
Add Remove

⏪

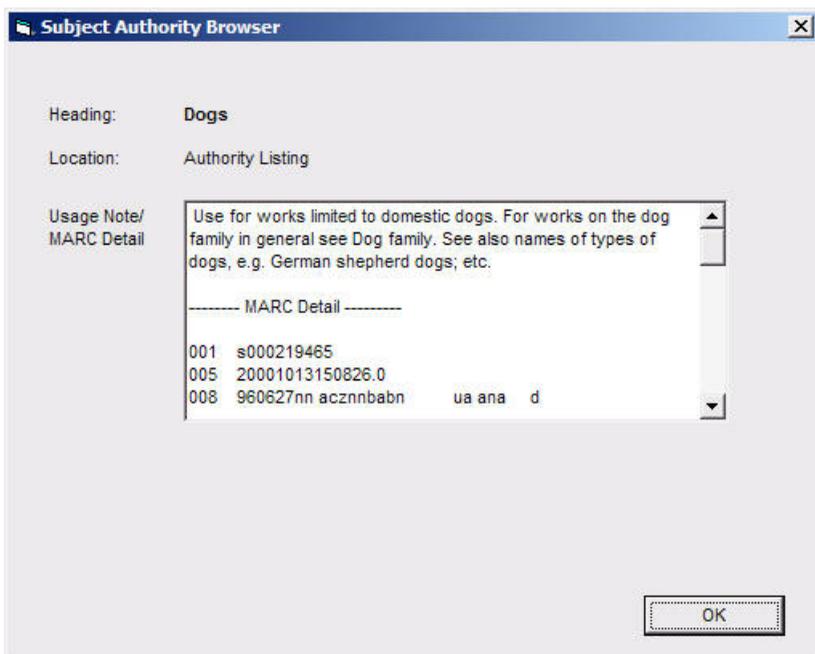
The following screen appears:

This screen differs from the subjects screen in that only subjects matching the entry criteria are displayed. Type in at least 3 characters of the subject and click search to locate an entry containing or starting with the given term.

The list of matching subjects appears on the left. Selecting one of these entries will result in the linked terms being displayed on the right hand side of the screen. You can quickly search a linked term or subject by clicking an entry in the right hand list.



To display the authority note (SCIS), click the 'View detail' button and the following screen will appear giving the usage note and MARC record details:



## Group/Set Management

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MLM provides a number of options for managing the cataloguing and circulation of related material. You could barcode and treat each item as a separate entity within the package (and this is also a valid option) or you may choose to use either the group or set features in MLM to simplify things.

### Group Management

A group consists of a number of related items which may or may not be physically identical to each other. Each item is separately catalogued (usually with its own barcode). A group has a **master** item (which may just be a catalogue entry for the box/container that physically contains the group items).

The following items are grouped with this Item

Accession Number	Title	Issue Sep.
B008743	"Here I am!" said Smedley	<input type="checkbox"/>
B007537	"Smile!" said Dad	<input checked="" type="checkbox"/>
B014233	"What is that?" said the cat	<input type="checkbox"/>

Buttons: Add Item, Scan & Add, Remove Item(s)

The grouping facility supports the circulation of groups of items – particularly in the following situations:

- A book of short stories or a video cassette with a number of stories or programs contained within the same physical item. Each story or program warrants its own catalogue entry so that you can associate subjects, author information and notes with it. You do not need to allocate an accession number for each item as it will not (cannot) be physically issued separately.
- A collection or kit of items that can be issued as a whole or as individual items. In this case you have a number of separate physical items that are logically grouped for circulation purposes. (each item should have its own accession number).

If the item currently being displayed is the master item in the group, then a list of the items grouped to the master item will be displayed and you can specify which of these items can be separately issued. In the case of a grouped item being displayed, then the name and accession number of the master item in the group is displayed in this area.

During circulation the package will prompt you with the number of items that it expects to be with the group when scanning the master barcode for the group. This number could differ from the number of items defined in the group if some items have already been issued. The circulation screen allows you to select/deselect group members if they do not appear in the group at the point of issuing/returning.

### **Setting up a group (resource kit)**

1. In both of the above cases, you enter each item into the database as per normal.
2. Create an item as a master item (which can be a 'dummy' catalogue entry just representing the container for the group items). This master item represents the group as a whole.

3. Go to the groups tab on the master item record.
4. You now need to associate each of the non-master items with the master. To do this click on the 'add item' button and select the item to be included with the group from the list. The title and accession number of the added item will now appear in the list.
5. If the item is able to be issued separately from the master item (as is the case in example B above), ensure that there is a tick in the 'Issue Separately' column.
6. Repeat the above process for each item to be included in the group.

You are now ready to circulate the item as a group (see the section on circulation for more information on circulation of groups).

## Resource set facility

An alternative to the grouping facility for cataloguing and circulating related material is the set facility. This allows you to have a single catalogue record that represents a number of **identical** items. Each item must be the same and the set is circulated as a whole. If you want to be able to individually issue each item in the set, then the items must be catalogued and bar-coded separately and the grouping facility is more suitable for those items.

The set facility is most useful for class sets of items that are issued to the class as a whole. During issuing and returning, the package will prompt you to count the number of items that are in the set and it will note if the quantity of items in the set is different from the number that was entered when the set was catalogued. Any anomalies are recorded against the transaction and you can report on these using the 'Resource set circulation problem' report. Note that the overdue reports will only include the set if it has not been returned. If the set is partially

returned, the 'Resource set circulation problem' report can be used to detect outstanding items. If material is returned to the set after the set was previously returned but before it is issued again, the package will mark the previous transaction as having had the full set returned as the current issue confirms that the correct number of items is included in the set.

This is useful for sets of items that may be issued to the class as a whole and then later distributed to individual pupils. You don't really want to barcode each and every item, but you do want to keep track of the circulation of the set as a whole and to detect if there are items that are missing from it when returned.

To turn an item into a set, simply add the 'Set item count' field (Added Fields tab) and enter the number of items in the set.

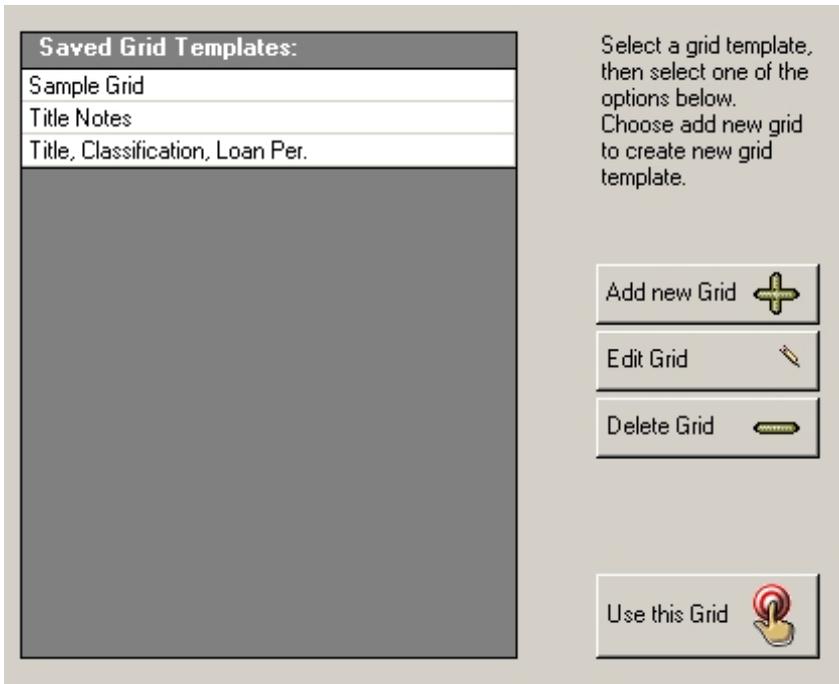
## The Grid Editor

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Grid mode allows you to edit data in a spreadsheet like format. This is useful if you are updating a single field against many items (possibly based on the data in other fields). To use grid edit, you need to first define a grid template that identifies the fields you wish to work with along with various other options.

### Creating a grid definition

When entering grid mode you can choose to edit data using an existing grid template or create a new one.



## Editing the data

Select the required grid template and click 'Use this Grid' to load the grid for data entry.

The screenshot shows the 'Grid Editor' window. The main grid contains the following data:

Title/Author	Accession Num.	Classification	New [▲]
MAKING MONEY IN NEW ZEALAND by NEWMAN, FI	1157	332.4 NZ	
MAKING MONEY MADE SIMPLE! by WHITTAKER, NI	1158	332.4	
SMALL INVESTOR'S GUIDE TO THE SHAREMARKE	1159	332.6	
THE GALA ATLAS OF PLANET MANAGEMENT by G/	1160	333.7	
NATURE by NATURE	1161	821.08	
YOU AND YOUR LAWYER by LUDBROOK, ROBERT	1162	340	
COURTROOM PROCEDURE IN N.Z. by O'DONOVAN	1163	347 NZ	
BASIC RULES OF THE GENEVA CO			
THE GENEVA CONNECTION by LOV			
BATTLE FOR THE EARTH by BATT			
RUNNING PRESS GLOSSARY OF IT			
WOMEN & EDUCATION IN AOTEAF			
SUPERTRAINS by KLEIN, AARON E			
THE ROYAL STYLE WARS by EBBE			
MOKO by KING, MICHAEL			
SAMOAN PROVERBIAL EXPRESSIO			
MAORI LEGENDS FOR YOUNG NEV			
TALA O LE VAVAU by TALA			
THE WORLD OF THE POLYNESIAN			
MYTHS & LEGENDS OF CHINA by V			
NEW OXFORD PICTURE DICTIONA			
NELSON ENGLISH DICTIONARY by			
FIRST ENGLISH DICTIONARY by WITTY, F.R.	1182	423 B	

A 'HotKeys' dialog box is overlaid on the grid. It contains the text: 'The following hotkey combinations are available:' and a table with the following content:

Key	Text
Ctrl-0	New Zealand
Ctrl-1	Australia
Ctrl-2	Fiji
Ctrl-3	England
Ctrl-4	
Ctrl-5	
Ctrl-6	
Ctrl-7	
Ctrl-8	
Ctrl-9	

The 'Grid Editor' window has buttons for 'Grid Editor' and 'Hot Keys' at the bottom.

The following features are available in grid mode:

- Click and drag a column heading (whilst holding the mouse button) to change the order the columns are displayed.
- Click a column heading to sort the data by that column (alternating ascending and descending).
- Place the mouse between a column heading so the cursor changes to a left-right arrow. Click and drag to change the column width.
- Changes to the column widths, order etc are saved automatically if you have the

- remember grid layout check box set in the grid template options.
- Press F5 to display the list associated with a field (e.g. Publisher, series etc).
  - Press F2 to display a larger box for editing the current field (this is useful for editing longer fields such as notes etc).
  - You can temporarily switch from grid mode to full record display mode for an item by clicking the icon to the left of the item you wish to edit.

## Grid Options

Pressing the options button or creating a new grid template will give you the following screen:

The screenshot shows the 'Grid Setup' dialog box. It is divided into several sections:

- Available Fields:** A list of fields including Status, Stocktake, Subject Grouping, Subjects Assessed Date, SubTitle, Title (highlighted), Title Prefix, Type, Unused MARC Info, and IssueCharge.
- Selected Fields:** A table with three rows:
 

Field	Editable
Accession Date	<input type="checkbox"/>
Author	<input checked="" type="checkbox"/>
Title	<input type="checkbox"/>
- Grid Settings:**
  - Grid Name: My Grid
  - Default Filter: All Items
  - Set Font: Arial, 9pt
- Buttons:** Clear List, Checked fields are editable (with up/down arrows), Options, Cancel, and Save & Exit.

Select fields to include in the grid by double clicking them or using the right arrow after they are selected. The selected fields will appear in the list to the right. The tick next to the field indicates whether it is editable or just read-only.

Additional settings such as the default filter, display font and grid name can be set within this screen.

## **Hotkeys**

Hotkeys allow you to quickly enter a value from a list of predefined options. Hotkey settings are associated with the grid template.

To remind yourself of the current hotkey settings, press and hold Ctrl-~ and the list is displayed temporarily. The hot key entries are activated using Ctrl-1 to Ctrl-9

## Retrospective MARC Importing

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If you have a library catalogue which has an inconsistent quality of data entry, you can update your existing records from MARC record information. This is especially useful for schools that subscribe to SCIS due to their being no per record charge, the fact that SCIS records are specifically created for school libraries and have a consistently high quality of data entry.

Note that updating existing records with MARC record information does not affect certain fields such as location, loan period, accession number etc which are specific to your library. You can also choose not to overwrite fields that you may have modified such as classification and notes.

To make a retrospective request, go into the item import/export area of cataloguing and click 'Create MARC request'. Then click the 'Create' option at the top of the screen. You will be asked if you wish to generate a retrospective request or a request for new records. You can create the request using a filter to update just a selected area of the library or choose to update all records that have ISBN details associated with them.

The package will then generate the request file which you can use to obtain MARC records (see the previous section on SCISWeb).

When importing the request you are given the option of creating new items from the request or updating existing items. You will obviously choose to update existing items for a retrospective request. If you inadvertently choose to create new items, you can simply change your addition items to deletes and remove them again from the catalogue.

## The Title Matching screen

If you attempt to do a retrospective MARC import for items that do not appear to exist in the catalogue the title matching screen will appear. Only MARC records that cannot be matched on ISBN will appear in this screen. Successful matches will be updated automatically.

### Unmatched Titles

The following MARC records could not be matched to any titles based on an ISBN number match. You can however update your existing records through manually matching the titles by selecting an entry from the list below and the action to take for importing the record.

MARC Record Title	Action
A closer look at ancient Egypt by BOASE, Wendy; MCBRIDE, Angus; THOMAS, Eric	Ignore record
A family in Thailand by JACOBSEN, Peter Otto; KRISTENSEN, Preben Sejer	4 Items to update.
A family in World War II by ROSS, Stewart	Create new record
Alan Duff's Māori heroes by DUFF, Alan	Create new record
Alexander the Great and the Greeks by HARRIS, Nathaniel; WOOD, Gerry	
Amazing journeys by BACON, Ron; HURFORD, John; Photobank	

View Record  | Action ▼ | Update

- Ignore MARC Record
- Select the catalogue entry to update
- Create a new catalogue item

Exit

This screen allows you to manually link the MARC record to the correct entry in your catalogue or create a new blank entry if you do not already have the item in the catalogue.

Before the screen is displayed, the package will attempt a basic match on title/author (entries that have matched this way will appear with an entry in the action column. Note that it is quite likely your existing catalogue entries won't match due to punctuation, typos etc.

## Linking up titles

You can do one of three things for each MARC record:

- Select the title using scan mode that matches the MARC record (all copies of that title will be updated).
- Ignore the MARC record being imported (nothing will be updated or added to the catalogue).
- Create a new item: If you are satisfied that you didn't actually have the record in the catalogue, you can create a new record. This option would not normally be used as a retrospective request is for existing catalogue records.

Once you have decided what action to take, you can click the update button to apply the changes to the catalogue.

## **Borrower Management**

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Borrower management can be greatly simplified by using the MUSAC borrower update. We generally recommend that you use the enrolment number as this allows a single method for uniquely identifying pupils throughout your school.

### **Building your Borrower Database**

There are two main options for building your database of borrowers – via the MUSAC Borrower Update, or Manual entry of Borrower Records. Most schools with Student Manager would use the first option as this requires the least effort in maintaining the database.

Note: For schools using another Student Management System (SMS), there is an option for importing borrowers from a tab delimited text file. More information about this option is available by contacting MUSAC Software Support, phone 0800 600 159.

## Manual Entry of Borrowers

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Borrower records can be added manually by clicking on the Add button in the borrower scan screen or choosing the Add Borrower option under the borrower editing screen.

### Creating a new Borrower record

**Either** Enter the borrower selection screen and click on Add.

**Or** Within the borrower editing screen select 'Create new Borrower' from the Borrower menu.

Enter the borrower's personal details as appropriate. Most fields can be left blank if desired.

### ***Borrower Note***

Any information inserted here will appear during circulation to notify you of important information about the borrower.

### ***Library Number***

Each borrower should have a unique library number for circulation purposes. This number can be changed after being added. However once a borrower has been deleted from the database, you will no longer be able to view or recover their borrower history.

Some libraries choose to reallocate library numbers to new borrowers each year. You can do this and retain your previous borrowers quite safely with this version of library. Simply remove the borrower number from the previous borrower and reassign it, the new one – the borrower history of the previous borrower will stay with that borrower and not appear against the new borrower.

## ***Borrower types***

	Status	Description
P	Pupil Borrower	Only pupil borrowers are affected by the update. The lesser of the item and borrower loan periods are used for students.
S	Staff Borrower	These borrowers must be entered manually as they cannot come from Student Manager information. The greater of the staff/item loan periods is used during circulation.
L	Leaver	Borrowers who do not appear in the Borrower update file will be changed to leaver status.
A	Adult	Used for Community libraries
C	Child	Used for Community libraries
D	Delete	Borrowers must have their status changed to delete before they can be removed from the database.

You can additionally add your own borrower types within the system (if needed).

### ***Borrower Loan Periods/Issue Limits***

Although you can enter these manually against individual borrowers, the default values can also be set by year level under the borrower framework (see configuration – ‘Borrower Framework’ for more information).

### ***Start date/End date***

These can be used to restrict the dates that a borrower is active within the system. Any attempt to issue etc outside the start/end dates will be prevented. By default these dates are not active.

### ***Pictures***

If you have chosen to update your borrower data from Student Manager (including student pictures), the picture will appear here as well as in circulation.

### ***E-mail address***

Borrower e-mail addresses can be used for contacting the borrowers regarding over-dues etc. If using e-mail, it is mainly important to enter addresses for the staff, so they can be notified of outstanding issues for students in their class. (Please refer to

the circulation history section and report printing section to understand how e-mail addresses are used within MLM).

## **Borrower Tags**

As there are no added fields for borrowers, the borrower tags facility provides an alternative method for tagging or identifying individual borrowers for your own purposes. You could for example use this feature to identify which borrowers were pupil librarians.

The borrower listing and overdue reports allow printing by borrower tags.

You can edit the list of available borrower tags in configuration (fields and lists).

# Import of Borrowers

Whether you have **edge** or Student Manager (SM), you can update your borrower listing from that student data without having to duplicate this for your borrowers.

Student details can be exported from **edge** manually, or even quicker and easier for your library, automatically; see more on borrower updates. There's an "MLM Updating borrowers from edge" video which demonstrates setting up for this, see MUSAC Classic Video Library on [musac.co.nz](http://musac.co.nz).

## When do I run the borrower update?

Run this routine any time of the year in order to synchronise borrower details with that contained in **edge** or Student Manager. The most obvious time is at the start of the year, however depending on how frequently the student details change, you may wish to do this more frequently (once a month, once a week or even daily).

The library software includes a check to ensure that the student data has been modified recently. This is a double check to help ensure you are updating from the correct location.

## Borrowers automated update from edge

If your school is using edge, you can update your borrowers online removing the requirement for a file to be imported into your computer to update the borrowers in your school.

Once the link is set up in Library Manager (from version 14.4.10) shown below, the updates can be directly retrieved.

Click Borrowers > SM/edge Borrower Update, and in the Update Options Section select **edge** from the dropdown, selecting "No" in both radio button selections for:

Have you used enrolment numbers...?, and  
Do you want to change....?

Library Administration - 14.4.10 - 12/11/2014 - [Borrower Framework]  
Library Windows Help

### Borrower Update

Borrower details can be updated from either MUSAC Student Manager or Edge.

**Update Options**

Update data from  Note: Non-pupil borrowers are not affected by an update.

Have you used enrolment numbers for your borrower barcodes in library?  Yes  No

Do you want to change the status of leavers to deletes?  Yes  No

Update Borrowers and Framework?

Prompt to set borrowing defaults after update

Use a Borrower Update file  Retrieve the Borrower Details directly from edge

edge User (Number or eMail)

edge User Password

edge Borrower Update URL

When "Retrieve the Borrower Details directly from edge" above is selected, the user borrower update URL (and your school number) populates:

Click "Proxy Settings" and complete the settings for your school, before you can update your borrowers in the normal way, click "OK" and "Run Update".

## Updating Borrowers from MUSAC Student Manager

You can update borrowers from MUSAC SM either directly over the network or via a pen drive.

To update via pen drive, enter the backup and update area of Student Manager and select 'create library export file' (you may want to get someone who is familiar with Student Manager to do this for you).

1. Enter Borrowers -> SM Borrower Update (under administration).
2. If you are updating by disk, insert the pen drive and select the drive letter, which contains Student Manager on the network.
3. Ensure the update options are specified correctly
4. Click update. The update process will proceed but not make any changes to your database.
5. Once the update has finished you will be presented with a list of the changes that will be applied to your borrowers. Check that the changes made are what you expect them to be before continuing. This is your last chance to back out before the changes are permanently applied.

There is a button next to the update drive that allows you to navigate to a selected folder on the network to find the SM update file. This allows you to navigate to data on the network without having to use mapped drives etc.

## **Points to Note:**

- It is advisable to update using the enrolment number as this does not change from year to year as can the particular spelling of student names.
- If you are updating at the start of the year, you should ensure that the office staff have 'rolled over' the Student Manager information for the coming year, otherwise you will just be updating last year's borrowers!
- Performing a backup before doing the update is advisable, particularly if you are unsure about what you are doing.

## **Photos from Student Manager**

If the borrower update routine detects that you are using student pictures in SM and are updating across the school network, it will ask you if you wish to bring those pictures across into Library Manager. When updating from a pen drive, the pictures may not automatically be brought across with the update file if there are space limitations.

For Student Manager the corresponding directory is CM\Media.

To get the pictures into MLM manually, copy the contents of the CM\Media directory to the MLM\PFPic directory after the borrower import.

## Circulation

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Circulation is one of the main activities within a Library Package. MUSAC Library Manager makes this process relatively straightforward.

**Note:** There are a number of defaults that are relevant to circulation. These defaults should be reviewed before circulating any items to ensure that the package operates in the desired fashion.

### Daily circulation

Clicking on the Daily circulation screen will bring up a list of circulation activities. To start an activity either click on the relevant button or press the appropriate key for the activity. The program will return to this screen after a period of inactivity to avoid accidentally issuing material to the wrong borrowers.

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**Note:** If the 'Allow Circulation on Barcode only' option is checked under 'Configuration –circulation' then you must enter library numbers and accession numbers to circulate. If the flag is unchecked then you can also select borrowers and items by surname and title. Having this flag checked helps prevent errors during circulation.

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### Issuing

To issue an item, scan or type the borrower's barcode/library number. The borrowers name and a summary of their circulation details will appear at the top of the screen. From here (if you have appropriate rights) you can view either the borrower's personal details and/or circulation history.

If there are any problems with issuing a selected item to the borrower, you will be notified and have the opportunity to cancel the issue. If set, you may need to enter the circulation override password to continue with the action.

Continue to scan or enter the barcodes for items you wish to issue to this borrower. Press escape once you have finished.

The issue information along with the due date appears in the box at the bottom of the screen (the most recent transaction is first entry in the list).

If you scan a borrower barcode when the system is expecting an item barcode during issuing or renewing, the system will automatically change the current borrower. Not that this is not the case with other circulation activities (e.g. reserving) as doing so would potentially result in incorrect circulation details to be recorded (e.g. reserving a title instead of issuing it).

## **Returning**

Scan or type Accession numbers/barcodes for the items that you are returning. Each item will appear in the transaction list as it is returned.

Entering a borrower barcode whilst returning will automatically switch back into issuing mode.

## **Renewing**

Renewing is nearly identical to the issuing process. First scan the borrower you wish to renew items for and then the barcodes for the items themselves.

## **Reserving**

Scan in the borrower and item details. If there are multiple copies of the specified item, you will have the option of reserving any copy of that Title/Author combination.

## **Item Details**

Enter an item barcode or title to view the details on it.

## Borrower Details

Enter a borrower name or barcode to view details on it.

## Circulating Grouped Items

Accession	Title	Present	Issued?
9029	"AT SCHOOL I'VE GOT A CHANCE"	✓	No
10171	"WHERE DID I COME FROM?"	✓	No
12282	\$4 BILLION SHEEP	✓	No

When circulating the master item of a group, you will be prompted to check that the number of items in the group is identical to the number of items that the package expects to be in the group. During issuing, an item is expected to be with the group if the circulation status is current and the item is not already issued to another borrower.

During returning, items in the group are expected to be with the group if they have been issued with the master item.

In order to ensure that only those items included with the group at the time of circulation are actually recorded, you can choose to specify individually which items are present if the total is different from that expected.

The group circulation screen (shown on the previous page) shows details about the items included with the group as well as whether or not the package expects the item to be with the group. Items appearing with a tick are expected to be with the group. To change an item from being present to not being present, make the item the current selection by pressing the up or down arrow key and then the space key to toggle the present status. Continue to do this until the 'present' status of each of the items is correct. Only those items with a tick in the present column will be issued or returned.

You can also scan the barcodes of the items in order to specify whether or not they are present. To do this click on the 'scan barcodes' button and follow the instructions on screen.

## **UpdatingOverdues**

The update overdue process determines which items are flagged as overdue and to update current issue count. This process can be set to run periodically and can also be run manually. By default this process runs once a day, however if you wish to run this process manually or more often, you can configure this in the configuration area of the package.

## Due Dates

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### How are due dates determined?

By default the due date is determined by the item/borrower loan period combination (the longer of the two periods for Staff borrowers, the Shorter of the two for other borrowers). If you have set the 'use library calendar for due dates' flag under circulation defaults then the library calendar will also modify due dates according to those settings. Settings for last due date for year levels will also apply. The **shortest** of the possible loan periods will be used.

In addition there is a fixed loan period flag that ensures that the item circulation period is used for that item (i.e. staff borrowers will not automatically have the item issued for a longer period if their loan period is greater than the item).

### Specifying alternative due dates

By pressing F4 within the main circulation screen, you can choose a specific due date to use for returns. This overrides the defaults mentioned above, allowing the specified due date to be used or to prompt for a due date on each issue.

You can also change the due date of an item immediately after it has been issued, by pressing F3 and amending the transaction details.

## Circulation Messages

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During the course of circulation, certain situations will arise requiring the attention of the person circulating material. The package gives feedback in a number of ways.

**Screen colours:** You can configure the circulation screens to give a visual indication of the circulation mode the package is in at any point in time.

**On screen messages:** If your attention is required a message will appear on the screen requiring you to respond before the package continues with the requested action.

**Sounds:** The feedback sounds (as listed below) can give an audible indication of the success or otherwise of an action without having to view the screen.

Action	Description
Successful	No problems with circulation action. Continue as normal.
Warning	A message will appear indicating a warning. You should read the message before continuing. This message can be overridden.
Unsuccessful	An Important situation requiring attention has arisen. A message displaying the problem will appear. Depending on your logon rights, you may or may not be able to continue with the actions. If another user with appropriate permission is available, they can temporarily enter their logon and password to override the block.

Refer to configuration for more details on these settings.

Typical Circulation Messages include:

***Borrower Limit has been reached.*** This borrower has reached the maximum number of items that they are allowed out at any one time.

***Borrower Has Overdues.*** The currently selected borrower has overdue items.

***Item cannot be issued:*** (Zero loan Period).

***Item Status Not Current*** – you will have the opportunity to change the status of the item to current and issue it or to cancel the issuing process.

***Item Already Issued*** – you will have the option of returning the item for the previous borrower and re-issuing it to the current borrower.

***Item is Reserved by another borrower*** - If you attempt to issue an item that is being held for another borrower on the reserve list, the package will warn you.

Depending on configuration settings some of these messages can be overridden, whereas others may not.

The last few transactions are listed at the bottom of the circulation screen.

## Reserves

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Reserves can be made through daily circulation or through OPAC (if you have configured your library to allow borrowers to do this). Reserves are based on the title/author combination so they are not copy specific. This avoids the need for a specific copy to become available for a given borrower reserve. The exception to this is where a borrower reserves a title that is already in the library. In this case the reserve is made copy specific to avoid having the item issued to another borrower.

When a reserved title is returned, the reserve then becomes copy specific and remains on the file until the book is issued to the person who requested the book. The idea is that you are now holding that copy for a borrower, so any attempt to issue that copy to a borrower other than the reservee will result in a circulation warning appearing.

## Viewing and editing reserve information

View: All Reserves

Date	Title	Borrower	Generate Slip
2/08/2002	COMPUTER CONTROL (STARTING DES HAWES, HENRY PARRY, DAVID	KAKA , Lindaria 11WE DA	<input type="checkbox"/>
2/08/2002	VISUAL BASIC 6 COMPLETE BROWN, STEVIE AND OTHERS	HICKLING , Daniel 11FC PH	<input type="checkbox"/>
15/08/2002	PADDY CLARKE HA HA HA DOYLE, RODDY	HARTNELL , Cameron 9FF HA	<input type="checkbox"/>
26/08/2002	COLLECTED POEMS 1909-1962 ELIOT, T.S.	LE SUEUR , James 12FX TE	<input type="checkbox"/>
3/09/2002	HARRY POTTER AND THE PRISONER C ROWLING, J.K.	BROWN , Shari 10AN AN	<input type="checkbox"/>
4/09/2002	DARWIN'S FORGOTTEN WORLD LEWIN, ROGER	PERI , Dominique 9NU NU	<input type="checkbox"/>
	VISUAL BASIC 6 COMPLETE	FRASER , Samantha	<input type="checkbox"/>

More Options    Print/E-Mail    Entries in Red are being held for borrowers to collect.    Exit

The reserves editing screen allows you to view, create and remove reserve information. Entries that appear in red are the borrower specific items (that should be held aside for the borrower to collect).

Reserves can be viewed by Title, Item, Borrower or date. To display the current borrower and due date for a given title, double click the entry or select More Options -> Display Current Borrowers.

You can remove reserve (More Options button) by borrower status, All reserves (e.g. end of year) or selected reserves. Use Ctrl-Click to select multiple entries.

**Generate slip:** Under configuration, you can specify whether or not a reserve slip is printed for items as the item is returned. If you choose not to print a reserve slip as the item is returned then the reserve entry is tagged for printing later. You can then print the reserve slip from this screen. The message that

appears on the reserve slip can be changed each time you print if required.

## Circulation History

View:  All Circulation History

**Status**

Out       Overdue  
 Returned     Lost

**Date range**

Due/End Date  -

Due Date	Status	Accession	Title	Classification	B
12/09/2002	Returned	3793	MACMILLAN BIOGRAPHICAL ENCYCLOPEDIA OF PH	770.92 REF	8
27/09/2002	Returned	4529	MACMILLAN BIOGRAPHICAL ENCYCLOPEDIA OF PH	770.92	9
2/09/2002	Returned	6168	MAGIC	133.4	1
22/10/2002	Returned	13194	MAGIC EYE 111	152.14	1
21/10/2002	Returned	12560	MAGICIAN'S GAMBIT	EDD	8
26/08/2002	Returned	14247	MAKE-UP BOOK	646.7	1
22/08/2002	Returned	14247	MAKE-UP BOOK	646.7	8
22/10/2002	Returned	2686	MAKE YOUR OWN ELECTRIC GUITAR	787.6	9
19/12/2002	Overdue	9344	MANA TIRITI	759.9931	8
30/08/2002	Returned	B15207	MANGROVES	582.16	0
30/08/2002	Returned	7301	MANGROVES IN NEW ZEALAND	582.16	0
22/10/2002	Returned	14396	MANTLE OF KENDIS-DAI	WEI	1
24/10/2002	Returned	B15175	MADRI CARVING	736 NZ	7
16/09/2002	Returned	B15175	MADRI CARVING	736 NZ	1

Sort by:  590 Non Fiction. 416           

This screen provides access for viewing and editing circulation information by borrower, item or date. You can choose which types of transactions (Returned, overdue etc) you wish to view as well as a date range for the start (issue), end (due) or return date. You can also access this screen from within the catalogue borrower and daily circulation areas.

**Note:** If you change either the displayed status or the date range, you need to click on 'Refresh' at the bottom of the screen to update the display.

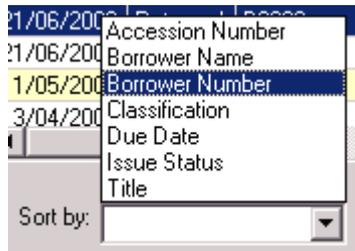
You can delete transactions by selecting the entries you wish to delete, then click on delete (you require appropriate access to do this).

Items that were issued as part of a group appear with an asterisk (\*) next to the Status.

If you access this screen through daily circulation, then by default only the current transactions are displayed. All transaction history is displayed by default when viewing this screen through borrower history. You can of course change which transactions are displayed by selecting or deselecting the appropriate statii.

You will receive a warning if your selection criteria includes too many entries. This limit is applied so that the list doesn't become too large and unmanageable. You can of course change the date range or statii to further restrict your view.

You can also choose to sort the list by any of the following criteria:



Clicking a column heading will also sort by that column. You can remove individual transactions by selecting the entries you wish to delete, then click on delete (you require appropriate access to do this!). Even though you have this option it is recommended that you only use it where a transaction is completely bogus.

To edit the details on a particular transaction, select it from the list and either right click on it or click the edit button. You will now see the transaction detail for this item (shown below). You can modify the details and change the status of the transaction to misplaced etc.

If you change the due date on a transaction that was part of a group issue, the package will ask you if you wish to change the due date on the other transactions as well.

**Circulation Details:**

---

**Item:** AA DAY TOURS IN NEW ZEALAND (AA GUIDE TO) (5199)

**Borrower:** Carrig , Ben ()

**Start Date:** 13/02/2003 12:30 p.m.      **Status:** Overdue

**End (Due) Date:** 27/02/2003 11:59 p.m.

**Return Date:** 01/01/1980 12:00 a.m.

**Notes:**

## E-Mailing overdue messages

You can e-mail overdue messages to staff members responsible for a class or individual borrowers. To do this, select the 'E-mail list of overdue' option from within circulation history.

**Note:** you must have the following already configured:

- The name or IP address of your mail server and the return e-mail address for the library in configuration. If you do not know the name of your mail server, please contact your system administrator. The reply address will be used for any e-mails sent, so responses from borrowers will go to that address.
- Ensure that the class teacher has their class name entered against their borrower record and that the teacher has an e-mail address if you wish them to receive e-mails for students in their class. This allows you to send e-mail notifications to teachers without

- having to enter e-mail addresses against all borrowers.
- If you wish to have individual borrowers receive e-mail notifications, enter their e-mail address against their borrower record. If the borrower has an e-mail and the teacher for that borrowers class has an e-mail address, both the teacher and the borrower will receive a notification. The teacher's e-mail will indicate that the borrower has also been notified individually.

The e-mail text includes the list of currently overdue titles for the individual borrowers or form class (in the case of staff members).

## **E-mailing PDF reports to Staff Members**

This alternative option (available from the Report Preview screen) allows you to send a report to a selected staff member. To do this, print the required report and select 'E-mail report' from the report preview screen. A list of staff borrowers that have e-mail addresses entered will appear, choose the required staff member and click send.

## Recall Facility

This facility allows you to change the due dates on material that has already been issued and produce recall slips that can be distributed to borrowers to notify them of this change. To recall an item or group of items issued or falling due on a particular date:

- Enter circulation history and specify the parameters that identify the transactions to be recalled.
- Check that the transactions listed on the screen are correct and should be recalled (note that only items that are currently issued or overdue will be recalled).
- Select "Recall displayed items" from the options menu and confirm that you wish to recall the displayed items.
- Enter the message that you wish to have included on the recall notice. This should probably include the reason for the recall.
- Specify the new due date for the material to be recalled. The recalled items will have this due date after the recall.
- Choose whether you want to have the list sorted by class or borrower name.
- The list of recall notices will appear. You should print these and distribute them to the borrowers affected by the recall.

Note that this facility could also be used to extend due dates for material that would otherwise fall due on undesirable dates. If you are using this facility to do a blanket recall of items at the end of year, you may wish to just distribute a generic notice to students rather than use individual notification slips.

If you know the final date that the library is open, you will probably wish to specify these dates in the library calendar (in configuration) to ensure that material is not issued beyond these periods.

## Reprinting recall slips

If you wish to view the list of recalled items or to reprint the 5 most recent recalled items at a later date, you can enter the reports area of the package and select "Reprint Recall Notices" from within the "Circulation Reports" area. You need to select the date at which the recall was made. Note that if a particular transaction is recalled again, it will only appear on the most recent recall notice.

## Library Utilities - Stocktaking

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### Scan Barcodes

Scan or enter the accession numbers of items as you find them on the shelves.

Recently scanned items:

Book not found: sd
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Click the download button to register items scanned with a portable barcode reader.

### Progress

- ✔ Introduction
- ✔ Stocktake Setup
- Scan Items
- Print Reports
- Clean up
- Finish

---

**Filter:** Our Library  
**Total Items:** 7891  
**Unstocktaken:** 691

Stocktaking is a process that can be carried out at any appropriate time during the year, particularly if the library is either partially or fully closed. If you are new to this process, you should contact your local MUSAC training provider to give you advice on how best to carry out this process.

Each item in the catalogue has a flag indicating whether or not the item is stocktaken (this appears under the financial tab). During the normal course of circulation this flag is set to 'stocktaken' when an item is returned. Note that the stocktake flag is not really of any significance until you actually carry out the stocktake (for example an item may be returned and marked in the catalogue as being stocktaken, however it might 'walk' from the library the next day).

The general process involved in a stocktake is to mark items as not being stocktaken (resetting the stocktake register), then registering each item by entering or scanning the barcode. Once you have completed the stocktake, you can print a list of items that are in the catalogue but not registered as stocktaken. A

shelf check should then be carried out to determine which of the unregistered items are really lost or were just misplaced during the first check. This information can then be recorded in the catalogue by changing the item status, providing a true reflection of the contents of your library at the point of stocktake.

**Notes:** The entire stocktake does not have to be carried out in one day (unless you have a very small library or are incredibly efficient!). At any point during the stocktake you can exit the package (and do your regular daily backups) and then re-enter and continue from the point you left off.

When resetting the register, you can choose to keep grouped items that have no barcode and are not able to be issued separately flagged as stocktaken. Most likely you will want to do this as these items are probably short stories etc, which cannot be separated from the main catalogue.

The most important thing to remember is NOT to change the filter whilst undertaking the stocktake.

## **Carrying out a stocktake - Step by step**

To perform a stocktake, take the following steps:

1. Select Library Utilities-Stocktaking from the main menu. This will bring up the stocktaking wizard. The steps of the stocktake process are listed on the right. Click 'continue' to move to the next step.
2. You now need to identify the portion of the library that you wish to stocktake (this may be the entire library of course). Click 'select filter' to do this.
3. The next step is to zero the register so that all the filtered items are considered not stocktaken. Remember that you should only do this once at the beginning of the stocktake. You will be notified if there are

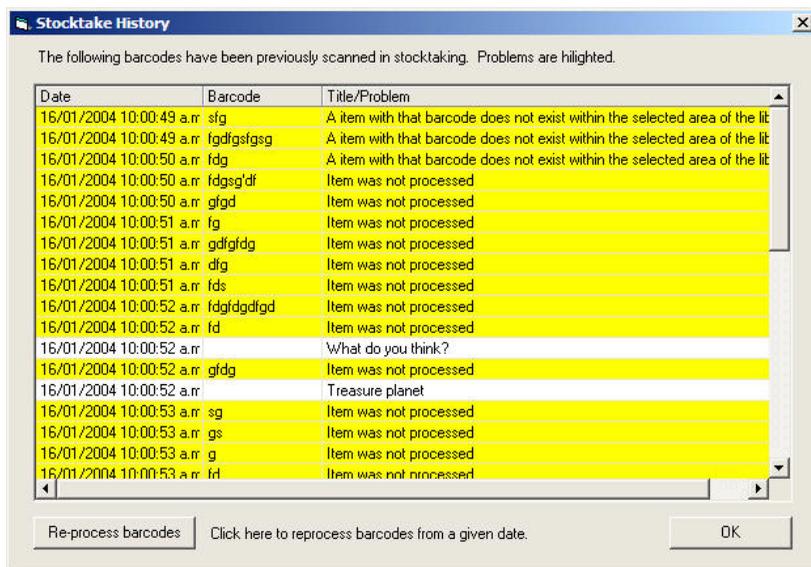
- any items that do not have an accession number and need to be stocktaken manually.
4. Carry out the stocktake by scanning accession numbers into the stocktake entry box. Continue to do this until you have completed all your titles in the portion of the library you are stocktaking. If you are using a portable barcode reader, scan your barcodes using the reader, then select the download button and activate your barcode reader download function. Continue to do this until you have completed all your titles in the portion of the library you are stocktaking. MUSAC hires out a portable barcode reader that can be used to speed stocktaking - please contact your agent for more information.
  5. Now print out a list of unregistered items. This will give you the items that were not recorded as being present during the stocktake. You can choose to omit items that are currently issued from the library. At this point you will want to recheck your shelves to ensure that the books were not overlooked during the stocktake process.
  6. Once you have finished checking your shelves, click continue to move to the clean up stage. Here you can change items tagged as not being stocktaken to 'lost' or 'missing at stocktake' status. You have the option of not including any currently issued items in this change.
  7. You have now finished the stocktake and your catalogue should correctly reflect the current state of your library.

## The download from scanner option

In stocktaking, the download from scanner option now logs the barcodes as they are read. You are notified of the number of barcodes that have been read and will be prompted to process the logged barcodes once you exit the download screen. A list of problems encountered during the processing of the barcodes will be displayed (if there are problems). You can choose not to process the barcodes when exiting, however you will be prompted again to do so next time you exit the screen if there are barcodes still to process.

## Stocktake History screen

You can display the stocktake processing history by clicking the show history button. This will display the following screen which lists the titles processed and any problems with the barcodes scanned.



If you inadvertently reset the register before completing the stock take, you can use the re-process barcodes button to 'play' back the stocktake process from a given date.

## Clean up routines

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The clean up routines allow you to perform a variety of clean up activities on your library data. These activities may result in information being removed from the library database so additional care is needed when running these routines (remember to make daily backups of your data).

Clicking on an activity in the list on the left of the screen will bring up a description of what the activity does on the right hand side. Read the description before running the routine to be sure that it is what you want to do.

### **Removing Borrowers/Items/Circulation History from the Database**

In order to delete an item or a borrower from the database, you need to first change it's status to 'DELETE' and then run the delete items/borrowers cleanup routine to remove them from the database.

Note that removing either an item or a borrower from the database will also have the effect of removing any circulation details associated with the item or borrower.

Borrowers or items that are associated with current issues are NOT removed from the database using this process even though they are tagged for delete. You should print a list of these and check whether or not they should be deleted before returning the item and running this routine again.

Circulation history can be removed by individual items and borrowers as well as by a selected date range.

### **Change case on Field/List**

This option allows you to change a field or lookup list (subjects, publishers etc) to be of a consistent case. Note that it is not

always possible for a computer to determine the correct sentence case as the package must follow a set of predefined rules that are not context specific. One of these rules is a check for words beginning with Mc and Mac (e.g. McDonalds and MacDonald). This may sometimes give the wrong result (for example MacLin instead of Maclin).

## **Rebuilding Search Indexes**

This feature allows you to manually rebuild the keywords indexes that are used for OPAC searches. Normally you shouldn't need to use this as the package makes the necessary updates each time an item is saved.

## **Update Fiction Status**

Under configuration, you can specify if you wish the package to automatically determine whether or not a given item is fiction or non-fiction. If you have elected to set this flag manually yourself and then later decide that the general classification should be determined by the package, you can use this routine to update all items to have the general classification to reflect the contents of the classification field.

## **Return Issued Items**

This option can be used at the end of year/term to return all currently issued items or just those with a particular status.

## **Bulk status change**

This option allows you to change the borrower or item status for multiple entries by scanning the barcodes.

## **Fix Group Links**

This routine removes any invalid links for grouped items.

## **Approve OPAC reviews**

Use this to approve (or change) the content of reviews that have been entered by library users through OPAC.

## **Remove unused lookup list entries**

This option removes entries in the selected list that do not appear against any item/borrower in the system.

## **Check for duplicate items/borrowers**

This will notify you if there are any items or borrowers that have the same number.

## **Non-approved subjects to keywords**

Use this to move subject entries that are not approved in the subject authority to the keywords field of the items that they appear against.

## **Stocktake non-issuable grouped items**

This routine sets the stocktake flag to 'stocktaken' for items that are part of a group and cannot be issued separately (such as a book of short stories).

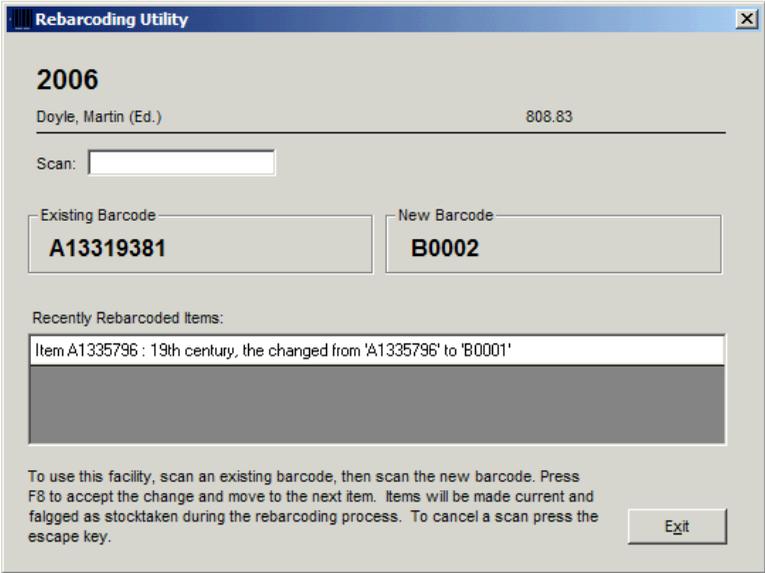
## **Pre borrower update cleanup**

This routine should only be used on advice of the helpdesk.

## Rebarcoding facility

The rebarcoding facility is intended to allow rapid bulk rebarcoding of items within the library. This facility can be used when two libraries with overlapping barcoding schemes are merged or if you wish to replace outdated or incorrectly placed barcodes.

To access this facility, enter the Library Utilities - Clean up area of the package and select 'Rebarcode Titles'. The following screen will appear:



The screenshot shows a window titled "Rebarcoding Utility" with a blue title bar. The main content area is light gray and contains the following elements:

- 2006** (Year)
- Doyle, Martin (Ed.) (Author) | 808.83 (Price)
- Scan:
- Existing Barcode: **A13319381**
- New Barcode: **B0002**
- Recently Rebarcoded Items: 

Item A1335796 : 19th century, the changed from 'A1335796' to 'B0001'
--
- Instructions: "To use this facility, scan an existing barcode, then scan the new barcode. Press F8 to accept the change and move to the next item. Items will be made current and flagged as stocktaken during the rebarcoding process. To cancel a scan press the escape key."
- Exit button

To rebarcode an item, scan the original barcode followed by the new barcode. The system will check that the first barcode exists on an item in the library and that the second barcode does not exist. Press F8 to activate the change and reset the screen for the next item.

Items that have their barcode changed will also have the stocktaken flag and current status set.

There are two additional fields that are set when the item barcode is changed through this facility:

**Old Barcode:** Previous accession number for the item.

**Rebarcoded Date:** Date and time that the item was rebarcoded.

## Search and Replace

---

This section allows you to perform a range of changes to your data. The routines here do not delete records from your library like the clean up routines do, - however you should take care that the changes you make here are really the changes that you need to make. If you are uncertain, it is always sensible to make a backup before continuing.

### Quick Changes

#### Changing Status

Typical changes of status are provided as options as well as an option for arbitrarily changing status.

**Items LOST -> DELETE** (generally carried out before a stocktake).

**Items ADDITION -> CURRENT** (Done after you have checked recently added items for data entry and wish to make them become available as part of the catalogue).

**Item status zap:** Change any item status to another status.

**Borrower status zap:** Change any borrower status to another status.

#### Zero issue count

A count of how many times an item is issued is recorded against each item. You may wish to zero this count at the start of each year.

## Changing loan periods

Routines for modifying loan periods based on a variety of criteria are provided. Loan periods modified by subject can be restored to their previous values.

Loan periods may be changed:

- To a maximum
- To a default
- By Subject
- By Media

## Advanced Search and Replace

Quick Changes | **Advanced** | Subject Changes

Please note: This facility allows you to quickly change large amounts of data within your database. You should always do a backup FIRST if you are not sure about what you are doing!

**1:** Specify the change you wish to make:

Change  to

**2:** Select the group of items/borrowers that you would like to apply the change to by clicking the button below:

Media = AUDIO VISUAL EQUIPMENT.

**3:** Click the 'Apply' button (to the right) to apply the changes to the database.

The advanced tab allows you to carry out additional changes to the catalogue. To make a change to your data you need to carry out the following steps:

1. Firstly identify the change you would like to make by selecting the required field and entering the new value.
2. Specify the group of records that you would like to apply the change to using a filter. (You can create a new filter if needed).
3. Now click the apply button to apply the changes. You will be notified of the number of records that will be affected before the change is completed. Once you accept this, the changes will be applied to the database.

**Note:** If you are not sure of what you are doing, it would be advisable to make a backup of your database BEFORE you use this facility.

## Subject Search and Replace

Quick Changes | Advanced | **Subject Changes**

Make the following changes to the subject entries against items.

**1:** Specify the change(s) you wish to make:

Change	Subject
Add	ABORIGINAL PEOPLE

You can either enter a subject directly or use the F5 key to display the list of subjects to select from.

**2:** Select whether you would like the change to be applied to all items or just those in a selected filter.

Filter: **(All Items)**

Having/Not having these subjects:

Condition	Subject
Has subject	AUSTRALIANS

Select

**3:** Click the 'Apply' button (to the right) to apply the changes to the database.

Apply

This option can be used to quickly change the subject entries against a group of items.

To make subject changes:

1. Firstly identify the change you would like to make by entering the subject and choosing to add/remove it. You can use F5 to display the list of entries.

2. Specify a filter and or the subjects that the item must have (or not have) to meet the selection criteria.
3. Now click the apply button to apply the changes. You will be notified of the number of records that will be affected before the change is completed. Once you accept this, the changes will be applied to the database.

**Note:** If you are not sure of what you are doing, it would be advisable to make a backup of your database BEFORE you use this facility.

## Other Utilities

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This section contains a range of important maintenance type facilities to support the smooth running of the library package.

- Backup and Restoring data
- Compacting your library database
- Library
- Who else is using the library database
- Creating a new library database

## The Reclassification Wizard

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### Classification Selection

Please enter the classification or range of classifications you are currently interested in updating.

You can enter a specific dewey number (e.g. 123.45) or a range of dewey numbers (e.g. '123-124' or '123\*').

Multipile entries should be separated by a comma (e.g. '123-125, 129\*')

You can also select an item filter if you so wish by clicking the filter button.

Now click Find and Tag Items to tag the items to be processed.

### Progress

- ✔ Introduction
- Classification Selection
- View/Report Items
- Update Classifications
- Print Spine labels
- Finish

---

**Total Items: 1**  
**Processed: 0**

The purpose of the Reclassification wizard is to assist with reclassifying portions of your library catalogue. Although you can make any required changes by using existing features of the package, the wizard groups the steps needed together in one place and simplifies this process for you.

The steps involved are in reclassifying portions of your library catalogue include:

- Selecting the portion of the library to reclassify.
- Checking individual items within that area of the library to see if they need to be reclassified. Sometimes this may be an automatic change from one dewey number to another.
- Changing the classification field against items that require a change.
- Reprinting spine labels for changed items.
- Viewing progress and printing a list of changes.

MLM includes some additional fields that are used with the Classification Wizard:

**Old Classification:** This records the previous classification used for the item and can be useful if the item was accidentally reshelfed in the wrong place.

**Classification changed date:** This is the date that the item was reclassified and is used within the package to notify you if the item was reclassified whilst being issued.

## **Step 1: Selecting the portion of the library to reclassify**

You will probably be running the wizard a number of times, each time selecting a range of dewey numbers that you are wanting to work with. You can enter a range of dewey numbers (e.g. 123-124), a specific dewey number (e.g. 123.45) or a group of dewey numbers (e.g. 123, 125, 789) etc. If you prefer, you can also set an item filter determining the area of your catalogue you are working with.

Once you have set the area of the library you wish to work with, click the 'Find and Tag' button. Note that you only need to click this button after you have changed the area being reclassified.

## **Step 2: Printing a list of items, to check if reclassification is required**

This step may not be needed if the change for the selected area of the library applies to all items within that range of Dewey numbers. If that is the case, you can skip to the next step in the wizard and make the necessary changes. Otherwise you can print off a list of the items within this area of the catalogue, then go to the shelves and make the appropriate checks on the individual items.

When you have noted on the report what changes are required (if any), then you are ready to move to the next step.

### **Step 3: Changing the classification**

This step involves updating a single field against many items. Depending on the area you are reclassifying, you may be updating everything to a new number or updating groups of items to different Dewey numbers. The simplest way of achieving this is to use the grid editor which displays items in a spreadsheet like format.

The grid editor displays in list form, the items you are working with. Some fields are editable and others are view only (e.g. Title, Accession number etc). With the grid editor you can do the following:

- Sort the list by clicking on the column title at the top of the screen (this allows you to change the sort order between title, classification etc).
- You can use hotkey combinations to change the values to a list of possibilities. For example you may have a number of Dewey numbers that you wish to update to (e.g. 123.4, 123.5, 123.6). You can enter these in the hotkey list and use the hotkey combinations to quickly enter those values against the appropriate entries (e.g. hotkey1 = 123.4, hotkey2 = 123.5 etc). You then select the entry (or range of entries) you wish to update, and press Ctrl and the hotkey number (i.e. Ctrl-1, Ctrl2 etc). This is much faster (and more reliable) than manually entering each Dewey number separately. The Ctrl-~ (control key and tilde key (next to the "1" key on the keyboard) combination is a short cut that enters the default value (in this case the existing classification value).

For additional information regarding the grid editor, refer to the chapter on cataloguing.

## **Step 4: Reprinting spine labels**

Once you have determined the new classifications for the area of the library you are reclassifying, you can now print the new spine labels and attach them to the items. This report is printed in two parts, the first is the spine labels (which you print on labels and the second is the list of updates that allows you to link a title to the new spine label.

After printing the new spine labels, you can attach them to the books and re-shelve them in the appropriate location. If there are items that were issued at the time of reclassification and need a new spine label, you will be notified when returning the item through circulation.

# Backups

---

## Library Backup

Please select one of the activities listed below.

 Backup	Backup Library data to disk.	 Restore	Restore previously backed up Library data.
 View Backup	View the contents and dates of files included in a backup.	 More Options	Additional Maintenance functions, viewing current database users etc.

Regular backing up of your data is **essential!** The recommended procedure is to use the automated server backup which your school will have. As well, you could use a USB pendrive which has 5 folders on it – one for each day of the week into which you can save a backup. The USB pendrive can then easily be taken off-site in order to protect from disasters such as fire etc.

At least once every 6 months you should ensure that your backup files can restore properly. It is not much use making regular backups if the drive is faulty and prevents you from accessing the data if the need arises. Even if your school computer technician tells you that there is no need to make a backup through the package as s/he is backing up the server each night - still make a backup for your own peace of mind. We do get calls from schools where their data has become corrupted and they have tried to restore, only to find that for one reason or another, the technician cannot recover the data.

You can choose to backup a library that is in use. Library Manager will still warn you about the library being open, however you can continue past this message. This allows backups to be made whilst [WebOPAC](#) (or other OPAC terminals) are running. Note that if you backup while the library is open and being actively

used, other users may experience a slowdown or error messages. The backup will complete successfully though. It is still recommended that you try to get everybody out of the package before doing the backup if at all possible.

Although it may be a pain to have to go through the process of backing up at the end of a busy day, just think how much busier your days will be if you suffer a systems failure and need to re-enter all your data again. Don't think that this won't happen to you!

## Performing a Backup

Note that a backup backs up only the current library. If you have multiple libraries, you must back them up separately.

1. In administration Enter 'Other Utilities: Backup & Restore'.
2. Check that the library database to be backed up is selected from the library list.
3. Ensure that the correct drive is shown for backing up to (click on the 'Backup settings' tab to change this).
4. Click Backup. You will be prompted for disks to insert as required.
5. Label your backup disk(s) and place them in a safe place.

## Backup Settings

**Compression:** You may wish to change the compression options depending on the type of media you are backing up to. For instance if you have a slow machine and are backing up to relatively fast media (such as your hard drive) you may wish to select faster which will result in a slightly larger backup but will take less time.

**Compact Database before backing up:** It is suggested that you use this option although it can take a few moments to

complete, it will ensure that unused space is removed from the database and the database rebuilt before backing it up to disk.

***Drive to use for Backup/Restore:*** Select the drive that you wish to use for backing up to or restoring from. In most cases this will probably be the a: floppy drive.

## **Auto-saved Backups**

The package automatically saves the last 5 backups on the network/local drive where MLM is installed. This means that you can quickly restore a backup even if the actual backup pendrive/media is not available.

The auto-saved backups folders are located in the MLM\backup directory and have names like BKYYMMDD\_HHNNSS where YY=year, MM=month, DD=day, HH=hour, NN=minutes and SS=seconds.

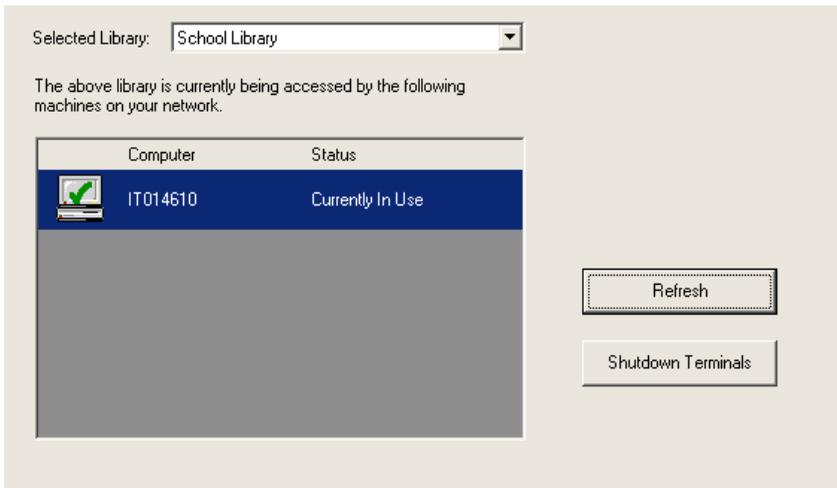
## **Restoring**

To restore a previously made backup, click on the restore button within the backup area of the package and ensure that you have selected the correct drive to restore from. The library contained in the backup will be restored. Note that if the backup being restored is not the current library, the current library database will not be affected by the restore. If you wish to change the name of the library during the restore you can do so (note that this will result in another library appearing on the login list). You will be warned if any data is to be overwritten.

## Viewing the contents of a backup

To check the files contained in a library backup, you can use the View backup option which displays the files included in the backup and their dates of modification.

## Viewing Database Users



Selected Library:

The above library is currently being accessed by the following machines on your network.

Computer	Status
 IT014610	Currently In Use

This screen allows you to view the machines that the current library database is being accessed on. You will need to know this information if you wish to gain exclusive access to the database for backup and compacting purposes. An entry is shown for each active use of the database so if you have both Administration and OPAC running on the one machine, you will see two entries in the list.

The machine name shown is the name of the computer as it appears on your network.

## **Backup/Restore Catalogue Export File**

This option is provided so you can move an export file from one location to another. Note that you must first create the export file before running this option.

## **Update Database Structure**

When installing an update, the package goes through a number of checks to verify the database and add structure information to support new features. This normally happens only opening Library Manager the first time after doing an upgrade. There may however be times where Support may ask you to run this option manually.

# Compacting, Repairing databases and Library Scripts

---

## Compacting the Library Database

Over a period of time, during the normal operation of the package, the database file will gain a certain amount of redundant or unused space. The compact routine will rebuild the database file resulting in better performance and a smaller file size.

**This routine does not affect your data in any way, it merely verifies and rebuilds the database structures.**

You should run this routine periodically. The easiest way to do this is to ensure the 'Compact Library before backup' box is checked under backup settings. This will keep the size of your backup to a minimum. If you encounter errors during the backup of your data, these may indicate corruption. You should still be able to backup by unchecking the compact library check box, however you should consult the helpdesk for advice on correcting the situation.

## Database corruption and damaged databases.

Periodically MUSAC will get calls from schools experiencing problems with our software due to data corruption. These problems may only be apparent when working with certain items or borrowers or you may not be able to access your library data at all.

## **Why does data corruption occur?**

Corruption can occur for a number of reasons including hardware failures (bad hard drives, faulty network cabling or network cards) or software problems. Slow networks or various network configurations can contribute to corrupt databases as well.

## **How can I help prevent data corruption?**

You can help prevent corruption by:

- Ensuring you have a good backup system (automated server backup in addition to USB pendrive).
- Ensuring your hardware meets the recommended specifications.
- Periodically running scandisk(or a similar disk checking utility) to help ensure that your drives are healthy.
- If you notice things going wrong, seek advice from Support before it's too late.

## **How can I detect corruption?**

It may not always be obvious that you have corrupted data as Library Manager may appear to function properly in most cases, however the following can help identify corruption:

Windows package: Error numbers 3000 (Unknown error), 3197 (The Microsoft Database engine stopped the process as you and another user tried to update the data , 3343 (Unrecognised database format) can indicate a corrupt database.

## **How can I repair corruption?**

In the first instance, when you notice something going wrong it is advisable to call Support before taking any action such as running a rebuild or using any repair options. Taking the wrong course of action may only help contribute to the problem. At a minimum, you should make a backup of your current data to a pendrive before attempting to correct things so that you can restore if something goes wrong.

# Library Scripts

**Update Scripts**

Occasionally MUSAC may provide a disk containing scripts then extend the package and provide additional features.

To update the available routines, enter the disk supplied from MUSAC into your floppy disks drive and click on 'load scripts from disk'.

**Currently available scripts:**

Change Reference Loan Periods  
Fix Item Index  
Purchase Price to OD price  
Remove borrower date restrictions



Load Scripts  
from Disk



Run Script

Select the routine you wish to run, then click on 'run script' to activate it.

Library scripts are small extensions to the package that are provided for a specific purpose to update data or make changes to a library.

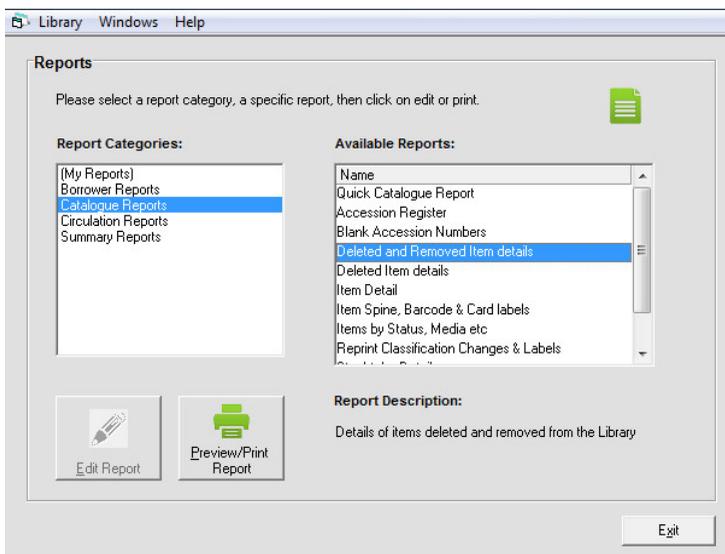
The 'Load Scripts from disk' routine allows you to add scripts from a disk supplied by MUSAC.

If you have the need to use this section of the package, you will be supplied with additional details on how to do so.

## Printing Reports

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Before printing, you should read the section on report configuration and check that your settings are suitable for your purposes.



Above is the main report selection screen. To the left is a list of report categories - selecting a category will display the list of related reports on the right hand side.

Select the required category of reports and the report you wish to print, then click on 'Preview/Print Report' to print the report.

## Borrower Reports

### ***Barcodes – 2 or 3 Column Format:***

Prints barcodes in a form suitable for placing in a clear plastic folder and using for circulation.

**Barcode Sheets:**

Prints more borrower records per page with additional information.

**Borrower list:**

Prints lists of borrowers with a count of current issues.

## Catalogue Reports

**Quick Catalogue Report:**

This is a flexible report that allows you to report on a wide range of catalogue information. The details that are printed on each item can vary from just the basic details to more or less the entire catalogue record.

**Accession Register:**

Allows you to print a list of titles by accession number. You can choose to print just additions or a selected range of accession numbers.

**Blank Accession Numbers:**

This list contains items that have no accession number associated with them.

**Deleted Item Details:**

This report prints a list of items that have been previously deleted from the Library. Note that deleted items are not the same as items that have a delete status.

**Item Detail:**

Prints catalogue details for a selected item.

**Item Spine and Barcode labels:**

Prints barcode labels and spine labels in 3x10 format for books. The barcodes are formatted for labels (64 x 25.4mm, 30 per sheet). Office Max stocks "Office Elements Multi-purpose labels" stock code 1937960 – 100 A4. Addition items can be printed, selected individual items or by location, series, media etc. This report can also be used to print card labels.

***Items by Status/Media etc:***

Gives basic details of items based on a range of selection criteria.

***Stocktake Details:***

Use this report to print lists of registered and unregistered items in the catalogue.

***Subject Problem report:***

This report prints a list of items that have more than the specified number of subjects.

## **Circulation Reports**

***Borrower Status Report***

This report is similar to the overdue letter, however it is intended to be used as a recall notice or for school leavers.

***History for Borrower***

Circulation history for a selected borrower.

***History for Item***

Circulation history for a selected item.

***Late Returns Listing***

Produces a report of items that have been returned but were returned late.

***Overdue Last Notice***

Intended as a final notice, single page letter type format for an individual borrower.

### ***Overdue List***

This displays a list of the titles overdue to the selected borrowers.

### ***Overdue Slips***

This prints 4 slips to one page with up to 4 overdue titles per slip. If a borrower has more than 4 overdue titles, then the system will print more than one slip. The message appearing on the overdue notice can be changed to allow for first and second notices.

### ***Reading Habits:***

Analysis of borrower reading habits by various borrower groupings and selected dates. You can also sort this report by the number of items read to obtain a list of your most and least prolific readers.

### ***Resource set circulation problems***

If you are using the resource set feature, you can use this report to identify any resource sets that have items missing when they were issued or returned.

### ***Titles currently out:***

Prints main details on currently issued titles. Useful for chasing up borrowers at the end of the year.

### ***Transactions Log:***

Prints out an ordered list of Issues>Returns by date range etc.

# Summary Reports

## ***Least or most popular titles***

Can be used to determine what titles are frequently read and those that may need to be culled from the library. Filtering by year levels is possible, the issue count when broken down by year level should match the Most Popular by date range report.

## ***Library summary***

Produces a one page summary of various statistics for a selected filter.

## ***Location/Media Summary***

Summary of the number of items by location and media.

## ***Publication Year value analysis***

A summary of fiction/non fiction totals and values by publication year.

## ***Purchase values analysis***

Displays a summary of the purchase values for selected areas of the catalogue.

## ***Search Analysis***

This report gives you a list of popular successful and unsuccessful search terms. You can use this to identify areas of the catalogue that are in demand by library users but may not have sufficient material.

## ***Subject, Publisher, series analysis***

Summarises the number of items in the catalogue by subject, publisher or series.

## ***Yearly financial summary***

This report produces the details required for Ministry finance reports.

## School Logo on final overdue report

If you wish to replace the books icon on the final overdue report with your own school logo, you need to save your school logo picture as BMP file with the name *school.bmp*. This file should be placed in the MLM\Support directory, replacing the *school.bmp* file that is present. The next time you print the final overdue report, your school logo will appear.

## List printing facility

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This facility allows you more flexibility with producing lists. You can print most details on borrowers, items and transactions. The facility is available under the 'create new report' feature under the reports area of administration. Clicking this button will give you the following screen:



**Report Options**

**Report Name:**

**Description:**

**Options for Creating or Editing a Report:**

	<b>Use Report Wizard</b> Specify or edit the report step by step using the wizard. This option is simpler if you have not created a report before or want to quickly create a report..		<b>Use Report Editor</b> Edit/Create the report using the report editor. This gives you the most flexibility.
---	---	---	--

Here you can enter the title and description of your report. Then there are two options below allowing you to create the list step by step using the report wizard or by using the report editor. The simplest way is to use the report wizard as this allows you to consider each step at a time. Once you become familiar with the steps involved in creating a report, you will most likely want to go directly to the report editor without using the wizard.

The following is a description of each step in the list report wizard.

## Field Selection

### Report Contents

Select the fields you would like to include in your report:

**Available Fields:**

(All fields) ▾

- Accession Date
- Accession Num.**
- AccumulatedDepreciation
- Action: Edit
- Action: Issue Note
- Action: Reserve Note
- Action: Return Note
- Address
- Address Line2
- Address Line3
- Address Line4

Add Field >

**Selected Fields:**

FieldID	Field	Summary
2002	Title	(None)
2006	Accession Num.	Count
2004	Author	(None)

Remove Field    Remove all

Double click a field to add it to the list of field to be included in the report.    To remove a field from the list press, select the entry and press the Delete key.

< Prev    Next >    Save    Exit

Here you choose the fields that you wish to appear in your list. The order of the fields determines the order they will appear across the page. If you choose fields from more than one category (i.e. borrower and item fields), then the resulting list will be based on the transactions linking a borrower to an item. This may or may not be what you expected. For example if you include the borrower surname and title fields, you will get a list entry for each transaction meeting your selection criteria (as the transaction is the thing that links a borrower to an item). If you want your list to include all borrowers or all items within your selection criteria (even though there may be no transactions for the borrower) then you need to include only item fields OR only borrower fields in the report.

## Sort Order

**Sort Options**

Which fields do you wish to sort your data on?

Sort by:   Sort Descending

Then Sort by:   Sort Descending

Then Sort by:   Sort Descending

Then Sort by:   Sort Descending

< Prev    Next >

Save    Exit

Select how you wish to sort the fields that you have already selected to include in your report. You can sort in ascending or descending order on up to four of the fields that you have included in your report. If you choose not to sort by anything, the list will appear in a more or less random order, so you should select at least something here.

## Selection

**Selection Criteria**

**Items**

**Items to include:**

Note: The selected item filter will also affect which records are included.

Include only items with the following status:

Prompt for selection of the following when printing:

Location

(None)

(None)

(Any Status)  
 (NO Status)  
 Addition  
 Current  
 Deleted  
 Interloan  
 Lost  
 Out of circulation  
 Poor Repair  
 Potential Purchase  
 Unresolved  
 Withdrawn

< Prev    Next >

Save    Exit

Here you can specify which details to be prompted for when you print the report. This allows you to create a standard report layout and allow selection of specific criteria each time you print the report. There is a separate screen for borrower, item and circulation details selection. You can elect to be prompted for the following:

- Up to three item related fields
- The borrower, class, room or timetable option
- Circulation date ranges

## Filters

**Filter Options**

Please select the Item and/or Borrower filters you wish to use for this report:

<b>Include these BORROWERS...</b> 	<b>Include these ITEMS...</b> 
<input checked="" type="radio"/> All Borrowers	<input type="radio"/> All Items
<input type="radio"/> Prompt for filter	<input checked="" type="radio"/> Prompt for filter
<input type="radio"/> Selected Filter: (No Filter)	<input type="radio"/> Selected Filter: (No Filter)

< Prev      Next >

Save      Exit

Here you can select which borrower and/or item filters that are to be used with the report. Both the selection and filter criteria must be met for an entry to be included in the report. For example if you exclude non-current items in the selection screen, then even if your filter includes non-current items, they will not appear in the list.

The options in this area include using ALL items/borrowers, a pre-selected filter, or the option of selecting a filter each time you print.

## The report editor

**Report Settings:**

 Fields    Sort Order    Selection    Filters    Font

**Appearance:** Arial, 11 point.

Wrap cells when text is too long  
 Display Selection and Filter details at top of report

**List Heading:** Enter below any message that you would like to appear at the top of the report:

Sample Report

**List Details:** Select and drag the vertical bars to change the relative widths of the columns on the page. Drag a column to change its position.

Title	Author	
-------	--------	--

 Page Setup    Preview/Print    Exit

This screen allows you to change all the information regarding the report. Along the top of the screen are buttons that allow access to the steps in the report wizard (field selection, sorting, selection criteria, filters etc). You can also change the following:

- Font that the report is to be printed with
- The heading that appears at the top of the report
- Whether or not the selection criteria are displayed at the top of the report
- The relative widths of the field columns
- If the report is to be printed in landscape or portrait.

Once the report has been saved, it will appear in the (My Reports) category under the 'Print Report' area of the package.

You can also edit or delete the report later using this area of the package.

Reports you define are included in a library backup.

You can preview and print your report from this screen.

**Note:** Reports you create will appear in all library databases on your computer, however under some circumstances, a report may only be printed in the library database where it was created. This applies to reports that include the following:

- Specific borrower or item filters, rather than all items/borrower or prompting for the filter when printing. (Filters can differ between library databases)
- Reports that include any added fields. (Added fields can differ between library databases).

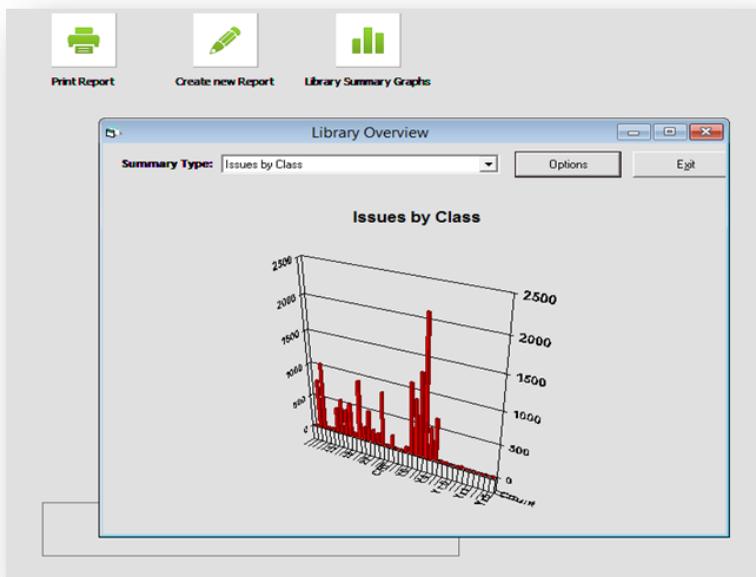
## Library Summaries

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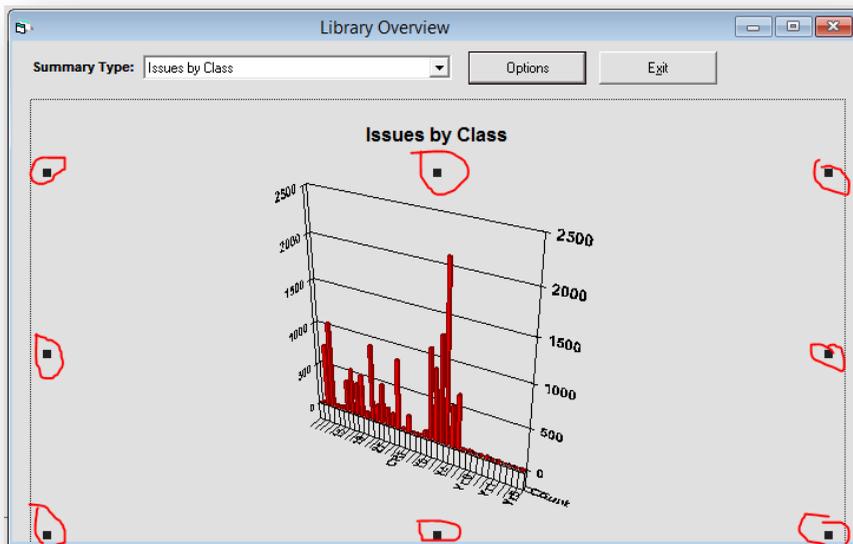
This facility gives you the ability to view various summary graphs for your library data, for example the following graph (Issues by class).

Note that under certain conditions however, the summary graph may be absent or distorted on the printed report. This is due to differences in scaling between the chart and the specific screen and printer. This in turn is dependent on three factors: the amount of data displayed, the size of the print preview window, and the size of the chart itself.

For best results, choose a small set of data, (eg. a month) that will fit comfortably onto the report. If you are a larger school, this may not be possible. In this case you would need to resize the window containing the chart, like this:



You can also resize the chart itself (shown as follows) by clicking on the graph and once selected, using the resize handles (ringed in red) to size and position the chart on your report.



Some experimentation will be needed to find the right setting for your screen and printer, to achieve a legible graph.

## **OPAC (Online Public Access Catalogue)**

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The Online Public Access Catalogue provides search access to the library catalogue for your library users. MUSAC Library Manager supports three different OPAC installations. Depending on your needs, you may have more than one of these installed.

Note: The WebOPAC option is not installed as part of Library Manager. WebOPAC must be installed separately. The setup files for these are available from our [website](#).

### **MLM Windows OPAC**

This is the standard Windows version of OPAC for Library Manager. It runs on 32 bit windows systems. Most users will use this version of OPAC.

**Advantages:** User friendly, Provides online access to all MLM features. Can be used networked or standalone.

**Disadvantages:** Runs on PC's, 32 bit windows only.

### **MLM WebOPAC**

This search option for MLM allows you to access the library catalogue using a familiar web browser. Numerous hyperlinks allow for a more flexible search approach.

**Advantages:** Any machine able to run a web browser can be used for searches. With appropriate configuration, you can allow access to your school catalogue through the Internet.

**Disadvantages:** Installation is more complex, requires a Windows PC and a TCP/IP intranet.

## **Searches - Windows OPAC**

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Most of the OPAC searches have both simple and advanced search options. The simple search option presents a minimum number of options for users to enter. The advanced search options allow more flexibility for users who know what they are looking for and need to be able to specify additional options. Your configuration settings can significantly affect the type and number of results that you receive during a search. You should carefully read the OPAC configuration section before using OPAC.

### **Similar or loose Match Searches**

OPAC permits minor spelling mistakes that younger library users are liable to make when using the package. Rather than searching for an exact match on what has been entered, you can choose to search loosely. This will give you a larger set of results and also include some items that are not what you were searching for. However getting something close to what was desired is generally better than getting the 'Nothing Found' message.

The choice between loose and exact matches depends on the spelling competency of your borrowers. You can always override the default settings for a given search, if required. Refer to the section on configuration for more information on this feature.

### **Renaming or Disabling Searches**

The buttons used to select a search type can be renamed or disabled in configuration.

## **Title**

Enter the title or a portion of the title that you are looking for. The advanced option allows you to specify Fiction and/or Non fiction. You do not need to be concerned about punctuation as this will not affect the search result.

If the similar spelling option is enabled, you will get the best result if you attempt to enter the entire title. Entering only one or two words will result in many matches.

## **Subject**

Type the subject that you are looking for or click on the advanced button to select from the list of available subjects. The advanced search allows for Boolean (and/or) subject searches. As with the other lookup list based searches, the package will attempt to 'auto-complete' your search criteria. You can also use the up/down arrows to scroll the list of available entries. Hit the F5 key to display the full subject listing.

The subject authority screen also appears in the OPAC subject search. If you Press F5 in the subject search screen, the list of subjects will appear with a related button at the bottom left of the popup screen. Click this to display the subject authority link screen. Within OPAC the screen appears with limited options and only displays those subjects that have items associated with them to avoid having empty searches.



The related subject search also provides access to the subject authority browser and allows you to search on linked subjects for those subjects that appear against the selected title. These may be subject entries from the authority or manually specified.

## Author

Enter the author's name to search for. This search searches within the author field so you can enter just the authors surname if required. Entering the first name of the author may not be desirable as only the initials may have been entered.

## **Keyword**

Enter a keyword to search for or click on “advanced” to select from the list of subjects. The fields that are searched during a keyword search are specified in the OPAC defaults under administration and the number of items returned can vary significantly depending on these settings.

## **Series, Publisher, Reading Age**

Type the series, publisher or searching age that you are looking (or click F5) for. Alternatively click on ‘advanced’ to select from a list of available series, publishers etc.

## **Dewey Search**

This allows you to search the classification field. You can enter an asterisk (\*) after an entry to find anything beginning with that classification. For example ( '234' will match only '234', where as '234\*' will match '234.34', '234 TR' etc)

## **Field Search**

The media search allows you to locate items based on the contents of additional fields. Select the required field and enter your search term.

## OPAC Screens

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The Online Public Access Catalogue (OPAC) provides search access to the library catalogue for your library users. You can start OPAC either through Administration (Start OPAC button) or by clicking on Start ->All Programs -> MUSAC Library Manager -> Library Searches from the Windows task bar.

There are a number of defaults that affect the operation of OPAC (refer to the section on configuration for more information).

### Main Search Screen

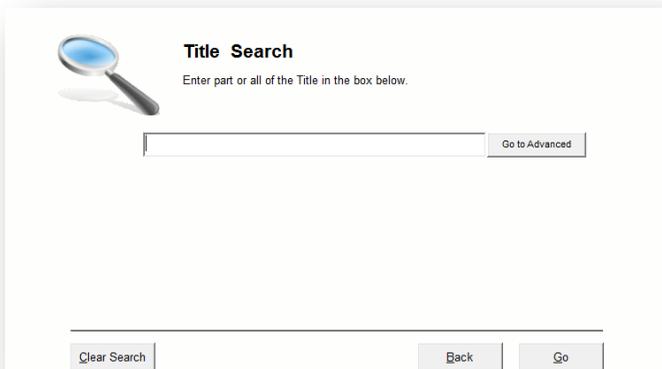


The Main Screen displays the most commonly used search types. Additional search options can be accessed by clicking on the More Options button (or hitting F9).

To search, you can just enter a term into the box in the middle of the screen and press return. This will default to a keyword search and provides quick access to search results. If you wish to use a particular search type, you can also enter a term into the box, then hit the button or key for the desired search (e.g. entering 'harry potter' followed by F4 will do a title search for 'harry potter'). If you wish you can disable the quick search option and force your library users to select a search type before entering their search criteria.

You can choose (in configuration) from a number of 'display themes' to make the screen look a little different. The search filter dropdown at the bottom of the screen allows you to restrict your search to a subset of the library (e.g. teacher library).

To get more search options you can click the required search type (or hit the corresponding key). An additional screen with more options will appear:



**Title Search**  
Enter part or all of the Title in the box below.

Depending on your settings the search criteria screen may appear with few options (above) or more advanced choices (below). You can switch between these modes using the Go to Simple/Advanced button.



**Subject Search**  
Type the subject you are looking for. Use Arrow Up/Down to move to the previous/next subject. Press F5 to select from the list.

CATS Go to Simple

NOT LIONS

AND

Match: ALL of the above Fiction and Non Fiction

Clear Search Back Go

## Search Results Screen (Hit List)

**Matching Items**    Order by: Title    Items Found: 176

Subject search for "CATS +LIONS "

Tag	Media	Title	Classification	In
<input checked="" type="checkbox"/>		100 facts on cats & kittens Parker, Steve	636.8	
<input type="checkbox"/>		89th kitten, the nilsson, eleanor		
<input type="checkbox"/>		An American tail - Fievel goes west swenson, charles		
<input type="checkbox"/>		Annie and Moon smith, miriam		
<input type="checkbox"/>		Aunt Nina and her nephews and nieces brandenberg, franz		
<input type="checkbox"/>		Bad Martha orr, wendy		
<input type="checkbox"/>		Baxter and the golden pavements forsyth, anne		

Press Alt-T to Tag all or Alt-U to untag all.    Print    Back    Show

The above screen displays the results of a search and allows you to select which items you wish to display further information about (by clicking the 'show' button). Items that have already been viewed will appear with an eye over the top of the media icon.

The right hand column gives an indication of the availability of the item in the library. The icons are interpreted as follows:

*Red Cross:* The item is out, overdue or misplaced

*Green Tick:* The item is in the library and has a current status

*Yellow Question Mark:* The item is returned and has a non current status or is reserved (copy specific).

The icon displayed to the left reflects the media for the particular item. If you wish to change the icons shown for a given media type, you can do so in configuration.

The tag checkbox on the left indicates whether the item is tagged. You can use tagging to determine which items you wish to print details for.

The results list can be ordered by title or shelf location.

# Item Detail Screen

 **100 facts on cats & kittens**

**Author:** Parker, Steve  
**Classification:** 636.8  
**Publisher:** Miles Kelly  
**Location:** Our Library  
**Series:** 100 facts on  
**Media:** Book  
**Type:**  
**Reading Age:**

**Accession Num.:** b11111  
**ISBN:** 9781842369685  
**Pub. Year:** 2008  
**Overdue Price:** \$.00  
**Status:** Current, Overdue, Due: 15/03/2012  
**Subjects:** CATS

**Notes and Keywords:**  
Other Title: One hundred facts on cats and kittens  
Other Title: Cats & kittens  
Other Title: Cats and kittens  
One hundred facts on

 Reserve this Item

Mouse over field to display full details. Press F9 to display group details.

[Detail](#) [More Detail](#) [Reviews](#) [See Also](#) [Back](#)  

The previous screen displays the main details of the selected item. If a field has more data than can be displayed on the screen, you can move the mouse over the field to display the full field contents.

The field names on screen reflect those specified within the configuration area of Library Manager. If you wish to change a field name, use the configuration section of this user guide.

You can change the view by clicking one of the buttons on the lower left side of the screen. The possible views are:

- Main Item Detail
- More Detail
- Reviews information
- See Also/Related searches

The more details screen shows additional information including any added fields associated with the item:

<b>Stocktake:</b> No	<b>Accession Num.:</b> b11111
<b>Source:</b>	<b>IssueCount:</b> 1
<b>Purchase Price:</b> \$10.00	<b>Keywords:</b>
<b>Purchase Date:</b> 25/11/2010 1:47:07 p.m.	
<b>Loan Period:</b> 6d	
Physical Description	48 p, col. ill
MARC Import date	25/11/2010 1:47:07 p.m.

Detail **More Detail** Reviews See Also Back  

Review details list previous reviews for this item that have been approved by the librarian for display.

**Reviews for this item:**

There are no reviews for this item or this review has not yet been approved for display.

Add New Review

Detail More Detail **Reviews** See Also Back  

The 'see also' screen contains links to other results based on this search item.

**Related things to search for:**  
Click on a button to do a search for items related to this one.

 Similar Author Name  Same Series

 Related Subjects  Titles Nearby on shelf

Detail More Detail Reviews **See Also** Back  

- Similar Author Name.
- Related Subjects (based on dewey number).
- Same Series (if the item has a series).
- Items nearby on the shelf.

## Grouped Items

If there are grouped items associated with this item, then you can press F9 to display the details of those items.

The following Items are grouped to this one. Double click an entry to display the details.

Title	Author	Classification
CATS	FRITZSCHE, HELGA	636.8
CATS (DRAW 50)	AMES, LEE J.	741.2



## Attachments



If an item has any attachments (pictures, web pages etc) associated with it, an eye in the top right corner indicates this is the case. You can click this icon or the attachments button that appears at the bottom of the screen to display the list of attachments. From there you can display a selected attachment.

## WebOPAC

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Please refer to our website for the latest WebOPAC installation, and the documentation which accompanies WebOPAC.

## What is WebOPAC?

WebOPAC is an internet based extension of MUSAC Library Manager that permits searching of the library catalogue through an internet browser. Although it is primarily intended to be used on a local school intranet, with the right hardware configuration, it can be used to search the school library from outside the school using the internet. This type of configuration requires the services of an Internet Service Provider (ISP).

WebOPAC has the following advantages over the Windows version of MLM OPAC:

- **Hardware resources can be concentrated on a single machine** (your server) as this is where the searches are actually executed. The speed of searches will be similar on all machines in your library, even less powerful ones.
- **Any machine capable of running a web browser is capable of using WebOPAC.** If your school has Mac or Windows PCs, they can be used as search terminals.
  - **Your library computing environment can be configured more securely:** The only way in which pupils can get to the library data on a correctly configured network is through the web browser, so there is no possibility of malicious students bringing down your entire library by deleting important data files.

- **The web interface is more flexible** by allowing hyperlinks and search history, making it easier to find what you're looking for. For example, clicking on an underlined subject entry against an item will bring up a list of all items with the selected subject.

The Web based version of OPAC is different from the Windows version as we have tried to use the unique features available in this platform. The same kinds of features are in both WebOPAC and Windows OPAC versions, however they are implemented differently.

Updates to MUSAC Library Manager and other MUSAC software are available on our website:

[www.musac.co.nz](http://www.musac.co.nz)

## MLM Database Fixer

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This utility can be used to recover some corrupted library databases. **It does not replace the need for making regular backups of your data.**

You should seek advice from a MUSAC trainer or your account manager.

### MLMDBFix Options

There are three functions you can run on your database. In each case you need to select a library first, then select the option you wish to use. The options are as follows:

#### Check Library

This option runs through every table and field in the database to check that data can be read correctly. It will identify most corruption in a library database. You should run this regularly on your library to confirm that there are no obvious problems.

#### Recover Library

This button attempts to recover data from a corrupted database by creating a new library with a good structure and copying the contents of the existing database across.

If your database is severely corrupted, this option may fail. If this is the case you will either need to restore from a known good backup or contact MUSAC to see if we can recover the data.

## Monitor Library

This option brings up a list of the computers accessing the selected library and machines that have left the database in a suspect state. The list is updated every few seconds whilst MLMDBFix.exe is running.

Note that this option will not help identify problematic machines once the database is corrupted. You need to leave this utility running and monitoring a database for the program to detect that suspect activity has taken place. Once a machine has been identified as causing a problem it should be removed from the network immediately and the cause of the problem determined before the machine is placed back on the network.

## Keyboard Shortcuts

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### Daily Circulation

Key	Action
F5	Changes to the ISSUING function
F6	Changes to the RETURNING function
F7	Changes to the RESERVE function
F8	Changes to the RENEWING function
F4	Changes the default settings for the last due date
F3	Displays the details for the last transaction
F2	Allows you to print a log of transactions since you entered daily circulation or when you last printed the log

### Scan Mode

The following keyboard shortcuts apply when displaying **items** in scan mode:

Key	Action
Alt-A	Change item to ADDITION status
Alt-C	Change item to CURRENT status
Alt-D	Change item to DELETE status
Alt-I	Change item to INTERLOAN status
Alt-L	Change item to LOST status
Alt-O	Change item to OUT OF CIRCULATION status
Alt-P	Change item to POTENTIAL PURCHASE (AQUISITION) status
Alt-R	Change item to POOR REPAIR status
Alt-U	Change item to UNRESOLVED status
Alt-W	Change item to WITHDRAWN status

The following keyboard shortcuts apply when displaying **borrowers** in scan mode:

<b>Key</b>	<b>Action</b>
Alt-A	Change item to ADULT status
Alt-C	Change item to CHILD status
Alt-D	Change item to DELETE status
Alt-L	Change item to LEAVER status
Alt-P	Change item to PUPIL status
Alt-S	Change item to STAFF status
F2	Toggle between Borrower listing and Filter selection

# Glossary

Some terms used within this help file.

## Accession Number

(Also referred to as a Barcode number). Under a manual system the accession number generally includes the year and number of acquisition of the item. Under an automated system these unique numbers can simply be allocated unique sequential numbers (not including the year as this information can be extracted separately under any automated system).

## Added Field

Either a MUSAC or user defined field that may appear against some items in the catalogue.

## Attachments

Additional files such as Web (HTML) pages or pictures associated with items in the catalogue.

## Authority File

File used for consistent forms of headings and to link headings to preferred forms.

## HTML

The language that is used to create Internet Web Pages.

## ISBN

International Standard Book Number. Assigned by an item's publisher and identifies the country of publication, the publisher and the title of the work.

**ISSN**

International Standard Serial Number

**MARC**

Machine Readable Cataloguing. A system for standardising the construction of cataloguing records in an automated environment. MARC records allow for the exchange of records between libraries.

**NZBN**

New Zealand Bibliographic Network. An online network linking most public, university, government and specialist libraries to a central bibliographic database.

**OPAC**

Online Public Access Catalogue. Used by library users to access the library catalogue.

## Problems installing MUSAC system files

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In most instances the system files will install correctly and you will be able to run the software without problems. Sometimes, for a variety of reasons, there may be the odd file that causes problems. Please try the following steps in order to resolve the issue.

### Step 1: Initial Steps

Install the system files when no other applications are running. In addition disable background software such as virus scanners as these will hold open files and can interfere with installation. Ensure that the installation runs to the point where a successful installation message appears. This means that the installation completed all steps, however it doesn't guarantee that everything has installed correctly. Please reboot the machine if requested to do so.

### Step 2: Attempting to manually register a system file

Where a specific file seems to be causing the problem, you can attempt to manually register it.

From a command prompt accessed by clicking start > Run, type the following:

```
regsvr32 comdlg32.ocx (where comdlg32.ocx is an  
example file) and click OK to register the file.
```

Note: The system directory is usually c:\windows\system32 for Windows XP. If a successful message appears, the file has registered correctly and shouldn't cause any more problems. If however you get an unsuccessful registration message (e.g. load library failed etc), then browse to MLM folder and run MLMInstallChecker.exe, the instructions for which are a PDF file in the same folder.

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