



## **Mandarin M5**

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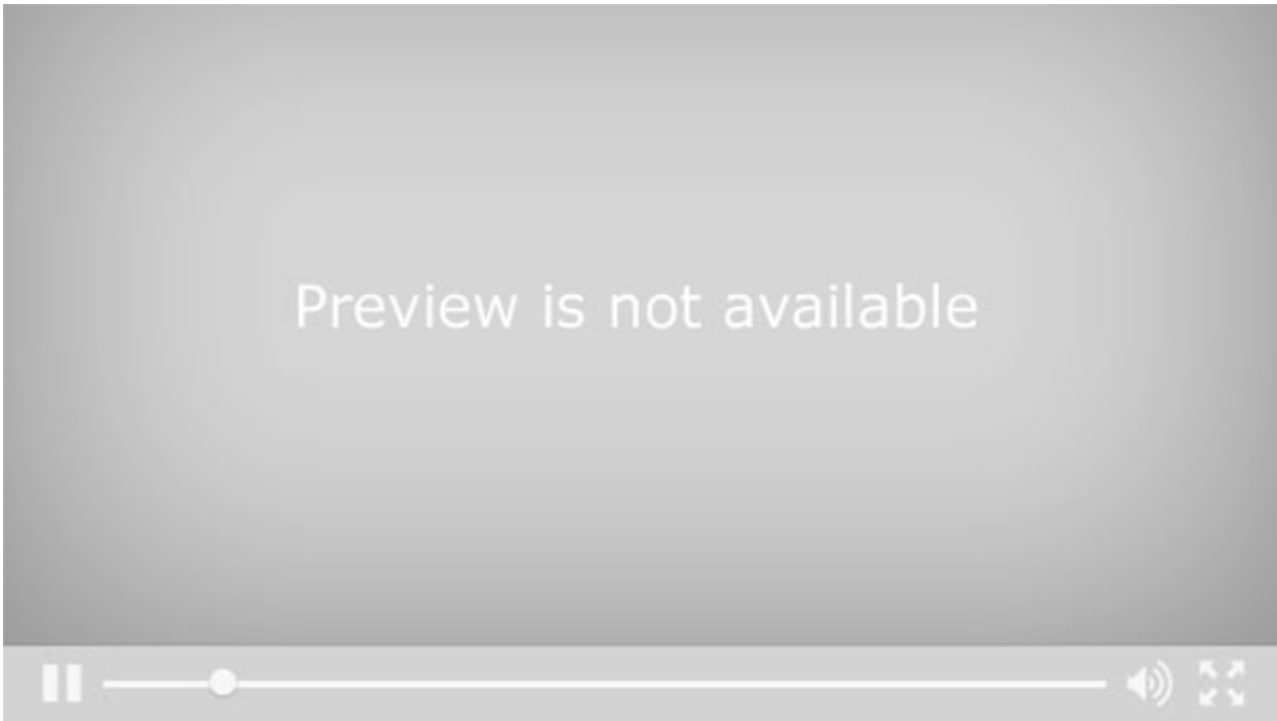
**Daily Use Handbook**  
2016

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## Mandarin M5

Mandarin M5 is a Web-based library management system that allows users to access library resources through any workstation with a Web browser, anywhere at anytime.





## Getting Started with M5

This Daily Use Handbook guides you through routine library tasks using the Mandarin M5 library management system. This handbook is designed to supplement training by providing simple, step-by-step instructions for common procedures in M5 Circulation and Catalog. It also includes daily maintenance tasks that should only be performed by an authorized administrator. For detailed instructions on the procedures included in this handbook, as well as procedures not included in this handbook, refer to the Mandarin M5 Users Guide.

**Mandarin customers have permission to reproduce any or all of this Daily Use Handbook for instructional purposes.**



## The M5 Interface

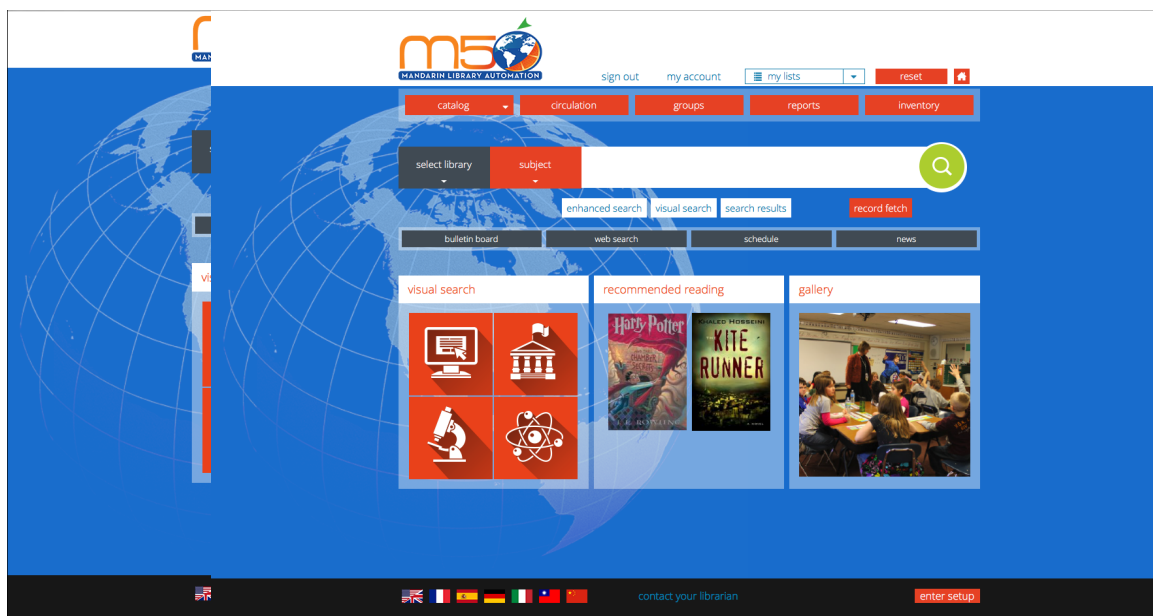
To display Mandarin M5 correctly, set your monitor's resolution to 1024x768 or higher. If you need instructions, refer to your Windows documentation.

Patrons and library staff can launch Mandarin M5 by entering the Web address in their browser's address bar or clicking a link provided by the library. When M5 is launched, the Catalog page displays.

The Mandarin M5 interface has two modes: Patron Mode and Librarian Mode.

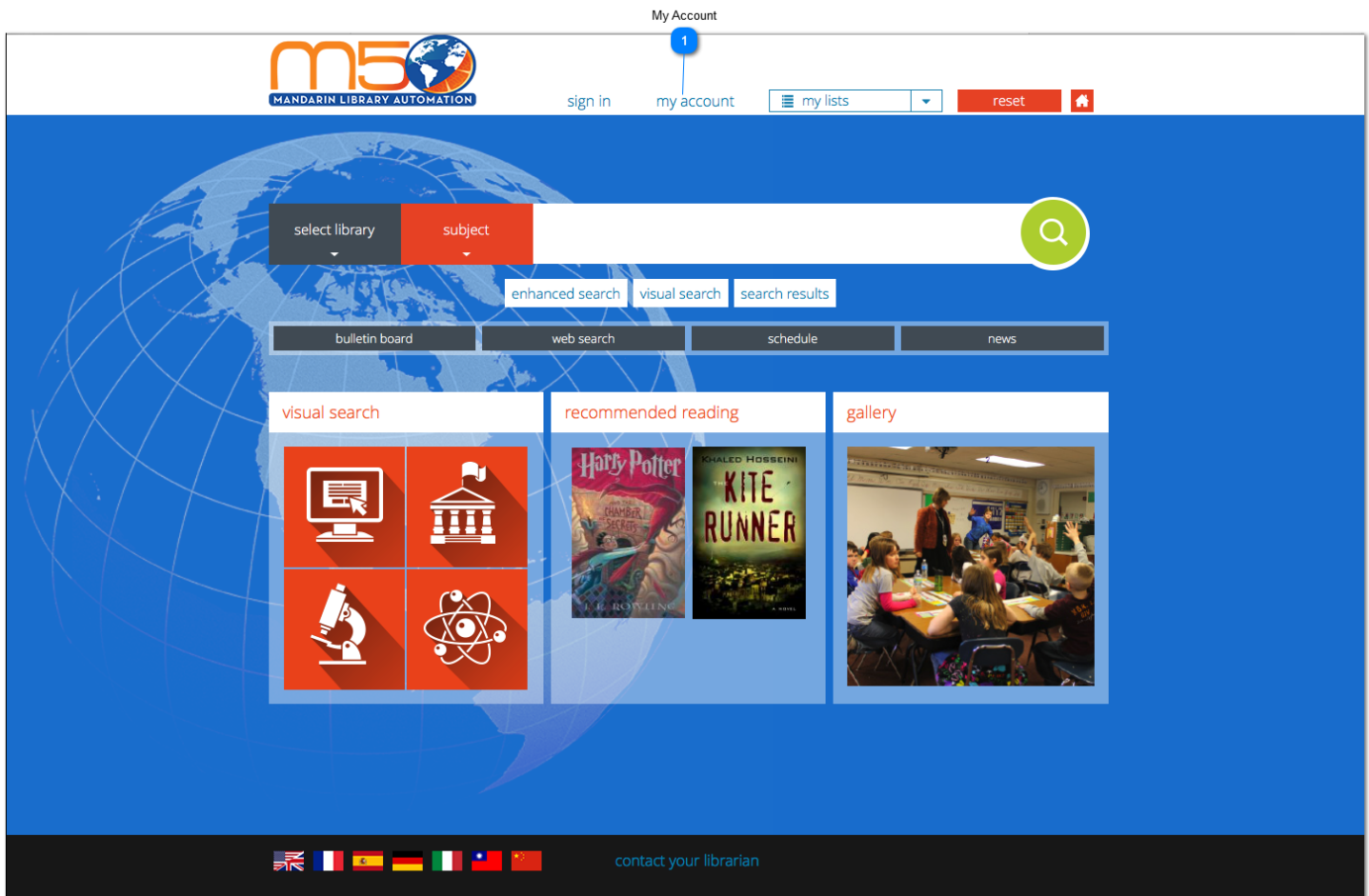
Patron Mode only allows the viewing and searching of records in the [Catalog](#). Librarian Mode allows access to library functions such as Cataloging, [Circulation](#), Group Editor, Inventory, and [Reports](#). The level of access for each of these functions is granted in Group Editor.

### Patron Mode Librarian Mode



## Patron Mode

If a patron signs in to Mandarin M5, or if no one signs in, the interface displays in Patron Mode with only the Catalog visible. In this mode, no data can be modified.



1

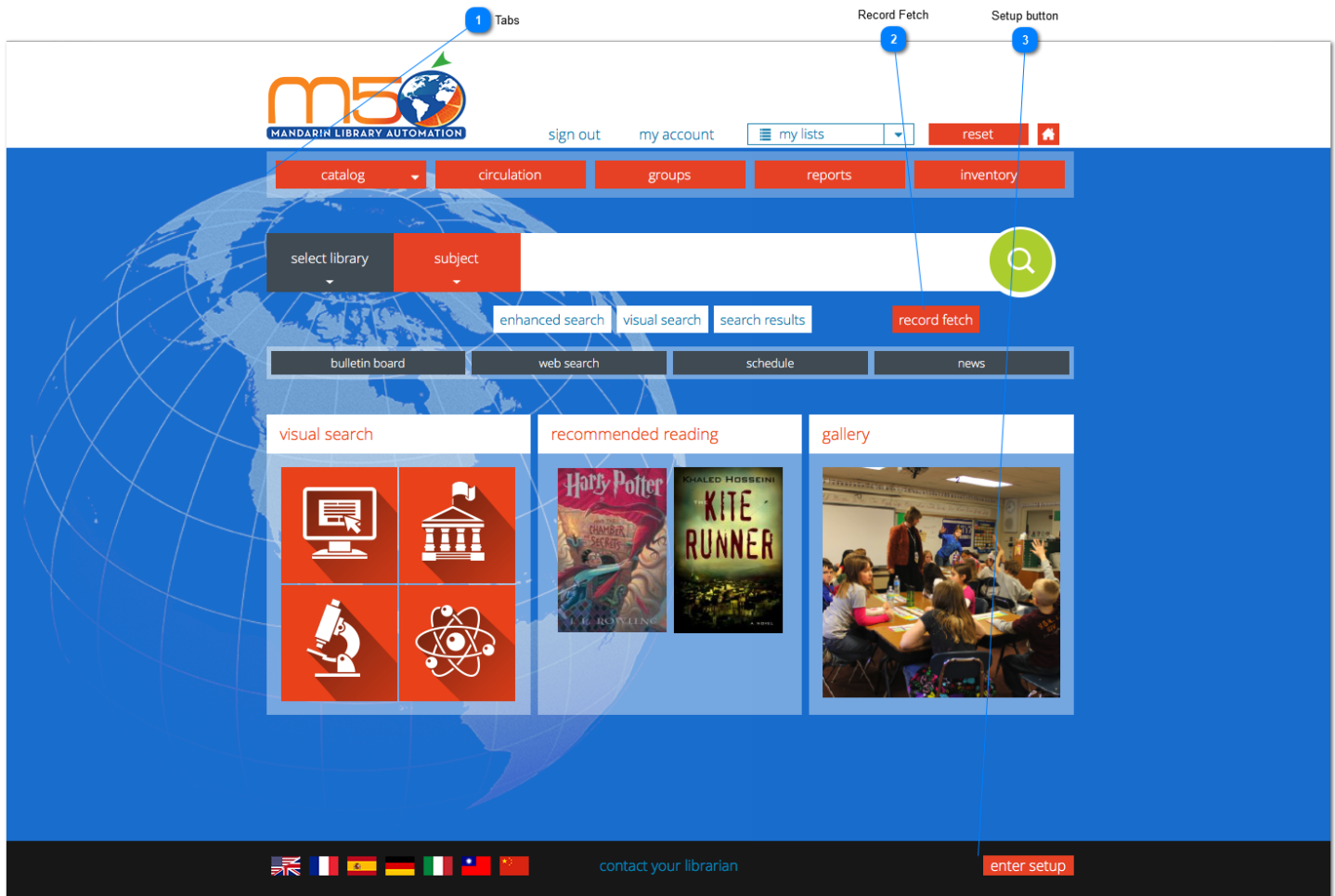
### My Account

[my account](#)

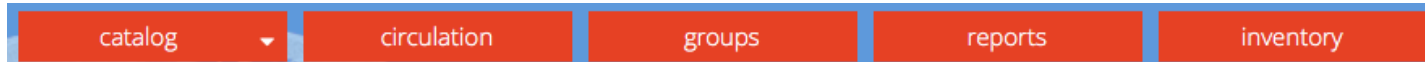
Click here to **Sign in** in to your M5 account

## Librarian Mode

When someone signs in to Mandarin M5 with librarian or administrator rights, M5 displays the tabs and side menu options for all library functions that person has permission to access.



### 1 Tabs



To all library functions

### 2 Record Fetch



This will display the Record Fetch dialog box

record fetch

close

ISBN

AND

Title

AND

Author

Search


reset

select library

### 3 Setup button

enter setup

This button display the setup screen



Setup  
71.4.228.137:80

Login  
Server Configuration  
Library Settings  
Options  
Style  
Change Login/Password  
Sort Formulas  
All Material Types  
Record Icons  
Z3950 Searches  
Visual Search  
Bulletin Board  
Record Templates  
Database Groups

Login name/barcode  
Password  
Login

## Using Circulation

This chapter describes:

- How to set up the circulation schedule for your library, including closed dates and hours of operation.
- How to conduct circulation transactions, including loans, returns, renewals, reserves and holds, bookings, and fines.
- How to change the system date.

**Note:** Some features described in this chapter may have been disabled by your system administrator, or you may not have permission to access them.

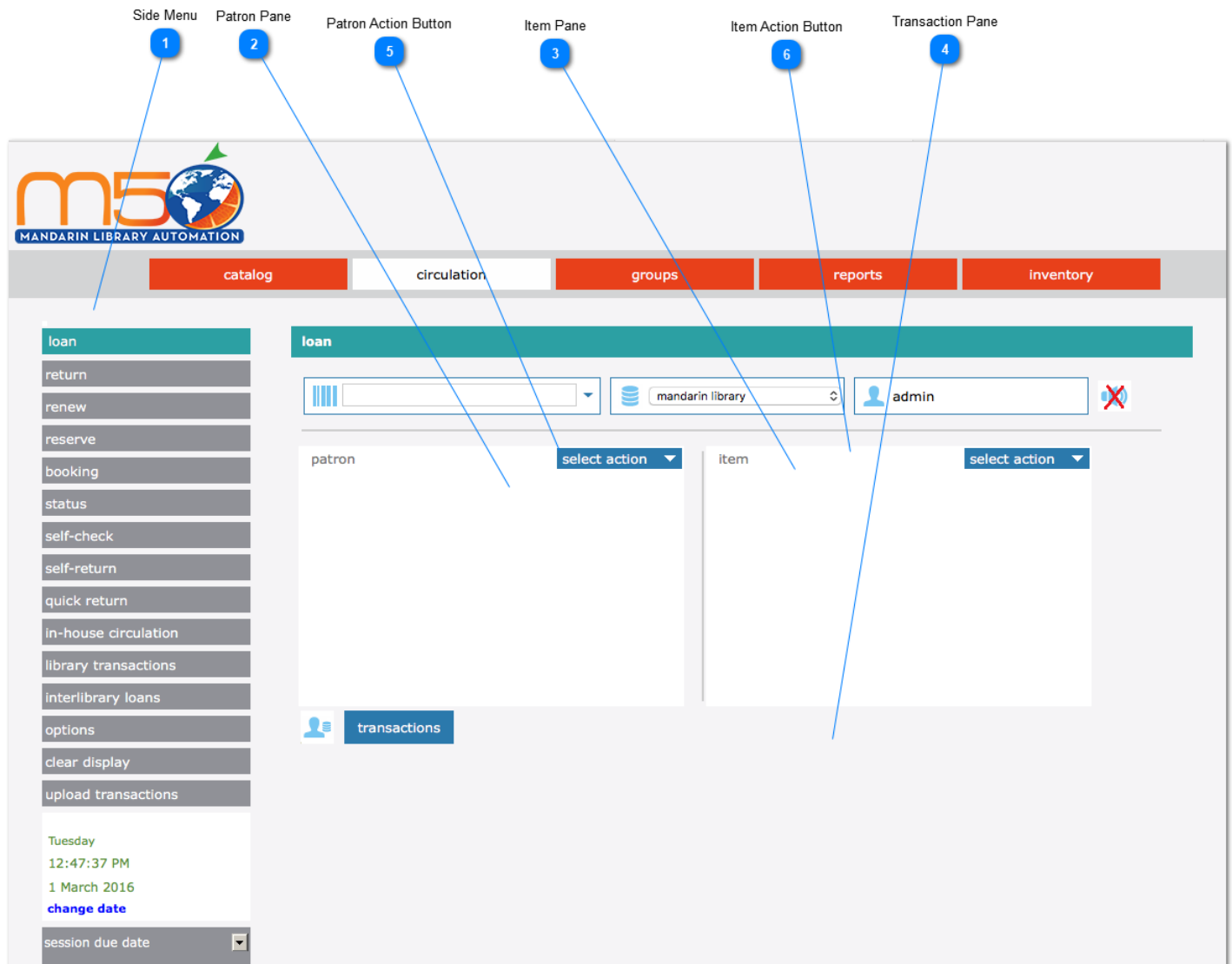
### Signing In to Circulation

In order to use Circulation, you must sign in to the Catalog with the appropriate permissions.

1. Click the **Sign In** link that appears on the right side of most pages in the Catalog.
2. Type your login name in the **Login Name/Barcode** box.
3. In the **Password** box, type your password.
4. Click **Sign In**. M5 displays the tabs for all library functions that you have permission to access.
5. Click the **Circulation** tab at the top of the page.

**NOTE:** If you need to sign out, click the **Catalog** tab and then click the **Sign Out** link on the right.

## Circulation Features



Side Menu 1 Patron Pane 2 Patron Action Button 5 Item Pane 3 Item Action Button 6 Transaction Pane 4

mandarin LIBRARY AUTOMATION

catalog circulation groups reports inventory

loan

return

renew

reserve

booking

status

self-check

self-return

quick return

in-house circulation

library transactions

interlibrary loans

options

clear display

upload transactions

Tuesday  
12:47:37 PM  
1 March 2016  
[change date](#)

session due date

loan

barcode

mandarin library

admin

patron select action

item select action

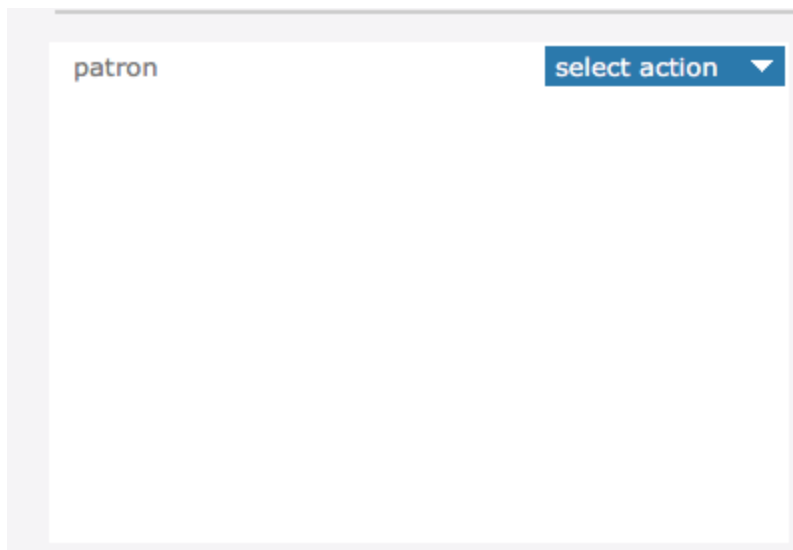
transactions

### 1 Side Menu



**Circulation side menu** – Contains options for conducting transactions, configuring the schedule, docking the side menu right or left, clearing the display, and changing the system date.

## 2 Patron Pane



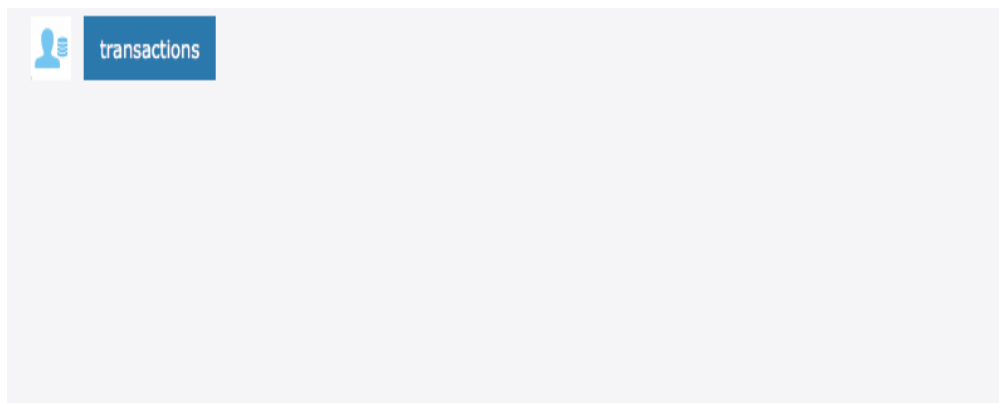
**Patron pane** – Displays information about the selected patron. The type of information displayed in this pane is customizable, but typically contains data such as the patron name, ID number, address, phone number, and current transaction information.

### 3 Item Pane

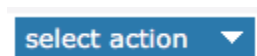


**Item pane** – Displays information about the selected item. As with the Patron pane, the type of information displayed here can be configured, but typically contains data such as the call number, title, author, and current transaction information.

### 4 Transaction Pane

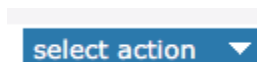


### 5 Patron Action Button



Patron Action Button allow you to apply Payments, Attach/Modify Picture, Create New Patron Record, Edit Patron Record, Post Message, Display Patron History

### 6 Item Action Button



Item Action Button allow you to Attach/Modify Picture, Create New Bibliographic Record, Edit Bibliographic Record, Create New Holding Record, Edit Holding Record, Attach Message, Display Item History



## Setting Up the Schedule

Before using Circulation, you should set up your library's system schedule. You can set up multiple schedules to accommodate different times of the year. For example, your summer schedule may differ from the rest of the year.

To set up your library circulation schedule:

On the side menu, click **Options**. This displays the Circulation Options. Click the Schedule button, this will display the Schedule page with four tabs. Enter the appropriate information in each tab as described in the following sections.

### General Tab

In this tab, establish general loan period rules.

1. Under **Due Time**, click the option appropriate for your library.
2. Under **If calculated due date is on a closed day**, click the option appropriate for your library.
3. When finished, click the **Schedule** tab.

**Circulation Schedule**

general
schedule
holidays & exceptions
global recalls

The following settings apply to loan periods of one or more days

**Due Time**

☐ Due time is the item's check-out time  
☒ Due time is the closing time on the day the item is due.  
☐ Due time is the opening time on the day the item is due.

**If calculated due date is on a closed day**

☐ Make item due on the first open day that precedes the closed day.  
☒ Make item due on the first open day that follows the closed day.  
☐ Make item due on the same day of the week as checked out date.  
☐ Use calculated due date.

ok
cancel

### Schedule Tab

In this tab, establish periods and indicate your library's open and closed days. You can create multiple schedules to apply to different times of the year.

1. Under **Period**, specify this schedule's starting date and end date. To do so, click **Add**. This enters a new line. Modify the **From** and **To** dates by clicking the date arrows and selecting the desired dates in the calendar.
2. Under **Day**, click the **Mon** arrow, and then click **Open** or **Closed**. Repeat for all days of the week.
3. Under **Circulation Hours**, select the **Start Time** and **End Time** for each day of the week that you are open. To do so, click a time arrow and select the time.

*NOTE: If you want to create an additional schedule, wait until you have completed the Holidays & Exceptions tab and the Global Recalls tab for this schedule.*

4. When finished, click the **Holidays & Exceptions** tab.

### Holidays & Exceptions Tab

In this tab, eliminate or add irregular dates within the schedule you created in the Schedule tab.

1. Click **Add**. This enters a new line.

## 2. Enter information for the exception date as follows:

A. Select the **R** check box if this exception date should repeat every year. This would be appropriate for holidays that always occur on the same date each year, such as New Year's Day.

B. In the date box under **Date & Status**, enter the exception date by clicking the date arrow and selecting the desired date in the calendar.

C. In the box beside the date box, select **Open** or **Closed** to indicate whether the library is open or closed on the date entered in step B.

D. If you selected **Open** in step C, enter the **Start Time** and **End Time** for this exception day by clicking a time arrow and selecting the time. If you clicked **Closed** in step C, no times can be entered.

E. In the **Description** box, type any information necessary to clarify this exception date.

## 3. To enter more dates, click **Add** and repeat step 2.

## 4. When finished, click the **Global Recalls** tab.

Circulation Schedule

general

schedule

holidays & exceptions

global recalls

ok

cancel

add

R	Date & Status	Circulation Hours Start Time	End Time	Description	
<input type="checkbox"/>	Mon 12 October 2015 Closed			[enter description here]	remove
<input type="checkbox"/>	Mon 07 September 2015 Closed			[enter description here]	remove
<input type="checkbox"/>	Fri 14 November 2014 Closed			[enter description here]	remove
<input type="checkbox"/>	Tue 02 September 2014 Closed			[enter description here]	remove
<input type="checkbox"/>	Mon 01 September 2014 Closed			[enter description here]	remove
<input checked="" type="checkbox"/>	Sun 25 May 2014 Closed			[enter description here]	remove
<input checked="" type="checkbox"/>	Sat 24 May 2014 Closed			[enter description here]	remove

R=Repeating Exceptions

## Global Recalls Tab

In this tab, specify the date all items have to be back in the library, such as the end of a school term or an inventory date.

### 1. Click **Add**. This enters a new line.

### 2. Enter information for the closing date as follows:

A. Select the **R** check box if this closing date should repeat every year.

B. Under **Recall Dates**, enter the closing date by clicking the date arrow and selecting the desired date in the calendar.

C. In the **Description** box, type any text necessary to clarify this closing date.

### 3. To enter more dates, click **Add** and repeat step 2.

### 4. When finished, click **OK**.

5. If you want to add another circulation period (such as a "summer hours" schedule), repeat the procedures for the Schedule, Holidays & Exceptions, and **Global Recalls** tabs.

Circulation Schedule


general
schedule
holidays & exceptions
global recalls

R	Recall Dates	Description
<input type="checkbox"/>	Fri 10 June 2016 ▾	<div style="border: 1px solid #ccc; padding: 2px;">[enter description here]</div> <span style="float: right; color: #007bff; text-decoration: underline;">remove</span>
<div style="background-color: #666; color: white; padding: 5px 15px; display: inline-block;">add</div>		

R=Repeating Recall Dates

ok
cancel

## Circulation Options

Several configuration settings are available to customize Circulation. Defaults options are good enough for most users. To change the Circulation settings click the **Expand** button  located on top of each group.

Click **Apply** after a change has been done.

Return Renewal Operations

?
↺
apply

Convert claimed never had to missing ? ☐

Convert claimed returned to missing ? ☐

Allow return at other location ? ☒

Set In-Transit status for return at other locations ? ☐

Hold/reserve send to patron's home location ? ☐

Convert reserve to hold for In-Transit items ? ☒

Allow return of damaged items at other locations ? ☒

Allow return of Claimed Never Had items at other locations ? ☒

Allow return of Claimed Returned items at other locations ? ☒

Allow return of Lost/Missing items at other locations ? ☒

Transfer holdings to returned location ? ☐

Generate fines for overdue returned items ? ☒

Exclude closed days from fine calculation ? ☒

Default overdue returned item transaction fee ?

Enable suspend transaction ? ☒

Fines total more than ?

Overdues more than ?

Return Renewal Operations	Configure the settings relating to return and/or renewal operations, such as allowing return at other location, in-transit processing, etc.
Convert claimed never had to missing	Select this option to convert the status to MISSING for Items patrons claimed Never Had.
Convert claimed returned to missing	Select this option to convert the status to MISSING for Items patrons claimed returned.
Allow return at other location	Enables accepting return of items belonging to other libraries (organizations).

## Setting Up the Schedule

Set In-Transit status for return at other locations	If enabled, items returned at other locations will have their status set to In-Transit and send to the owning organization.
Hold/reserve send to patron's home location	For items returned at other locations, if there are holds/reserves send the items in-transit to the patrons home locations
Convert reserve to hold for In-Transit items	For items returned at other locations, convert reserves to holds before sending the items in-transit to the patrons home locations
Allow return of damaged items at other locations	Allow return of Claimed Never Had items at other locations.
Allow return of Claimed Never Had items at other locations	Check this option to accept return of Claimed Never Had items at other locations
Allow return of Claimed Returned items at other locations	Check this option to accept return of Claimed Returned items at other locations.
Allow return of Lost/Missing items at other locations	Check this option to accept return of Lost/Missing items at other locations.
Transfer holdings to returned location	Items returned at other locations will be transferred to the returned locations. Returned location will be the home/owning location.
Generate fines for overdue returned items	Turns on/off generation of fines for returned overdue items.
Exclude closed days from fine calculation	Exclude from the fine calculation the days the library is closed during the given loan period.
Default overdue returned item transaction fee	This late fee is added to all overdue returned items on top of any calculated overdue fine amount.
Enable suspend transaction	Enable suspend transaction if patron fines amount or overdue transaction count exceed the preset amount.
Fines total more than	Suspend transaction if the patron fines amount exceeds this amount.
Overdues more than	Suspend transaction if the patron overdue transaction count exceeds this amount.

Barcode Pre-Processing

?

↺

apply

Enable barcode pre-processing

☒

Enable removal of leading zeroes

☐

Number of leading zeroes to remove

Remove leading zeroes task priority

Enable removal of trailing characters

☐

Number of trailing characters to remove

Remove Trailing Characters Priority

Enable remove prefix

☐

The prefix(es) to Remove

Remove prefix task priority

Add specified prefix

☐

The prefix to add

Add prefix task priority

Conditional add prefix

☐

Add prefix condition

Use substitution list

☐

Add prefix substitution list

Use retry without adding prefix list

☐

Exclude organization list

Barcode Pre-Processing	These settings instruct Circulation how to massage the raw barcode string into the desire form before submitting the query to the server.
Enable barcode pre-processing	Enable the pre-processing of the raw entered barcodes before querying the server. Often used to add/remove characters due to scanners peculiarities.
Enable removal of leading zeroes	Enable removing leading zeroes from the entered raw barcodes.
Number of leading zeroes to remove	Maximun number of leading zeroes to remove from the raw entered barcode. Enter 0(zero) to remove all leading zeroes.
Remove leading zeroes task priority	The task priority (1-6) is the order in which removal of the leading zeroes will take place.
Enable removal of trailing characters	Enable removing trailing characters from the entered raw barcodes.
Number of trailing characters to remove	The number of trailing characters to remove from the entered barcode.

## Setting Up the Schedule

Remove Trailing Characters Priority	The task priority (1-6) is the order in which the removing of trailings characters will take place.
Enable remove prefix	Enable removing prefixes from the entered raw barcodes.
The prefix(es) to Remove	Enter one or more prefix separated with semicolon(;) to be removed from the entered barcodes
Remove prefix task priority	The task priority (1-6) is the order in which the remove prefix will take place.
Add specified prefix	Add the specified prefix to all entered barcode.
The prefix to add	Enter here the prfix to add to the barcodes.
Add prefix task priority	The task priority (1-6) is the order in which the add prefix will take place.
Conditional add prefix	Add a prefix to the barcode based on the current user or workstation organization symbol. In addition, a substitution list can also be provided.
Add prefix condition	Use either the user or workstation organization symbol as the prefix or as the condition for substitution.
Use substitution list	Enables getting the prefix text from the substitution list. For any symbol matching the condition, add the conrresponding prefix text.
Add prefix substitution list	The list of organization symbols and the corresponding prefixes. Select an Organization, enter prefix text and click on ADD.
(EMPTY)	To force a prefix for user or workstation with empty organization symbol, select [EMPTY] and specify the prefix.
(ADD) (REMOVE)	To exclude an organization from adding a prefix, select the organization and set the prefix to one or more blank spaces.
Use retry without adding prefix list	Re-try without adding prefix for those organizations in the list if fetching barcode fails.
Exclude organization list	The list of organizations to retry without adding the prefix if fetching the barcode fails.
Conditional add prefix task priority	The task priority (1-6) is the order in which the conditional add prefix will take place.
Make entered barcode fixed length	Make all entered barcodes of a fixed length by padding or removing characters as configured.
Length of the barcode	The number of characters to make the entered barcodes.
Pad leading characters	Make the barcodes a fixed length by padding the leading characters. Otherwise pad trailing characters.
Padding character	The character to used to pad the barcodes when the entered barcodes are shorter than the required length.
Remove leading characters	Make the barcodes a fixed length by removing the leading characters. Otherwise remove trailing characters.
Make fixed length task priority	The task priority (1-6) is the order in which the make fixed length will take place.

Miscellaneous Settings
?
refresh
apply

Enable sound

☐

Delete bibliographic when last holding is deleted

☒

Print checkout transaction receipt

☒

Print patron's name in transaction receipt

☒

Receipt printing header

Receipt printing footer

Disable history options

☐

Skip transaction overrides Self Mode

☒

Self Mode overrides max fine amount

Self Mode overrides max overdues count

Allow reserve transactions on In-Process items

☐

Display and process entered barcodes in upper case

☒

Display patron current statistics

☒

Display patron expiration alert days

Display item current statistics

☒

Enable view patron records detail

☒

Enable view item records detail

☒

Show related image in Transaction panes

☐

Show related image in name/title search panes

☒

Enable Circulation display timeout

☐

Display timeout period (seconds)

Max number of transactions per page

Name/Title search results show max per page

Library transactions show max per page

Patron phone number source field

Patron email address source field

Library display location type

Suppress 411 messages

☐

Suppress overdues messages

☐

Miscellaneous Settings	Provides many options to enhance Circulation customization.
Enable sound	Enable playing sound file at the end of each operation.
Delete bibliographic when last holding is deleted	Delete the bibliographic record when the last attached holding record is deleted.
Print checkout transaction receipt	Enables printing receipt for loan transactions.
Print patron's name in transaction receipt	Enables printing the patron's name when printing receipts. Otherwise the name is masked.
Receipt printing header	The header to print in the receipt. Leave blank if no header is desired.
Receipt printing footer	The footer to print in the receipt. Leave blank if no footer is desired.
Disable history options	Checking this option will disable the history menu options for both patron and item.
Skip transaction overrides Self Mode	Skip transaction overrides in Self Mode. Overrides are NOT waived, instead the transactions are cancelled.
Self Mode overrides max fine amount	This is the maximum fine amount the patron may owe before blocking the transactions in Self Mode when the skip override flag is off.
Self Mode overrides max overdues count	This is the maximum number of overdue loans the patron may have before blocking the transactions in Self Mode when the skip override flag is off.
Allow reserve transactions on In-Process items	Allow reserve transactions on items with In-Process status.
Display and process entered barcodes in upper case	Display and process entered barcodes in upper case.



## Setting Up the Schedule

Display patron current statistics	Display the patron current statistics (number of items currently on loan, on hold, on reserve, fines, etc.
Display patron expiration alert days	The number of days before the patron expiration to display notification alert.
Display item current statistics	Display the item current statistics (number reserves, bookings, fines, etc.
Enable view patron records detail	Enables the option to view all the patron records (patron, barcode, group, etc.) in Full MARC.
Enable view item records detail	Enables the option to view all the item records (holding, bib, barcode, group, etc.) in Full MARC.
Show related image in Transaction panes	Show the related image in the transaction panes. Patron pictures for item transactions and book covers for patron transactions pane.
Enable Circulation display timeout	Clears the Circulation display after a specified timeout period of inactivity.
Display timeout period (seconds)	The number of seconds of inactivity necessary to clear the display.
Max number of transactions per page	Maximum number of transactions to display in the transaction pane at once. Paging will occur if exceeded. Default is 10.
Library transactions show max per page	Maximum number of transactions to display in the library transaction pane at once. Paging will occur if exceeded. Default is 20.
Patron phone number source field	The field in the patron record that Circulation uses to retrieve the patron phone number.
Patron email address source field	The field in the patron record that Circulation uses to retrieve the patron email address for email notifications.
Library display location type	The library display location type (PUBLIC or SCHOOL library) can be used to restrict displaying sensitive information.
Suppress 411 messages	Disable displaying of information (411) messages when a patron loaded.
Time Zone	Select the time zone for your location. Enter user defined time zone as: GMT+HH:MM or GMT-HH:MM.
Email service type for notification	The type of email service to use for notification. Currently only SMTP service is supported.
Email server IP address	The IP address of the email server to used for email notifications.
Email server port	The the listening port of the email server. Default value is port 25.
Sender email address	The email address of the sender. The email address that will be used in the FROM field of the email notifications.
Email address to furnish copy to	The email address to furnish copy of email notifications. The email address that will be used in the CC field of the email notifications.
Authenticate	Check this option if your email server requires authentication.
User:	Enter the SMTP account user name.
Password:	Enter the SMTP account user password.
Duplicate patron detection fields	One or more fields separated with slash(/) used in the auto import to detect duplicate patron records. Default field is 852#p.
Use AND operator in duplicate detection	For multiple duplicate detection fields use AND to require matching on every field. Otherwise matching on any of the fields.

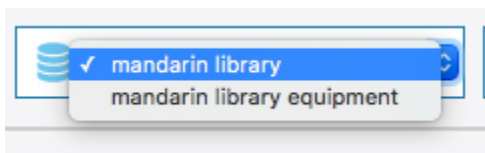


## Conducting Transactions

From the main Circulation page, you can view patron and item status, loan items, return items, renew items, reserve and hold items, book equipment and rooms, process fines, configure the schedule, and change the system date. Procedures are explained in the following sections.

### Selecting a Circulation Database

Your M5 system may offer several databases from which you can circulate items. If so, you can select a different database in the **Current Database** list at any time.



## Using the Transaction Menu

The Transactions menu allows you to quickly loan, return, and renew items; mark items as lost, damaged, claimed returned, or claimed never had; and cancel a reserve, hold, or booking.

To access the Transactions menu:

1. Display the item(s) you want to process. To search for recent transactions, click **Library Transactions** in the left side options menu

2. Hold the mouse over the rows in the list, select the desired transaction and click on it.

library transactions back

list all today's all loans return  fines holds reserves bookings

print
3495 Results
1 of 175
>>

Grade	Homeroom	Teacher	Barcode	Patron	Barcode	Call Number	Item	Transaction	Created	Date Due
105	Jordan	Jordan	P97	Reed, Leslie	B39144	FIC Sti	Attack of the mutant	Overdue Loan	19 April 2002	07 October 2003
			P97	Reed, Leslie	B39145	600 MAC	The commonwealth of independent states	Overdue Loan	19 April 2002	07 October 2003
			P107	Rickenbacker, Tiffany	B39111	FIC LOW	Anastasia's chosen career	Overdue Loan	19 April 2002	07 October 2003
			P112	Riley, Dayla	B39206	FIC Mar	Mary Anne's bad-luck mystery /	Overdue Loan	19 April 2002	02 October 2003
			P112	Riley, Dayla	B39208	FIC Suz	Choosing sides /	Overdue Loan	19 April 2002	02 October 2003
105	Jordan		P120	Robinson, Craig	B39245	FIC Sti	Sunburn /	Overdue Loan	19 April 2002	16 September 2003
			P125	Rollins, Alexander	B39266	FIC Sti	Be careful what you wish for-- /	Overdue Loan	19 April 2002	09 September 2003
			P125	Rollins, Alexander	B39267	FIC Sti	The ghost next door /	Overdue Loan	19 April 2002	09 September 2003
			P125	Rollins, Alexander	B39268	FIC Sti	The curse of the mummy's tomb /	Overdue Loan	19 April 2002	09 September 2003
			P125	Rollins, Alexander	B39269	FIC Sti	Welcome to dead house /	Overdue Loan	19 April 2002	09 September 2003
			P125	Rollins, Alexander	B39271	FIC Sti	One day at Horrorland /	Overdue Loan	19 April 2002	09 September 2003
			P126	Rollins, Timothy	B39272	FIC Sti	Let's get invisible! /	Overdue Loan	19 April 2002	09 October 2003
			P126	Rollins, Timothy	B39273	FIC Sti	Say cheese and die! /	Overdue Loan	19 April 2002	09 October 2003
			P126	Rollins, Timothy	B39274	FIC Sti	The haunted mask /	Overdue Loan	19 April 2002	09 October 2003
			P126	Rollins, Timothy	B39275	FIC Sti	Why I'm afraid of bees /	Overdue Loan	19 April 2002	09 October 2003
			P126	Rollins, Timothy	B39276	FIC Sti	The girl who cried monster /	Overdue Loan	19 April 2002	09 October 2003
			P127	Roses, Troy	B39278	FIC Sti	Welcome to Camp Nightmare /	Overdue Loan	19 April 2002	08 October 2003
			P127	Roses, Troy	B39280	FIC Sti	Piano lessons can be murder /	Overdue Loan	19 April 2002	08 October 2003

3. Select the check box by each desired item. To select all items in that pane at once, select the check box at the top of the check box column.

loan

mandarin library

admin

patron

P120

Robinson, Craig

Grade:

Homeroom: 105

Teacher: Jordan

Fines Owed: 0.00

Permission:

Overdues: 2

Loans

Holds

Reserves

Fines

2

0

0

0

item

B39245

Call No.: FIC Sti

Title: Sunburn /

Author: Stine, R. L.

Price:

Date: 1993.

Date Due: 16 September 2003

Status:

Loans

Holds

Reserves

Fines

1

0

0

0

print

2 Results

patron transactions

1 of 1

	Barcode	Call Number	Item	Transaction	Created	Date Due
<input type="checkbox"/>	B106	J 598.2 GAN	Birds at night.	Overdue Loan	04 November 2003	18 November 2003
<input type="checkbox"/>	B39245	FIC Sti	Sunburn /	Overdue Loan	19 April 2002	16 September 2003

3. Click the **Patron Transactions dropdown** or the **Item Transactions dropdown** This displays the Transactions menu.

print

loan

renew

return

lost

damaged

claimed returned

claimed never had

cancel reserve/hold

cancel booking

change date

4. Click the transaction type you want to perform.


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## Searching for Item or Patron

### NOTES:

- If you are searching for an item in Loan, Reserve, or Booking mode, there should be an active patron in the Patron pane.
- If you are searching for a patron in Loan, Reserve, or Booking mode, and another patron already appears in the Patron pane, click Clear Display in the side menu to clear the pane before searching by this method.

1. In the Barcode box, type a patron or item name, then press ENTER. This displays the Search Results page.

 CRAIG  patron	Grade	Homeroom	Teacher	Barcode	Name (Last, First)	Postal Address
				P846	Smith, Arnisha	D-16 Glenfield Apt. Miami, FL
				P847	Smith, Ashley	4504 St. Matthews Rd. St. Matthews, FL
				P848	Smith, Britanna	903 Roosevelt Garden Apt. Miami, FL
				P849	Smith, Chelsea	1824 McQueen Blvd. Miami, FL
				P169	Smith, Chris	2799 Hillcrest Dr. Miami, FL
		105	Jordan	P168	Smith, Christopher	795 Limestone Rd. Miami, FL
				P850	Smith, Corey	1824 McQueen Blvd. NE Miami, FL
				P851	Smith, Destiny	117 Michael Street Miami, FL
				P852	Smith, Ellis	412 Grasshopper Ct Miami, FL
				P170	Smith, Ernest	795 Limestone Rd. Miami, FL

2. Click the desired patron or item barcode. This returns you to the main Circulation page and displays the patron or item.

**patron** select action ▼



**P847**  
**Smith, Ashley**  
Grade:  
Homeroom:  
Teacher:  
Fines Owed: 0.00  
Permission:  
**Overdues: 3**

Loans	Holds	Reserves	Fines
3	0	0	0

**item** select action ▼

**B42768**  
Call No.: TM 001.64 SPE  
Title: Exploring careers as a computer technician.  
Author: **Spencer, Jean W.**  
Price:  
Date:  
Date Due: 03 May 2002  
**Status:**

Loans	Holds	Reserves	Fines
1	0	0	0

  print ▼

patron transactions ▼


	Barcode	Call Number	Item	Transaction	Created	Date Due
<input type="checkbox"/>	B42770	TM 398.2 MCK	Beauty :	Overdue Loan	19 April 2002	03 May 2002
<input type="checkbox"/>	B42768	TM 001.64 SPE	Exploring careers as a computer technician.	Overdue Loan	19 April 2002	03 May 2002
<input type="checkbox"/>	B42767	TM 305.8 GRI	Black like me.	Overdue Loan	19 April 2002	03 May 2002


3 Results  
◀ 1 of 1 ▶


## Viewing Patron and Items


1. In the side menu, click **Status**.
2. In the **Barcode box**, scan the patron or item barcode, or type it and then press **ENTER**. This displays a record in the Patron or Item pane, depending upon the type of code you entered. If there are any open transactions for this patron or item, they display under Transactions.
3. To view the status of another patron or item, enter a different barcode in the Barcode box.

status










patron



P10

Mintz, Joseph

Grade:

Homeroom:

Teacher:

Fines Owed: 0.00

Permission:

Overdues: 2

Loans

3

Holds

0

Reserves

0



Fines

0

select action

item

select action

print

3 Results

patron transactions

1 of 1

	Barcode	Call Number	Item	Transaction	Created	Date Due
<input type="checkbox"/>	B12751	J 001.9 LAR	Close encounters :	Loan	02 February 2016	02 June 2016
<input type="checkbox"/>	B47665	J B SMI	A world explorer--John Smith,	Overdue Loan	09 November 2005	14 November 2005
<input type="checkbox"/>	B4	J FIC DIC	Because of Winn-Dixie /	Overdue Loan	13 June 2005	17 June 2005

To view the Patron and Item Toolbar see [Circulation Features](#)

## Loaning Items

1. In the side menu, click Loan.
2. In the **Barcode** box, scan the patron barcode, or type it and then press **ENTER**.

### NOTES:

- If your library has not yet established a circulation schedule, an error message displays. For information on establishing a circulation schedule, see “Setting Up the Schedule”.
- If any patron record has a fine associated with it, a fine message displays.
- You can:
  - Click *Override* to ignore the message and continue with the transaction.
  - Click *Cancel* to stop the transaction.

3. In the **Barcode** box, scan the item barcode, or type it and then press **ENTER**. The loan transaction appears
4. To loan more items to this patron, scan the next item barcode in the Barcode box, or type it and then press **ENTER**. Repeat this process for each item loaned to this patron.

loan

mandarin library

admin

patron

P9

**Jones, Ken**

Grade: 9

Homeroom: 203

Teacher: Mr. Barclay

Fines Owed: 0.00

Permission:

**Overdues: 3**

Loans

3

Holds

0

Reserves

0

Fines

0

item

B43463

Call No.: J 323.1 WEL

Title: Children of the civil rights era /

Author: **Welch, Catherine A.**

Price:

Date: c2001.

Date Due: 08 January 2005

**Status:**

Loans

1

Holds

0

Reserves

0

Fines

1

print

3 Results

patron transactions

1 of 1

	Barcode	Call Number	Item	Transaction	Created	Date Due
<input type="checkbox"/>	B7	FIC NAP	Changing tunes /	Overdue Loan	13 June 2005	17 June 2005
<input type="checkbox"/>	B43472	J 813 CAS	Understanding Flowers for Algernon /	Overdue Loan	05 January 2005	08 January 2005
<input type="checkbox"/>	B43463	J 323.1 WEL	Children of the civil rights era /	Overdue Loan	05 January 2005	08 January 2005

5. A transaction receipt will be printed if a receipt printer is connected to the circulation workstation.

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## Loaning Items

### Receipt printing header

demo  
03 Jan 2014 03:26 pm

#### **LIBRARY RECEIPT** CHECKOUT

P9  
NAME: Jones, Ken

B43456  
Due: 08 January 2005 05:00 pm  
Understanding I am the cheese /

## Returning Items

### Notes:

- *If an item is returned that belongs to a special reserve group, a warning message displays.*
- *When a reserved item is returned, a message displays indicating the name and barcode of the patron who reserved it.*

Circulation provides five methods to return items.

- **Side menu method** – Used to return items one at a time by entering each barcode.
- **Transactions menu method** – Used to return one or many items at once using a menu under Transactions. See [“Using the Transactions Menu”](#).
- **Quick Return method** – Used when scanning bookdrop returns without patrons present.
- **In-House Circulation method** – “Returns” items left on tables and desks after in-library use.
- **Self-Return method** – Allows patrons to check out or return items without staff assistance. See [“Using Self-Return”](#).

### Side Menu Method

1. In the side menu, click **Return**.
2. In the Barcode box, scan the item barcode, or type it and then press **ENTER**. This returns the item. Repeat for each item you want to return.

### Quick Return

This rapid entry method is designed for situations such as bookdrop returns. Quick Return does not alert you to patron messages since it is assumed that patrons are not present. Quick Return does alert you when a Hold is attached to an item.

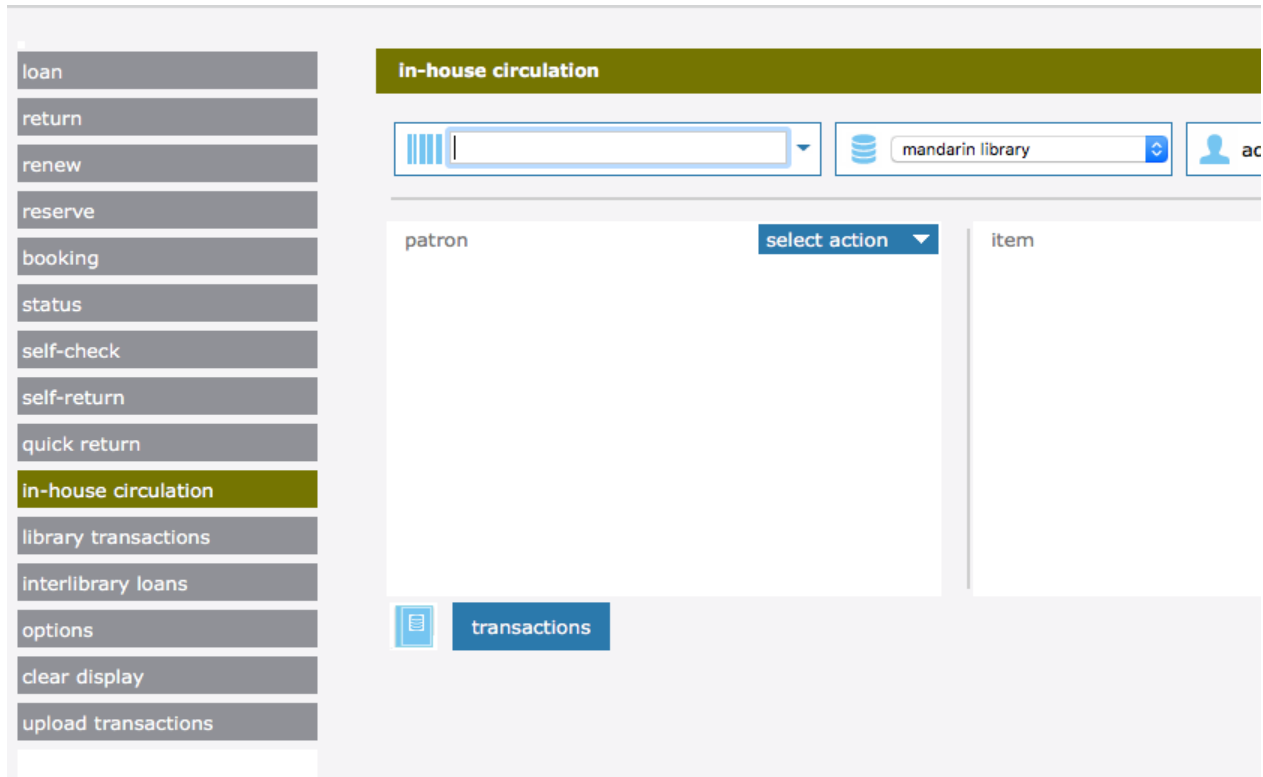
1. In the side menu, click **Quick Return**.
2. In the Barcode box, scan the item barcode, or type it and then press ENTER. Repeat this for each item being returned.



## In-House Circulation

This feature takes the guesswork out of tracking in-library usage of your collection. It is used for items that were removed from shelf positions and left on library tables or desks, presumably used at the library though not checked out. It records one use of each item.

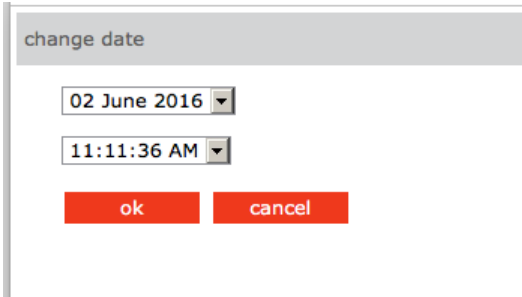
1. In the side menu, click **In-House** Circulation.
2. In the Barcode box, scan the item barcode, or type it and then press **ENTER**. Repeat this for each item being returned.



The screenshot shows the 'in-house circulation' interface. On the left is a vertical sidebar menu with options: loan, return, renew, reserve, booking, status, self-check, self-return, quick return, **in-house circulation** (highlighted), library transactions, interlibrary loans, options, clear display, and upload transactions. The main area has a header 'in-house circulation' in a green bar. Below this is a barcode input field with a dropdown arrow, a database icon, and a text box containing 'mandarin library'. To the right is a user icon and the text 'ac'. Below these is a table with two columns: 'patron' and 'item'. Above the 'patron' column is a 'select action' dropdown menu. At the bottom of the main area is a blue button labeled 'transactions' with a document icon.

## Changing an Item's Due Date

1. Display the item in the **Circulation** window.
2. Under Transactions, click the **due date**. This displays a dialog box with the date and time.
3. Change the date and time as desired, then click **OK**.



A screenshot of a web-based dialog box titled "change date". The dialog box has a light gray header bar with the title. Below the header, there are two dropdown menus. The first dropdown menu shows "02 June 2016" and the second dropdown menu shows "11:11:36 AM". At the bottom of the dialog box, there are two red buttons: "ok" and "cancel".

## Recording an Item as Lost or Damage

When an item is returned and recorded as damaged, a fine is attached to the patron's record. The fine amount is the maximum amount established for members of the item group (see "Circ Periods")

*When recording an item as lost or damaged, the fine based on field 852#9 (Price) will only be added if the Fine Transactions entry in the global.ini.REG file is generate=yes.*

When an item is recorded as lost, the fine amount is the item price indicated in field 852#9. If no price exists, the fine is the maximum fine as set in the Group Editor.

**NOTE:** *If you want to be prompted to add an additional transaction fee to a lost or damaged item, change the Transaction Fee entry in the **Global.ini.REG** file (the default path is **C:\M3 Server\Registry\Common**) to **Prompt for fee=on**. In the amount entry, type the desired amount.*

To record items as lost or damaged, use the Transactions menu. For instructions, see "[Using the Transactions Menu](#)".

Recording an Item as "Claimed Returned" or "Claimed Never Had"

## Recording an Item as "Claimed Returned" or "Claimed Never Had"

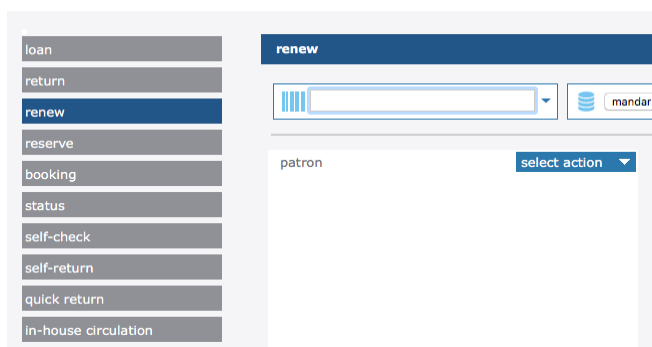
To record items as "Claimed Returned" or "Claimed Never Had," use the Transactions menu. For instructions, see "[Using the Transactions Menu](#)".

## Renewing a Loan on an Item

Circulation provides two methods to renew items on loan. The side menu method is described below. The Transactions menu method saves time if the patron is renewing more than one item; it is described in [“Using the Transactions Menu”](#)

### Side Menu Method

1. In the side menu, click **Renew**.
2. In the **Barcode** box, scan the item barcode, or type it and then press **ENTER**.



The screenshot shows the Mandarin Library Automation interface. On the left is a side menu with options: loan, return, **renew** (highlighted), reserve, booking, status, self-check, self-return, quick return, and in-house circulation. The main area has a header 'renew' and a barcode input field. Below the input field is a 'patron' section with a 'select action' dropdown menu.

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

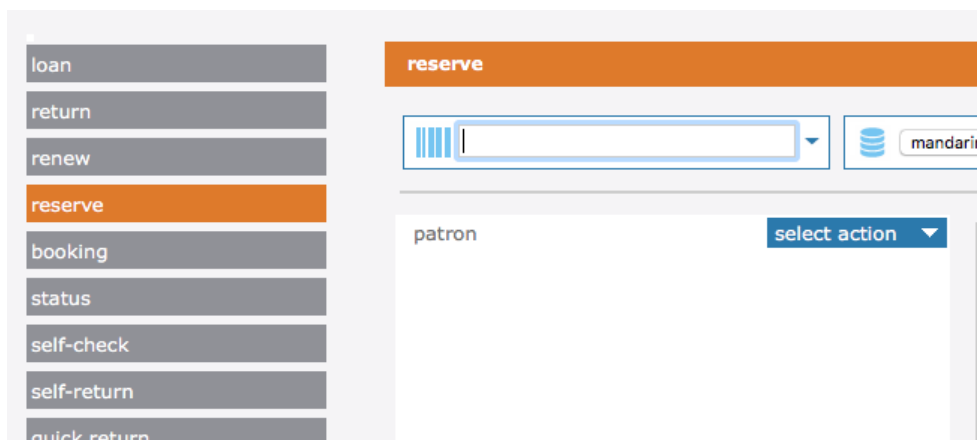
- Click **Override** to ignore the message and continue with the transaction.
- Click **Cancel** to stop the transaction.

## Reserving or Holding an Item

**Note:** You cannot reserve or hold a deleted item.

A hold is applied when the requested item is currently checked into the library and is therefore available; a reserve is applied when the item is currently checked out.

1. In the side menu, click **Reserve**.
2. In the Barcode box, scan the patron barcode, or type it and then press ENTER.
3. In the Barcode box, scan the item barcode, or type it and then press ENTER. The reserve or hold transaction appears in the Item pane.



The screenshot shows the Mandarin Library Automation interface. On the left is a vertical sidebar menu with options: loan, return, renew, reserve (highlighted in orange), booking, status, self-check, self-return, and quick return. The main content area has an orange header bar labeled 'reserve'. Below this is a barcode input field with a blue border and a dropdown arrow. To the right of the input field is a small blue icon and the text 'mandarin'. Below the input field, the word 'patron' is displayed, and to its right is a blue button labeled 'select action' with a dropdown arrow.

### NOTES:

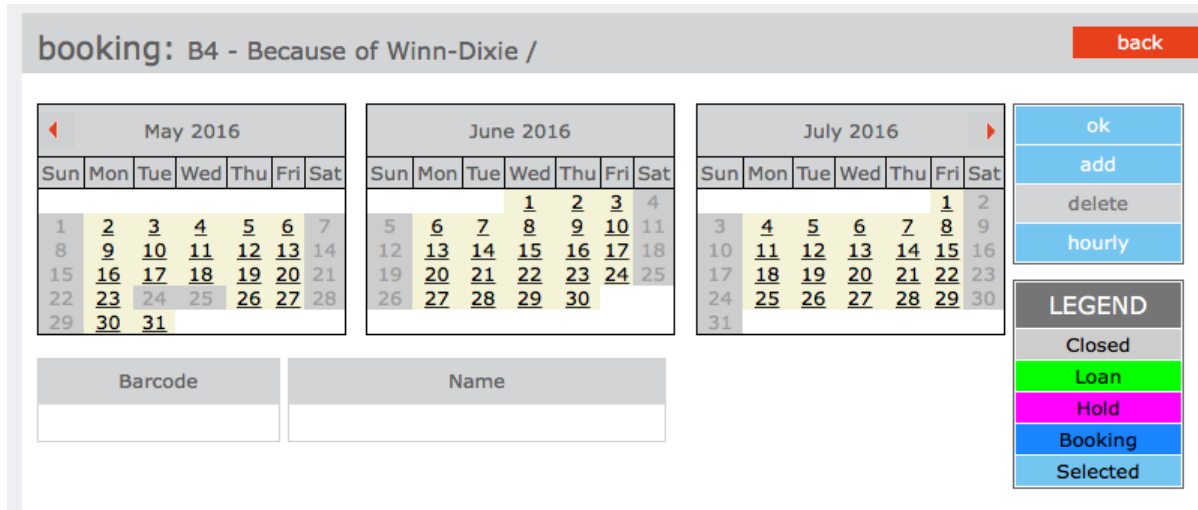
- If a reserve is placed, a notification e-mail will automatically be sent to the patron when the item is available (if there is an e-mail address in the patron record).
- When a reserved item is returned, a message displays indicating the name and barcode of the patron who reserved it.
- You can cancel a reserve or hold with the Transactions menu. See “Using the Transactions Menu”

## Booking an Item

**Note:** You cannot book a deleted item.

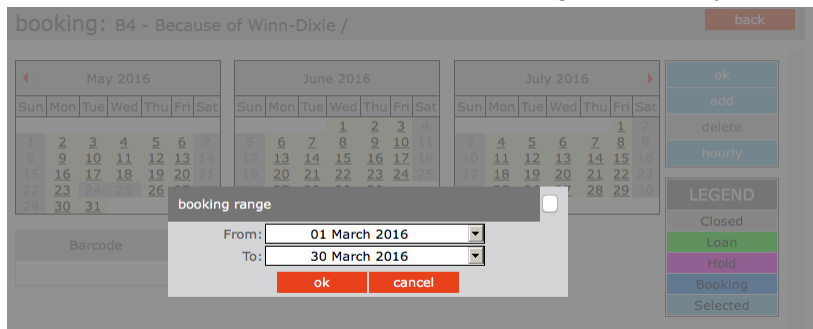
Use the Booking feature to reserve an item such as a conference room or piece of equipment for a future day and/or time. You can book an item for a single day, a range of days, or for specific hours.

1. On the side menu, click **Booking**.
2. In the Barcode box, scan the patron barcode, or type it and then press **ENTER**. This displays the patron's record in the Patron pane.
3. In the Barcode box, scan the item barcode, or type it and then press **ENTER**. This displays the Booking page.



4. The three calendars are for display purposes only; they will display the booking date or time after it has been set. To set the booking date:
  - A. In the Booking Range box, click the arrow next to the **From date**. This displays a new calendar at the bottom of the page.
  - B. Click a date in the calendar; it now displays in green
  - C. If you need to specify a time, select a time in the **From Time** boxes.
  - D. Click the **OK** button under the From Time boxes.
  - E. The **Booking Range** box displays the **From date** you selected. Click the **arrow** next to the **To date** and repeat steps B through D. The Booking Range box now displays the **To date** you selected.

5. Click **Add**. This adds the booking and displays the dates.



6. If you selected a time range for the booking and would like to view it, click **Hourly**. This displays the agenda in half-hour blocks. To return to the calendar view, click **Daily**.
7. When finished, click **OK**. The booking transaction appears on the main Circulation page.

**NOTE:** You can cancel a booking with the Transactions menu. See [“Using the Transactions Menu”](#).



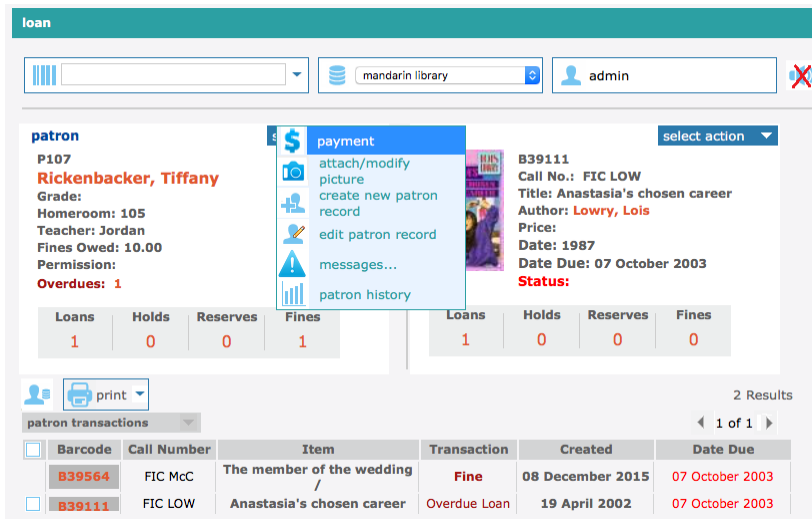
## Processing Patron Fines

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

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

### Recording a Payment

1. In the **Barcode** box, scan the patron barcode, or type it and then press ENTER.
2. In the side menu, click **Payment**. This displays the Payment page, which lists the patron’s fine(s).



The screenshot shows the 'loan' interface with a sidebar menu. The 'payment' option is selected, displaying a dropdown menu with options: 'attach/modify picture', 'create new patron record', 'edit patron record', 'messages...', and 'patron history'. The main area shows patron details for P107, Tiffany Rickenbacker, including her grade (Homeroom: 105), teacher (Jordan), fines owed (10.00), and permission. Below this, there are two tables showing loan and fine details.

Loans	Holds	Reserves	Fines
1	0	0	1


Loans	Holds	Reserves	Fines
1	0	0	0

Below the tables, there is a 'patron transactions' section with a table showing two results:

Barcode	Call Number	Item	Transaction	Created	Date Due
B39564	FIC McC	The member of the wedding	Fine	08 December 2015	07 October 2003
B39111	FIC LOW	Anastasia's chosen career	Overdue Loan	19 April 2002	07 October 2003

Barcode	Name	Postal Address	E-mail
P107	Rickenbacker, Tiffany	978 Graham Street, Miami FL 29115	

payment
new fine
refund
history


print

Title	Fine	Balance	Reason	Claimed Paid	Date Due	Date Returned
Anastasia's chosen career	10.00	10.00			07 Oct 2003	
The member of the wedding /	10.00	10.00	OVERDUE	<input type="checkbox"/>	07 Oct 2003	08 Dec 2015

Total: 10.00

Claimed Paid: 0.00

Forgiven: 0.00

Balance: 10.00

Tendered: 0.00

apply
back

3. This page has four tabs:

- **Payment** – Use this tab if the patron is paying the fine. Type the amount of currency received in the **Tendered** box. Click **Apply**. (If change is due back, a dialog box displays the amount to be returned to the patron. Click **OK**.)

**NOTE:** If the patron claims that he or she previously paid a particular fine, click the History tab to review the payment history. If you want to record that this item was previously paid, select the Claimed Paid check box by that item. This reduces the **Balance** amount accordingly.

- **New Fine** – Use this tab if you want to add a new fine. Type the amount of the fine and a note, if desired. The new fine and the note will be added to the fines listed in the Payment tab. Click **Apply**.
- **Refund** – Use this tab to apply a refund. Type the amount of the refund and a note, if desired. Click **Apply**.
- **History** – Use this tab to view payment history. When finished, click **Done**.

## Using Self-Check and Self-Return

These features allow patrons to check out or return items without staff assistance.

### NOTES:

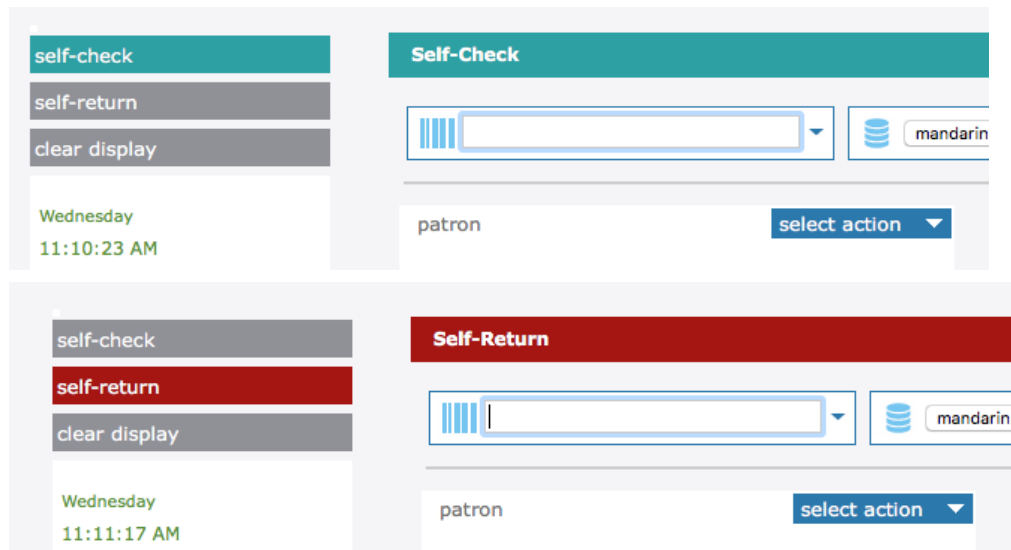
- For system security, once the Self-Check transaction mode is selected, the patron cannot perform any other type of circulation transaction. Similarly, if the Self-Return transaction mode is selected, then the patron is limited to self-return. Libraries using the Self mode can set up a network workstation restricted to self-checkout transactions, and a separate workstation restricted to self-return transactions.
- To enable override messages in Self-Check mode, change the Self Mode entry in the Global.ini.REG file (the default path is **C:\M3 Server\Registry \Common**) to **Skip Override=off**. Otherwise, the only override that will display is if the item is non-circulating.

### Using Self-Checkout

1. On the side menu, click **Self-Check**. The workstation remains in this mode until you log out of M5.
2. In the **Barcode** box, scan the patron barcode, or type it and then press **ENTER**.
3. In the **Barcode** box, scan the item barcode, or type it and then press **ENTER**. This checks out the item.

### Using Self-Return

1. On the side menu, click **Self-Return**. The workstation remains in this mode until you log out of M5.
2. In the **Barcode** box, scan the item barcode, or type it and then press **ENTER**. This returns the item.

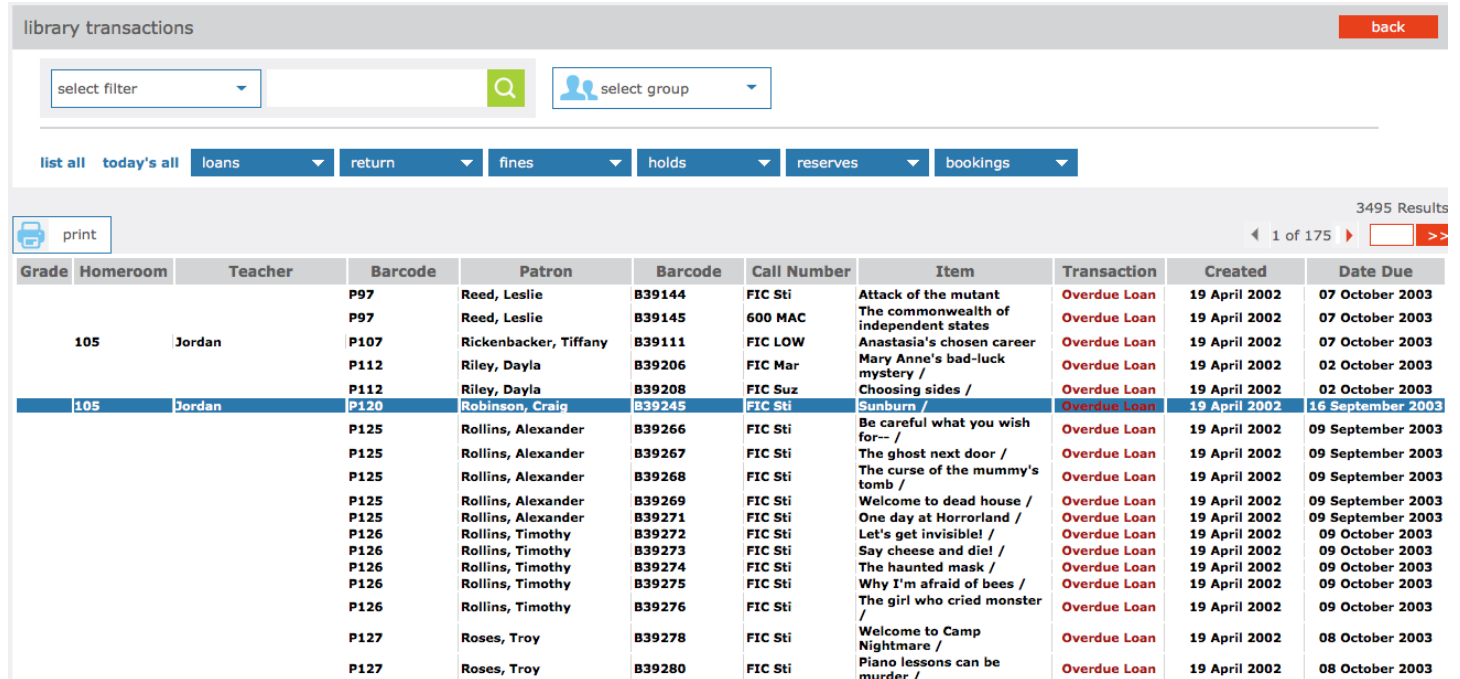


The image displays two screenshots of the Mandarin Library Automation interface. The top screenshot shows the 'Self-Check' mode. On the left, a side menu has 'self-check' highlighted in teal, with 'self-return' and 'clear display' in grey. Below the menu, it shows 'Wednesday 11:10:23 AM'. The main area has a teal header 'Self-Check'. Below it is a barcode scanner icon and a text input field. To the right of the input field is a database icon and the text 'mandarin'. Below the input field, it says 'patron' and 'select action' with a dropdown arrow. The bottom screenshot shows the 'Self-Return' mode. The side menu has 'self-return' highlighted in red, with 'self-check' and 'clear display' in grey. Below the menu, it shows 'Wednesday 11:11:17 AM'. The main area has a red header 'Self-Return'. Below it is a barcode scanner icon and a text input field. To the right of the input field is a database icon and the text 'mandarin'. Below the input field, it says 'patron' and 'select action' with a dropdown arrow.

## Using Library Transactions Mode

Library Transactions mode allows you to view, sort, and print transactions.

1. On the side menu, click **Library Transactions**. This displays a list of all transactions.



library transactions back

select filter Q select group

list all today's all loans return fines holds reserves bookings

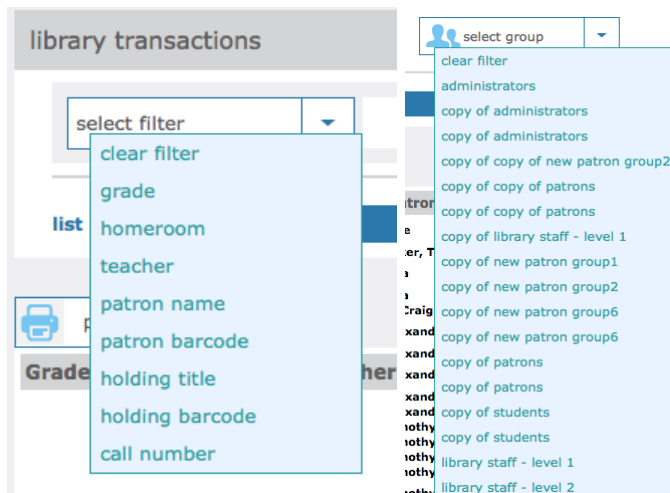
print 3495 Results

1 of 175 >>

Grade	Homeroom	Teacher	Barcode	Patron	Barcode	Call Number	Item	Transaction	Created	Date Due
			P97	Reed, Leslie	B39144	FIC Sti	Attack of the mutant	Overdue Loan	19 April 2002	07 October 2003
			P97	Reed, Leslie	B39145	600 MAC	The commonwealth of independent states	Overdue Loan	19 April 2002	07 October 2003
			P107	Rickenbacker, Tiffany	B39111	FIC LOW	Anastasia's chosen career	Overdue Loan	19 April 2002	07 October 2003
			P112	Riley, Dayla	B39206	FIC Mar	Mary Anne's bad-luck mystery /	Overdue Loan	19 April 2002	02 October 2003
			P112	Riley, Dayla	B39208	FIC Suz	Choosing sides /	Overdue Loan	19 April 2002	02 October 2003
105	Jordan		P120	Robinson, Craig	B39245	FIC Sti	Sunburn /	Overdue Loan	19 April 2002	16 September 2003
			P125	Rollins, Alexander	B39266	FIC Sti	Be careful what you wish for-- /	Overdue Loan	19 April 2002	09 September 2003
			P125	Rollins, Alexander	B39267	FIC Sti	The ghost next door /	Overdue Loan	19 April 2002	09 September 2003
			P125	Rollins, Alexander	B39268	FIC Sti	The curse of the mummy's tomb /	Overdue Loan	19 April 2002	09 September 2003
			P125	Rollins, Alexander	B39269	FIC Sti	Welcome to dead house /	Overdue Loan	19 April 2002	09 September 2003
			P125	Rollins, Alexander	B39271	FIC Sti	One day at Horrorland /	Overdue Loan	19 April 2002	09 September 2003
			P126	Rollins, Timothy	B39272	FIC Sti	Let's get invisible! /	Overdue Loan	19 April 2002	09 October 2003
			P126	Rollins, Timothy	B39273	FIC Sti	Say cheese and die! /	Overdue Loan	19 April 2002	09 October 2003
			P126	Rollins, Timothy	B39274	FIC Sti	The haunted mask /	Overdue Loan	19 April 2002	09 October 2003
			P126	Rollins, Timothy	B39275	FIC Sti	Why I'm afraid of bees /	Overdue Loan	19 April 2002	09 October 2003
			P126	Rollins, Timothy	B39276	FIC Sti	The girl who cried monster /	Overdue Loan	19 April 2002	09 October 2003
			P127	Roses, Troy	B39278	FIC Sti	Welcome to Camp Nightmare /	Overdue Loan	19 April 2002	08 October 2003
			P127	Roses, Troy	B39280	FIC Sti	Piano lessons can be murder /	Overdue Loan	19 April 2002	08 October 2003

2. You have the following options:

- Transactions can be filtered by selecting the proper filter in the dropdown menu or by patron group selecting the dropdown list and select the appropriate group



library transactions

select filter

list

print

Grade

select group

clear filter

administrators

copy of administrators

copy of copy of new patron group2

copy of copy of patrons

copy of copy of patrons

copy of library staff - level 1

copy of new patron group1

copy of new patron group2

copy of new patron group6

copy of new patron group6

copy of patrons

copy of patrons

copy of students

copy of students

library staff - level 1

library staff - level 2

- To view information related to the transaction, click the transaction anywhere in its row. This displays the patron and item information on the main Circulation page.
- To sort the transactions by type, click **List All**, **Today's All**, **Loans**, **Fines**, **Holds**, **Reserves**, or **Bookings**.
- To print the transactions, click **Printable view**. This opens a list of transactions only. To print the list, click **Print** on the File menu.

## Using Library Transactions Mode

list all today's all

loans ▼

return ▼

finer ▼

holds ▼

reserves ▼

bookings ▼

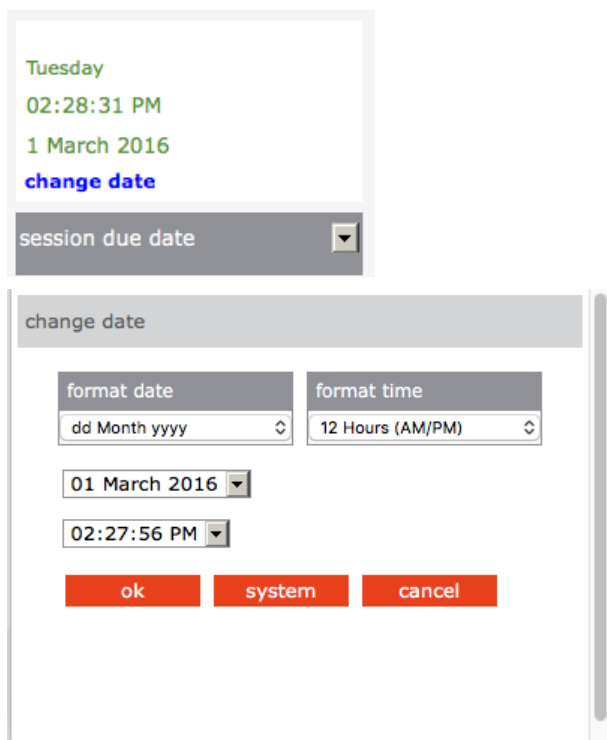


print

## Changing the M5 System Date

The system date displays in the Circulation side menu. You can change this date if you need to backdate the system calendar to process a return, such as for items returned in evening **bookdrops**.

1. In the side menu, click **Change Date**.
2. Change the date and/or time, then click **OK**. The new date or time displays in the side menu.
3. To return the system to the current date and time, click **Change Date**, then click System. Click **OK**. The current date and time display in the side menu.



The screenshot shows the 'change date' dialog box. At the top, the current system date and time are displayed: Tuesday, 02:28:31 PM, 1 March 2016. Below this is a 'change date' link. The dialog box itself has a title bar 'change date'. It contains two dropdown menus for 'format date' (set to 'dd Month yyyy') and 'format time' (set to '12 Hours (AM/PM)'). Below these are two more dropdown menus for the date (set to '01 March 2016') and the time (set to '02:27:56 PM'). At the bottom are three buttons: 'ok', 'system', and 'cancel'.

## Using the OPAC

This chapter describes:

- The features of the OPAC
- How to search the OPAC
- How to work with search results
- How to use My List and My Account

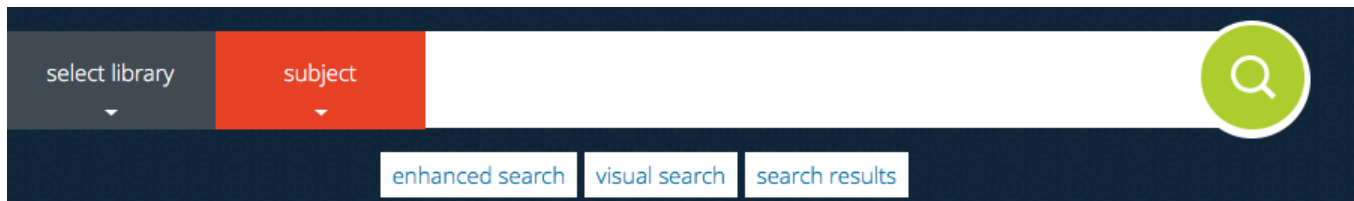


**Note:** Some features described in this chapter may have been disabled by your system administrator, or you may not have permission to access them.

## OPAC Overview

The OPAC allows patrons to search your library collection from any computer with a Web browser. Please note, the search bar is persistent throughout the OPAC, enabling patrons to enter a new search at any time using one of the three search methods described below.

A “search results” button is also available below the standard search bar, which will return the user to the most recent list of search results.



The OPAC offers three different search methods:

**Standard Search** – A basic keyword search method that allows the patron to select an index to be searched. This method recognizes Boolean logic, truncation, and phrase searches. The Standard Search bar is persistent throughout the OPAC, and a new search can be initiated anytime by simply

entering a new search term and pressing “Enter” or clicking the search button 

- **Enhanced Search** – A more advanced search method that offers search flexibility and options. Patrons can enter simple or complex queries, search by material type, and use index browsing.

- **Visual Search** – An easy point-and-click graphical search method. Patrons click visually descriptive graphics to narrow their searches from broad topics to more defined sub-topics. This accesses a curated list of search results in the catalog and/or external online resources. (For more information about how to configure visual search results, please click the “Visual Search” link above).

The following widgets are currently available on the OPAC homepage. We are actively working to provide additional widgets, please email [support@mlasolutions.com](mailto:support@mlasolutions.com) with any requests that you would like to add.

- **Visual Search** – Please refer to the Visual Search section in Setup for more information.
- **Recommended Reading** – Admin users can select items to display on the OPAC homepage so that patrons can click the image to access item details directly. Please refer to the Recommended Reading section in Setup for more information.
- **Gallery** – Admin users can upload images to highlight on the homepage. Please refer to the Gallery section in Setup for more information.

The following features enhance the search session:

- The “Standard Search” feature also includes autocomplete functionality that will provide search suggestions as the user enters his or her search term. Autocomplete suggestions are based on the



selected search attribute (Title, for example) and pulled from what is in the library collection, to ensure that patrons are being directed to items that are in the catalog.

- Mandarin M5 also includes a post-query filtering capability that enables patrons to refine their search to: show only available items, toggle between libraries, or filter by format, fiction vs nonfiction, reading level or publication dates.

refine search

☐ show only available items

library

☒ Mandarin Library 304

format

☐ Book 292
 ☐ Video Recording 2
 ☐ Film 2
 ☐ Ebook 8

☐ Fiction 162
 ☐ Nonfiction 134

reading program

☐ Lexile 1
 

all ranges

☐ Fountas & Pinnell 0
 

all ranges

☐ Accelerated Reader 83
 

all ranges

☐ Reading Counts! 4
 


all ranges

- The **My List** feature enables a patron to add selected records to a “Guest List” throughout the course of the search session. These records can then be saved, printed, or e-mailed. Guests Lists will be deleted as soon as the session refreshes when a user hits the “Reset” button or the session auto-refreshes after a configurable timeout period (the timeout period can be modified in Setup). Logged-in users may save and edit lists to access anytime they log in.

- **Authority Control** users can view “**See**” and “**See Also**” references if there are more appropriate headings used by the library than the one searched for, or if there are other headings related to the search that may also be useful.

***Note:** Authority Control is an optional module that may not be installed on your system.*

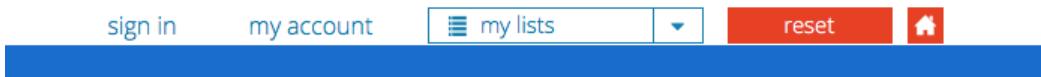
- An **Interlibrary Loan (ILL)** request system allows authorized users at cooperating libraries to e-mail loan requests.

- The **Reset feature** returns the user to the default search page and refreshes the session. If the user is NOT signed in, this means that search history and any unsaved lists will be deleted. If the user was signed in, he or she will be automatically signed out.
- The Home Button  returns the user to the default search page. Unlike the Reset feature, the home button will NOT sign the user out nor refresh the session.
- The **Bulletin Board** is the four grey buttons below the standard search bar that can be used to link to Web pages or files that the library wants patrons to view. These buttons can be edited or turned off in Setup.
- The **Comments/Ratings** feature allows patrons to rate items on a scale of one to five, and/or submit reviews or other comments about specific items. Reviews must be approved by an admin before they will be displayed publicly.

## Signing in to the OPAC

Patrons can launch your library's OPAC by entering the Web address in their browser's address bar, clicking a link on your library's Web site, or using a desktop shortcut on a library workstation.

In order to perform tasks that require the OPAC to identify you (such as accessing your saved Bookbag, using **My Account**, or reserving items), you must sign in. To do so:



1. Click the **my account** link that appears on the upper bar of most pages in the OPAC.
2. Type your login name or patron barcode in the Login Name/Barcode box.
3. In the Password box, type your password.
4. Click Sign In.

**Note:** When finished with your session, click Sign Out or Reset to ensure your privacy.

**Note:** Some features require patrons to have access privileges, which are granted in the OPAC Access tab of the Group Editor.

[catalog](#)

[select library](#)

[subject](#)



[enhanced search](#)

[visual search](#)

[search results](#)

[record fetch](#)

my account



Print

[my information](#)

[history](#)

Welcome Back Dominique!

You currently have overdue items (3)



Name: Dominique M.

Grade:

Homeroom:

Teacher:

Email: dominiquem@mail.com

Loans

3

Holds

0

Reserves

0


Overdues

3

Fines

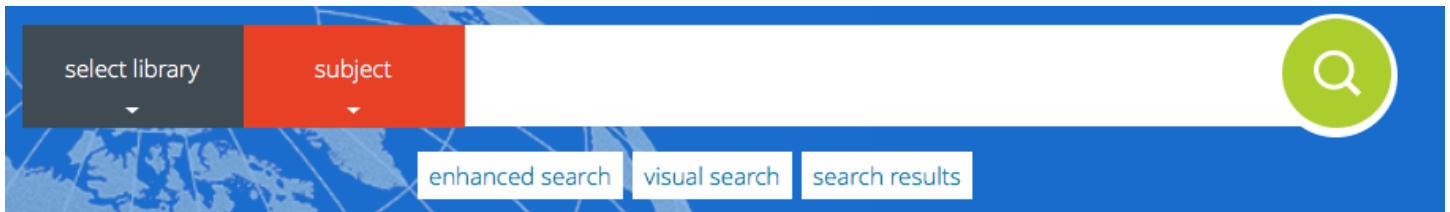
1

Transaction History

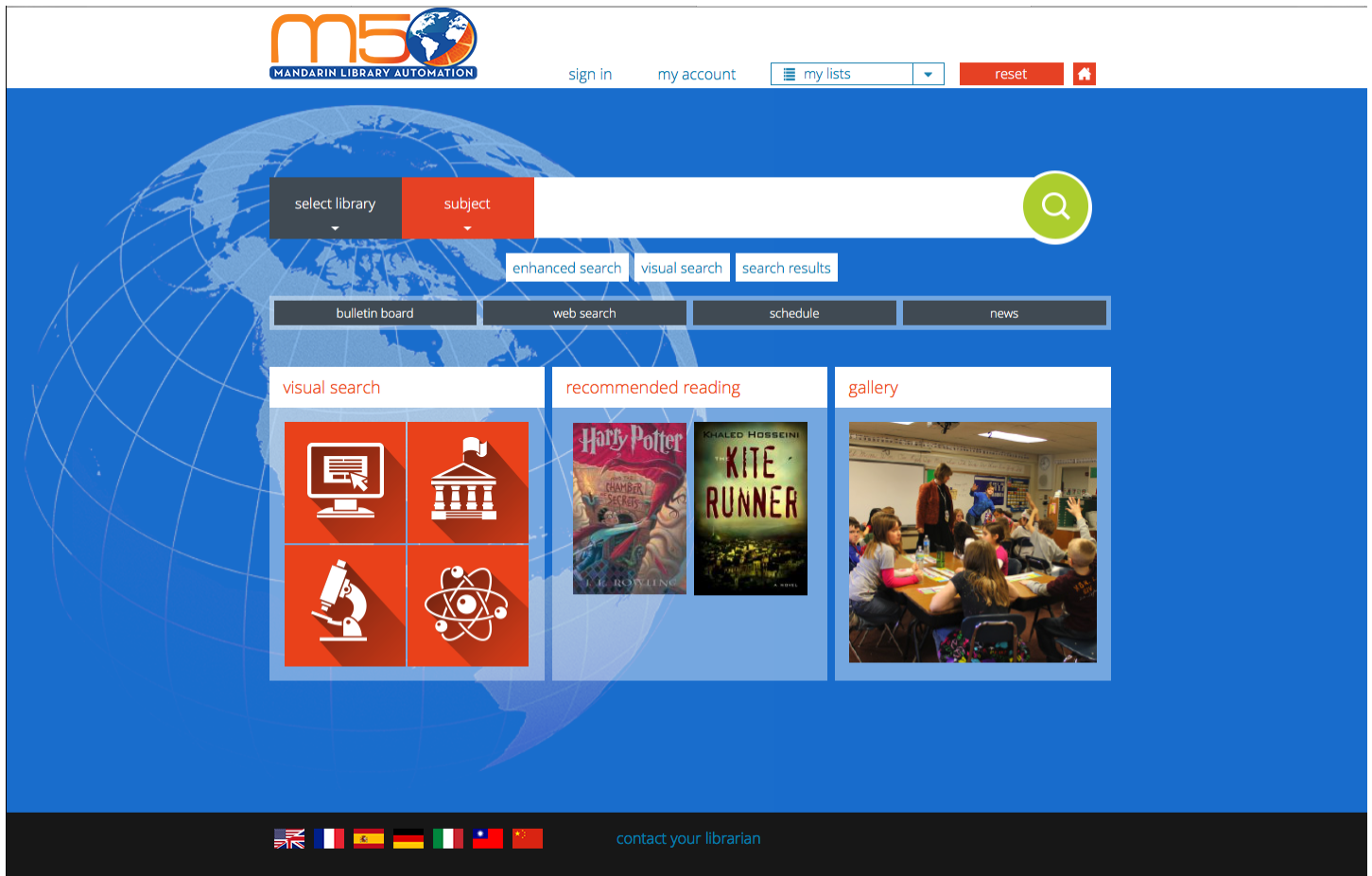
Author	Title	Call Number	Type	Due Date	Date Returned
 Avi,	Abigail takes the wheel /	FIC AVI	Loan	02/16/2016	02/15/2016

## Searching the OPAC

The OPAC offers three different search methods: [Standard](#), [Enhanced](#), and [Visual](#). These are described in the following sections.

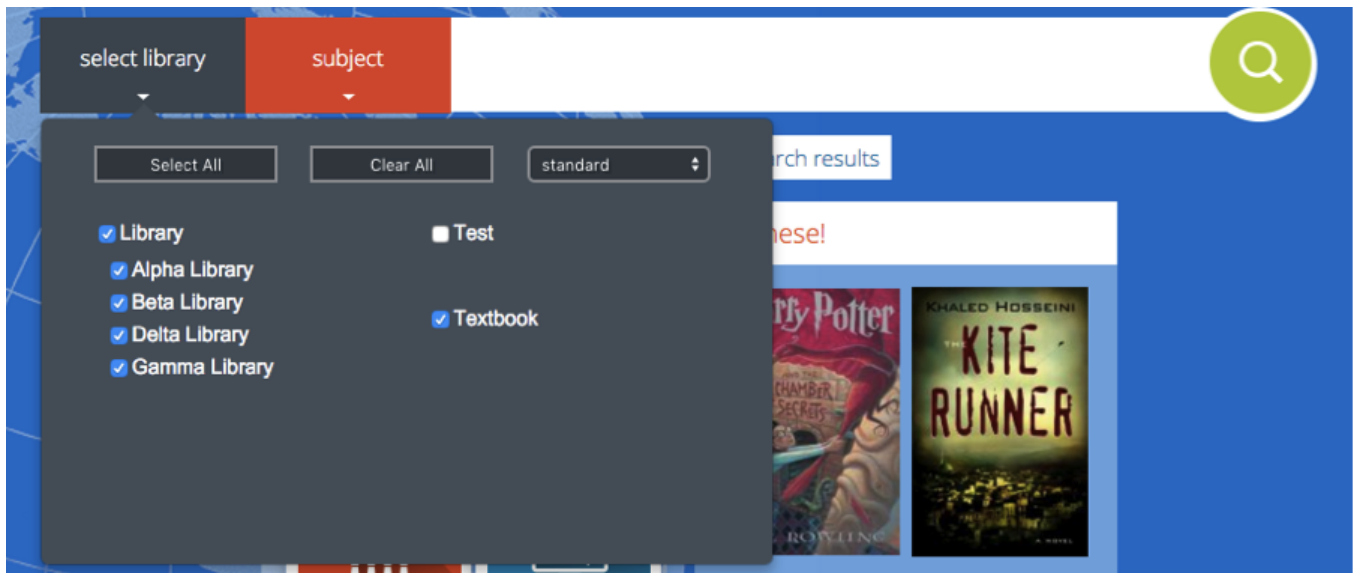
The image shows a search interface for an OPAC. It has a blue header bar. On the left, there are two dropdown menus: "select library" (dark grey) and "subject" (red). To the right of these is a large white search input field. At the end of the input field is a green circular button with a white magnifying glass icon. Below the input field, there are three buttons: "enhanced search", "visual search", and "search results". The background of the header bar features a faint, stylized map of the world.

## Standard Search

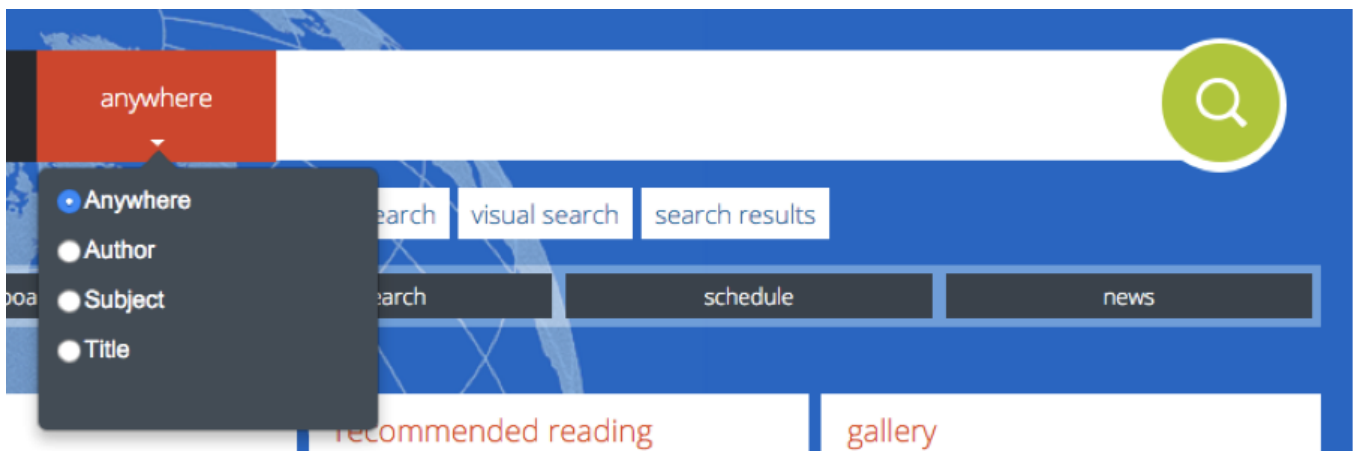


The screenshot shows the Mandarin Library Automation Standard Search interface. At the top, there is a navigation bar with the M5 logo, a sign in link, a my account link, a my lists dropdown menu, a reset button, and a home icon. Below this is a large search area with a blue background featuring a globe. The search area includes a select library dropdown, a subject dropdown, and a search input field with a magnifying glass icon. Below the search input are links for enhanced search, visual search, and search results. Further down are links for bulletin board, web search, schedule, and news. The main content area is divided into three sections: visual search (with icons for a computer, a building, a microscope, and an atom), recommended reading (with book covers for Harry Potter and Kite Runner), and a gallery (with a photo of a classroom). At the bottom, there are flags for various countries and a contact your librarian link.


1. Before entering a search term, check the “Select Library” and search by dropdowns.
  - “Select Library” will display all collections that have been configured for that catalog installation. Subsequent searches will search any/all selected libraries. “Standard” collections – which include bibliographic records - are displayed by default. Users may change the display to “Equipment” collections; admin users also have the option to change to “Patrons” in order to search patron records.
  - In Merged Union Catalog configurations, this will include all library catalogs that are searchable from that installation.



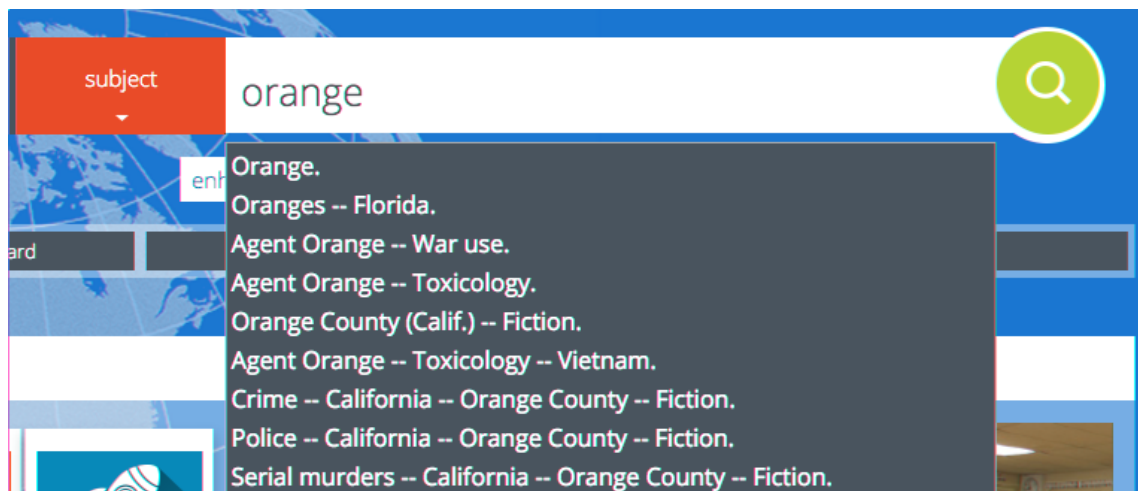
- The “Search By” dropdown will display the selected search attribute: Anywhere, Author, Subject, or Title. The default search attribute may be configured in Setup > Options > “default\_search”.



2. Click the search bar and begin typing your desired search term. Once the search term has been entered,

press “Enter” or click the search button 

- The “Standard Search” feature includes autocomplete functionality that will provide search suggestions as the user enters his or her search term. Autocomplete suggestions are based on the selected search attribute (Title, for example) and pulled from what is in the library collection, to ensure that patrons are being directed to items that are in the catalog.



3. Once a search term has been entered, a results list will display (please refer to The Results Page for more information).

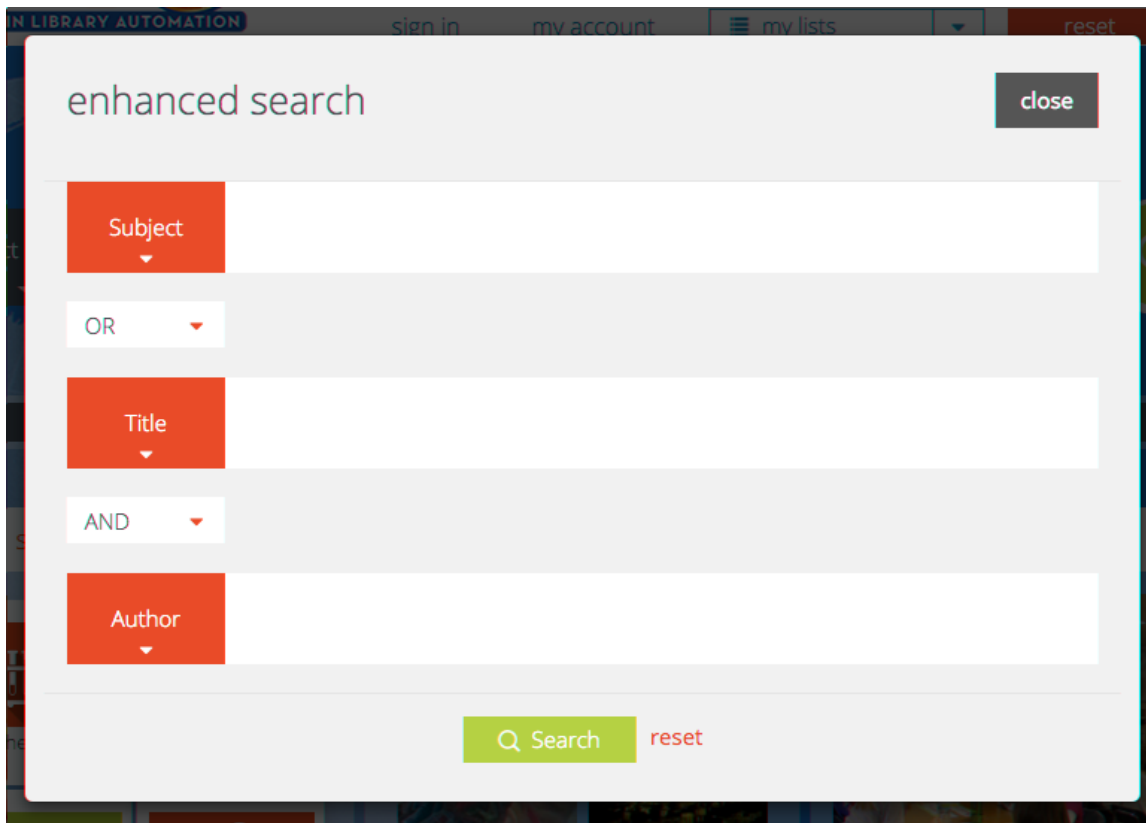
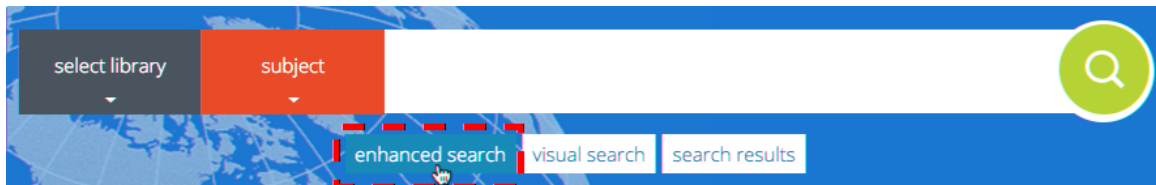
- The results list will include post-query filters (if available) that enable patrons to refine their search to: show only available items, toggle between libraries/collections, or filter by format, fiction vs nonfiction, reading level or publication dates.
- If a search returns “No Results”, please check the spelling of the search term, and try again.
- A new search can be initiated at any time by entering a new term(s) into the standard search bar, or activating one of the other search modes (visual or enhanced search)

**Note:** Your system administrator may have disabled some of the options shown here.



## Enhanced Search

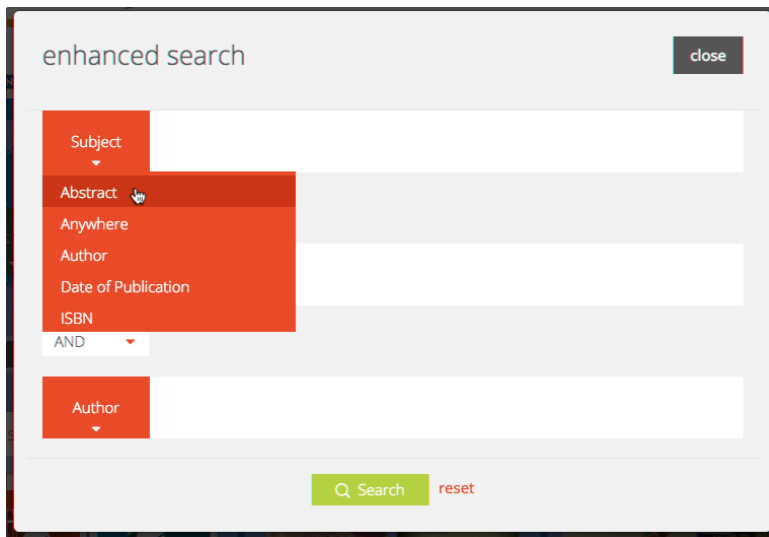
1. To activate Enhanced Search, click the “Enhanced Search” button below the Standard Search bar, which will prompt an Enhanced Search form.



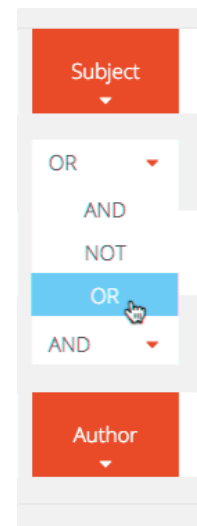
This screenshot shows the 'enhanced search' form, which is a modal window. It has a title bar with the text 'enhanced search' and a 'close' button. The form contains three search input fields, each with a dropdown menu for selecting search attributes: 'Subject', 'Title', and 'Author'. Between the first and second fields is an 'OR' Boolean operator dropdown, and between the second and third fields is an 'AND' Boolean operator dropdown. At the bottom of the form, there is a green 'Search' button with a magnifying glass icon and a red 'reset' button.

2. Type your search query into one or more of the three keyword boxes, use the dropdown menus to choose search attributes and Boolean operators.

## Enhanced Search

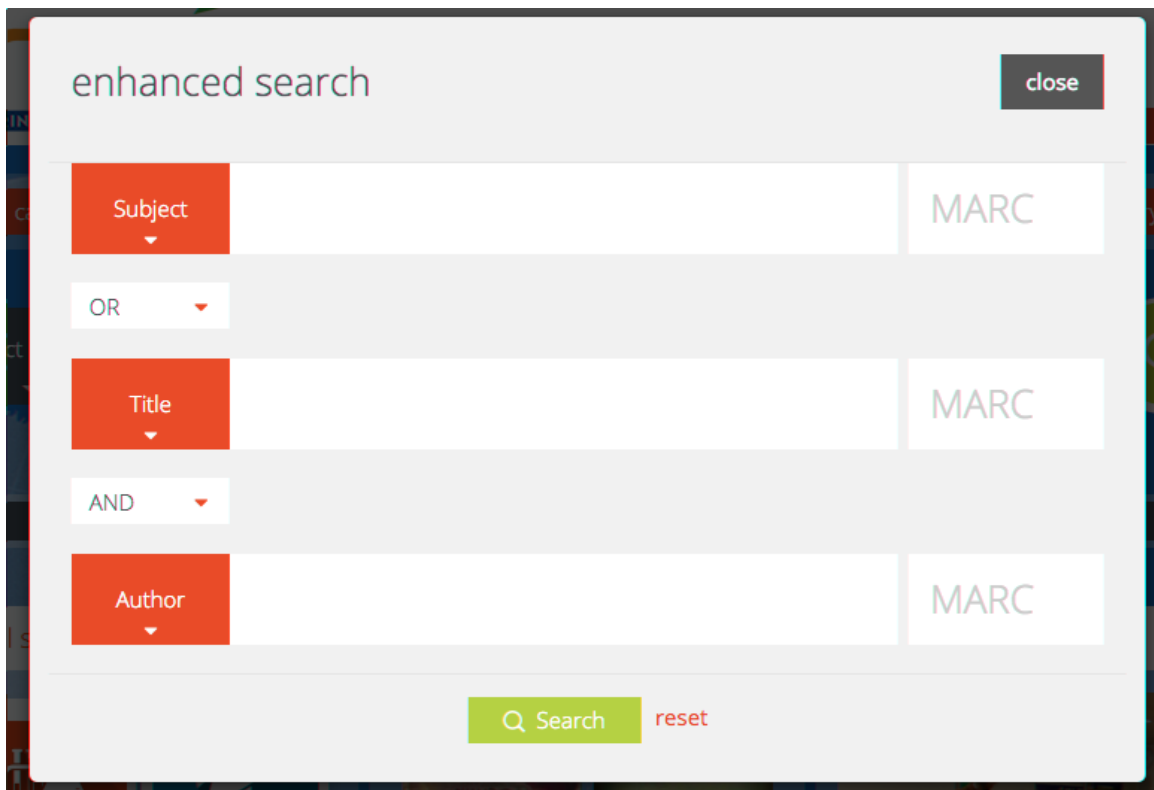


The screenshot shows the 'enhanced search' window with a 'close' button in the top right. The first search field has a dropdown menu open, showing options: Subject, Abstract, Anywhere, Author, Date of Publication, and ISBN. Below the dropdown is an 'AND' button. The second search field has an 'Author' dropdown. At the bottom are 'Search' and 'reset' buttons.




This screenshot shows a vertical stack of search fields. The top field is 'Subject'. Below it is a dropdown menu with 'OR' selected. The next field is 'Author'. The interface is designed for sequential or combined searches.

**NOTE:** Admin users also have the option to include MARC tags in Enhanced Search



This screenshot shows the 'enhanced search' window with the 'MARC' option enabled for each search field. The first field is 'Subject' with a 'MARC' button to its right. The second field is 'Title' with a 'MARC' button. The third field is 'Author' with a 'MARC' button. The 'Search' and 'reset' buttons are at the bottom.

3. Press Enter or click **the search button** . The **results page** will display the list of search results. See [The Results Page](#) for more information.

**Note:** Your system administrator may have disabled some of the options shown here.

## Search Tips

#### Enhanced Search

- You can apply the truncation asterisk (\*) to the beginning and/or end of a keyword; and quotation marks (" ") around a phrase.
- You can use AND, OR, and NOT to connect keywords in a keyword box. Be sure to type these in capital letters.

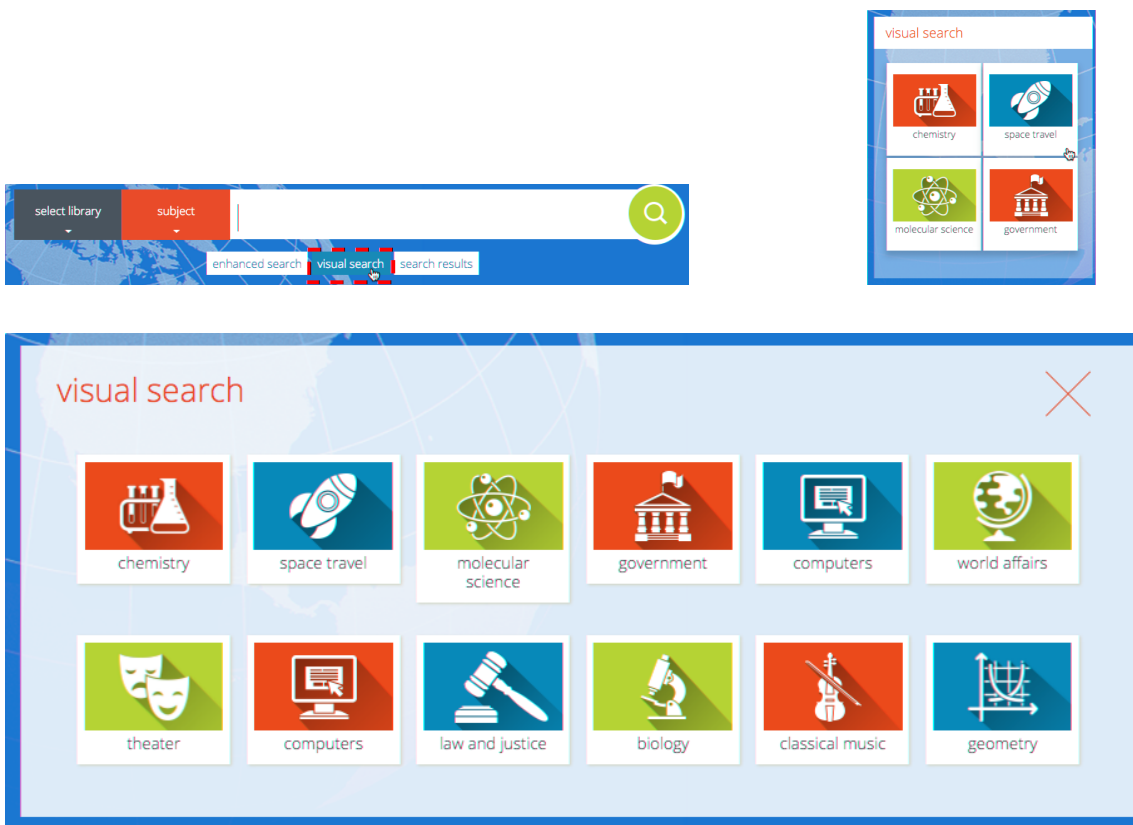
## Visual Search

The Visual Search method provides patrons with an easy point-and-click graphical search method. From a patron's perspective, a search consists of clicking a topic component and then clicking a related sub-topic component; this generates a list of search results. In actuality, it is a keyword search method disguised behind a graphical interface - topic components are connected to query components, which are linked to predefined search queries. A query component launches a search of the selected database and returns a list of results.

For more information about how to configure Visual Search results, please refer to the Visual Search section in Setup.

These graphical components can also be configured as link components, which launch external Web pages instead of search queries. Link components are optional and are not included in the default interface.

1. To display Visual Search, **click the “Visual Search” button under the standard search bar, or open the widget from the OPAC homepage.** This displays the Visual Search page, which contains a menu of topics.



2. Click a topic. This either opens a sub-menu page or launches an external Web page.

3. If a sub-menu page appears, continue clicking the desired topics (narrowing the search) until you reach the last menu level (a breadcrumb trail will also appear to allow you to click back to previous levels). Clicking the last level will launch a search query and display the search results on the [Results page](#). (If you click a link component, it will launch a Web page instead of a search query.)

**Tip:** Topic, query, and link components look the same.

*The result of selecting them is what makes them different.*

- *A topic component opens a sub-menu.*
- *A query component returns search results.*
- *A link component opens a Web page.*

## The Result Page

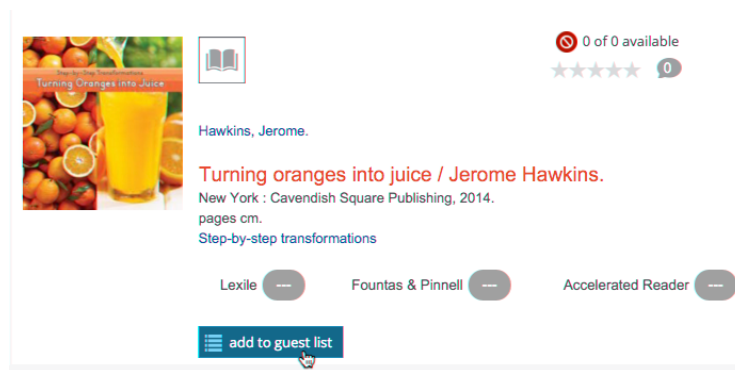
### # Post-Query Filters

Post--query filters (if available) enable patrons to refine their search to: show only available items, toggle between libraries/collections, or filter by format, fiction vs nonfiction, reading level or publication dates

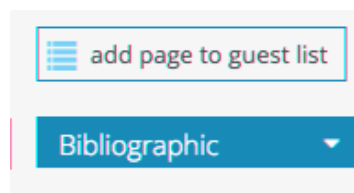
### # Add Item(s) to List(s) – please refer to “Using Lists” to learn more about how to manage lists

#### Non-logged-in Users

• Next to each item in the results list, a button will appear to “add to guest list”. This will add that item to the Guest List.

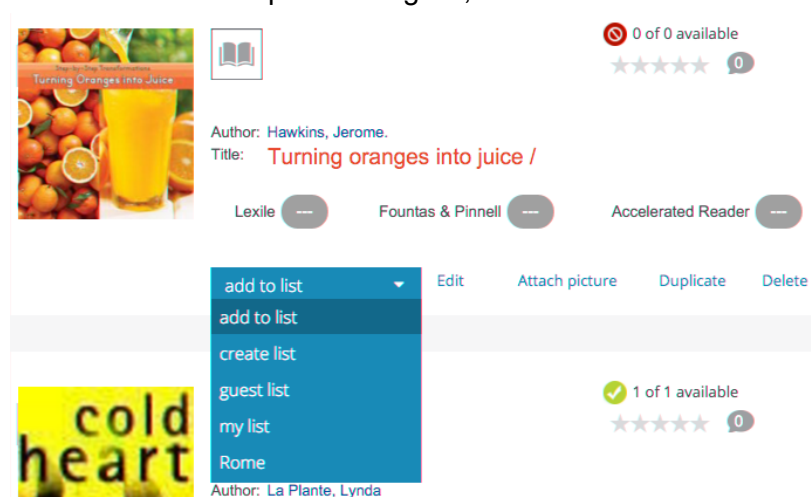


• In the top-left area of the results page, there is also an option to “add page to guest list”, this adds all items shown on that page to the Guest List



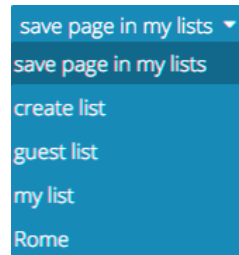
#### Logged-in Users

• Next to each item in the results list, a button will appear to “add to list”, which prompts a dropdown that allows you to add that item to a pre-existing list, or create a new list.



## The Result Page

- In the top-left area of the results page, there is also an option to “save page in my lists”, which prompts a dropdown that allows you to add all items shown on that page to a pre-existing list, or create a new list.

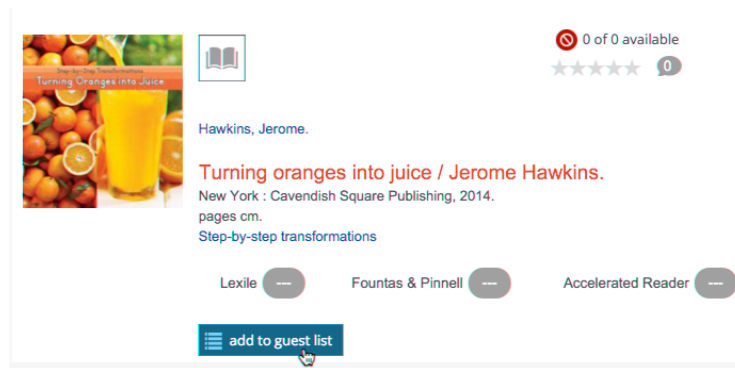


## The Detail Page

# **Add Item to List(s)** – please refer to “Using Lists” to learn more about how to manage lists

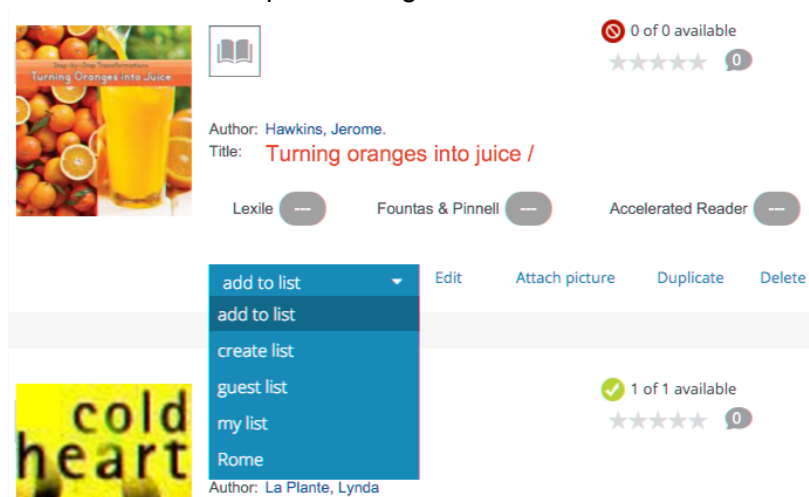
### Non-logged-in Users

- In item details, the record container includes a button to “add to guest list”. This will add that item to the Guest List.

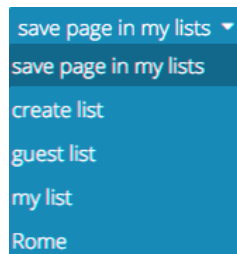


### Logged-in Users

- Next to each item in the results list, a button will appear to “add to list”, which prompts a dropdown that allows you to add that item to a pre-existing list, or create a new list.



- In the top-left area of the results page, there is also an option to “save page in my lists”, which prompts a dropdown that allows you to add all items shown on that page to a pre-existing list, or create a new list.





## Using Lists

Mandarin's new tools make it easy and intuitive for students and library patrons to manage, store and share lists of library resources. For more information about how to add items to lists, please refer to the "Add Item(s) To List(s)" in the Results List section.

### Non-logged-in Users

- To view the Guest List, click the "guest list" button on the top-right corner of the screen.



- From the Guest List, users may remove items from the list, remove all, download, print or email

**NOTE:** Guests Lists will be deleted as soon as the session refreshes when a user hits the "Reset" button or the session auto-refreshes after a configurable timeout period (the timeout period can be modified in Setup). Users may log in to save guest lists.

- "share list" will make a static copy of that list – available in the "shared lists" tab – formatted as a bibliography that can be printed or emailed

### Logged-in Users

- To view the My Lists, click the "my lists" button on the top-right corner of the screen.



- From My Lists, users may view or edit each list individually, including the option to: remove selected items, remove all items, as well as share, download, print or email each list.
- "share list" will make a static copy of that list – available in the "shared lists" tab – formatted as a bibliography that can be printed or emailed

## Using My Account

My Account is an optional feature that allows patrons to view information about their accounts. If the system administrator enabled this tab and all of its features, patrons can view information including their current transactions, past transactions, and personal information that is on record with the library. They can also renew items they have on loan as well as cancel reserve, hold, and booking requests.

### Viewing Your Account Information

1. Click the My Account link on the top of the page. (If you are not already signed in, you will be prompted to do so; for instructions, see “Signing in to the Catalog”)

sign in

my account

my lists

reset



If you *are* already logged in, you might notice a red bubble with a number in it, this means there are pending notifications (like overdue items)

sign out

my account

2

my lists

reset



In either case, clicking the “my account” link will bring you to the My Account page.

2. The My Account page will default to display the “my information” tab with information about current transactions (loans, holds, reserves, overdues and fines), while the history tab will display a list of past transactions .

my account

Print

my information
history

Welcome Back !  
You currently have overdue items (2)  
  
Name: A.  
Grade: 13  
Homeroom: Valhalla  
Teacher: God  
Email: jone@mlasolutions.com

Loans	Holds	Reserves	Overdues	Fines
2	2	0	2	0

Current Transactions

Author	Title	Call Number	Type	Due Date	
Johnson, Stephen,	A Roman fort /	J 355.7 JOH	Hold	11/02/2015	Cancel
	The war against Iraq /	J 956.704 NAR	Hold	10/28/2015	Cancel
Russell, Jeffrey Burton,	Witchcraft in the Middle Ages.	914 RUS	Overdue	09/23/2015	
Mauldin, Bill,	A sort of a saga.	B MAU	Overdue	09/23/2015	

## Renewing Items

1. On the My Account page, click the “my information” tab and scroll down to view “current transactions”.
2. Click the Renew button that corresponds to the item you want to renew.
3. On the confirmation page, click OK.

**Note:** The program will not allow a patron to renew an item from within My Account if the item is overdue and past the grace period set in Group Editor for this type of item.

## Canceling a Reserve, Hold, or Booking Request

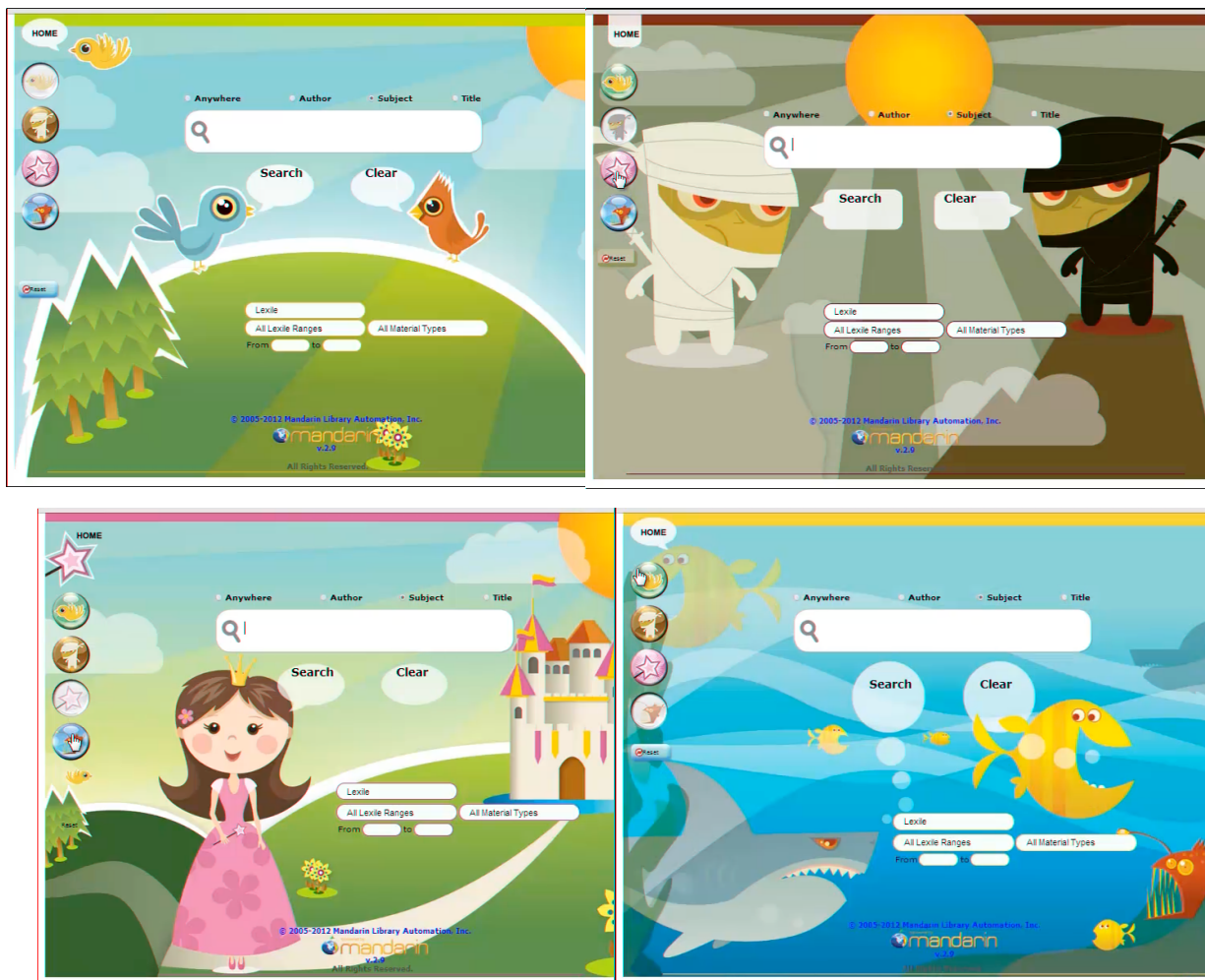
1. On the My Account page, click the “my information” tab and scroll down to view “current transactions”.
2. Click the Cancel button that corresponds to the item you want to cancel.
3. On the confirmation page, click OK.

## Kids OPAC

Kids OPAC makes it fun for young readers to search a library's collection! Children can choose from four themes by toggling among them.

### Overview

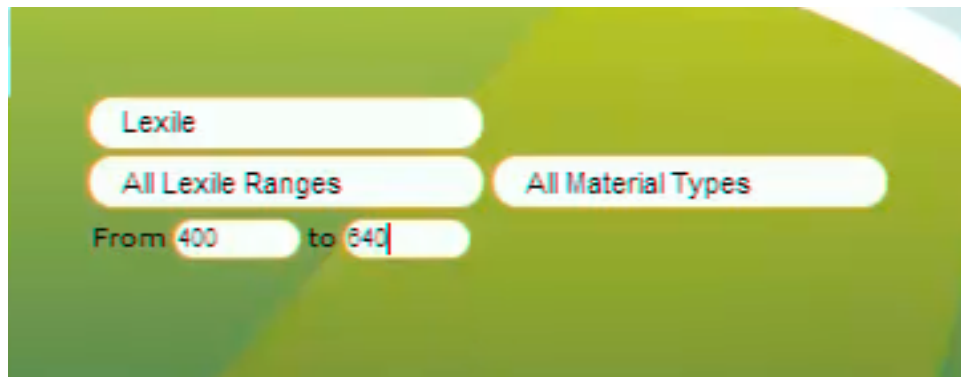
The new Kids OPAC has four different choices of backgrounds, the happy birds, the sneaky ninjas, a lovely princess and her castle, and all kinds of friendly and scary fish.



### How to use it

Kids OPAC works with your existing M5 OPAC and includes the features you are already familiar with, in a format that will attract young library users and make their searches fun.

As in the regular OPAC, students can search by Lexile, Fuontas & Pinnell or Accelerated Reader to find materials at their individual reading level.



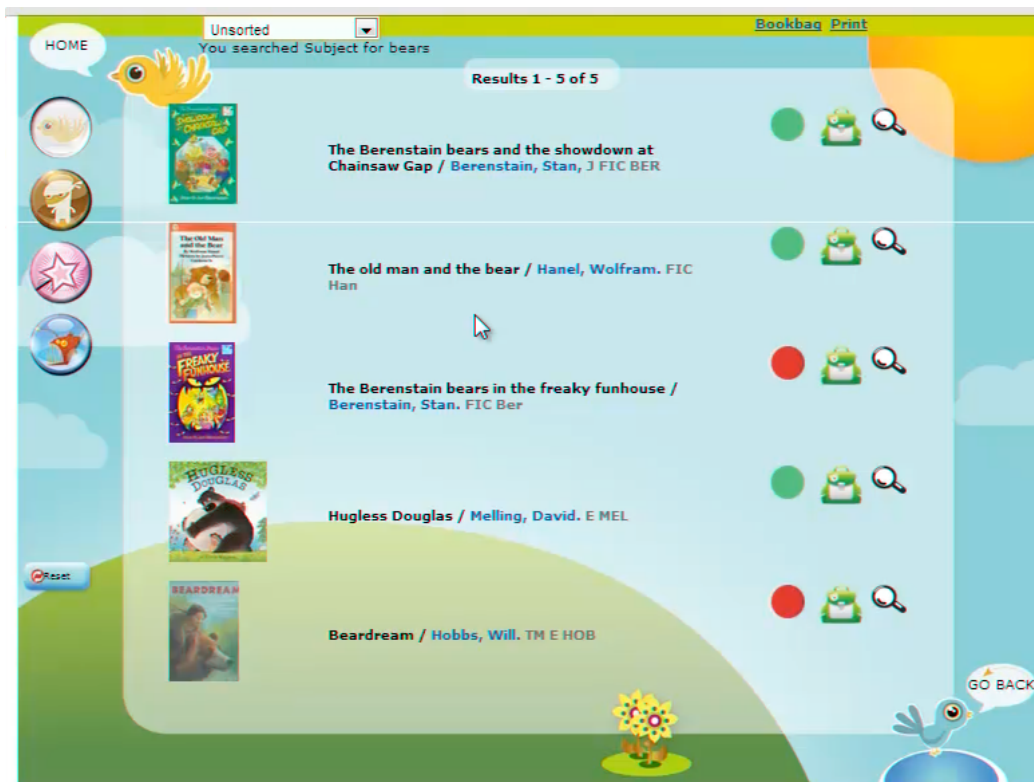
Lexile

All Lexile Ranges

All Material Types

From 400 to 640

The results list shows title, author and call number. Children can also see whether the items are available or not from the large green or red dot. They can create a list of their favorite items. And they can look at more information about each item.







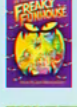





HOME

Unsorted

You searched Subject for bears

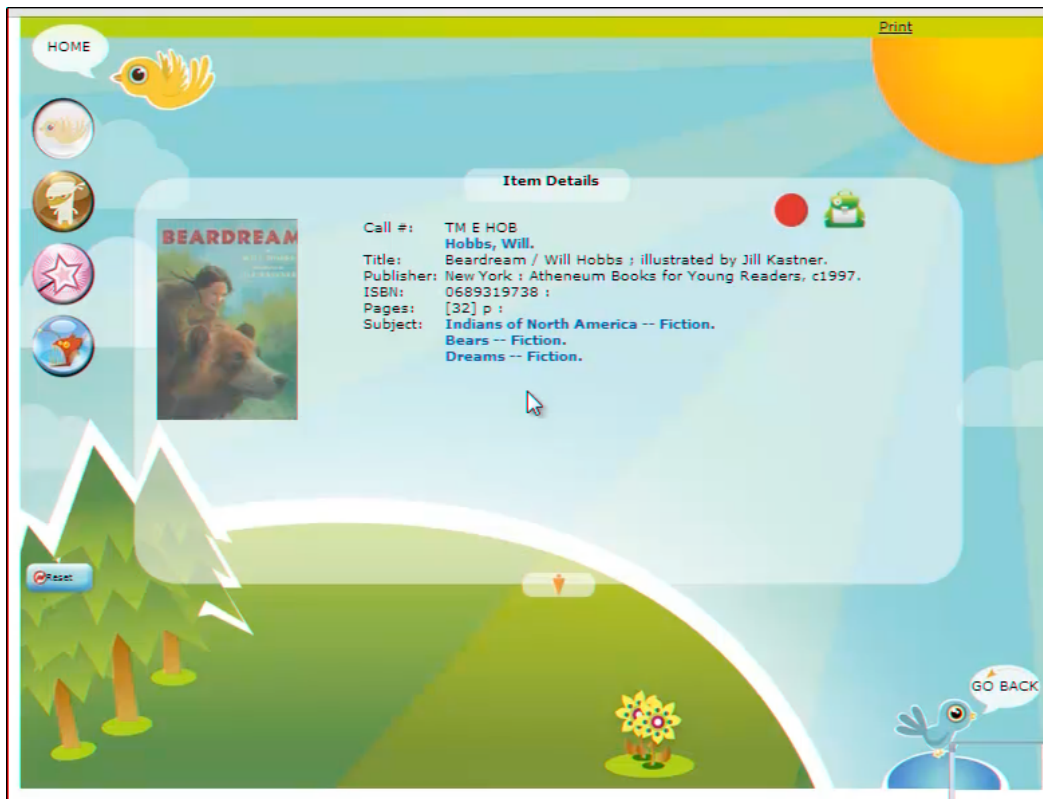
Results 1 - 5 of 5

Bookbag Print

	The Berenstain bears and the showdown at Chainsaw Gap / Berenstain, Stan, J FIC BER	●	
	The old man and the bear / Hanel, Wolfram. FIC Han	●	
	The Berenstain bears in the freaky funhouse / Berenstain, Stan. FIC Ber	●	
	Hugless Douglas / Melling, David. E MEL	●	
	Beardream / Hobbs, Will. TM E HOB	●	

GO BACK

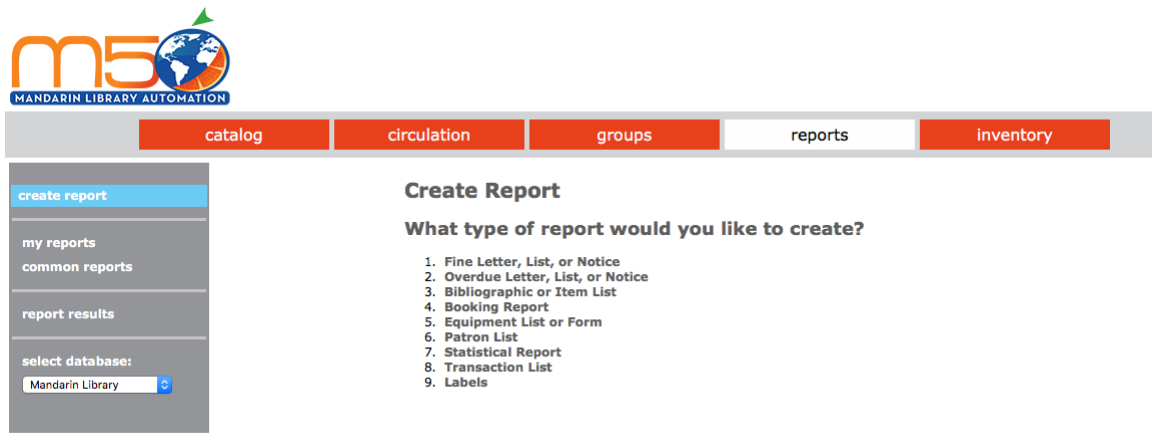
This details view includes the usual hyperlinks, so they can follow the authors or subjects and see what else they find.



Again, this is connected to your usual OPAC, and clicking on Home brings you back to the standard OPAC home page.

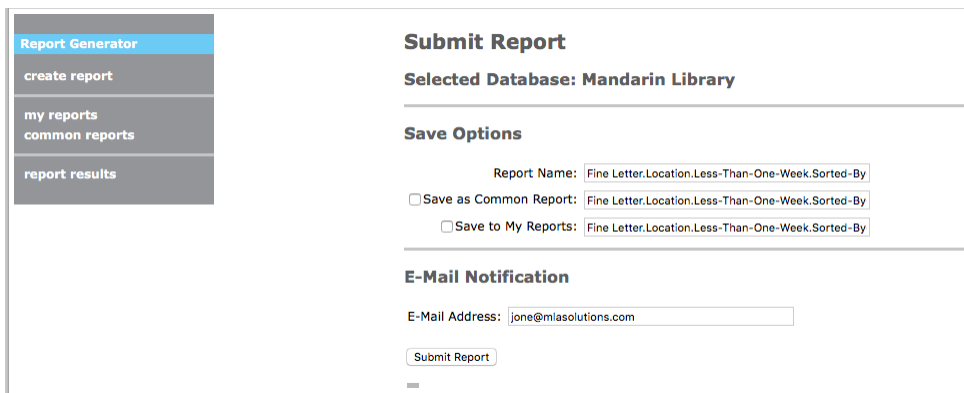
## Using the Report Generator

On the main Reports page, you can create a report, access your saved reports, generate common reports, or view report results. These procedures are described in the following sections.



### Creating a Report

1. When the Report Generator is launched, the Create Report page displays. You can also access this page by clicking **Create Report** in the menu.
2. In the list, click the type of report you want to create. Several pages of questions will follow, allowing you to select the exact type of report you need.
3. The Submit Report page displays



On this page, you have the following options:

- Select the desired database in the **Select Database** list.
- Type a name for the report in the Report Name box.
- Select the Save as Common Report check box if this is a report you plan to use regularly, then type a name for the report. Later, you can quickly access this report by clicking Common Reports in the side menu. For more information, see “Generating Common Reports”

**Note:** Any report saved to My Reports will be available only to a user who is signed in with your login name and password.



Using the Report Generator

- Select the **Save** to My Reports check box if this is a report you want to save only for your use, then type a name for the report. Later, you can quickly access this report by clicking My Reports in the side menu.
- In the E-Mail Address box, your e-mail address displays. This is the address that will receive a notification when the report is ready. If you do not have an e-mail address assigned in the system and the box is empty, type your e-mail address.

The e-mail you receive will include a link to the PDF report. (You must have Adobe® Reader® installed to view the report.)

4. Click **Submit Report**. This displays the Report Results. Your report will be listed in the Report Queue while it is processing. When it is ready for viewing, it disappears from the Report Queue and appears in the Report Results.

5. To view the report, do one of the following:

- In the Report Results list, click the **report name**. This opens the PDF report.
- If you indicated an e-mail address when you submitted the report, you will receive an e-mail notification when the report is ready. Click the link provided in the e-mail to open the PDF report.

## Report Results

<input type="checkbox"/>	Name	Completed	Size
<input type="checkbox"/>	Fine Letter.Location.All-Dates.Sorted-By-Grade	2/22/2016 12:07:09 PM	174.7K
<input type="checkbox"/>	Transaction Holds.Location(HCF).All-Dates(*)	2/21/2016 10:46:41 AM	40.0K
<input type="checkbox"/>	Overdue Faculty Notice.Location (*).One-To-Two-Weeks.Sorted-By-Barcode	12/18/2015 12:51:39 PM	2.5K
<input type="checkbox"/>	Spine Labels.Location(ENF).Daterange(20150101,150909).Sorted-By-Call-Number	9/9/2015 8:23:03 AM	1.1K
<input type="checkbox"/>	Overdue Student Notice.Group(students).Location (*).Three-Plus-Weeks.Sorted-By-Grade	8/4/2015 11:52:44 AM	26.0K
<input type="checkbox"/>	Shelf List.Location.Call-Number-Range (*).Sorted-By-Call-Number-With-Prefix(Fic,Fic).Group(*)	8/4/2015 11:48:25 AM	1569.1K
<input type="checkbox"/>	Deleted Patron List.Location(*).Sorted-By-Patron(*)	7/29/2015 9:19:02 AM	54.1K
<input type="checkbox"/>	All Item List.Location(*).Sorted-By-Call-Number(*).Group(*)	7/29/2015 9:12:43 AM	5585.2K

Delete Selected Reports

## Report Queue

<input type="checkbox"/>	Position	Name	Submitted	User
<input type="checkbox"/>	1.	Fine Letter.Location.Less-Than-One-Week.Sorted-By-Grade	3/1/2016 11:07:09 AM	admin

Delete Pending Reports

## Generating Your Saved Reports

1. In the side menu, click **My Reports**. This displays the list of reports that have been saved to your login name.
2. Select the check box next to the report you want to generate, then click Resubmit. This resubmits the report criteria and generates a current report.

**NOTE:** To delete reports from this list, select the check box next to each desired report and click Delete Selected Reports at the bottom of the list.



3. To view your report, see step 5.

### Generating Common Reports

1. In the side menu, click **Common Reports**. This displays the list of commonly used reports.
2. Select the check box next to the desired report, then click Resubmit. This resubmits the report criteria and generates a current report.

**NOTE:** To delete reports from this list, select the check box next to each desired report and click Delete Selected Reports at the bottom of the list.

3. To view your report, see step 5.

### Viewing the Report Results and Report Queue

You can view the Report Results list and the Report Queue list at any time by clicking Report Results in the side menu. Pending reports appear in the Report Queue until they are finished processing. When they are ready for viewing, they disappear from the Report Queue and appear in the Report Results.

#### Report Queue

	Position	Name	Submitted	User
<input type="checkbox"/>	1.	Fine Letter.Location.Less-Than-One-Week.Sorted-By-Grade	3/1/2016 11:07:09 AM	admin
Delete Pending Reports				

**NOTE:** To delete reports from the Report Results, select the check box next to each desired report and click Delete Selected Reports. To delete reports from the Report Queue, select the check box next to each desired report and click Delete Pending Reports.

## Maintenance

The procedures in this chapter should be performed only by an authorized administrator.

### SYSTEM BACKUP INFORMATION

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

The Mandarin M5 Library Automation System does not currently provide continuous backup. A backup device, such as a tape backup, should be installed to allow backups. In addition, Mandarin recommends that your server be equipped with an automated backup system that can be used to schedule unattended backups.

### BACKUP RECOMMENDATIONS

Mandarin recommends performing a daily backup after closing, and a full backup at the end of the week or before a holiday. In case of a hardware failure, a restore of a full backup followed by a restore of the latest partial backup can be completed. In case of a loss of only M5 data, a restore of the latest partial backup can be completed.

Backups must be performed when no users are logged on the server.

### Backup Methods

Two recommended backup methods are as follows:

- **Partial backup** – Backs up only the data that is critical to daily operation of M5. This entails selecting the specific location where M5 data and PostgreSQL data is stored (the default path is **c:\m3 server\registry** and **c:\Program Files\PostgreSQL\9.4\data\base**), and starting the backup. This operation completes within a few minutes, and is a reliable solution for restoring M5 data. This type of backup does not back up the operating system or any other files on the computer. If a server failure occurred and the data on the hard disk was lost, the operating system and all applications would have to be reinstall; M5 would be restored from the latest backup, repairing all data and transactions. This type of backup is typically performed by a network administrator.
- **Full backup** – Backs up the entire server, including the operating system, users, security, login scripts, applications, and all M5 data. This entails selecting the drive (s) and starting the backup. This operation may take a half hour to several hours to complete. This type of backup is typically performed by a network administrator.



## Contacts & Credits

### POSTAL ADDRESS

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P.O. Box 272308  
Boca Raton, FL 33427-2308

### PHONES AND FAX

(800) 426-7477 Toll-free  
(561) 995-4065 Local  
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### REGULAR OFFICE HOURS

M-F 8:30AM - 5:00PM EST

### TECHNICAL SUPPORT HOURS

24x7x365 - 24 hours/day, 7 days/week

### BY EMAIL

Sales & Marketing: [automation@mlasolutions.com](mailto:automation@mlasolutions.com)  
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