Mandarin M3 Tutorial™

How to use Mandarin M3
2014

Last Update: 05/30/2014

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Introduction

Thank you for your interest in the Mandarin M3 Library Automation System. We have prepared this tutorial to give you a tour of M3.

After you have imported bibliographic and patron records into M3, you can use this guide to familiarize yourself with M3, to conduct training, etc. This guide is not intended to replace our Users Guide as it only briefly touches on many of M3's capabilities.

If you prefer to use Mandarin's sample record database instead of importing your own records, we offer a version of the M3 Server that includes sample patrons and bibliographic items. This version of M3 Server is available through the same link as the free M3 download on the Mandarin Web site.

***Note**: ReportTool is available This tutorial will walk you through all M3 modules (except ReportTool):*

- Windows OPAC (Online Public Access Catalog)
- Circulation
- Cataloging
- Group Editor
- Inventory

In many cases, there are several ways to perform a function or command. For this tutorial, we have generally chosen to present just one of the options

Windows OPAC

OVERVIEW

***Note**: This tutorial may not explain all features available in the OPAC.*

With the Windows-based OPAC module, you can:

- Conduct Standard, Enhanced, and Visual Catalog searches of your library’s holdings
- Select different interface languages
- Determine item availability and location
- Work with search results in brief and expanded record formats
- View book cover images
- View and link to “See” and “See also” cross-references with the optional Authority Control module
- Print records or save records to file
- Add records to the Bookbag; print or save records in the Bookbag
- Use Shelf Browse to locate records
- Review your search session history and return to prior searches
- Allow patrons to view their transaction history and personal information with the My Account tab
- Enter or scan barcodes into the Bookbag to create a list of items
- Use the Bulletin Board to deliver information to patrons
- Customize the appearance of the OPAC with your library name
- Customize the Visual Catalog interface

STARTING THE OPAC

Open the Mandarin M3 folder on your desktop, then double-click the **OPAC** icon. This displays the main OPAC window (Figure 2.1) with Standard Search selected.

FIGURE 2.1

The header can be customized to display the name of your library or institution.

Language Options

Patrons can change the interface language of the OPAC at any time; this does not change the language of the information in the MARC records. Patrons may choose from English (default), French, Spanish, German, and Italian.

Click **Languages**. This displays the Languages dialog box with the list of language choices.

Bulletin Board Feature

The Bulletin Board feature links to a local HTML file or a Web page. Use this fea- ture to link to customized information, the library home page, or a page of public service announcements.

Click **Bulletin Board**. This displays a blank bulletin board.

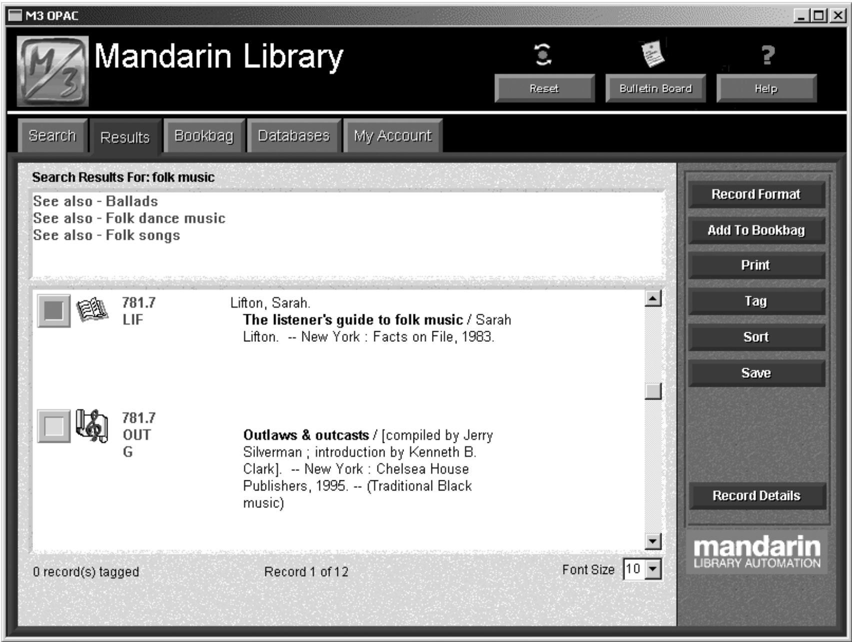
To configure your bulletin board, click the **Start** button, select **Programs**, select **Mandarin M3**, select **Utilities**, and then click **Setup Bulletin Board**. Follow the prompts.

STANDARD SEARCH

Tip: *To ensure a successful search, M3 automatically searches as follows:*

- *The Subject field searches all Subject and Summary fields of the MARC Record.*
- *The Title field searches Title, Added Title, Contents, and Notes fields of the MARC Record.*
- *The Author field searches Author, Added Author, and Responsibility Statement of the MARC Record.*

FIGURE 2.2



Standard Search allows patrons to easily search your catalog with the familiar **Subject**, **Title**, or **Author** fields. A patron can enter a search term in the keyword box or click **Browse** to view a list of all data currently contained in the corresponding record index. M3 can be configured to search more or fewer fields of the MARC record or to default to different record indexes at the librarian's discretion.

Search Example 1

In the **Subject** keyword box, type a keyword, then click **Search**. This displays the Search Results list (Figure 2.2).

- A media type icon displays next to the call number of each record. Media type icons in this results list include book, music, video, and Web site. Scroll through the search results list to view titles.
- When the mouse points to the media type icon, the icon type displays. (It may take a moment for the text to display.)
- A green box to the left of the record indicates that the item is avail- able; a red box indicates that the item is not available. Clicking this box tags the record for functions such as printing or adding to the Bookbag.

Tips:

- *Click Sort to sort by Author, Call Number, Call Number by Prefix, Copy- right Date, or Title.*
- *Active Web links can be enabled in the OPAC by entering a Web address and optional description in the bibliographic record.*

If you add the optional Authority Control module to your M3 system, "See" and "See also" cross-references will display in the **Cross-Reference** box (shown in Figure 2.2). You will be able to view records associated with a cross-reference by clicking the "See also" term.

Tip: *Use the truncation asterisk (*), wildcard ques- tion mark (?), and phrase quotation marks (" ") with your keywords.*

Examples:

- *Farm* finds farms, farmer, farmers, farming, and so on.*

• *Wom?n finds woman and women.*
• *"African American" only looks for the keywords when they appear next to each other. This eliminates false results in which the words are listed separately.*

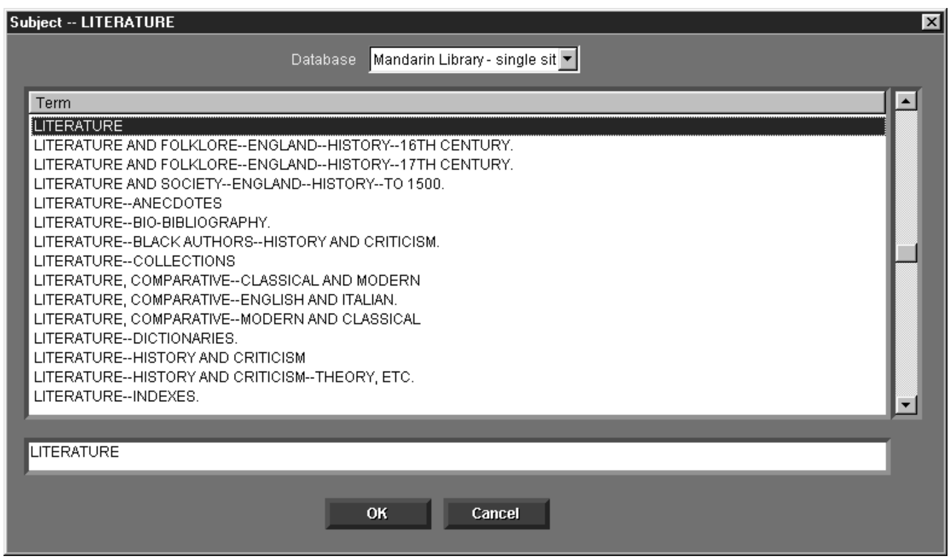
Search Example 2

- Click the **Search** tab, and then click **Clear**.
- In the **Title** keyword box, type a title, and then click **Search**. This displays the Search Results list.
- Select a record, then click **Record Details**. This displays detailed information about the selected title.

Search Example 3

- Click the **Search** tab, and then click **Clear**.
- In the **Subject** keyword box, type a keyword, and then click **Search**.
- Click the **Search** tab.
- Click the **Browse** button next to the **Subject** keyword box to display a list of subject headings (Figure 2.3). This list allows you to narrow your search to a specific area of interest.

FIGURE 2.3



- Select a subject heading in the list, and then click **OK**. The selected term appears in the **Subject** keyword box.
- Click **Search** to view the Search Results list for this subject.

Search Example 5

- Click the **Search** tab, and then click **Clear**.
- A patron can search the Author field by entering a name in any order: for example, **Steinbeck, John** or **John Steinbeck** or just **Steinbeck**.
- In the **Author** keyword box, type any form of an author's name and then click **Search**. This displays the Search Results list. By default, the records display in bibliographic record format.

***Tip*: *Record Format* allows patrons to choose the display format that best suits their needs. Standard options include Bibliographic, List, Full MARC, Catalog Card, Brief Labeled, Expanded Labeled, and Compressed List.*

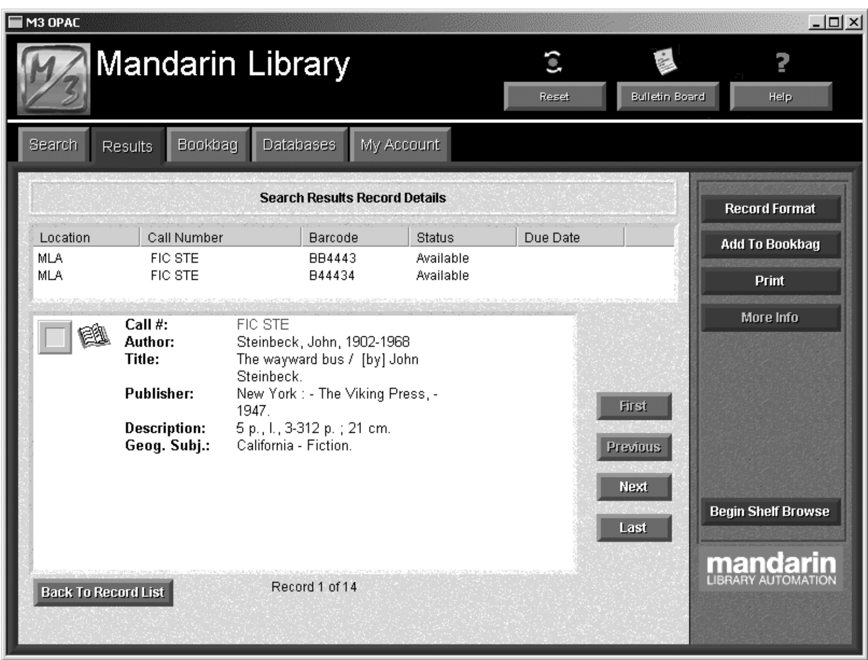
- To view other record format display options, click **Record Format**.

Select a different format to view, and then click **OK**.
OR
Click **Cancel** to close the Record Format dialog box.

- To view record details, select a record and then click **Record Details**. This

displays detailed information about the selected title and lists all copies owned by the library, as shown in Figure 2.4.

FIGURE 2.4



***Tip*: *Shelf Browse* allows you to quickly find records with a call number similar to that of a selected record. This feature creates a virtual electronic shelf and simulates a patron browsing the shelves and discovering books/items that may not be discovered any other way.*

- When finished reviewing the record details, click **Back To Record List**.

USING THE BOOKBAG

To create a reading list or bibliography, click the green/red check box to tag indi- vidual records in the Search Results list. (Green indicates the item is available; red indicates unavailable.)

- Tag at least three records.
- Click **Add to Bookbag**, and then click **Add Tagged**.
- Click the **Bookbag** tab to view the records you added.

From here, you can print or save the list. You can also add records to the list by scanning or entering barcodes, but this feature is not enabled by default; refer to the M3 Users Guide for instructions on enabling this feature.

ENHANCED SEARCH

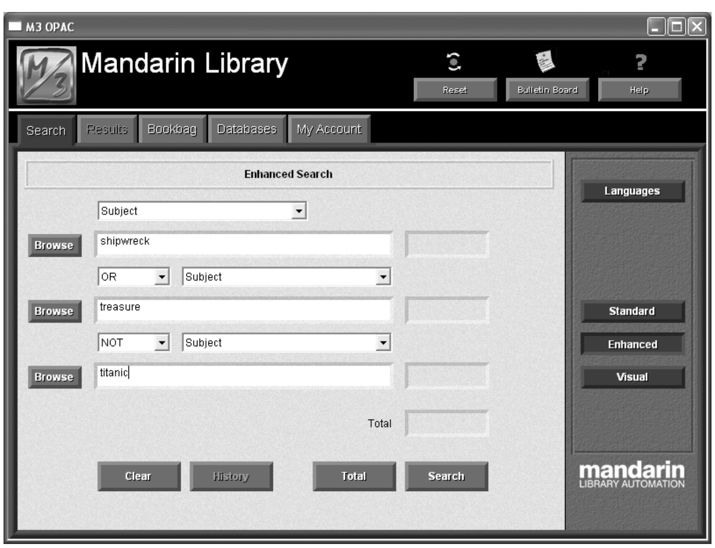
***Tip**: If a patron is not sure what index to search, the Enhanced Search index list includes the Anywhere option. This option searches for the entered term anywhere in the MARC record.*

Enhanced Search allows the user to type a search query into one or more of three keyword boxes. To select different record indexes or Boolean operators, click the corresponding arrow button, and then select from the list. (You can also use the Browse button to enter a search term, as explained in “Search Example 3” on page 2-4.)

Search Example

- Click the **Search** tab, and then click **Enhanced**. This displays the Enhanced Search window (Figure 2.5).
- In the first keyword box (under **Subject**), type **shipwreck**.
- In the Boolean operator list below, select **OR**.
- In the second index list, select **Subject**, then type **treasure** in the second keyword box.
- In the second Boolean operator list, select **NOT**.
- In the third index list, select **Subject**, then type **titanic** in the third keyword box (shown in Figure 2.5).

FIGURE 2.5



Tip: *The index lists can be customized to display different indexes.*
Tip: *Click History to view a list of your Enhanced Search queries during this session.*

- Click **Search**. If matches are found, the Search Results list displays. Your options are the same as those described in “Standard Search” beginning on page 2-3.

VISUAL CATALOG SEARCH

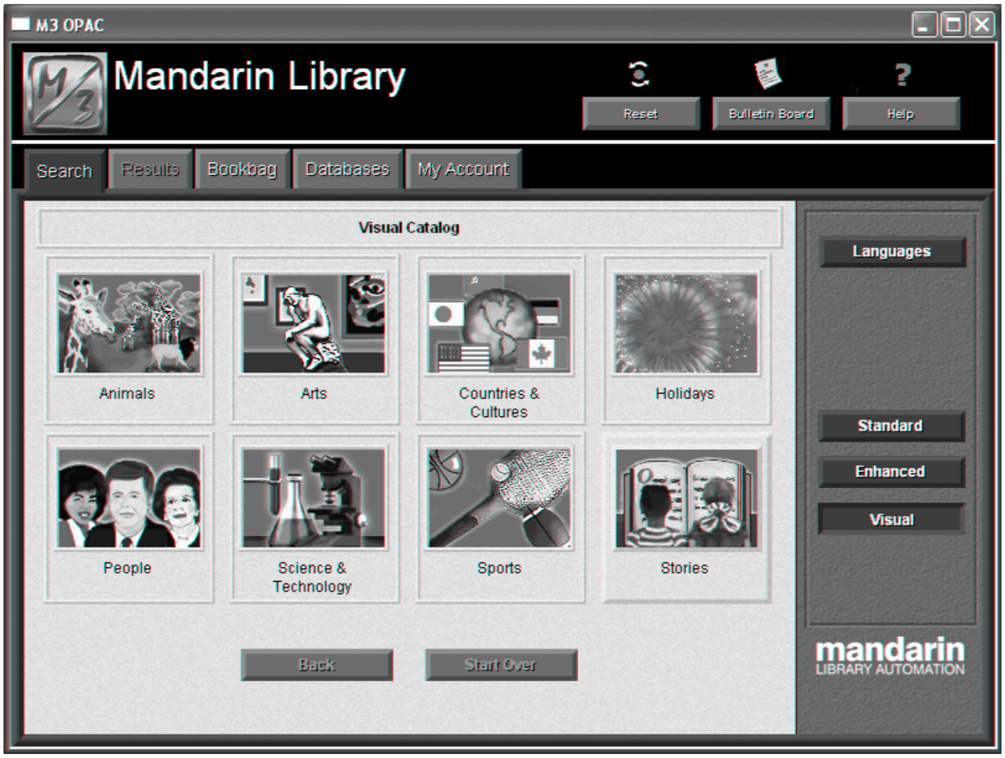
Visual Catalog Search combines library-definable queries that are organized into a hierarchy of topics and subtopics utilizing graphics and text. This easily configurable graphical interface offers the following benefits:

- Helps younger patrons quickly find library materials via visual cues, such as **Animals** or **Countries & Cultures**
- Creates databases for special groups, faculty, and students, such as “Home Schoolers” or “Rotary Club”
- Queries special collections, such as “New Books,” “e-Books,” or “Video Collection”
- Launches software applications, such as WordPad
- Launches CD-ROM applications, such as an encyclopedia
- Launches URLs (MARC field 856), such as “Featured Web Sites of the Week”

To perform a Visual Search:

- Click the **Search** tab, and then click **Visual**.
- Click each of the eight buttons featured in the Visual Catalog interface and tour on your own.

FIGURE 2.6



Tips:

- *M3 includes over 75 colorful graphics for use in the Visual Catalog. Additional graphics can be used from sources on the Internet or your own files.*
- *Topic, query, and launcher buttons look alike. What they do when selected differenti- ates them. A topic button opens a sub-menu. A query button returns search results. A launcher button opens an application or a Web page.*
- *Two navigation buttons function as follows: Back returns to the previous menu level; Start Over returns to the first menu level.*

DATABASES TAB

M3 can be configured to host the collections of a single library or the collections of many libraries either as a Classic Merged Union Catalog or Virtual Union Catalog. The system can be configured to search the local collection first and, if the desired record is not found, to then search other collections.

A patron can choose which collections to search by clicking the **Databases** tab. Click the **Databases** tab to review layout.

MY ACCOUNT TAB

This feature allows patrons to view their own open and closed transactions as well as their personal information on file with the library. This tab is not enabled by default; refer to the M3 Users Guide for instructions on enabling this feature.

- Click the **My Account** tab. This displays the My Login dialog box.
- In the **Patron Barcode** box, type a patron barcode that exists in the system. (If you are using Mandarin's sample record database, type **P2**.)
-

In the **Password** box, type the patron's password, then click **OK**. (If you are using Mandarin's sample record database, type **demo**.) This displays **Open Transactions** with any current, or open, transactions that the library has on file for the patron. The **Current** button is now active.

- Click **Historical** to view closed or historical transactions.

You can also view patron contact information and a patron photo (if there is one on file), but this feature is not enabled by default; refer to the M3 Users Guide for instructions on enabling this feature. After enabling, a **My Info** button will appear in this window.

Circulation

OVERVIEW

With the Circulation module, you can:

- Conduct loans, returns, reserves, holds, bookings, renewals, and fine pro- cessing
- Select different interface languages
- View patron and item status
- Add, edit, and search for patron and item records
- Add book cover images and patron photos to records so they can be viewed in Circulation and OPAC
- Temporarily change the system date
- Set up one or more circulation schedules
- Add and delete patron and item messages
- Attach, edit, and detach messages to patron and item records
- Enable self checkout, self return, and quick return
- Send e-mail notifications to patrons who owe a fine or have overdue items.
- Send automatic e-mail notifications to patrons when items they reserved are available
- Track in-house usage
- Run transactions reports
- Upload transactions from portable scanners
- Print receipts

STARTING CIRCULATION

- Open the Mandarin M3 folder on your desktop, then double-click the **Cir- culation** icon. This displays the Login dialog box.
- In the **Login Name** box, type **admin**.
- In the **Password** box, type **boca raton**, and then click **OK**. This displays the main Circulation window (Figure 3.1).

FIGURE 3.1

- ***Circulation menu bar*** – Contains File, Mode, Patron, Item, Tools, Settings, and Help menus.

- ***Circulation toolbar*** – Contains Loan (green), Return (red), Renew (blue), Reserve (yellow), and Status (purple) functions. Click each of these buttons to observe the color change with each function.

- ***Shortcut toolbar*** – Contains buttons for commonly-used functions, such as adding an item or patron, accessing circulation options and the schedule, and changing the interface language. Rest your mouse pointer on each toolbar button for a moment to view a tooltip that explains the function of each button. To turn the shortcut toolbar on or off for the current session, press CTRL+T.

- ***Barcode box*** – Allows you to type or scan a patron or item barcode, type a patron or author's last name, or type an item's title to access the matching record.

Images can be added to patron and bibliographic records. Patron and item images will display in the Circulation and OPAC modules.

CONDUCTING TRANSACTIONS

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

Loaning Items

There are three ways to access the loan function:

- On the toolbar, click **Loan**.
- On the **Mode** menu, click **Loan.**

- Press F5.

Tip: *If a patron has a fine, a warning appears. You can:*

- *Click Override to ignore the message and continue with the transaction.*
- *Click Payment to go to thePayment dialog box.*
- *Click Cancel to stop the transaction.*

Tip: *There are several methods for returning items:*

- ***Single Return** – Returning a single item from a patron.*
- ***Multiple Return** – Returning multiple items from one patron.*
- ***Return All** – Returning all items listed.*
- ***Quick Return** – Scanning in bookdrop returns without patrons present.*
- ***In-House Circulation Return** – Returning items left on tables and desks after in- library use.*

Loan Example

- On the toolbar, click **Loan**.
- In the **Barcode** box, type a barcode or patron name, and then press ENTER.
- This displays information for the patron in the Patron pane. The Patron pane can be customized to display any information that is stored in the patron record.
- In the **Barcode** box, type an item barcode, and then press ENTER to check out the first item.
- Type another barcode and press ENTER to check out a second item.

Returning Items

Returning a Single Item

- On the toolbar, click **Return**.
- In the **Barcode** box, type the barcode of the item being returned, and then press ENTER. This returns the item.

Returning Multiple Items for the Same Patron

- On the toolbar, click **Loan** to reset the screen.
- In the **Barcode** box, type the patron's barcode, and then press ENTER.
- In the Transactions pane, select the check boxes next to the items being returned.
- Right-click in the Transactions pane to access a transaction menu (shown in Figure 3.2).

FIGURE 3.2

- Click **Return**. This batch-returns all checked items.

***NOTE**: You can also return all loaned items by clicking Return All on the transaction menu; you do not need to select the check boxes next to the items.*

Attaching a Message to a Patron Record

- In the **Barcode** box, type a patron barcode, and then press ENTER.
- On the **Patron** menu, click **Messages**.

This displays a list of any messages in the system. You can select a message from the list or add a new message for this patron.

- Click **New**. Type a message, click **OK**, and then click **Accept**.
- In the **Block Type** list (click the arrow to view the list), select **Information** as the block type, and then click **Accept**.

This message will appear the next time this patron’s barcode is entered.

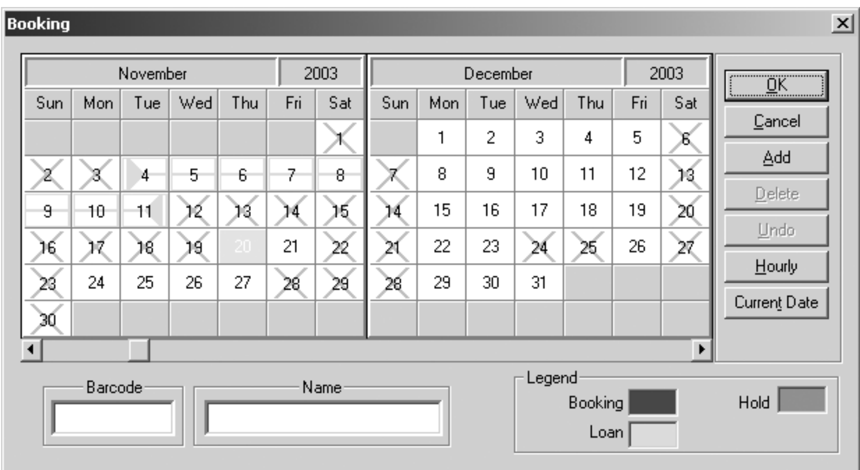
Message Block Types in M3	
Information block – You can bypass the message by clicking anywhere on the Circulation window (the least intrusive block type).	**Nudge block** – On first occurrence, you must order to proceed. Any time this message appe an information block.
Blocking block – You must select an option in order to proceed.	**Privilege block** – You must type a password t (the most intrusive block type).

Booking an Item

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

- On the toolbar, click **Loan**.
- In the **Barcode** box, type a patron's barcode, and then press ENTER.
- On the **Mode** menu, click **Booking**.
- In the **Barcode** box, type the barcode of an equipment item that exists in the system, and then press ENTER. This displays the Booking dialog box (Figure 3.3).

FIGURE 3.3



***Tip**: Click **Hourly** to display the current day's agenda. Click **Daily** to return the calendar to a two-month view.*

- Click the first day you want the item and drag the mouse to the last day you want the item. Click **Add**, and then click **OK**.

OR

Click **Hourly**, then click the first hour you want the item and drag the mouse to the last hour you want the item. Click **Add**, and then click **OK**.

- To exit Booking mode, click **Loan** on the toolbar.

Locating a Patron

- Clear the Circulation window by pressing ESC.
- In the **Barcode** box, type a patron's last name. This displays the Select Barcode box, which lists all matches for this name.
- Select a patron and click **OK**. This displays the patron information in the Patron pane of the Circulation window.

Locating and Loaning an Item

- With a patron displayed in the Patron pane, type an item's title in the **Barcode** box, and then press ENTER.

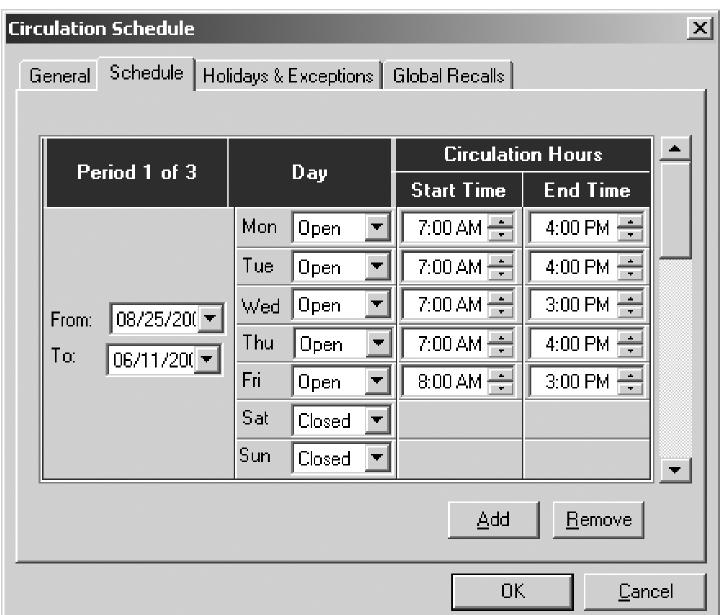
This displays the bib and holding information in the Item pane of the Circulation window and loans the item to the patron.

Setting Up the Library Calendar

- On the **Tools** menu, click **Schedule**. This displays the Circulation Schedule dialog box.
- Click each tab and review the contents.

  - **General tab** – Establishes loan period rules.
  - **Schedule tab** – (Shown in Figure 3.4) Establishes the calendar period and the library's opening and closing hour for each day of the week. Create multiple calendar periods to apply to different times of the year.
  - **Holidays & Exceptions tab** – Allows you to eliminate or add irregular dates. Identify days when library is closed because of holidays, and so on.
  - **Global Recalls tab** – Allows you to specify the date when all items have to be back in the library.

FIGURE 3.4



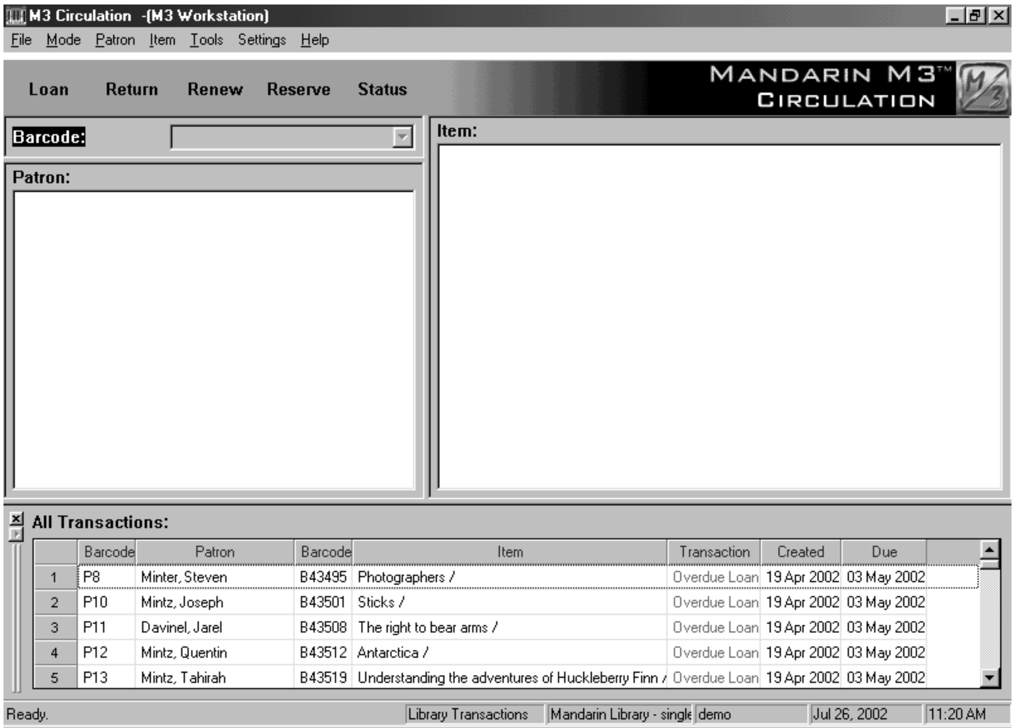
- When finished, click **Cancel** to close this dialog box.

Transaction Report Utility

M3 provides basic transaction reports to monitor your library status and activity. On the **Mode** menu, click **Library Transactions**.

In Figure 3.5, notice the **All Transactions** header in the Transactions pane.

FIGURE 3.5



***Tip**: To resize the bottom pane to allow for easier viewing, drag “up” the bar at the top of the Transactions pane.*

- Right-click in the Transactions pane to open a shortcut menu with a list of report choices.
- Click **Select Transactions**. This displays the Select Transactions dialog box.
- Under **Transaction Type**, click **Overdue Loans.**
- Under **Overdue Loans**, click the second option and type 30 in the days or more box.
- Click **OK**.

Notice the header in the Transactions pane has changed.

Cataloging

OVERVIEW

With the Cataloging module, you can:

- Add, edit, delete, and search for MARC records
- Use the find and replace utility to modify records
- Import and export records, including pictures

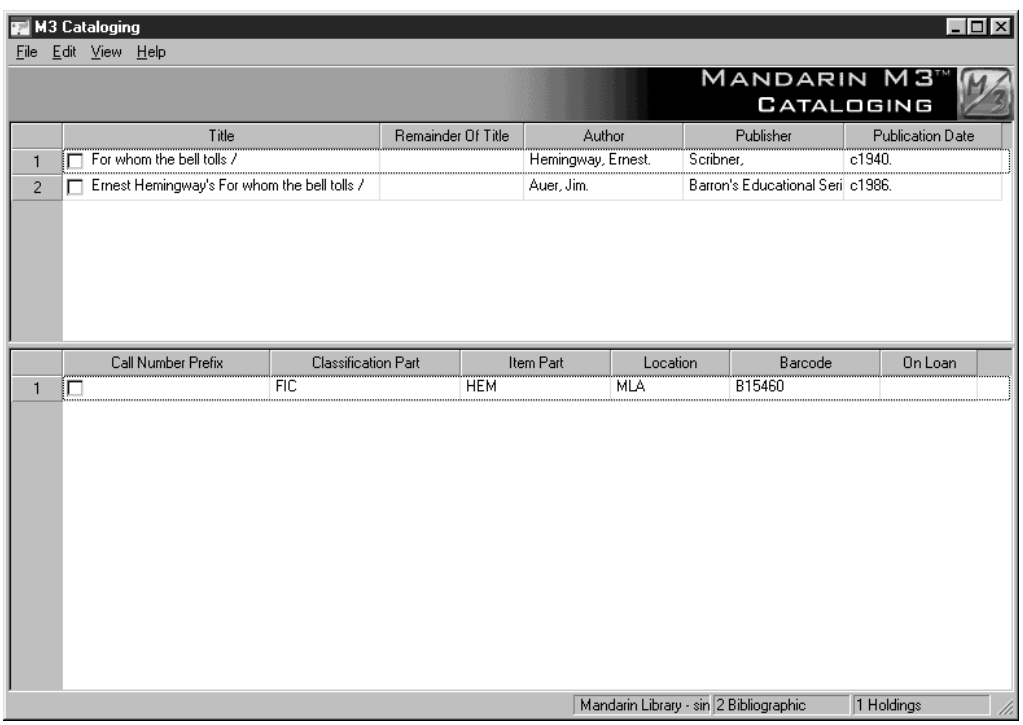
STARTING CATALOGING

- Open the Mandarin M3 folder on your desktop, then double-click the **Cataloging** icon. This displays the Login dialog box.
- In the **Login Name** box, type **admin**.
- In the **Password** box, type **boca raton**, and then click **OK**. This displays the main Cataloging window (Figure 4.1).

EDITING AN EXISTING RECORD

- On the **Edit** menu, click **Search**. This displays the Search dialog box.
- In the **Search For** list, select **Bibliographic**.
- In the first index list, change **Subject** to **Title**.
- In the first keyword box, type the title of an item that exists in your system, and then click **Search**. This updates the main Cataloging window with the records matching your search (Figure 4.1).

FIGURE 4.1

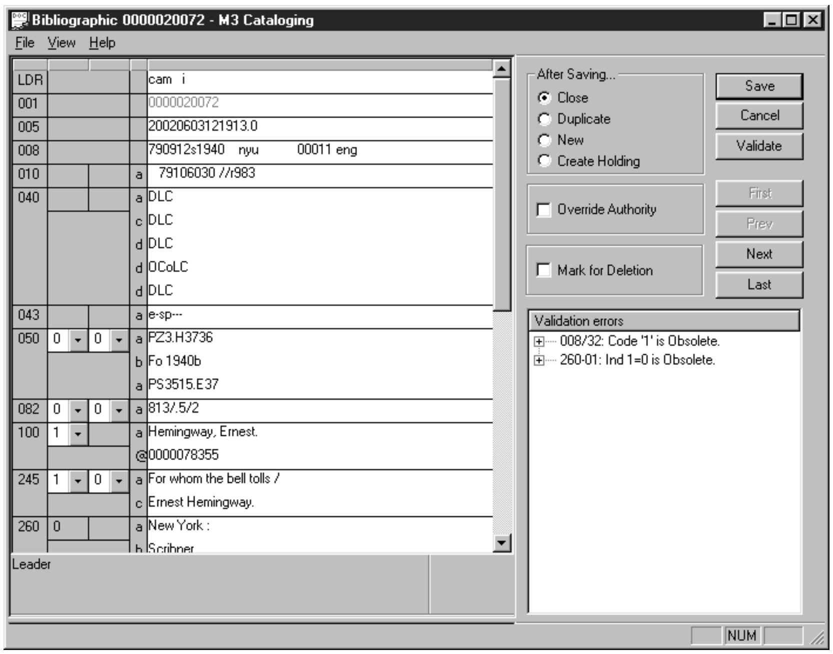


Tips:

• *You can sort information by any field in the pane by clicking the field's column heading.*
• *The Holding records pane displays all copies linked to the bibliographic record selected in the upper pane.*

- Double-click the first bibliographic record in the Bibliographic records pane. This displays the Bibliographic-Cataloging window with the selected record in full MARC format (Figure 4.2). The record can now be edited.

FIGURE 4.2



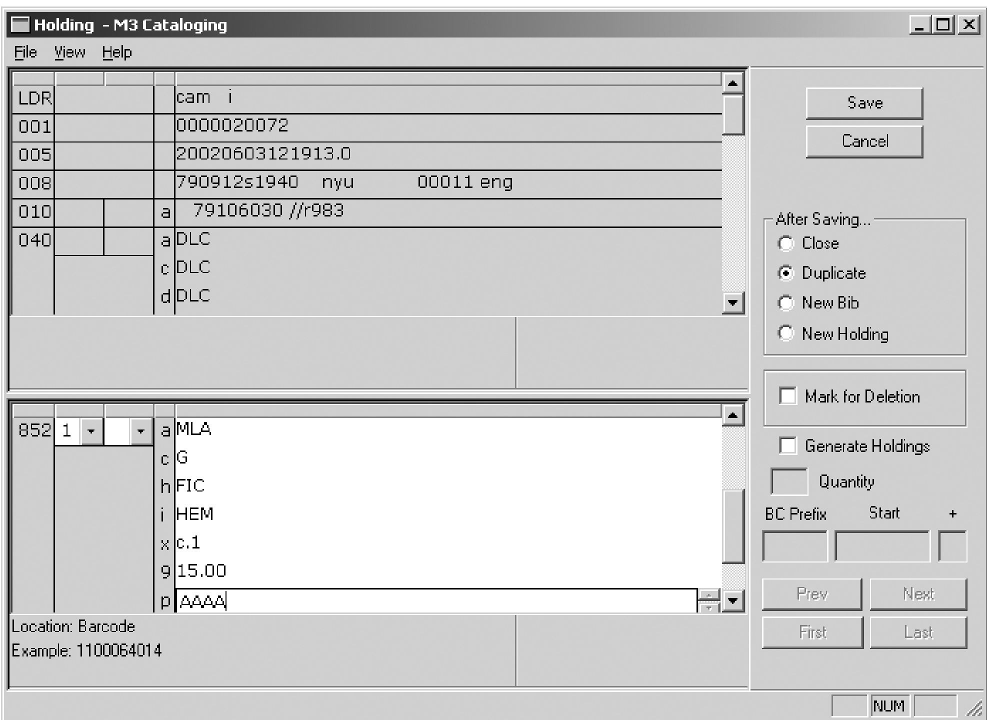
***Tip**: Once you have clicked a MARC field to activate the record pane, you can go to the end of a record by pressing CTRL+END. You can also go to the beginning of a record by pressing CTRL+HOME.*

- Right-click any field or subfield to access a context-sensitive menu for editing. In the menu, click **Toggle Prompts** to switch the display of the MARC numeric tags to text fields.
- The **Override Authority** check box is available if you have purchased the
- optional Authority Control module. With this module, a window automatically appears when you select a field containing a name, subject, or series heading. This window displays all headings in your authority file valid for use in the selected field. You select the desired heading, and the heading is then added to the bibliographic record and a link is created to the authority record. Authorized users can edit an authority controlled bibliographic field directly by selecting the **Override Authority** check box, then typing the new text in the field.
- Any errors or cataloging inconsistencies in the record appear in the **Validation errors** box on the right. To view information explaining each error, click the plus (**+**) sign to the left of the error.
- Click **Cancel** to close the Bibliographic-Cataloging window.

CREATING A DUPLICATE OF AN EXISTING HOLDING RECORD

- In the main Cataloging window, double-click the holding record in the Holding records pane (lower pane).
- Under **After saving**, click **Duplicate**. This creates a new holding record for an additional copy of this book.
- Click **Save**. This displays a new Holding-Cataloging window containing the duplicate holding record.
- In the lower pane, scroll to **852#p** (barcode) and type a barcode in the field at right (as shown in Figure 4.3).

FIGURE 4.3



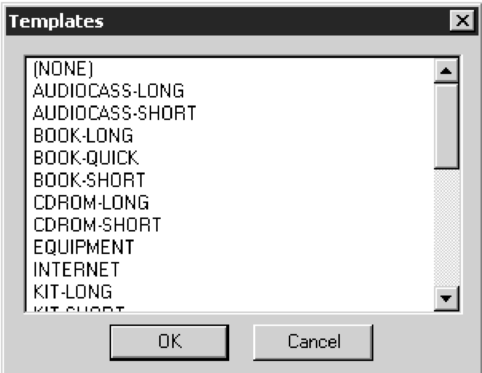
- Click **Save**.
- Click **Cancel** to close the Holding-Cataloging window.

The main Cataloging window displays the newly created holding record in the Holding records pane beneath the original holding record.

CREATING A NEW BIBLIOGRAPHIC RECORD

- On the **File** menu, select **New**, and then click **Bibliographic Record**. This displays the Templates window with the list of cataloging templates included with M3 (Figure 4.4). The templates can be used in their current form or customized.

FIGURE 4.4



- Select a template, then click **OK**. This displays the Bibliographic-Cataloging window.
- Type entries in the blank fields and subfields for the bibliographic record as desired.
- Click **Save**. This displays the Holding-Cataloging window with the newly created bibliographic record in the top pane and the associated holding record in the bottom pane.
- Type entries in the blank fields and subfields for the holding record.
- Click **Save**.

The bibliographic and holding records have been created. You can now search for this title in the OPAC.

IMPORTING RECORDS

M3 Cataloging imports bibliographic and patron records in MARC, delimited, and fixed-width formats, and authority records in MARC format. To import bibliographic records, for example, the user:

1. Selects the records, fields, and subfields to import
2. Specifies how fields are displayed
3. Checks for duplicate records
4. Generates holding records
5. Updates barcodes

The import feature is not fully documented in this tutorial; however, Figure 4.5 and Figure 4.6 show samples of the Step 1 and Step 2 windows in the import process.

FIGURE 4.5

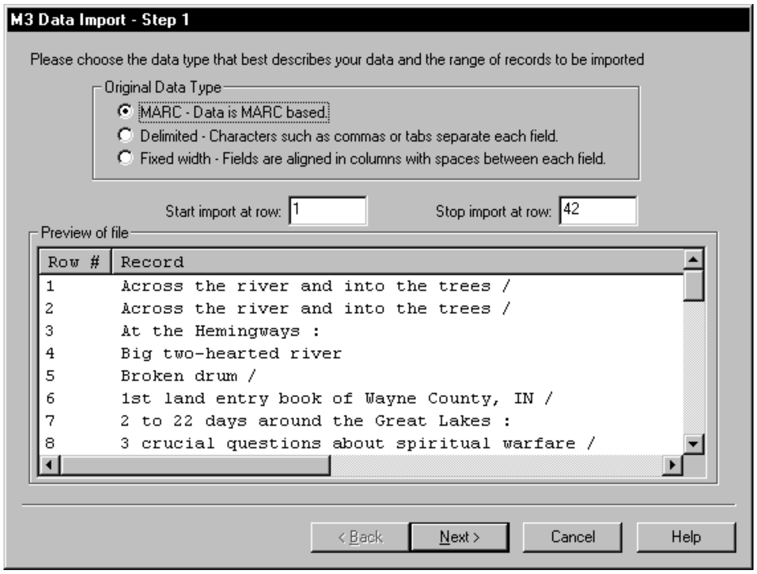
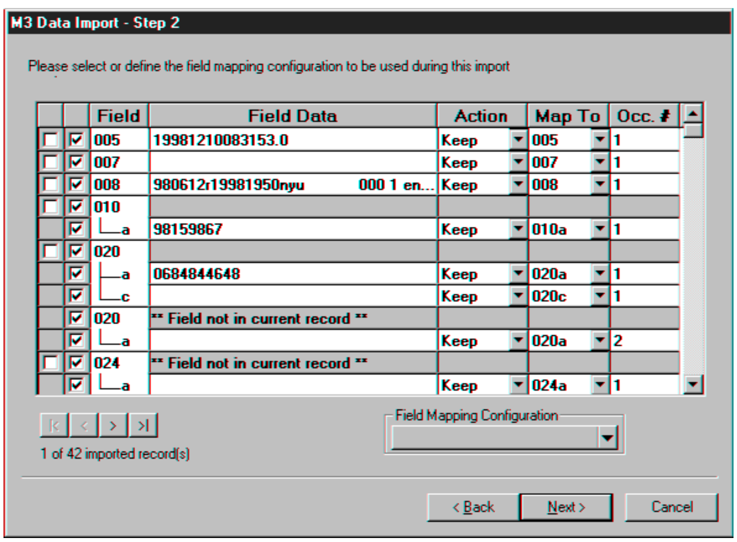

M3 Data Import - Step 1
Please choose the data type that best describes your data and the range of records to be imported
Original Data Type
MARC - Data is MARC based.
Delimited - Characters such as commas or tabs separate each field.
Fixed width - Fields are aligned in columns with spaces between each field.
Start import at row: 1
Stop import at row: 42
Preview of file
Row # Record
1 Across the river and into the trees /
2 Across the river and into the trees /
3 At the Hemingways :
4 Big two-hearted river
5 Broken drum /
6 1st land entry book of Wayne County, IN /
7 2 to 22 days around the Great Lakes :
8 3 crucial questions about spiritual warfare /
< Back
Next >
Cancel
Help

FIGURE 4.6


M3 Data Import - Step 2
Please select or define the field mapping configuration to be used during this import
Field Field Data Action Map To Occ. #
005 19981210083153.0 Keep 005 1
007 Keep 007 1
008 980612r19981950nyu 000 1 en... Keep 008 1
010
a 98159867 Keep 010a 1
020
a 0684844648 Keep 020a 1
c Keep 020c 1
020 ** Field not in current record **
a Keep 020a 2
024 ** Field not in current record **
a Keep 024a 1
Field Mapping Configuration
1 of 42 imported record(s)
< Back
Next >
Cancel

Group Editor

OVERVIEW

M3 Group Editor enables the librarian to create, customize, and modify the group permissions required to gain access to M3 functions. Using an elaborate, hierar- chical security scheme, librarians are able to assign levels of access for Cata- loging, Circulation, OPAC, and database maintenance features.

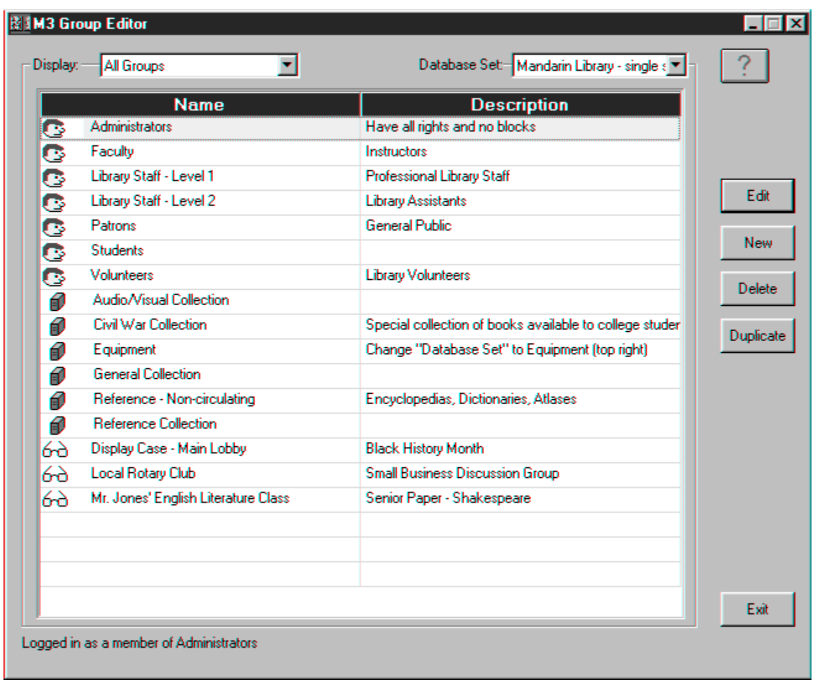
There are three types of groups: Patron, Item, and Special Reserve. When dis- playing a group listing, a group type icon appears to the left of each group:

- a head signifies a patron group
- a book signifies an item group
- eyeglasses signify a special reserve group

STARTING GROUP EDITOR

- Open the Mandarin M3 folder on your desktop, then double-click the **Group Editor** icon. This displays the Login dialog box.
- In the **Login Name** box, type **admin**.
- In the **Password** box, type **boca raton**, and then click **OK**. This displays the main Group Editor window (Figure 5.1).

FIGURE 5.1

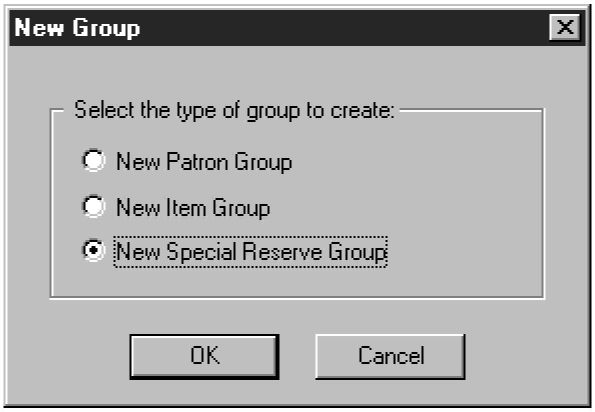


CREATING A NEW GROUP

For this example, we will create a new special reserve group.

- In the main Group Editor window, click **New**. This displays the New Group dialog box (Figure 5.2).

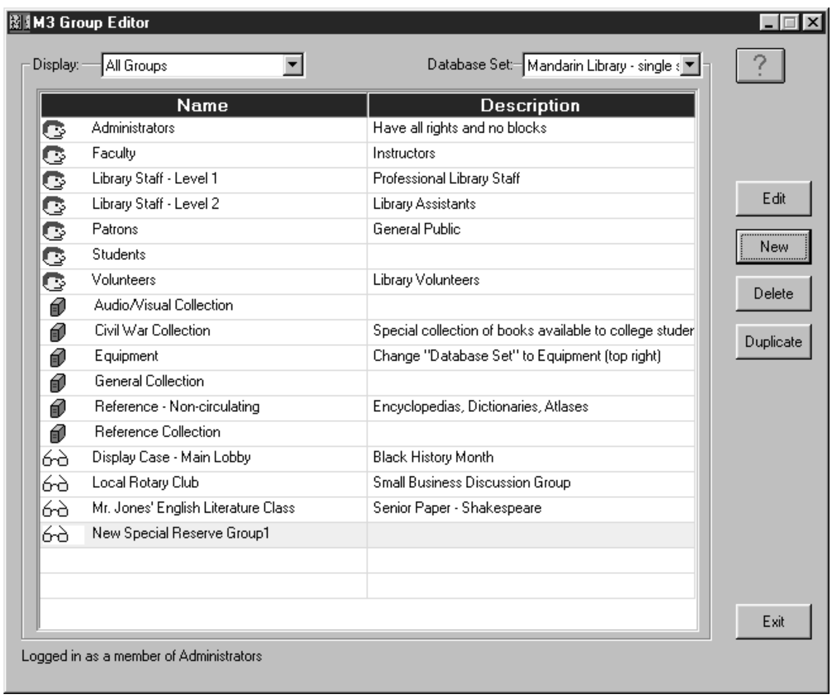
FIGURE 5.2



- Click **New Special Reserve Group**, and then click **OK**.

This places a **New Special Reserve Group** in the Group Editor window (Figure 5.3).

FIGURE 5.3



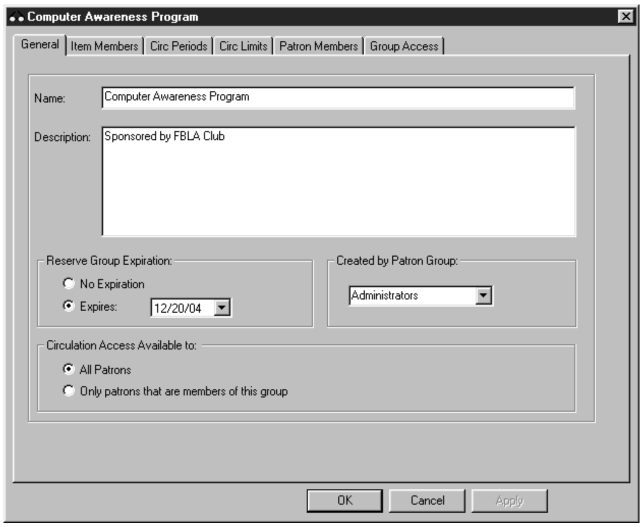
- Select the **New Special Reserve Group**, then click **Edit**.

This displays the Special Reserve Group window. Here, you can customize this group's patron privileges and item parameters.

- Click the **General** tab.

- In the **Name** box, type **Computer Awareness Program**.
- In the **Description** box, type **Sponsored by FBLA Club**.
- Under **Reserve Group Expiration**, click **Expires**, and then select a date.
- Under **Created by Patron Group**, leave the entry as **Administrators**.
- Under **Circulation Access Available to**, click **All Patrons**.

FIGURE 5.4



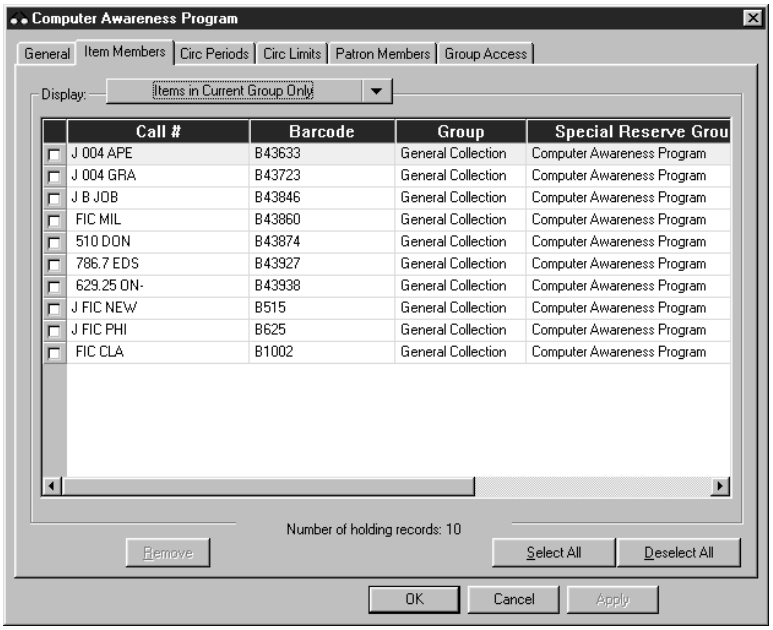
- Click the **Item Members** tab.
- A message appears indicating that there are no records found. Click **OK**.
- In the **Display** list (under the tab names), select **Search**.

This displays the Search dialog box. You can now add item members to the group just created by searching for items.

- In the first keyword box, type **computer***, and then click **Search**.
- Select the check box next to each item you want to add to the group, and then click **Add**.
- In the **Display** list, select **Items in Current Group Only**.

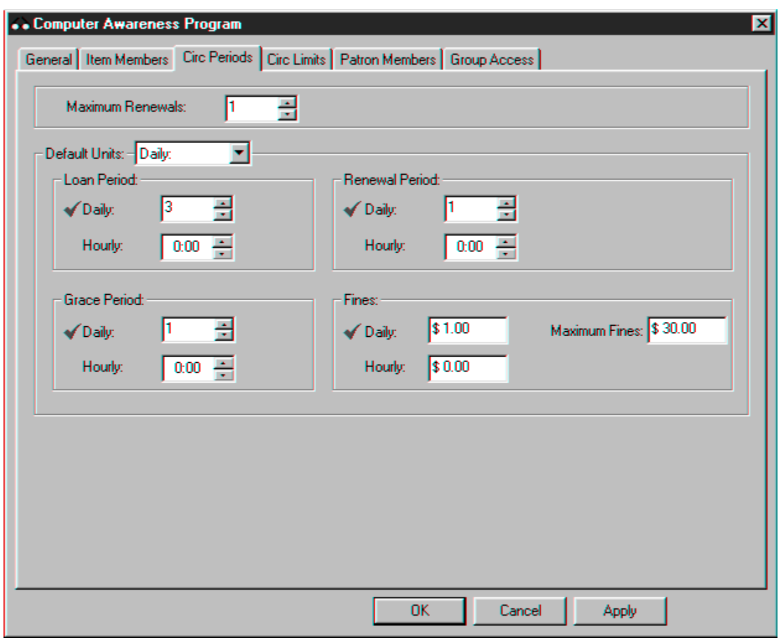
The list refreshes to display only the items you selected and added to the group (Figure 5.5).

FIGURE 5.5



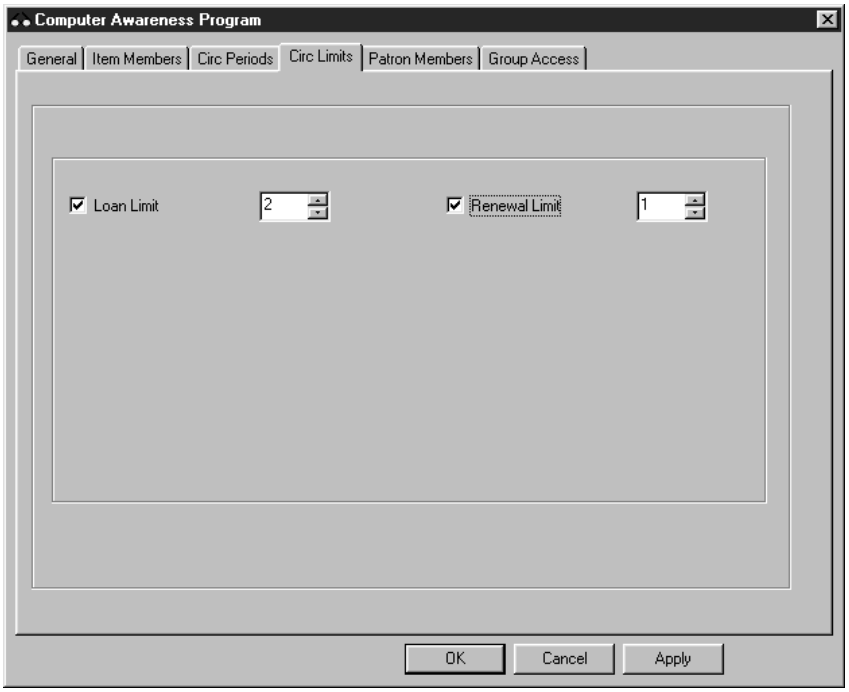
- Click the **Circ Periods** tab (Figure 5.6) and establish circulation time frames and fine amounts in the boxes provided. When finished, click **Apply**.

FIGURE 5.6



- Click the **Circ Limits** tab (Figure 5.7) and establish the circulation quantity limits. Select a limit type check box, then establish the limit in the corresponding box.

FIGURE 5.7



- When finished, click **Apply,** and then click **OK**. This displays the main Group Editor window with the new group listed.
- To review the Computer Awareness Program group and its attribute, select the group, and then click **Edit**.

VIEWING GROUP INFORMATION

Patron Groups

To review the privileges and parameters of a patron group:

- In the main Group Editor window, select a patron group. (If you don't have any patron groups, create one now before proceeding.)
- Click **Edit**. This displays the Patron Group window.
- Click each tab and review the contents.
- When finished, click **Cancel** to return to the main Group Editor window.

***Tip**: Use the Item Group Overrides tab to grant a patron group rights to over- ride specific circulation limits connected to item groups. For example, if the item group "General Collection" has a loan period of 14 days, the "Volunteers" patron group could be given a loan period of 21 days.*

***NOTE**: When the check box corresponding to a feature or limit is selected, the feature or limit is enabled. In this example, the patron group is comprised of Library Assistants. Therefore, you will notice that the members of this group have more privileges than general patrons/students and fewer privileges than the professional library staff.*

***Tip**: The Members tab lists items assigned to the item group. New items may be added or removed when necessary. Items assigned to this group adhere to the circulation parameters established in the **Circ Periods** tab.*

Item Groups

To review the parameters of an item group:

- In the main Group Editor window, select an item group. (If you don't have any item groups, create one now before proceeding.)
- Click **Edit**. This displays the Item Group window.
- Click each tab and review the contents.
- When finished, click **Cancel** to return to the main Group Editor window.

***NOTE**: When the check box corresponding to a feature or limit is selected, the feature or limit is enabled.*

Special Reserve Groups

To review the privileges and parameters of a special reserve group:

- In the main Group Editor window, select a special reserve group. (If you don't have any special reserve groups, create one now before pro- ceeding.).
- Click **Edit**. This displays the Special Reserve Group window.
- Click each tab and review the contents.
- When finished, click **Cancel** to return to the main Group Editor window.

***NOTE**: When the check box corresponding to a feature or limit is selected, the feature or limit is enabled. In this example, notice that the tabs Circ Periods, Circ Limits, and Patron Members do not display any information. The items in this special reserve group are being placed into a display case in the lobby of the library; therefore, the items will not circulate.*

Inventory

OVERVIEW

***Note**: This demonstration guide may not explain all features available in Inventory.*

With the Inventory module, you can:

- Conduct a full or partial inventory
- Enter additional barcodes after the barcode records have been uploaded
- Remove barcodes during the inventory process
- Print and save inventory results
- Export a barcode list of inventory results

Conducting an inventory with M3 requires a few basic steps:

1. Scan items to be inventoried
2. Upload the results into the Inventory module
3. Set range limits (partial inventory only)
4. Perform the “Do Inventory” procedure

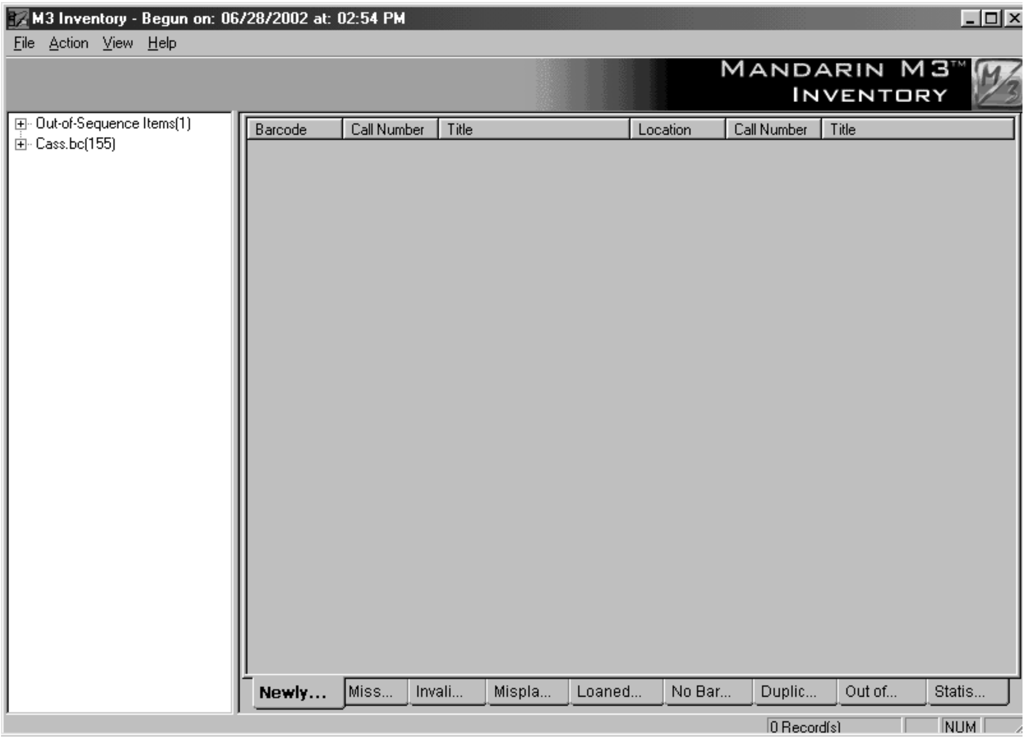
STARTING INVENTORY

- Open the Mandarin M3 folder on your desktop, then double-click the **Inven- tory** icon. This displays the Login dialog box.
- In the **Login Name** box, type **admin**.
- In the **Password** box, type **boca raton**, and then click **OK**. This displays the Select Inventory Session window.

CONDUCTING AN INVENTORY

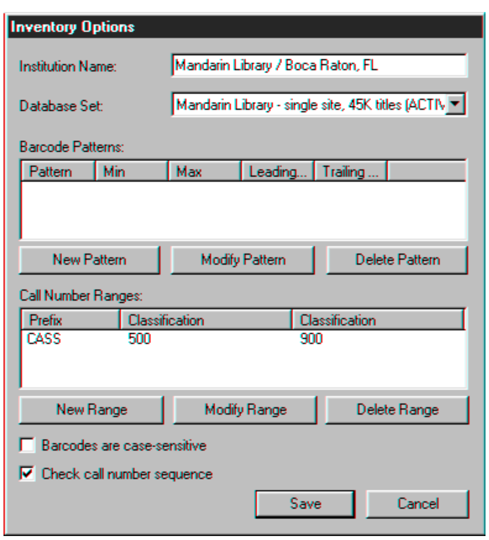
This basic example assumes that you have scanned and uploaded barcodes into M3, and then saved the barcode file. For instructions, refer to the M3 Users Guide. In the Select Inventory Session window, click **Create New Session**. This displays the main Inventory window (Figure 6.1).

FIGURE 6.1



- In the File menu, click **Add Barcode File**. Navigate to your saved barcode file and click **Open**.
- In the Barcode pane, click the plus (+) sign next to the barcode file name. This displays the list of barcodes in the file.
- To review Inventory set-up, click **Inventory Options** on the **Action** menu. This displays the Inventory Options window (Figure 6.2).

FIGURE 6.2

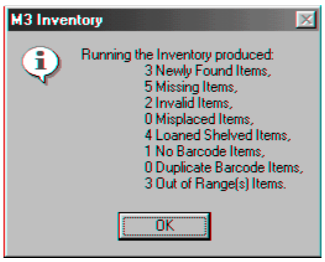


In this window, you can:

- Configure the Inventory module to recognize a specific pattern of characters, a certain barcode length, or both
- Indicate a partial inventory by entering the range of call numbers (classification parts) and selecting a call number prefix

- When finished in this window, click **Save**.
- On the **Action** menu, click **Do Inventory** to run the Inventory procedure. When finished, a dialog box displays with a summary of the inventory results (Figure 6.3).

FIGURE 6.3



- Click **OK** to close the dialog box and return to the main Inventory window.

M3 places the appropriate information in each of the nine tabs in the Inventory pane.

- **Newly Found** – Lists items present in this barcode upload, but previously flagged as missing.
- **Missing** – Lists all items missing from this barcode upload.
- **Invalid Barcodes** – Lists items that do not belong in the collection or have the wrong barcode length.
- **Misplaced** – Lists items that are in the wrong shelf position.
- **Loaned Shelved** – Lists items that have an availability status of loaned, but are actually on the shelf.
- **No Barcode** – Lists items that have no barcode on file in the catalog.
- **Duplicate Barcode** – Lists items that have duplicate barcodes.
- **Out of Range(s)** – Lists items that are not in the inventory call number range, but are in the barcode upload in shelflist order.
- **Statistics** – Displays a summary of the current inventory results, as well as statistics regarding this inventory.

Click each of the tabs in the Inventory pane to view the Inventory results. Now that all the results are compiled, the reports needed to reconcile the Inventory can be printed from within each tab by clicking **Print [List Type] List** on the **File** menu.

Report Tool

OVERVIEW

With the ReportTool module, you can:

- Create and run new reports
- Access and run preloaded reports
- Customize your library name on a preloaded report
- Print reports or download reports to diskette

The ReportTool module is a flexible and powerful Windows report generator. More than 900 library-related reports for school, public, academic, and special libraries are offered. You can run these preloaded reports in their current form, customize the preloaded reports, or create new reports.

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