



## **Mandarin M3™**

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## Overview

The Mandarin M3 Library Automation System is a native MARC database and search engine designed by Mandarin Library Automation specifically for library use. Mandarin M3 is a 32-bit Microsoft® Windows®-based program, designed using client-server architecture and created using C++ object-oriented programming and TCP/IP protocols.

M3 has the familiar feel of Windows that helps users navigate the system. M3 has full Windows functionality and all modules use a graphical user interface (GUI). There is no need to exit one module to access a different module.

M3 meets the following international library automation standards

Standard	Description
USMARC	Records in Electronic Form
NISO Z39.2	Information Interchange Format
NISO Z39.23	Standard Technical Report Number Format and Creation
NISO Z39.43	Standard Address Number for the Publishing Industry
NISO Z39.47	Extended Latin Alphabet Coded Character Set for Bibliographic Use
NISO Z39.50	Information Retrieval Service Definition and Protocol Specification for Open Systems Interconnection
NISO Z39.9	International Standard Serial Numbering (ISSN)
ISO 2108	International Standard Book Numbering (ISBN)
ISO 2709	Format for Bibliographic Information Interchange

The M3 Core Package is the basic building block of the M3 Library Automation System. All modules are discussed in later sections.

- Catalog (searching/OPAC, and cataloging)
- Circulation
- Group Editor
- Reports
- Inventory

Optional modules include:

- Authority Control
- ZServer (Z39.50 server)
- Syndetic Solutions
- Textbook Module
- Serials and Acquisitions

## Database Information

M3 uses true MARC records that do not need to be reinterpreted, resulting in exceptionally fast data retrieval. The transaction rates and effect of the system on hardware is dependent on the hardware supplied, number of transactions in a given time period, and the number of simultaneous connections. Fixed and variable USMARC fields, subfields, leaders, tags, and indicators are used in the system. All MARC fields and subfields are indexed and searchable. In the M3 system, all record types (bibliographic, holding, patron, authority, equipment, transaction, and specialty databases) conform to either a standard or customized MARC record structure. The maximum record length is limited by the MARC standard when using a MARC format. The MARC standard is 100K per record and 4K per field.

Bibliographic, holding, patron, authority, and equipment records are contained separately in table structures. Each table can hold up to 2 billion records. An unlimited number of tables can be created, enabling M3 to store any number of records. Tables can span multiple hard disks on multiple servers to accommodate libraries with large volumes of records. Special interest databases, such as community resource lists and reading lists, can be added to the M3 system for customized local use.

### Disk Storage Requirements

Disk storage requirements for M3 can be estimated using 3 MB of hard disk space per 1,000 records. This amount takes into account the program, record, and stored transactions. Each 9.1 GB hard disk on a file server is capable of accommodating approximately 3 million records.



## Security

M3 uses an elaborate, hierarchical security scheme that enables the librarian to assign levels of access for Cataloging, Circulation, Windows OPAC, and database maintenance features. Security in M3 is implemented through the use of the M3

Group Editor. The M3 Group Editor creates, customizes, and modifies the group permissions required to gain access to M3 functions. Groups are created with customized sets of parameters and privileges. The three default group types are patron, item, and special reserve. An unlimited number of each group type can be created.

M3 has many security measures in place to protect the integrity of the databases. Each module is accessed using a login name and password. Records that are marked for deletion are not removed from the database until a purge is performed. Various utilities, such as indexing and data repair, are available to the administrator if a problem arises in the databases.



## Customization

M3 can be customized to meet a variety of users' needs. Librarians can:

- add/remove fields from windows
- change font size, style, and color for windows
- display the library name and logo on the Windows OPAC and the Web OPAC
- display item photos in the OPACs, and item and patron photos in Circulation
- change Circulation sound cues
- change the Visual Catalog displays and searches in the OPACs



## Multilingual Interfaces

Users have the ability to select the interface language affecting window names, button names, text box names, and messages. Changing the interface language does not change the language of the information in the database. Available interface languages are:

- English
- Spanish
- French
- Italian (OPACs only)
- German (OPACs only)



## Union Catalog

M3 allows users to create, maintain, and communicate using the following union catalog models. A wide area network (WAN) or dedicated Internet connection (static IP address) for each library site is required to set up a union catalog.

### M3 Classic Merged Model

M3's Classic Merged Union Catalog, running on one or more central servers, provides information to all affiliated libraries from a single MARC database. The union catalog takes bibliographic and holding records from each participating library and merges them into the single database. This centralized database contains a single master bibliographic record for each title in the union collection and separate holding records identifying location, call number, and barcodes at the site level. Duplicate barcode records are merged and associated holding records, each containing a unique holding symbol (location code) identifying the owning library, are re-linked to the "master" bibliographic record. Individual library sites can use M3's scoping feature to browse only their local collection, selected collections, or all collections in the union catalog. The system links to affiliated libraries using either a WAN or the Internet. A T1 line is highly recommended for adequate communications performance. This model runs on a central server solution.

*NOTE: There is an additional charge for the creation of the Classic Merged Union Catalog. Charges vary according to the number of sites and records.*

**OPAC Access** – If all affiliated libraries run M3, no additional software is required. Patrons can select from any number of library locations for information.

**Circulating from the Union Catalog** – Circulation occurs independently at each individual library. Transactions update the associated holding records instantaneously over the WAN. There are no local databases and the shared database only exists on the union server.

**Cataloging and Maintenance** – Reports and batch processing, such as import and export, are run at the central site only. Merged union catalogs can be updated centrally or locally:

- If cataloging is performed centrally, record edits can be made to either the bibliographic record or the linked holding records. Changes are immediately displayed in the OPAC. New records can be imported in batches with automatic system checks for duplicates. If duplicates are found, the system can add new holding information to the existing bibliographic record. If the system has both a merged union catalog and individual catalogs at each location, the union catalog system can output a file of new and updated records for downloading into the local site catalogs. Software can also be installed, allowing remote libraries to automatically download bibliographic and/or holding records when newly added items are scanned.
- Some systems may want to allow affiliated libraries to edit records from remote sites. Cataloging software can be installed at the remote sites to provide access to any required cataloging functions.

### Virtual Union Catalog using M3 Core Package and Remote Site Software

M3 (with custom configuration) allows any multiple-site library running M3 to be part of a virtual union catalog. If a merged database is not desired or if libraries are not directly affiliated, libraries can participate

in a virtual union catalog but maintain their collections separately. A virtual union catalog is created by installing the M3 Core Package on all library automation servers and M3 client software at each library site. Each participating library must have M3 Library Automation software and set up its own separate database. M3 Server software can be configured so patrons can search single or multiple databases simultaneously. There is a charge for customizing the software based on the number of library collections. This model runs on central server or local server solutions.

**OPAC Access** – A directory is created which includes the IP address of each participating library. Once this is defined, OPAC searchers can select all sites or specific sites for searching. When a search is executed, results are returned along with library locations. Duplicate records are not automatically removed in a virtual union catalog.

**Circulating from the Union Catalog** – Circulation occurs at each individual library.

**Cataloging and Maintenance** – Reports are generated and cataloging is updated at each individual library.

***Note:** Mandarin offers BookWhere V4 and Book-Where Online as optional Z39.50 client software. See Chapter 12 for more information.*

### **Virtual Union Catalog with M3 Core Package and Z39.50 Protocol**

Z39.50 software is not required for a virtual union catalog unless libraries not using M3 are participating union catalog members. Library sites not using M3 must have Z39.50 client software to access and search bibliographic information. They must also have Z39.50 server software so M3 can broadcast their bibliographic information and allow it to be searched by other libraries. Performance is dependent on the total number of sites, circulation and patron workstations, and the communications infrastructure (T1 lines are recommended). This model runs on central server or local server solutions.

**OPAC Access** – A directory is created which includes the IP address of each participating library. Once this is defined, OPAC searchers can select all sites or specific sites for searching. When a search is executed, results are returned along with library locations. Non-M3 sites require Z39.50 services to be searched by M3. The sites running M3 need to be configured to search the non-M3 sites using Z39.50. When searching non-M3 sites, holding and transaction information is not usually available. Duplicate records are not automatically removed in a virtual union catalog.

**Circulating from the Union Catalog** – Circulation occurs at each individual library.

**Cataloging and Maintenance** – Reports are generated at each individual library. Virtual union catalogs can be updated centrally or locally:

- If cataloging is performed centrally, bibliographic records can be imported in batches from remote building sites to the specific record collections on the central server.
- If cataloging functions are performed at the local site level, cataloging can be restricted to authorized staff and specific record collections. Updates at the site level are immediately displayed in that site's OPAC.



## M3 Server

M3 Server is a connectivity tool that allows the M3 system to search the catalog database. It also acts as a usage monitoring tool, allowing administrators to view server information, TCP/IP port statistics, and database usage. Information about the activity of every port is contained in the log file.

The M3 Server must be configured for users to search more than a single database at one time, as in a central server configuration. This tool should only be configured by Mandarin technical personnel or by system administrators with the assistance of Mandarin technical personnel.



## Documentation

The **M3 Users Guide**, which is provided online, describes how to install, configure, and use M3.



## System Backup

The M3 Library Automation System does not currently provide continuous backup. Mandarin recommends that your server be equipped with an automated backup system that can be used to schedule an unattended backup. A full backup should be performed weekly and the new and amended files should be backed up daily.



## Users with Disabilities

M3 offers features for handicapped users. Many of the features are built into Windows 98, Windows 2000, Windows NT, Windows Me, and Windows XP operating systems and carry over into M3 use. Additionally, workstations equipped with speakers and headphones can increase the volume of audio alerts used in M3. All of these settings can be changed in Control Panel's Accessibility Options section.

Users with a touch screen monitor can take advantage of M3's touch buttons and visual icons for selections. In addition, the font style and size in the OPACs and the record editor (visible in Cataloging and Circulation) can be modified for easier viewing.



## Licensing

The Mandarin M3 Library Automation System is offered with an unlimited site license, providing for an unlimited number of local area network (LAN) nodes per site. An M3 Core Package Remote Site License is required for every library site that will run M3 from a hosting server located in another building.



## Group Editor

M3 uses an elaborate, hierarchical security scheme that enables the librarian to assign levels of access for Cataloging, Circulation, OPAC, and database maintenance features. Security in M3 is implemented through the use of the M3 Group Editor. The Group Editor creates, customizes, and modifies the group permissions required to gain access to M3 functions. Groups are created with customized sets of parameters and privileges. The three default group types are patron, item, and special reserve. An unlimited number of each group type can be created. Items and patrons can be moved in batches to different groups for quick updating.



## Patron Groups

Each patron record must be assigned to a group to establish circulation privileges. Patron groups may exist for many patron types, such as general, VIP, volunteer, or staff member. The following settings are established in the patron group:

- **General** – establishes identification information such as name, description, and card expiration
- **Circulation Blocks** – customizes the patron group's rights to add, modify, place, remove, and override messages
- **Circulation Limits** – customizes the circulation quantity limits for the patron group
- **Circulation Access** – sets the rights of group members to access Circulation functions
- **OPAC Access** – sets the rights of group members to access My Account and other features available in the OPAC
- **Cataloging Access** – sets the rights of group members to access Cataloging functions
- **Utilities** – sets access privileges for Inventory, Report Generator, Configuration Editor, and Group Editor functions
- **Members** – displays, adds group members to or removes from the group; allows for editing of individual member records
- **Item Group Overrides** – overrides item parameters for the specific patron group
- **Group Access** – specifies which patron groups have access to the group, as well as the default patron and item groups created by members of this group

## Item Groups

Each holding record must be assigned to a group to establish the item's circulation parameters. Item groups may consist of types such as: general collection, periodicals, equipment, reference, and so on. The following settings are established in the item group:

- **General** – establishes identification information such as name and description of the group
- **Circulation Periods** – sets circulation time frames and fine amounts for the group
- **Members** – adds items to the group
- **Group Access** – specifies which patron groups you want to have access to the group

## Special Reserve Groups

These groups accommodate unusual circulation restrictions for special items and, if necessary, patrons. For instance, a special reserve group can be created to reserve selected science books used by students involved in a four-week project. The following settings are established in the special reserve group:

- **General** – establishes identification information such as name, description, and access to the group
- **Item Members** – adds items to the group
- **Circulation Period** – sets circulation time frames and fine amounts for the group
- **Circulation Limits** – sets circulation quantity limits for the group
- **Patron Members** – adds patrons to the group
- **Group Access** – specifies which patron groups have access to the group

## M3 Cataloging

Cataloging is the process of describing an item in a library's collection in order to retrieve and control the item. M3 Cataloging is a full MARC editor used to create, modify, delete, and merge records. Fields and subfields can be added, deleted, and modified. Records can be duplicated and modified to create holdings. The field labels and tag structure conform to USMARC standards, as defined by the Library of Congress. Record types are bibliographic, holding, patron, authority, picture, and equipment. Cataloging is fully integrated with all M3 Core Package modules, ZServer (Mandarin's Z39.50 server software), and the optional modules M3 Web OPAC, M3 Authority Control, MARC Magician, BookWhere, and Serials and Acquisitions.

Cataloging has a split window that displays the bibliographic and holding record at the same time. It also displays the authority record and any linked bibliographic records at the same time. The patron record is displayed in a single window, as is the picture record. The librarian can configure which MARC fields are displayed in the window.

## Features

### Data Base Information

Bibliographic, holding, patron, authority, picture, and equipment records are contained separately in table structures. Each table can hold up to 2 billion records. An unlimited number of tables can be created, enabling M3 to store any number of records. Tables can span multiple hard disks on multiple servers to accommodate libraries with large volumes of records.

M3 recognizes both the USMARC fixed and variable length records. The maximum record length is limited by the MARC standard when using a MARC format. The MARC standard is 100K per record and 4K per field. M3 allows all fields of the MARC record to be indexed.

There is one bibliographic record for each separate catalog entry. An unlimited number of holding records can be associated with a single bibliographic record. Holding records must be linked to a bibliographic record. Cataloging automatically assigns a sequential record number to each record in the system.

Cataloging allows the MARC record to be customized in many ways. Additional fields or subfields can be added to MARC records to add local information using the MARC standard

### Templates

M3 Cataloging comes with pre-configured templates using suitable fields to create distinct record differences. Additional templates can be created or existing templates can be modified to meet local needs. Cataloging provides field descriptions and examples, making the cataloging process easy. Library staff can enter MARC field cataloging instructions and examples that define how each MARC field should be cataloged to match the library's conventions. Users can switch the MARC field labels from numbers to text for easy use. Cataloging provides a full screen editor with pop-up lists provided for fields with limited selection criteria. A validator checks the entry of records for possible errors and offers suggested corrections in some cases. Following are some of the templates included in M3 Cataloging:

- Audiocassette
- Maps
- Book
- Music CD
- CD-ROM
- Scores
- Equipment
- Vertical File
- Internet
- Video Recording

### Punctuation and Formatting

M3 ensures accuracy by automatically adding punctuation and appropriate formatting based on AACR2 and USMARC standards.

M3 is the first integrated library system to include the powerful Validation Plus® (V+), a product of The MARC of Quality. Although other systems offer validation checks, none offers a module with the depth of review provided by V+. Catalogers can check their records for invalid coding, nonrepeatable fields that are repeated, and obsolete coding. V+ checks fixed and variable fields for a variety of codes such as language, country, geographic area, relator, and more. Users can select only the checks that meet their specific



needs. Since all catalogers use non-standard coding on occasion, V+ tables can be customized for local usage, ensuring accurate and valid MARC record coding. In addition to standard validation, V+ also includes the unique TMQ Error Checker, which catches common cataloging and coding errors. In the future, V+ will be automatically updated, with the latest MARC changes and cataloging checks, as new versions of M3 are released.

### **Textbook Management**

M3 enables librarians to store and manage textbook information. Textbook information such as title, author, and all publication information can be entered as a bibliographic record. Any number of copies can be added, and multiple copies can be added at once. Barcodes can be attached to each textbook and scanned when textbooks are loaned or returned from students or staff. Inventory provides another method for recording missing textbooks that are kept in storage rooms. The system allows the school to determine loan periods that can be assigned by semester, day, week, month, year, or hour. In addition, reports can be generated by homeroom, student, teacher, subject, and so on. Lists of items not returned can be produced for teaching staff.

### **Reports**

All Cataloging reports are run by ReportTool™, which is a part of the M3 Core Package. For more information about ReportTool.

### **Authority Control**

The optional Authority Control module is integrated into M3 Cataloging and allows authorized staff members to import, export, add, edit, delete, and verify authority records and the authorized name, subject, and series (uniform title) headings they manage. Catalogers link authority headings to bibliographic records to maintain accurate use of terminology in records and consistent displays in the OPAC. Changes made to an authority-controlled heading are automatically updated globally in linked bibliographic records. Authority Control lets the library offer patrons the best possible access to the collection by displaying "See" and "See also" cross-references from terms they may search under to terms used by bibliographic records in the catalog.

## Utilities

### Find and Replace

Search for records using any MARC field to create a group of target records. Use the Find utility to search the target records for matching text in a field or indicator. Use the Replace utility to replace the matching text with the desired text.

### Advanced Find

The Advanced Find utility allows the following limitations in order to fine tune a search:

- Limit search to field or subfield occurrence
- Limit search to character position
- Match field, subfield, control field, or indicator field

### Advanced Replace

The Advanced Replace utility allows the following modifications:

- Copy, move, rename, or remove subfields or entire fields
- Insert new fields, subfields, or control fields
- Insert text into existing fields, subfields, control fields, or indicator fields

### Import

Bibliographic, patron, and authority records formatted in MARC, ASCII delimited, or ASCII fixed width format can be imported. Picture fields can be imported using the M3 Picture Manager utility, which is accessible through Cataloging. Fields in existing records must be mapped to the appropriate MARC field or defaults can be selected. During import, duplicate bibliographic or authority records can be imported or discarded, or can replace existing records. All holding records are imported. During the initial import, an optional high-speed import can be run to save time. Barcodes can be generated during the import process. After the import process is complete, an Import Summary is created listing duration of import session, number of records in the import file, number of records imported successfully, any duplicate barcodes, and the barcode creation summary.

M3 Cataloging also accepts records in the following formats:

- USMARC
- WLN
- MARC21
- SDM (MARC)
- LCMARC
- Bibfile
- OCLC
- Precision
- RLIN
- Laserquest
- UTLAS
- Marcive

*NOTE: SASI patron records have been successfully imported in the past.*

### Export



Bibliographic, holding, patron, and authority records can be exported in MARC format. MARC records can be exported using two methods:

- Standard Export – maintains the record's current field format
- Enhanced Export – allows fields to be remapped or excluded



## Circulation

All circulation transactions can be accessed from the Circulation window. Circulation has the ability to:

- Display patron and item status
- Display loans, returns, renewals, reserves, and holds
- Book equipment and rooms
- Attach messages to patron or item records
- Process fines and issue refunds
- Apply processing fees
- Display patron and item pictures
- Send e-mail notifications to patrons who have overdue items, owe fines, or reserved items that are now available
- Record patron claims of lost, previously paid, never had, and previously returned
- Import off-line Tricoder transactions
- Configure the library schedule
- Set up a session-based due date
- Pre-process barcodes to strip leading zeroes
- Print receipts on receipt or laser printers

In addition, bibliographic, holding, and patron records can be added or edited, and records can be searched. M3 allows library staff to define all circulation parameters, and authorized users can override any parameter when needed.

## Features

### CIRCULATION WINDOW

The Circulation window consists of three panes displaying patron, item, and transaction information, offering a panoramic view of all circulation functions. MARC fields and font characteristics can be modified for each transaction mode and in each window pane. Library staff can configure the window to display as much or as little information as desired. For security, a time-out period can be chosen that clears the window after a selected number of seconds has expired.

### SOUND CUES

Configurable sound cues accompany each circulation transaction. M3 signals the completion of a transaction by a notice on the status bar that reads, for example, "Loan Operation Successful," accompanied by a tone. The user can select specific words upon completion of a transaction, such as "Loan!" and "Reserve!"

### CIRCULATION CALENDAR

The Circulation calendar is used to set up loan period rules, library hours, and holidays. The calendar has the ability to backdate the circulation date (helpful for evening book drops) and temporarily override typical loan periods to process circulation exceptions. Loan periods can consist of any period of time, including hours. The calendar can adjust loan periods to accommodate holidays and closed hours.

### FINE CALCULATION

An overdue item's status changes from "Overdue Loan" to "Fine" when the item is returned. Fines are then calculated by the system. Closed days can be excluded from fine calculations. Patrons can pay the full fine amount, make a partial payment, or exclude an item from payment until a future date. Librarians have the ability to forgive or increase fines, and add a processing fee. The system calculates the amount of change back from a fine paid. Fines can be marked as previously paid if the patron claims that the fine was already paid. M3 allows item status to be changed to "Lost," "Claimed Returned," or "Claimed Never Had" to accommodate those situations. Librarians can issue refunds. M3 keeps a fine history for each patron that can be displayed from the payment screen.

### QUICK RETURNS

Quick Return is designed for situations such as book drop returns. Patron messages are not displayed since it is assumed that patrons are not present. Quick Return does alert when a hold is attached to an item.

### IN-HOUSE CIRCULATION RETURNS

In-House Circulation is designed to "return" items that were removed from shelf positions and left on library tables or desks, presumably used at the library though not checked out. This feature is used to track in-library usage of the collection.

### SELF-CHECK/SELF-RETURNS

M3 allows self-check and self-return transactions without the assistance of a librarian. For system security, in either mode, the patron cannot perform any other type of circulation transaction; the patron's only options

are self-check, self- return, or log out. Self mode can be set up so patron and item transactions do not display.

### **TRANSACTION BARCODES SHEET**

The laminated barcode sheet, included with the M3 Core Package, allows users to select the most common transaction modes without using the Circulation toolbar or menu bar. This sheet can be used to conduct basic transactions using a portable barcode scanner, or as a shortcut using the barcode scanner at the circulation desk. The barcodes sheet is a useful bookmobile solution. The following transaction modes can be accessed from the barcodes sheet:

- Loan Mode
- Quick Return Mode
- Upload Barcodes
- Return Mode
- Claimed Returned
- Print Patron
- Renew Mode
- Claimed Never Had
- Print Item
- Reserve Mode
- Lost Item
- Print Transactions
- Status Mode
- Damaged Item
- Sound Off
- In-House Circulation Mode
- Back Date
- Sound On

### **ON-THE-FLY TRANSACTION/PATRON PROCESSING**

Librarians can create temporary records to permit circulation of library materials that are not yet in the bibliographic database. At check in, the system alerts the operator that the temporary record exists, allowing the operator to route the item for proper cataloging. Patrons records can also be created on-the-fly.

### **LOAN OR RETURN MULTIPLE ITEMS**

Librarians can check out or return multiple items after entering a single patron without having to re-enter the patron barcode for each item.

### **ITEM AND PATRON HISTORY**

Librarians can display the transaction history of an item or patron. If privacy is an issue, this feature can be disabled.

### **ITEM AND PATRON STATUS**

Items can be searched, and the current location or condition of a particular item can be displayed. Any number of customized statuses can be created to accommodate local needs. Patron status can also be created and assigned.

### **BOOKING**

This feature is used to reserve an item such as a conference room or piece of equipment for a future day and/or time. Booking is available for a single day, a range of days, or for specific hours. Items and pieces of equipment can be grouped into sets for ease of circulation. The system maintains equipment holding records including information concerning date added, collection, item type, storage location, serial number, inventory number, equipment price, date purchased, last service, next service, condition, and

notes. Room holding records include room collection, item type, size, capacity, handicap access, elevator access, media equipment assigned to the room, and notes.

## HOLDS

M3 alerts library staff when materials on reserve are returned and placed on hold, displaying the name of the patron who reserved the item and instructions to notify the patron. You can also configure M3 to automatically send the patron an e-mail notification.

M3 can print a hold form to be placed with the item. The system allows library staff to specify a last acceptable date for a hold, after which time the material is no longer needed. The system clears holds not filled by such dates and automatically readjusts the holding queue.

## MESSAGING

One or more free-form text messages, or blocks, can be attached to a patron or item record. These messages appear to library staff whenever the patron or item record is accessed. Each message created must be assigned a circulation-intrusive block type. Each block type is described below. Messages can be created or edited during a transaction or “on-the-fly.” Messages and their use are defined by the library. The library staff’s authority privileges determines the staff’s override capabilities. Old, unused item and patron messages can be deleted.

**Information block** – The user can bypass this low-level block by clicking anywhere in the window.

**Blocking block** – The user must select an option in the message dialog box in order to proceed. The user must have authority granted by the administrator to override this mid-level block.

**Nudge block** – When a nudge block message appears the first time, the message acts like a blocking block until overridden by the administrator, then the message behaves like an information block.

**Privilege block** – The user must type a password to bypass the message dialog box. The user must have authority granted by the administrator to override this high-level block.

## TRANSACTION REPORTS UTILITY

Circulation provides transaction reports to monitor library status and activity. The types of transactions reported consist of loans, fines, holds, reserves, bookings, overdue loans, or all transactions. Reported transactions can be displayed for the current day, a specified number of days, or all transactions. In addition, bookings can be displayed for the future. Overdue loan transactions can be displayed for all transactions or a specified number of days. Additional reports can be printed using ReportTool. For more information about ReportTool, see page 6-1.

## STATISTICAL RECORD SUBFIELDS

Tables 4.1 through 4.3 are subfields from Statistical field 993 in patron, bibliographic, and holding records. These subfields can be accessed to provide circulation statistics and printed using ReportTool. For more information about ReportTool, see page 6-1.

TABLE 4.1  
Subfield Circulation Statistics from Patron Record

Sub	Name	Description
a	Loan count	Number of items a patron has borrowed
b	Hold count	Number of holds a patron has placed
c	Reserve count	Number of reserves a patron has placed
d	Renewal count	Number of renewals a patron has placed
e	Recall count	Number of recalls a patron has placed
f	ILL count	Number of ILL requests a patron has placed
g	Booking count	Number of booking requests a patron has placed
i	Fines count	Number of overdues for a patron
j	Fines total	Total dollar amount of fines generated by a patron
k	Fines forgiven count	Number of fines forgiven for a patron
l	Fines forgiven total	Total dollar amount of fines forgiven
m	Lost count	
n	Lost total (\$)	
o	Lost forgiven count	
p	Lost forgiven total	
q	Damaged count	
r	Damaged total	
s	Unpaid count	
t	Unpaid total	
u	Claimed never had count	
v	Claimed returned count	
w	Claimed paid count	
x	Current loan count	
y	Current hold count	
z	Current reserve count	
1	Current renewal count	
2	Current fines count	
3	Last subject borrowed	ISN of the last item borrowed
7	Current due amount	

TABLE 4.2  
Subfield Circulation Statistics from Bibliographic Record

Sub	Name	Description
c	Reserve count	
d	Current reserve count	
e	Purchase request count	

TABLE 4.3  
Subfield Circulation Statistics from Holding Record

Sub	Name	Description
a	Loan count	Number of times an item was loaned
b	Hold count	Number of times an item was placed on hold
c	Reserve count	Number of times an item was reserved
d	Renewal count	Number of times an item was renewed
e	Recall count	Number of times an item was recalled
f	ILL count	Number of times an item was requested
g	Booking count	Number of times an item was booked
h	Table charge count	Number of table charges for an item
i	Fines count	Number of overdues for an item
j	Fines total	Total dollar amount of overdues generated by item
k	Fines forgiven count	Number of fines forgiven for an item
l	Fines forgiven total	Total dollar amount of fines forgiven
m	Lost count	
n	Lost total	
o	Lost forgiven count	
p	Lost forgiven total	
q	Damaged count	
r	Damaged total	
s	Unpaid count	
t	Unpaid total	
u	Claimed never had count	
v	Claimed returned count	
w	Claimed paid count	
x	Current loan count	
y	Current hold count	
z	Current reserve count	
1	Current renewal count	

2	Current fines count	
3	Last borrower	
4	Purchase request count	
5	Inhouse loan count	
6	Due date	
7	Current due amount	

## Windows OPAC

### ABOUT THE WINDOWS OPAC

The M3 Windows OPAC (Online Public Access Catalog) is a flexible, multilingual search interface that enables the patron to search a collection to determine if desired items are owned, how many copies are owned, their shelf location in the library, and whether or not they are available. Search results list all bibliographic records found matching the query. The user can then determine availability and location, sort the list, and print the search results for a concise, comprehensive bibliography.

By default, records appear in a brief record format during viewing. With the click of a button, the expanded bibliographic record and item location information from the holding record are displayed. The default record format can also be changed to any one of the following formats: bibliographic, full MARC, catalog card, brief labeled, compressed, and expanded labeled. The librarian can customize any of these pre-configured displays.

The search results screen is the default bibliographic display. The record detail is the expanded label format. Search results can be sorted by author, call number, call number by prefix, copyright date, and title.

Media type symbols provide instant resource format recognition. Each record has a media symbol associated with it. The media type symbols used by the OPAC are: artifact, book, photo, music cassette, movie or slide, electronic media, journal, library kit, map, sheet music, book on tape, data CD, music CD, video recording, or online resource. Item availability is determined by color: a green square for available or a red square for on-loan status. Results are obvious with a quick glance.

Book cover images can be displayed alongside items in the Search Results, Record Details, Bookbag Record List, or Bookbag Record Details windows.

M3 supports USMARC field 856 (electronic location and access), enabling patrons to link to cataloged Web sites directly from the OPAC.

### SEARCH RESPONSE TIME

The M3 search engine was designed to handle long and/or complex searches in an instant; therefore, the ability to terminate searches is not necessary.

Table 5.1 represents a response time benchmark. The benchmark search was performed on a LAN with a PII 450 server and PII 233 workstation in a catalog of 88,723 bibliographic records and 126,295 holding records.

TABLE 5.1  
Response Time for Keyword Searches using Boolean Operators

Boolean Phrase	Response Time
Subject History OR American	11,828 hits in 1 second
Subject History AND American	411 hits in 1 second
Subject History NOT American	8,598 hits in 1 second
Subject American AND History NOT Irish OR English OR French	387 hits in 1 second





## OPAC WINDOW

The OPAC window can be customized by changing colors and by adding your library name and logo.

## Searching Method

The following parameters can be applied when performing a search:

- truncation asterisk (\*) at the beginning or end of a keyword
- wild card character (?) within a keyword
- quotation marks (" ") around a phrase
- Boolean operators (AND, OR, and NOT) to connect keywords within a key-word text box

Entries conform to Z39.50 use attribute standards.

M3 ignores and forgives variations in punctuation, such as apostrophes, quotation marks, brackets, and multiple continuous spacing. As defaults, the use of upper and lower case letters and special characters such as diacritics are ignored. M3 can be configured to recognize these items. Stop words are not used in M3.

Three search methods are available: Standard, Enhanced, and Visual Catalog, as described in the following sections.

### Standard Search

A basic keyword search method that recognizes Boolean logic, truncation, and proximity. Three specific fields can be searched: subject, title, and author. Patrons can browse a list of indexed entries to select keywords. If a patron searches and no matches are found, the list of indexed entries displays with the closest alphabetical match for the keywords entered. With the optional Authority Control module, "See" and "See also" cross-references display with the search results, offering links to more appropriate headings used by your library or related headings that may also be useful.

### Enhanced Search

A more advanced search method that offers search flexibility and options. Patrons can enter simple or complex keyword search queries, then select the fields and Boolean operators for the search. As with Standard Search, patrons can browse a list of indexed entries to select keywords; the list also displays if no matches are found. This search method offers customizable drop-down lists of search fields, allowing librarians to choose which fields of the MARC record are searchable.

Enhanced Search offers search techniques such as Shelf Browse and Search History. Shelf Browse can also be performed on search results. As with Standard Search, "See" and "See also" cross-references display with the search results when using the optional Authority Control module.

M3 retains all search strings for the duration of the search session. The system allows the patron to move backward and forward in a search, exploring alternate paths without having to retrace the entire original search.

### Visual Catalog Search

An easy point-and-click graphical search method. Patrons click graphical buttons to narrow their searches from broad topics to more defined sub-topics, ultimately reaching search results. A topic button opens a sub-menu of additional buttons leading to more sub-menus, query buttons that launch database searches, and/or launcher buttons that access different applications or Web pages. A query button is linked to a pre-defined search query. M3 ships with over 60 pre-configured topic and query buttons.



The Visual Catalog interface is easily customized. Library staff can use their own names and pictures, as well as change colors and add logos. Topic, query, and launcher buttons can be added, modified, and deleted. The number of levels before a search results list appears can be increased or decreased. Animation, sound, and visual properties on all button menus can be globally or individually modified, enabled, and disabled.

## OPAC Features

### Search History

The History function retains a cumulative list of Enhanced Search queries performed during the current session. A time-saving AutoSearch feature lets you select a search in the list and return to that prior search with the click of a button. To ensure privacy, a patron can clear this cumulative list at any time. The Reset function deletes all information stored in the History Selection dialog box, and returns all OPAC settings to their default positions.

### Shelf Browse

Shelf Browse quickly locates records with a call number similar to that of a selected record. The patron can move one bibliographic record at a time forward or backward through the list. This is equivalent to looking at items to the left or right of a specific item on a library shelf.

### Index Browse

Index Browse displays a list of data currently contained in the selected MARC record field. This allows patrons to review existing data and select a search term. This feature is particularly useful to patrons who are unsure of the terms to use in a search. M3 provides browse indexes for authors, titles, subjects, call numbers, and URLs by default. Library staff can create other indexes as needed.

### Bookbag

The Bookbag allows a patron to temporarily store selected records throughout the course of the search session for additional review or batch printing. Bookbag records can be sorted. A list of items can be created by entering or scanning bar-codes directly into the Bookbag. The Reset function clears information from a previous user.

### Bulletin Board

The Bulletin Board is a simple way for library administrators to deliver information to patrons. The Bulletin Board button can be linked to a local HTML file, such as the library home page, or a Web page that the library wants patrons to view. A preconfigured HTML file is included with M3 and can be modified using any HTML editor.

### My Account Tab

The My Account tab is an optional tab that allows patrons to view their current transactions, past transactions, and personal information that is on record with the library.

### Syndetic Solutions

Mandarin offers a subscription to Syndetic Solutions, which allows patrons to view cover images as well as summaries, reviews, and other content data for items in your collection through a link in the OPAC. This subscription also provides thousands of cover images that you can display alongside items in the OPAC and Circulation modules. For more information about Syndetic Solutions, see page 14-1.

## Report Tool

### ABOUT REPORTTOOL

ReportTool™, developed by Zen Software, Inc., is a flexible and powerful report generator. More than 850 K-12 library-related reports and 450 public, academic, and special library-related reports are preloaded into M3 and are also available on the Mandarin Web site. These preloaded reports can be run “as is” or customized. New reports can be created using virtually any field of any record. Reports can be displayed on the screen, printed, or downloaded to a file. Barcodes, spine labels, book pocket cards, multi-page forms, address labels, index cards, and letters can also be printed.

*Note: In a wide area network, reports should be run at the central site only.*

The following tables list the standard reports included in M3. Reports are divided into the following categories: Bibliographic & Item Lists, Bill Letters, Booking Reports, Cards & Labels, Equipment Lists & Forms, Fine Letters, Fine Lists, Fine Notices, Overdue Letters, Overdue Lists, Overdue Notices, Patron Lists, Statistical Reports, and Transactions Lists. The tables provide the report types available for each report category, along with the various selection, sorting and/or grouping criteria that are available.

Additional reports are added to the Mandarin Web site on a regular basis and are available for downloading. For detailed report information, including examples, please refer to the *Standard M3 Reports* booklet. If the *Standard M3 Reports* booklet was not included with this packet, you can request this document by calling Mandarin Order and Customer Service at (800) 426-7477.

### BIBLIOGRAPHIC & ITEM LISTS

Bibliographic lists include bibliographic records. Item lists include holding records with pertinent information from the bibliographic record, such as title, author, publisher, and date of publication. Reports are available for deleted records, but not purged records.

### BILL LETTERS

Bill letters list items that are overdue for a selected number of days. All bill letters allow the user to specify the number of days that items are overdue as a criteria in creating the letters; items due more than this number of days will be billed. These letters list the overdue item, with its replacement cost, and request payment. Selected bill letters allow a surcharge to be added to the cost.

### BOOKING REPORTS

Booking reports list items (holdings) or equipment (overhead and slide projectors, TVs, and so on) that are booked for future use.

### CARDS & LABELS

Cards and labels print barcodes, spine labels, book pocket cards, multi-page forms, address labels, and index cards. Most card and label names contain a number, which signifies that the report was created to run on special stock (the number is an Avery stock number unless otherwise indicated).

### EQUIPMENT LISTS & FORMS

Equipment lists and forms include equipment items and verification forms.

## **FINE LETTERS**

Fine letters are sent to patrons who have returned items but have outstanding fines due. One fine letter is created for each patron. Generating fine letters on a consistent day and at a consistent time will ensure accuracy and eliminate repetition.

## **FINE LISTS**

Fine lists include patrons who have outstanding fines. With the lists that include a "Range Of Days," the user can generate lists that correspond to the Fine Letter or Fine Notices that have been generated.

## **FINE NOTICES**

Fine notices are distributed to patrons who have returned items but have outstanding fines. One fine notice is created for each item having an outstanding fine. Notices are printed four per page and can be separated for distribution. Unlike fine letters, fine notices do not contain address information. Generating fine notices on a consistent day and at a consistent time will ensure accuracy and eliminate repetition.

## **OVERDUE LETTERS**

Overdue letters are sent to patrons with items that have exceeded the due date. Overdue letters do not include a fine amount unless specified in the report criteria. Generating overdue letters on a consistent day and at a consistent time will ensure accuracy and eliminate repetition.

## **OVERDUE LISTS**

Overdue lists include patrons who have outstanding loans. With the lists that include a "Range Of Days," the user can generate lists that correspond to the Overdue Letters or Overdue Notices that have been generated.

## **OVERDUE NOTICES**

Overdue notices are distributed to patrons who have outstanding loans. One overdue notice is created for each overdue item. Notices are printed four per page and can be separated for distribution. Unlike overdue letters, overdue notices do not contain address information. Generating overdue notices on a consistent day and at a consistent time will ensure accuracy and eliminate repetition.

## **PATRON LISTS**

Patron lists provide information about patrons and are generated from the library database. The reports for school use provide grade, homeroom, and teacher information, and the reports for public library/academic use provide address information.

## **STATISTICAL REPORTS**

Statistical reports include statistics for the following areas: circulation, fines, in-house circulation, loans (including hourly), renewals, and transactions.

## **TRANSACTIONS LISTS**

Transactions lists include items on hold, returned via in-house circulation, loaned, renewed, and reserved.

## Inventory

### ABOUT INVENTORY

M3 Inventory allows the user to conduct a full or partial inventory of the library's holdings. A full inventory involves scanning the entire collection during one time period. A partial inventory involves scanning portions of the collection at any time throughout the year. Inventory compares the scanning results to the contents of the holdings database. Nine reports are generated:

- Newly Found Items
- Missing Items
- Items with Invalid Barcodes
- Misplaced Items
- Loan Shelved Items
- No Barcode Items
- Duplicate Barcode Items
- Out of Range(s) Items
- Inventory Statistics

After the reports are compiled, they can be printed to reconcile the inventory. The reports can also be saved to a file to be exported from the M3 system. Inventory can be run to reconcile equipment as well.

If inventory cannot be completed at one time, the items that have already been processed can be saved and retrieved in order to continue the inventory process at a later time.

*NOTE: To assure accurate inventory results, items should not be circulated or cataloged while the collection is being scanned.*

### INVENTORY WINDOW

The Inventory window is divided into the Barcode pane and the Inventory pane. The Barcode pane displays the barcode files and barcodes used in the inventory procedure. The Inventory pane displays the results of the inventory procedure. Records are displayed in individual tabs: Newly Found, Missing, Invalid Barcodes, Misplaced, Loan Shelved, No Barcode, Duplicate Barcode, Out of Range(s), and Statistics. Media type icons display in all tabs (except Statistics) alongside items that have a media type assigned.



## Configuration Editor

### ABOUT CONFIGURATION EDITOR

The Configuration Editor is a powerful utility that allows system administrators to configure the M3 system over the library network. This tool visually displays M3 components, such as servers, databases, tables, and library sites for configuration. The Configuration Editor allows administrators to add, remove, or modify these components.

The Configuration Editor can be used to enhance or restrict access to servers, databases, and tables at the network or site level. Tables can be configured using multiple servers for optimum efficiency.

Additional configuration includes:

- Boolean operator translations and descriptions
- Attribute list (the list of all searchable fields) used to define and restrict end user searches
- Search configuration defines the search window configuration including Boolean operators, attributes, and search types
- Organization list (library organizations and their subdivisions) as per Z39.50 standards
- Registry Service for system maintenance





## Training

### ONLINE TRAINING

Mandarin offers online training sessions for customers who are experienced with Mandarin software, but need instruction on the use of new features or a particular aspect of M3. Since these sessions are conducted via the Internet using software licensed by Mandarin, customers only need to have Internet access and a telephone to participate.

### ON-SITE TRAINING

Mandarin offers on-site training tailored to an individual library's needs. Generally, a group of six or fewer participants will require two days of training to become self-sufficient with M3. An extra day should be added for optional modules such as Authority Control or Serials and Acquisitions. For larger groups, additional training days are recommended.

### Training Outlines

Training Outlines could be customized to specific library needs.



## Service and Support

### M3 SERVICE AND UPDATE AGREEMENT

The Mandarin M3 Library Automation System includes, at no additional charge, a one-year M3 Service and Update Agreement (SUA). This agreement includes technical support, software updates, utilities, Mandarin e-mail list membership, access to Customer's Corner and the Knowledge Base on the Mandarin Web site, and the Mandarin newsletter. Renewals to the SUA can be purchased annually.

After the first year, the M3 SUA can be purchased for the local or district level. Local level support allows each library site to contact Mandarin's technical support team directly for assistance. District level support allows only district personnel to contact Mandarin's technical support team for assistance. Contact Mandarin Customer Service for current SUA pricing.

### Technical Support

Mandarin's technical support team is available via modem, fax, e-mail, FTP, and toll-free telephone 24 hours a day, seven days a week, 365 days a year. Most calls are answered immediately. After-hours calls are taken by a voice message system and technicians are immediately paged. If the situation warrants, Mandarin technicians are able to dial in to the library's system, using a modem and communication software, and work as if on-site. Bilingual technical support in Spanish is also available.

Mandarin technicians are located in the corporate headquarters in Boca Raton, Florida, and in branch offices in New York and Puerto Rico.

Mandarin is a Microsoft Authorized Educational Reseller with MCSEs (Microsoft Certified Systems Engineers), CNEs (Certified Network Engineers), CCNAs (Cisco Certified Network Associates), and MCPs (Microsoft Certified Professionals) on staff.

### On-Site Assistance

Mandarin has technicians available for on-site maintenance or second level technical assistance, such as troubleshooting software and hardware issues, consulting on hardware upgrades, capacity planning, and performance analysis. Maximum guaranteed response time is determined based on the situation.

### Problem Solving Process

Software problems are handled in the following manner:

1. Customer calls Mandarin Technical Support Team via toll-free number.
2. Technician records problem and details in problem database.
3. Technician works immediately to resolve problem with customer on phone (first call solution).
4. If problem cannot be resolved with customer on phone, other support options are discussed and agreed upon (remote site maintenance, transfer of data by FTP, and so on).
5. Open problems are addressed by Level 3 technical support, management, quality assurance, or product development (according to severity and time of call).

### Problem Severity Definitions

- Severity 1 – Total loss of service
- Severity 2 – Performance degradation that impacts customer
- Severity 3 – Low customer impact



- Severity 4 – No impact to customer service

Severity 1 problems are given immediate attention by a technical support team, including management and senior level technicians, until resolved. Severity 1 and Severity 2 problems that are not resolved within one day are forwarded to quality assurance department for research, resolution, or workaround. After problem resolution is reached, the customer is contacted and assisted with implementing the resolution.

### **Problem Severity Statistics**

Most calls are answered immediately. All calls, regardless of severity, are responded to within 60 minutes.

The three most common problems for which Mandarin receives support calls are:

- installation of library automation software by non-technical personnel
- networking issues
- special customized software installations

### **Software Updates**

Mandarin software updates are distributed on CD or via the Mandarin Web site (<http://www.mlasolutions.com>) to all customers with a current SUA. Documentation updates can also be obtained from the Mandarin Web site. Updates to M3 and M3 software are released approximately twice a year.

### **Software Corrections**

Urgency of software corrections made will be determined by the severity of the problem. A Severity 1 problem will be worked on immediately and continuously until resolution. A Severity 2 problem will be worked on immediately and continuously until resolution. Program corrections will be provided for Severity 1 and Severity 2 problems as soon as possible. A Severity 3 or Severity 4 problem will be corrected in the next program release.

### **Mandarin E-mail List Membership**

Mandarin hosts an e-mail list exclusively for Mandarin customers. Mandarin posts notices about updates and upgrades, as well as periodic technical tips.

### **Mandarin Newsletter**

Impressions, Mandarin's customer newsletter, is periodically mailed to all customers with a current SUA. The newsletter is used to communicate new software developments, user tips, and library-related news.

### **User Suggestions**

Users can suggest enhancements to the software by emailing or calling Mandarin directly. Suggestions are recorded and presented to the Mandarin Advisory Board for comment. These comments are compiled and submitted to the developers for feasibility and scheduling.

## Minimum System Requirements

	Minimum	Recommended
<b>Server</b>	Windows 2003	Windows 2003 or Later
	Pentium 4 1.3 GHz	Xeon or Opteron dual core
	1 GB RAM	2 GB RAM
	400 MB hard disk space (free)	1 GB hard disk space (free)
	TCP/IP Enabled	TCP/IP Enabled
	MS Internet Explorer 6 SP1 or later	MS Internet Explorer 7 or later
	CD-ROM drive (Installation only)	CD-ROM drive

<b>Workstation</b>	Windows 2000	Windows XP or later
	Pentium III at 1 GHz	Modern Intel or AMD proc at 2GHz
	128 MB RAM	128 MB RAM
	800 x 600 Resolution	800 x 600 Resolution
	Ink Jet Printer with postscript support	Laser Printer with postscript support
	TCP/IP Installed	TCP/IP Installed
	MS Internet Explorer 6 SP1 or later	MS Internet Explorer 6 SP1 or later



## Ordering & License

You can **instantly order** the fully licensed version of M3 at [automation@mlasolutions.com](mailto:automation@mlasolutions.com) or call 561 995 4010 opt 2.

Please visit [www.mlasolutions.com](http://www.mlasolutions.com) for pricing information.



## Contacts & Credits

### POSTAL ADDRESS

Mandarin Library Automation, Inc.  
P.O. Box 272308  
Boca Raton, FL 33427-2308

### PHONES AND FAX

(800) 426-7477 Toll-free  
(561) 995-4010 Local  
(561) 995-4065 Fax

### 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)

Customer Service: [automation@mlasolutions.com](mailto:automation@mlasolutions.com)

Technical Support: [support@mlasolutions.com](mailto:support@mlasolutions.com)

Webmaster: [webmaster@mlasolutions.com](mailto:webmaster@mlasolutions.com)



## New Release Documents

## 1.6 NF

(Rev. 5 May 2003)

### CIRCULATION ENHANCEMENTS

- A flag in the Global.ini.REG file contains a new flag that can turn off most override messages when in self-check mode. The only override that will display is if the item is non-circulating. To enable:

[Self Mode]  
Skip Override=on

- A flag in the Global.ini.REG file contains an option to remove the item and patron history option entirely from Circulation (in both the Circulation Options screen and from the item/patron pull-down menu) To enable:

[History Option]  
Disable=on

- A flag in the Global.ini.REG file contains an option to add a transaction fee amount to any item that is returned as lost or damaged. This fee will be assessed in addition to the regular fine for a lost or damaged item. To enable:

[Transaction Fee]  
Prompt for fee=on  
Amount=x.xx

- A flag in the Mcircsys.ini file allows users to customize whether a message displays when an item is going to be placed on hold instead of on reserve. To enable, type under [maininit] :

Display Placed on Hold Message=on

- A flag in the Mcircsys.ini file will display a new shortcut toolbar for all Circ functionalities. To disenable type under [maininit]:
- Shortcut Toolbar=off

To toggle use Ctrl T  
Added the ability to search for an item or patron by typing in the barcode field.

- If in Loan, Reserve, or Booking mode and a patron is scanned, the search will be performed for an item title. If the search fails, the search will be performed for a patron name.
- If in Loan, Reserve, or Booking mode with no patron scanned, the search will be performed for a patron name.
- If in Return, Renew, and Status mode, the search will be performed for a patron name.
- Added a new Renew All and Return All function.
- If an item is returned that belongs to a Special Reserve group, a warning message will now display.
- After doing a bibliographic search, clients can now double-click on the bibliographic record to select the holding. They are no longer required to double-click on the holding.
- Added the ability to enter refunds on the payment screen.



- Added the ability to enter an additional fine on the payment screen.
- When an item is flagged as lost, the fine amount will be the item price as determined by field 852#9 in the holding. If no price exists, the fine will be the maximum fine in Group Editor.
- Sound was modified so that two distinct beeps will occur if there is a problem with the scanned barcode.
- When an item is returned and placed on hold, e-mail notification is now available.
- A flag in the global.ini file contains the ability to set the fields from which the patron email and phone number information is obtained on all hardcoded messages in Circulation (such as the message which displays when a lost item is returned). If not specified, this information will be obtained from fields 120#a (phone) and 120#c (email). To change the fields:

[PATRON INFO FIELD]  
email=110#m  
phone=110#k

## FIXES

- Corrects a crash that would occur when a user was logged in as a member of a group other than Administrator or Librarian and attempted to add a new patron.
- Fines are now calculating correctly on an odd schedule (such as Mon/Wed/Fri) when Exclude Closed Days was enabled.
- Receipts will now print correctly with fourteen digit barcodes.
- The problem with the bibliographic reserve statistics not being updated is fixed.
- Forgiven and payment amounts now display on the Paid screen in Payments.
- Override messages will no longer display in Status mode.
- Patron and item records can now be deleted and undeleted. The barcode table will be correctly updated. This will reduce instances of the "Barcode is deleted" problem when a patron or item is scanned in Circulation.
- Reserves, holds, and bookings will no longer be allowed on deleted items.
- Reserves/holds are now allowed on items that are members of an \*expired\* Special Reserve group.
- Circulation now handles a corrupt transaction table, such as at McConnell school (Gwinnett). Allows operations on unaffected transaction records.
- The Hold email message has been rewritten (new message requiring translation).
- The default Circ design views now displays pictures (if they are defined in 996#a). This affects only new customers.

## CATALOGING ENHANCEMENTS

- Added the ability to import pictures and to update bibliographic and patron records with these imported pictures.
- Added the ability to download and link pictures from the internal Syndetics picture database to bibliographic records. Field 020#a (ISBN) from the bibliographic record will be compared with the ISBN's on the Syndetics picture database. If a match is found, the matching picture will be linked to the bibliographic record.
- A flag in the ActiveMarcEdit.ini file contains an option not to strip empty fields/subfields when saving a record. To enable:  
[Strip Empty Fields]

## Override=on

- A flag in the ActiveMarcEdit.ini file contains an option to modify the font size and style in the Record Editor. If this flag is not present, the default type is MS Sans Serif and the size is 8. To enable:

[Default Grid Font]

Name=xxxxxxx

Size=xx

By default, the font is set to Verdana. This will support Central European, Baltic, and Turkish characters in a future Unicode release.

- Added the ability to select multiple records after a search by using the Ctrl+Shift command.
- Added the ability to create multiple holdings for a bib record at one time.
- The location codes for fixed field 008, position 15-17 (Place of Publication) was updated to include missing locations, such as Oregon and Egypt.
- Cataloging now integrates with MARC Magician. Users can edit records externally from M3 using MARC Magician and transfer records to and from Cataloging.
- Cataloging now hooks into BookWhere. Users can download MARC records from BookWhere directly into M3.
- New statuses (on order, in bindery) are supported.

## Fixes

- If using the patron overlay during import, the patron group selection in Step 3 of the import will be ignored and the patrons will be imported into their original patron group.
- Items with barcodes taken from deleted temporary items can now be returned after the temporary item is purged. This will reduce instances of the "Barcode not found" problem when an item is scanned in Circulation.
- Item barcodes can be re-assigned to patrons and vice versa. This will reduce instances of the "Barcode is detached" problem when items/patrons are scanned in Circulation.
- If transactions in the Library and Equipment databases have the same ISN, deleted holdings in one database will be purged if there are no open transactions in that database. The query now includes the database ID.
- Added ability to partially match a bib record against an authority record during verification.
- Authority records that are created during the verification process no longer have end of field punctuation.
- The drag and drop functionality would not work if there was no location in 852#a. This was fixed.
- When creating a new patron record, the expiration date of the patron group selected will be inserted into 853#e. Currently, the expiration date used is the default patron group as set up in Group Editor and not the patron group to whom the patron is assigned.
- When creating a new holding for an existing bib record, the 852#k (prefix) is now copied into the new holding.
- Sorting now ignores non-filing characters.
- Holding subfield 'k' is added to holdings created from the bibliographic and holding marcedit frame.
- Hitting Enter on the 'Record has changed' dialog after clicking Next Record now saves changes.
- Retrieve from MARC Magician of records not currently in the database appends (adds) the records to the current database.
- The crash that occurred when invoking the Retrieve from MARC Magician from any view other than Bibliographic has been fixed.

## OPAC

## Enhancements

- The Bookbag display is now identical to the Record Detail screen.
- Link to Syndetics (More Info button).
- OPAC now supports displaying cover images linked to 996#a of bib record.
- Added the ability to print/save all holdings attached to a bib record. This feature is a configurable option in the M3Opac.ini file by setting "Save\_Holdings=1".
- Library name can be customized on the main screen.
- In scoped environments, local holdings are designated with a star icon.
- Browse window is invoked if 0 results are returned.
- New installs include new and improved record display formats.

## Fixes

- Blind See and See Also references no longer display.
- For Authority Control, the search term no longer displays as a cross reference on the search results screen.
- Major redesign to correct how See Also references are displayed.

## Inventory

### Enhancements

- Media-type icons included in all report views. Icons are based on the leader, 007, and 008 fields according to the same specifications as OPAC's icon display.
- Add an option to mark newly found items as 'normal'. Display the Location (852#a) on the Missing list.
- Increase the font size on all reports.
- When saving an uploaded barcode file, leave the default name blank. Clients have reported that they have forgotten to rename the file and have overwritten a previously saved file.

### Miscellaneous

- The search dialogue is now able to handle special characters, such as ampersands.
- The backdoor user name/password was removed. The backdoor can be reinstated when needed for a pre-determined period of time.

## 1.6 SP1

(Rev. 7 April 2004)

Changes/Additions in Arial Bold Italic

\*Currently being developed

?Status to be determined

### CATALOGING ENHANCEMENTS

1. Selective purging has been added.
2. Fields used for duplicate detection for authority and bib records are now configurable in Cataloging.ini. Patron overlay now supports matching on more than one field.
3. Cataloging now handles multiple authority tables and multiple schemes (LC, Sears, etc.)

### BUG FIXES

1. Cataloging allows a user without access to delete selected bib records that belong to another organization.
2. Find/Replace is slow. This was caused by how the implementation of operating on selected records had been handled in 1.5. Find/Replace is much faster in this release.
3. Cataloging would hang when performing a Retrieve from MARC Magician. This was caused by a pointer being incorrectly set in the read buffer.
4. When importing records using the Do Not Allow Duplicates flag in Step 3 of the Import, the duplicate records are not written to Duplicates.txt in the ImportLogs\Bibliographic folder.
5. Cataloging crashes when attempting to purge deleted patron who have open transactions. This occurred when Cataloging was in a view other than the patron view. Fixed by a revision to Cataloging.ini.
6. Find/Replace may cause Cataloging to crash under certain circumstances. The immediate cause has been fixed and Find/Replace finishes in the example data. If a similar unhandled condition arises in the future, the exception will be handled and Find/Replace will complete with the message 'At least 1 record has failed to update.'
7. Select Authority dialog may hang. This was caused by a very long data stream in a 1xx field that was not handled by the scan grid.
8. Find/Replace ignores the INACCESSIBLE\_FIELDS keys in Cataloging.ini. This allowed Find/Replace to run on fields, such as the barcode (852#p) and group (991#a) fields.
9. During propagation of authority data after an authority record has been saved, the subfields specified in AuthorityVerifier.ini REMOVEFROMMATCHING key are stripped from the bib fields.
10. In a scoped environment, field 995 (Organization) in the bib record is not updated on import when the option Do Not Allow Duplicates is selected in Step 3.

### OTHER

The 'Automatically generate barcode records' checkbox has been removed from the Import dialog.

### CIRCULATION ENHANCEMENTS

- 1.

Circulation now supports centralized scheduling. Circulation will propagate CircSchd.cfg to the server on first run, then reads the file from the server thereafter. The Circulation schedule file is differentiated according to site and organization. The file is written into the Registry/Common folder using the following format: Site-Organization-CircSchd.cfg.REG. This allows different sites and organizations to use different schedules, while maintaining the global aspect of the schedule.

2. Can now sort the columns in the Transaction display.
3. In a scoped environment, 'Renew All' and 'Return All' functions work only on transactions of the current organization (as defined by organization\_key in startup.ini). Selected transactions can always be renewed/returned, if the user has access.
4. When email notification is turned on, the sender is no longer cc'd. If cc'ing is desired, multiple cc recipients can be defined in Global.ini.REG (the cc email addresses must be comma-separated).
5. Circulation now handles multiple authority tables and multiple schemes (LC, Sears, etc.).

## BUG FIXES

1. The Group Hierarchy override flag was reversed in the original 1.6 release. The correct handling is as follows: 'override=on' means the group hierarchy will not be enforced; 'override=off' means the group hierarchy will be enforced.
2. When adding a date column in the transaction view, if the transaction type does not include the data, the column will be empty rather than reflect today's date.
3. When returning as lost or damaged, the fine based on 852#9 will not be created if the value of the 'generate' key in the Fine Transaction section of Global.ini.REG in M3 Server\Registry \COMMON is equal to 'no'.
4. Circulation ignores repeating Global Recall in case of 365-day loan period.
5. Expired reserves may not be removed from a patrons transactions. This can happen if a patron has both a reserve transaction and a hold, and the reserve is first in the list of transactions. The reserve transaction will not be expired the first time Circulation starts up after the reserve expiry date. Circulation now expires both transactions after the first start-up.
6. Circulation may login slowly. This is caused by a very large transaction table and the query Circ sends to expire holds, bookings, and reserves. In SP1, the query has been optimized for performance.
7. 'View Library transactions' returns transactions for all databases. In SP1, in order to get transactions for Equipment, it is necessary to switch the current database to Equipment.
8. Status allows backdoor to transactions when the scanned patron has a privilege block (overdue, fine, etc.).
9. Hold email message contains incorrect due date. The date is the original reserve due date, not the due date of the hold.
10. In a scoped environment, Circulation ignores organization membership when converting reserves to holds.

## INVENTORY ENHANCEMENTS

Inventory now supports very large numbers (e.g., value of missing items).

## BUG FIXES

1. Inventory crashes on clicking Invalid Items and No Barcodes tabs. Caused by icons being turned on for these lists. The hasIcons key has been hardcode to off for the Invalid Items list, and the issue affecting No Barcodes has been fixed.

2. During partial inventories, Inventory sometimes shows a discrepancy in the number of missing items on the Inventory Statistics page. This was caused by getting the total number of missing items for the range.
3. Second title column in the Misplaced list repeats the title from the first line of the No Barcode list successively. Caused by memory error.
4. Barcodes appended to Out-of-Sequence Items cause the count to increment incorrectly.
5. Inventory may crash while the lists are being populated, if there is no range and a large number of barcodes are absent from the inventory. Caused by a memory access violation.

## OPAC

### ENHANCEMENTS

Displaying the Browse dialog when the query returns 0 results is now configurable.

### BUG FIXES

1. In the case where the Scoping flag is off for the selected database, OPAC no longer sends queries with scope restrictions.
2. The massive OR query with scope restrictions has been eliminated. This issue was introduced by fixes in OPAC to recognize organizations default scope restrictions. If all organizations are selected, OPAC now sends the query with no restrictions.

## PICTURE MANAGER

### BUG FIXES

1. Picture Manager inserts empty 996#a when using bitmaps. Bitmaps may not be moved into the Pictures folder.
2. Picture Manager hangs on browsing a hierarchical folder structure that contains no files.

## RECORD EDITOR

### ENHANCEMENTS

Ability to insert multiple subfields.

### BUG FIXES

If the user overrides Authority Control and inserts a subfield into an authority-controlled field, the data in the first subfield of the next field is lost.

## SEARCH DIALOG

### BUG FIXES

1. In a scoped environment, if all organizations' default scope restriction was set to unselected, Search Dialog deselected all restrictions. Search Dialog now allows the Startup.ini's organization key to override the organization's default scope restriction. The organization in Startup.ini is always selected, regardless of the organization's default scope restriction.
2. Organizations that have a relationship only to a database of type 'online' no longer appear in the list of restrictions.

## WEB OPAC

### BUG FIXES

1. The Clear button does not work after the query is submitted.
2. In a multi-database environment, when more than one database is selected in Preferences, the first database's holding table is queried for all other databases. When you click the Other databases link, the wrong holdings will be attached to the bib records when you view details.
3. The login username and the site key are case-sensitive.
4. ILL requires the presence of organization records in the Configuration table.
5. Holding symbols will be handled as phrases. This prevents features, such as ILL, from failing because of spaces in the holding symbol.
6. Bib-level availability is incorrectly set. If one or a few holdings are on loan or missing, but the remaining holdings are available, the graphic in the Record List displays as red.
7. When Renew, Reserve, and ILL links are all active, they overlap in the multiple holdings display.
8. If you set a password on an installation that is different from the m3opac-setup password and modify that installation, when you click Save, you are prompted for the m3opac-setup password, followed by the installation password, followed again by the m3opac-setup password. If you follow the correct sequence, this means at least three password entries. If not, it will require four or more.
9. The Search button has been disabled for more than one click until results are displayed. This prevents multiple clicks from running the service into the ground.



## 1.6 SP1a

(Rev. 7 May 2004)

### Web OPAC

1. Items flagged as Missing incorrectly show as available. The following statuses are now handled as unavailable in Web OPAC: Missing, In Process, On Order, In Bindery.
2. If a title contains an apostrophe, when an ILL is processed, the email contains no body.
3. Multiple 856 fields are not handled. SP1a handles multiple 856 fields in Bibliographic, Brief Labeled, and Expanded Labeled formats (Web OPAC Deluxe handles multiple 856 fields in these formats plus the Catalog Card format).
4. French and Spanish translations are transposed in several places in ui.xml.
5. Spanish translation for 'Sign Out' was inappropriate.
6. After the service is restarted, datasets that contain a large number of sites may cause Web OPAC to take several minutes to display the Search page.
7. If Syndetics is enabled for display in Record Details, and there is a long URL in 856, the record display is shifted far to the right out of view.

### Circulation

The fine amount does not appear on the Fine email.

### CleanUp

The SP1 version of CleanUp failed to initialize the Record Editor.

### HistoryPurge

HistoryPurge does not work in a dual-server environment. HistoryPurge sends an empty string for the database ID when it queries the transaction table.

### M3 Server – ReportTool

An issue present in the SP1 version of M3 Server prevented diacritical characters being handled in ReportTool. The fix is in zservice.exe (ver. 3.3.0.10). All related executables have been rebuilt to keep versions in sync.

### M3 Server – Scoping

The equipment.REG attribute set file lacks attribute 9999 (Scoping). This causes scope restrictions to fail on the Equipment database. It is necessary to reindex the equipment table manually if an earlier SP1 had already been applied.

### Reports (Full Distribution Only)

*Item-List(ByTitleForSelectedPrefix).rpt* – This report is missing the 852#k field in the call number area.

*Label-Book&Spine(Item-ForSelectedDateOrRange)Gaylord-LSL03.rpt* – This report contained an unused date formula.

*Loan-List(ForSelectedDate).rpt* – This reports does not show renewals.

*Loan-List(ForSelectedLocation&Date).rpt* – This reports does not show renewals.

### Miscellaneous

- 1.





The following INIs have been updated for Spanish translation: FindReplace.ini, ImportFacility.ini, PictureManagerDlg.ini, M3 Inventory-español.ini, Bibliographic.ini (definition), LanguageSupport.ini, MediaTypeManager.cfg.

2. The following INIs have been updated to display help in the selected language (English, French, or Spanish): LanguageSupport.ini, Cataloging.ini, \*GroupEditor.ini, M3Opac.ini.
3. Help files have been revised for Circulation (English and Spanish) and Group Editor, Inventory, and OPAC (Spanish).

\*GroupEditor ignores this flag. Help is only available from the interface in English.



## 1.6 SP2

(Rev. 8 March 2005)

### Cataloging/M3 Server

- Authority verification was failing on headings containing diacritical characters.

### Circulation

- An issue where the screens would come up blank when overriding overdues has been addressed. This happened when the timeout was enabled, and increased in frequency as the timeout value decreased.

### ReportTool (ODBC driver/M3 Server)

- Diacritical characters now display correctly in reports.

### Web OPAC

- Searches using diacritical characters now return correct results.

### Miscellaneous

The Equipment definition file has been updated to support pictures (field 996) in Cataloging and Circulation.

### NOTES

1. M3 1.6 SP2 is a *required* update for all Authority Control and Syndetics users. SP2 (server) is also required for Oasis. This is the first release version of the server (3.3.0.14) to support UTF-8 for the handling of non-Latin characters.
2. The full distribution CDs will be remastered to include SP2.
3. SP2 does not apply to the Basic Edition (free download).



## 1.6 SP3

(July 2006)

1. Cataloging and Circulation no longer allow editing Unicode records. Unicode records open read-only.
2. Cataloging no longer verifies Unicode records during Authority Verification.
3. Authority Control now handles LC Subject Headings for Children's Literature as part of the LC scheme.
4. The end-of-field Punctuation issue in Authority Verification has been addressed. When editing Authority-controlled fields using Record Editor, the correct end-of-field punctuation is enforced.
5. An issue that caused Circulation to start up slowly when the log file was very large has been addressed.

### Server

HTTP handling has been modified as part of enhancement to the Mandarin SIF Agent that allow better interaction with the Zone Integration Server.

## 1.7 NF

(June 2007)

### Cataloging

1. Picture records and related image files are now removed when the corresponding bibliographic or patron records are purged.
2. Cataloging now includes a Bookbag. Records can be added to a bookbag and saved for future editing.

### Circulation

1. Users in Self-check/return mode can no longer enable the menu by selecting the language button.
2. In the Select Patron dialog (when a duplicate barcode is detected), diacritical characters now display correctly.
3. Sorting has been improved in Library Transactions mode.
4. A scriptable interface is now built into Circulation that allows for more complex barcode processing
5. Circulation now supports the copy-specific reserve. This is enabled by a new Group Editor option that sets the type of reserve that is used for all items in that group.
6. In Transit handling has been enhanced for scoped library systems. In Transit status can be set by using the new "Send to Library..." command.

### Find/Replace

When the result set is selected using Select All, then a few records are deselected, Find/Replace now continues processing on all records that remain selected.

### Record Editor

Two-digit country codes in 008 are no longer replaced by 'xx' when the field is viewed in the Fixed Field editor.

### ReportTool

1. Improved stability.
2. Improved Memory Management.
3. Numerous system crash scenarios have been resolved.
4. Improved creation of temporary work files on network drives.
5. Addressed issues in 2-pass formula field processing.
6. Addressed issues in "Formula referencing another Formula" calculations.
7. Improved output when printing a report to HTML.
8. Improved output when printing a report to RTF.
9. There is now an Undo/Redo feature.
10. SubDetail with Frames: Multiple report objects, such as database fields, can now be manipulated as if they were a single object.
11. Conditional Color Formatting: Font attributes, such as color, can now be changed based on the contents of a database or formula field.
12. Added ability email a report in HTML format.

## 1.7 SP1

(April 2008)

### Circulation

1. Check Holdings for Reserves feature has been corrected. This feature allows creating holds for all items that are newly added and available, where all pre-existing holdings were on loan and reserved.
2. If the default loan period extends beyond a global recall date, the global recall date is always used as the due date, even if there is a session-based due date that is sooner than the recall date.
3. When you search for an item and click the barcode in the results list, the item loads in the item pane, but the transaction does not process.
4. On Windows Vista, if you search using Search Dialog, when you select the item (or patron) to load into Circulation, the program crashes.
5. On Windows 2003 (including XP x64) or Windows Vista, Circulation may display the Initialization Failed dialog during start up.
6. Booking issues have been addressed. Adjusted loan overlaps first day of booking; first-created, not first-up booking removed by loan override; more than one booking not handled when a loan overrides more than one booking. Various scenarios involving adjusting or overriding bookings when loaning items have been addressed.
7. If an overdue item is renewed during the Grace Period, the Overdue Item block message is no longer displayed.
8. When a Booking was canceled, Circulation would send out the Item Hold email.
9. Cancel override when doing batch processes (renewal) does not stop the transaction from processing on the first item that triggers the override.
10. When there are multiple reserves, skipping the patron with the hold and loaning the item to another patron causes the hold to be lost.
11. Related to 9 above, some holds may not appear under Item Transactions, but they do show up under Patron Transactions.

### Inventory

An issue involving multiple-core CPUs that could cause Inventory to crash has been addressed. (Previously released as an out-of-band update).



## 1.7 SP1a

### **Cataloging.**

A rare problem that could cause some imports to stop with a 'Fatal Error' has been addressed.

### **Circulation.**

1. Auto-import feature has been fixed.
2. An issue affecting basic barcode pre-processing has been addressed.

## 1.7 SP1b

(14 August 2009)

### **Circulation.**

1. An issue involving hourly bookings has been addressed. In the case where an item has two hourly bookings close together, if the first booking is converted to a loan that will overlap all, or part, of the second booking, there will now be an option to adjust the loan.
2. Temporary items created on-the-fly now loan properly.
3. An issue that prevented missing items being returned during Upload Transactions session has been addressed.

### **Configuration Editor.**

Configuration editor has been updated to handle installation and validation of the option Ratings table.

### **OPAC.**

OPAC now supports a DVD icon. In the M3 OPAC, the DVD icon will show if 007/00 = 'v' and 007/01 = 'd'. The 'd' in position 1 indicates a Videodisc. Due to a limitation in M3 OPAC's Media Type manager, the rule is slightly different from that originally implemented in Oasis. Oasis 1.1.1 has been updated to support both rules. The Template supplied in M3 has been updated to handle both rules.

### **Record Definition Files.**

1. Record definition files have been updated to support field 490 (Series Statement).
2. A new definition file for Ratings table has been included.

## 1.7 SP1c (Nov. 2009)

### Cataloging

Cataloging now purges records much faster. There was an issue introduced in the 1.7 release that caused Cataloging to make unnecessary connections to the Picture table during the purge operation.

### Circulation

1. Equipment Title in the Transactions list has been corrected to display from 245#a on the equipment record.
2. Patrons could not loan more than one item belonging to a special reserve group.

### Utilities

#### CleanUp

1. Better window behavior when another window is opened on top of the CleanUp window.
2. The 005 field is updated when a Bibliographic or Holding record is marked for deletion.
3. When doing "Find Bibs without Holdings" any Bibliographic records that were found but had an open transaction are not automatically deleted or purged now. The Bibliographic ISN's with open transactions will remain on the list and the user has the choice to proceed with the delete or purge or to not proceed and analyze the problem.
4. When doing "Find Holdings without Bibs" any Holding records that were found but had an open transaction are not automatically deleted or purged now. The Holding ISN's open transactions will remain on the list and the user has the choice to proceed with the delete or purge or to not proceed and analyze the problem.
5. When deleting/purging by barcode the delete/purge would still occur even if there was an open transaction on either the Holding or Bibliographic record.
6. When purging by barcode the bib would get purged if all of the holdings were marked for deletion leaving the marked holdings without a bib.

### TableRepair

1. A minimize button has been added to TableRepair.
2. A new check box has been added to the "Find Detached Barcode Records" portion of TableRepair, which allows the program to create a new barcode record for each patron and holding that does not already have a corresponding barcode record. A brief summary of the number of patron and holding barcode records created is displayed after the Find Detached Barcode Records processing is finished.
3. When running "Find Detached Barcode Records", if a barcode record is deleted but the corresponding patron or holding record is not deleted, TableRepair will detect that situation and undelete the barcode record.
4. TableRepair would sometimes stop updating the window after another window was opened. This would result in TableRepair showing as "Not Responding" in Task Manager, even though the program was still functioning and would eventually finish normally. This problem has been corrected.
5. TableRepair no longer erroneously deletes user created fines when doing the "Find Open and Detached Transaction Records" portion of the program.





## 1.7 SP2

(March 2011)

### All modules

Support for AES 256-bit strong encryption when saving user passwords.

### Cataloging

An issue that caused field 995 to be incorrectly removed when the last holding of a particular organization was purged (and there were still holdings from other organizations) has been resolved.

### Circulation

1. Support for SMTP authentication has been implemented. It is now possible to send email notifications through an SMTP server using authentication (username/password).
2. Circulation supports a user-configurable prompt for patrons that are up to 60 days before card expiration.
3. Self Check mode has been enhanced to block patrons with greater than a user-defined value of accrued fines and/or number of overdue items.
4. Circulation supports E-book loans. E-book loans expire after the loan period without overdue status or fine creation.

### Group Editor

Group Editor has a new E-book designation for groups. Loan transactions on items in a group that is flagged as an E-book group will expire after the loan period.

### Server

A new version of the M3 Server is available. This is a modernized version of the server, and has a new, more flexible interface that works on Windows 2008. The server performance scales with the number of processing cores. We have tested on a dual-socket quad Xeon environment, and established a four-fold increase in performance when compared with the prior version of the server on the same hardware.



## 1.7 SP3 (July 2011)

### **Cataloging.**

1. Support for MARC Magician Professional 2011. M3 1.7 SP3 no longer supports older versions of MARC Magician. Users who upgrade to MARC Magician Professional 2011 must also upgrade to Mandarin M3 1.7 SP3.
2. This release includes a new template for cataloging ebooks, an updated bibliographic definition file, and in the full installer, a number of templates have been updated to remove field 440 in place of field 490.

### **Circulation.**

1. Circulation now optionally allows patrons with a total fine value greater than \$XX, or a total number of overdues greater than X, to be automatically suspended. The fines/overdues cannot be overridden until the value of fines or number of overdues is below the defined threshold. In Global.ini:

[Suspend Transaction]

enable=on

Fines total more than=10

Overdues more than=0

2. Issues with how In-Transit items behave while moving between different libraries in a scoped environment have been addressed.

### **ReportTool.**

ReportTool has been updated to address Windows 7 compatibility issues.



## 1.7 SP4c (May 2012)

### Fixes:

**Windows 7 crashes affecting Cataloging and Inventory.**

### Circulation.

1. If there is a hold and a reserve on an item, and the hold expires, at that time that Circulation starts up and expires the hold, it does not present a message to the user to set the item aside for the patron whose reserve has just become the current hold. The reserve does become a hold, but the message is never displayed by Circulation.
2. When the date fields are used to specify a booking (instead of dragging a selection through the calendar), it is possible to overlap another booking, and you are not warned.
3. When loaning an item, if the loan period collides with a booking, the Adjust button no longer works properly. The Adjust button cancels the booking.

### Changes:

**\*FIPS 140. M3 now uses FIPS 140-compliant encryption.**

### Cataloging.

When importing duplicate patrons, the Group specified in Step 3 of the import is used at all times. If the patron already exists in the database with a different group membership, that membership will be updated according to the selection in Step 3.

### Special Considerations:

This is a major Service Pack, and all the applications have been rebuilt, with the sole exception of OPAC. Smart Heap is no longer used (except by OPAC). M3Client.dll version is now 3.5.0.1 (previous version 3.3.0.16). The setup prerequisites have been updated to include the Visual Studio 2010 Redistributable (32-bit). This will be installed automatically by the Setup program (Full or Update). The update continues to update all 1.6 to the latest, with the exception that support for Multiuser M3 installations has been removed from the update.



## 1.7 SP4d

This revision adds full support for all the RDA MARC fields defined at <http://www.loc.gov/marc/RDAinMARC29-9-12-11.html>

### **Circulation.**

1. It is now possible to Select All transactions to improve batch processing on large numbers of transactions.
2. Improved speed of returning significantly overdue hourly item.

### **Cataloging.**

Corrected problem with Series Authority record creation. Record was created with 'b' in position 16 of 008, indicating that it was not appropriate as a Series added entry.



## 1.7 SP4e

XP login/change password issue fixed.



## 1.7 SP5b

### M3 Cataloging:

# adds automatic handling for Lexile 997 field when creating, editing, or importing records.

### M3 Circulation:

# The Calendar issues in M3 Circulation and the hourly fine calculation issue have also been addressed.



## 1.7 SP5c

### M3 Circulation:

1. In-transit convert reserve to hold loop issue has been addressed.
2. Added the hold pick-up library name and symbol to the email message.



## 1.7 SP5e

M3 Circulation.

1. School libraries must also upgrade to M3 1.7 SP5e in order to populate the Grade, Homeroom and Teacher columns in Library Transactions
2. Addresses an issue where the 993 field would be added when loading uncirculated patrons or items.

Includes the new M3 LaunchPad in place of the M3 desktop folder.





## 1.7 SP5g (Nov. 2013)

### **Catalog.**

1. Support Accelerated Reader.
2. Support Fountas & Pinnell.

### **Circulation.**

1. Support Accelerated Reader range field 998.
2. Support Fountas & Pinnell range field 999.
3. Support Lexile range field 997.
4. Added new "Due time is opening time" option in the Schedule.

### **Import.**

1. Support Accelerated Reader range field 998.
2. Support Fountas & Pinnell range field 999.

### **Lexile Migration Utility.**

1. Support for Accelerated Reader added.
2. Support for Fountas & Pinnell added.

### **Record Editor.**

1. Support Accelerated Reader range field 998.
2. Support Fountas & Pinnell range field 998.