



Mandarin M3™

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Getting Started

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

With M3:

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

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



Installing M3

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

- The minimum and recommended M3 hardware requirements
- How to install Mandarin M3 from the M3 CD
- How to start the M3 modules
- Password considerations
- System backup information

Attention:

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

Before you Install

System Requirements to Operate M3

M3 Client/Server System Requirements

	Minimum	Recommended
Server	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

Workstation	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

Installation Configuration Options

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

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

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

General Installation Steps



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

1. Install the M3 Server files. The server files can only be installed onto your server. The folder containing these files resides on the M3 CD.
2. Install the program files for the M3 core client modules (Circulation, OPAC, and so on). These client modules can be installed onto individual workstation hard disks (*Option I in the previous section*) or onto the server site (*Option II in the previous section*). The folder containing these program files resides on the M3 CD.

If you selected **Option II** in the previous step, run the Workstation Setup procedure at each workstation that requires access to the M3 core client modules. After installing the client modules, the Workstation Setup can be found in the M3 folder on the server (*the default path is C:\Program Files\Mandarin M3\Workstation Setup*).

Installing the M3 Server

Installation Preparation

Before you install, verify:

- You are logged on your system with full Administrator rights, at the server as well as the individual workstations.
- Everyone else is logged out of the M3 system during the installation procedure.
- You have quit all applications, including the M3 Server and client modules.

Installation Procedure

1. Insert the M3 CD into the CD-ROM drive. The installation menu should appear. If not, navigate to your CD-ROM drive (D: on most computers) and double-click **autorun.exe**.

2. On the installation menu, click **Install M3 Database Server**.

Note: If you already have a version of M3 installed, you will not be prompted to choose a language; the program will use the previously selected language.

3. In the Choose Setup Language dialog box, select the desired language and click **OK**. This determines the language of the M3 Server setup only; it does not affect the language of the records in your database.

4. In the Welcome dialog box, click Next to begin installation.

5. In the License Agreement dialog box, review the agreement and click **Yes** to accept and continue the installation. Or, click **No** to discontinue.

6. In the Choose Destination Location dialog box, either:

- Click **Next** to install M3 Server into the default folder location on your hard disk (C:\M3 Server).

OR

- Click **Browse** and navigate to the desired folder location. When the desired folder has been selected, click **OK**, and then click Next.

7. In the Start Copying Files dialog box, review the settings you have chosen. If you want to change any settings, click **Back**. If you are satisfied with the settings, click **Next**.

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

9. Proceed to the next section, "Installing the M3 Core Client Modules."

Installing the M3 Core Client Modules

The M3 core client modules can be installed at the server site or at the individual workstations that will use them. The procedure below applies to both situations.

Installation Preparation

Before you install, verify:

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

Installation Procedure

1. Insert the M3 CD into the CD-ROM drive. The installation menu should appear. If not, navigate to your CD-ROM drive (D: on most computers) and double-click **autorun.exe**.
2. On the installation menu, click Install M3 Client Modules.
3. In the Choose Setup Language dialog box, select the desired language and click OK. This determines the language of the setup and the language in which the M3 modules display; it does not affect the language of the records in your database.
4. In the Welcome dialog box, click Next to begin installation.
5. In the License Agreement dialog box, click Yes to accept and continue the installation. Or, click No to discontinue.
6. In the Library Type dialog box, select your library type.
 - If you select **School** and choose to install ReportTool in step 8, over 800 preloaded reports generally used by K-12 schools, public libraries, and universities are installed.
 - If you select **Public or Academic** and choose to install ReportTool in step 8, over 400 preloaded reports generally used by public libraries and universities are installed.
7. Click **Next**.
8. In the Setup Type dialog box, select the preferred installation type:
 - **Custom Install** – Allows you to specify which modules are to be installed at this site. Select this option if you are installing at the server site.



- **Full Install** – Automatically installs all M3 core client modules (Cataloging, Circulation, OPAC, Group Editor, Inventory, and ReportTool). It also installs the Configuration Editor, Barcode Labels, BEDSCAT, History Purge, and Picture Manager utilities.
- **OPAC Only** – Installs the OPAC module only.

9. Click **Next**.

10. In the Choose Destination Location dialog box, either:

- Click **Next** to install M3 into the default folder location on your hard disk (**C:\Program Files\Mandarin M3**).

OR

- Click **Browse**. Navigate to the desired folder location, click **OK**, and then click **Next**.

11. If you selected **Custom Install** in step 8, the Select Components dialog box displays. Clear any check box that corresponds to a module you do not want to install at this workstation. Your options are:

- **Circulation** – Installs the Circulation module.
- **Cataloging** – Installs the Cataloging module.
- **OPAC** – Installs the OPAC module.
- **Inventory** – Installs the Inventory module.
- **ReportTool** – Installs the ReportTool module.
- **Utilities** – Installs the Configuration Editor, Barcode Labels, BEDSCAT, History Purge, and Picture Manager utilities.

***NOTE:** To limit the utilities, select Utilities and click Change. Clear the check box by any utility you do not want to install, then click Continue.*

- **Group Editor** – Installs the Group Editor module.
- **Workstation Setup** – Installs the Workstation Setup program on the server so client machines can start the program and use it to install required components. Select this option only if you are installing the program modules at the server site. This option is not appropriate if installing the program modules at individual workstations (as in Option I).

12. Click **Next**.

13. In the Select M3 Data Location dialog box, click **Browse** and select the folder where your M3 Server data is installed. Click **OK**, then click **Next**.

14. The Bulletin Board Configuration dialog box displays.

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

OR

- If you do not want to configure the Bulletin Board now, click **Skip**.

15. In the Start Copying Files dialog box, review the settings you have chosen. If you want to change any settings, click **Back**; otherwise, click **Next**.

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

***NOTE:** If you installed the M3 core client modules at the server site, you need to run the setup procedure at each workstation. Proceed to the following section, “Setup Procedure at Workstations.”*

Setup Procedure at Workstations

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

Installation Procedure

1. At the individual workstation, locate the M3 folder on the server where the M3 applications reside.
2. In the Workstation Setup folder, double-click **Setup.exe**.
3. In the Choose Setup Language dialog box, select the desired language and click **OK**. This determines the language of the workstation setup only; it does not affect the language of the interface or your database.
4. In the Welcome dialog box, click **Next** to begin installation.
5. In the License Agreement dialog box, click **Yes** to accept and continue the installation. Or, click **No** to discontinue.
6. In the Choose Destination Location dialog box, either:
 - Click **Next** to install M3 into the default folder location on your hard disk (**C:\Program Files\Mandarin M3**).
 - OR**
 - Click **Browse**. Navigate to the desired folder location, click **OK**, and then click **Next**.
7. In the Select M3 Data Location dialog box, click **Browse** and select the folder where your M3 Server data is installed. Click **OK**, then click **Next**.
8. In the Start Copying Files dialog box, review the settings you have chosen. If you want to change any settings, click **Back**. If you are satisfied with the settings, click **Next**.
9. In the Setup Complete dialog box, click **Finish**. If you are prompted to restart your computer, you can do so now or later.
10. Repeat this process at each workstation that will be used to access M3, and create desktop shortcuts for the modules the workstation will be using.



Starting M3

To start the individual modules of M3, either:

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

OR

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

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



Passwords

Password Setup

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

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

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

Modifying Patron Barcodes and Passwords

Patron barcodes, as well as patron passwords, reside in patron records. You can access and modify patron barcodes and passwords in the M3 Cataloging module.

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

M3 System Backup Information

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

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

Backup Recommendations

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

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

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

Backup Methods

Two recommended backup methods are as follows:

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

Using Group Editor

You must either set up a hierarchy of patron groups based on the permissions required for patrons in each group, or you must disable the hierarchy in the Global.ini.REG file.

About Group Editor

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

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

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

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

Creating Group Hierarchy

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

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

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

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

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

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

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

Starting Group editor

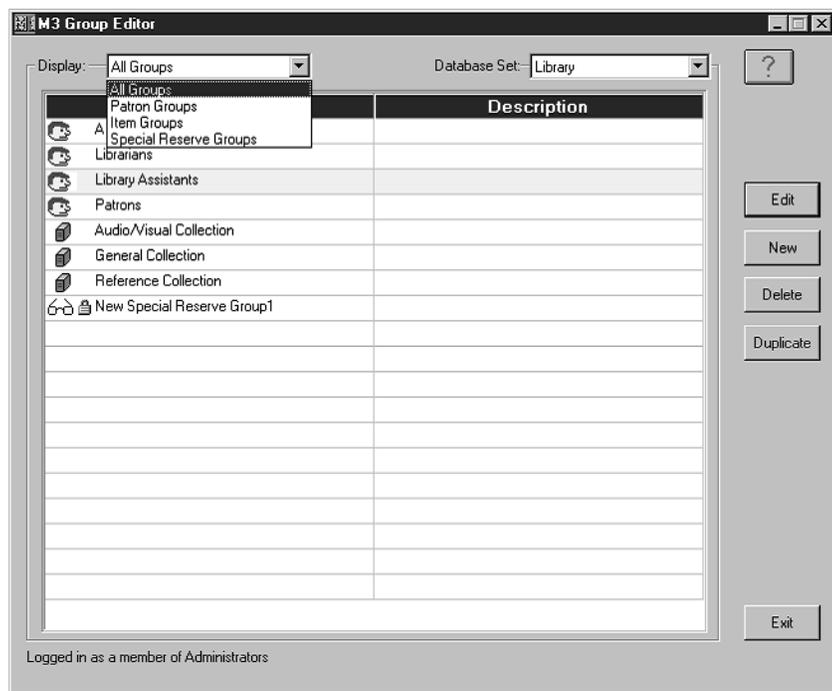
To start the Group Editor module:

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

Group Editor Window Features

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

FIGURE 3.1



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

Selecting a Catalog Database

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

Working with Patron Groups

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

Entering Patron Records & Patron Groups

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

Creating a New Patron Group

To create a new patron group:

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

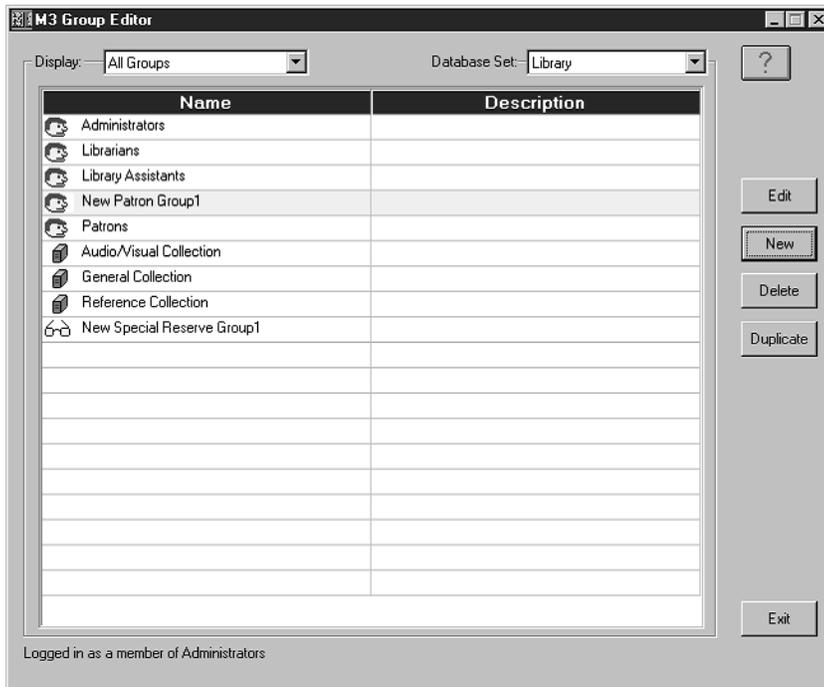
FIGURE 3.2



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

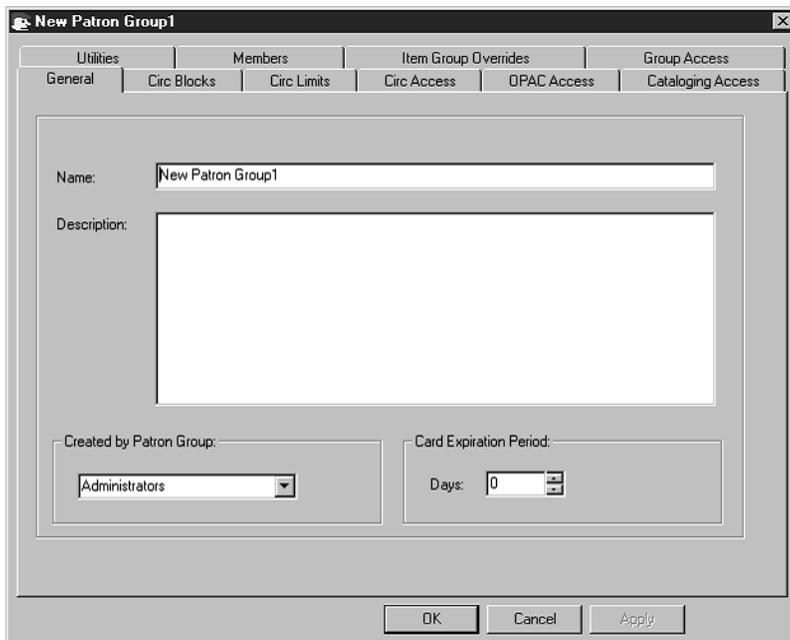
***NOTE:** If the new listing does not appear, verify that All Groups or Patron Groups is selected in the Display list.*

FIGURE 3.3



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

FIGURE 3.4



Note: When adding a person to the system, the person is assigned to a patron group and a new patron record with a unique barcode is created. In many libraries, this barcode is placed on the person's library card. The library card's expiration date is calculated from the number of days entered in the Card Expiration Period box, using the date the new patron record was created as day one.

General Tab

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

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

OR

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

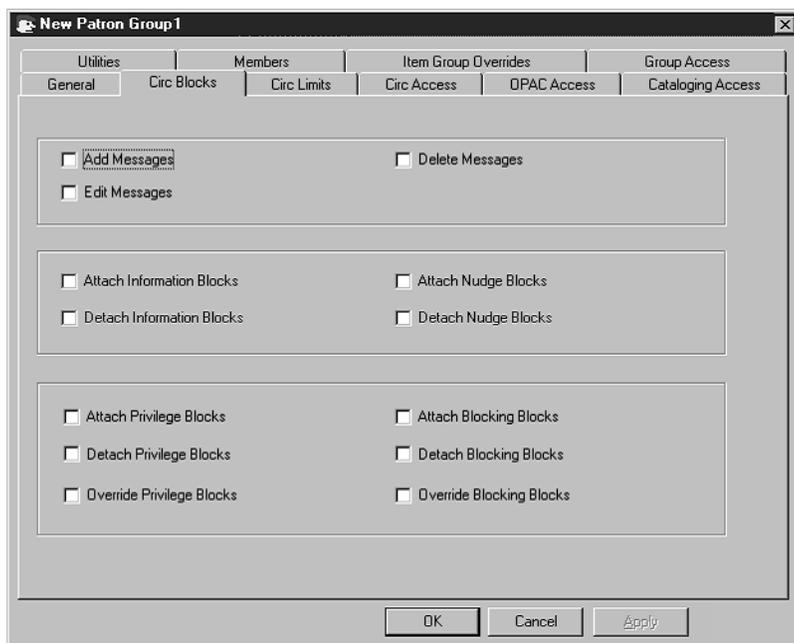
OR

Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

Circ Blocks Tab

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

FIGURE 3.5



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

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

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

OR

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

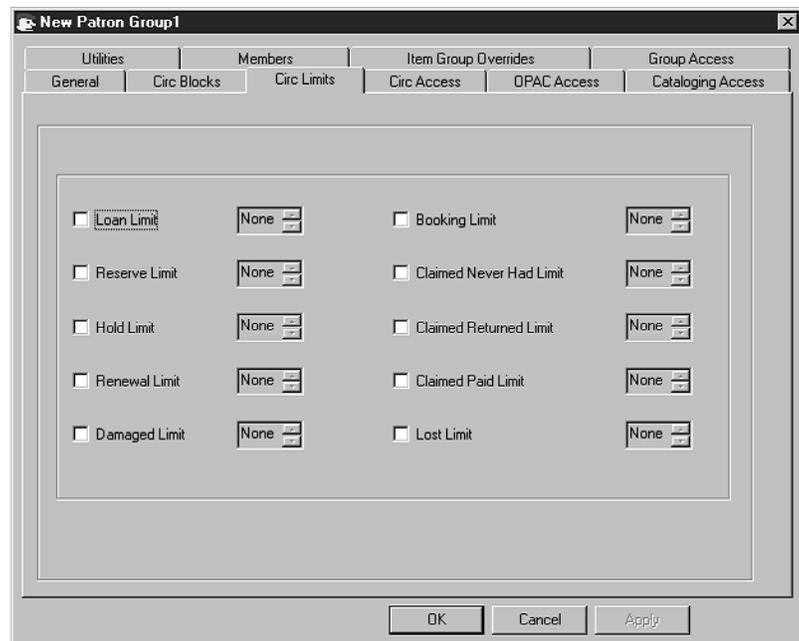
OR

Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

Circ Limits Tab

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

FIGURE 3.6



1. Select a circulation limit for each limit type. To do so:
 - A. Select a limit type. If a limit is not selected, no limit is assigned.
 - B. In the list next to the limit type, select a limit amount.

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

OR

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

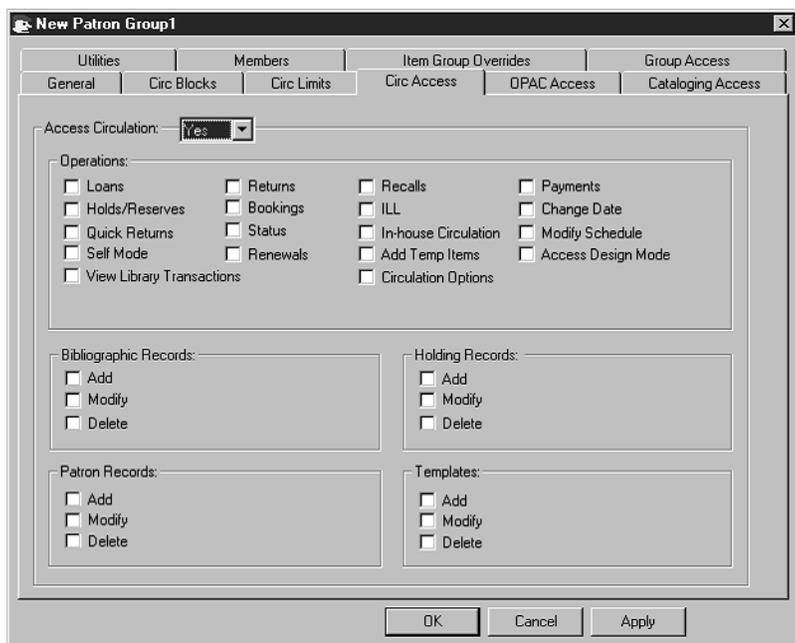
OR

Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

Circ Access Tab

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

FIGURE 3.7



1. In the **Access Circulation** list, select **Yes** or **No**.

- If you click **Yes**, you can enable any available function listed on the tab by selecting the function. Functions are organized into five groups:
 - **Operations** – lists various types of circulation transactions.
 - **Bibliographic Records** – pertains to bibliographic record maintenance.
 - **Holding Records** – pertains to holdings record maintenance.
 - **Patron Records** – pertains to patron record maintenance.
 - **Templates** – pertains to template record maintenance.
- If you click **No**, all functions listed on this tab are disabled.

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

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

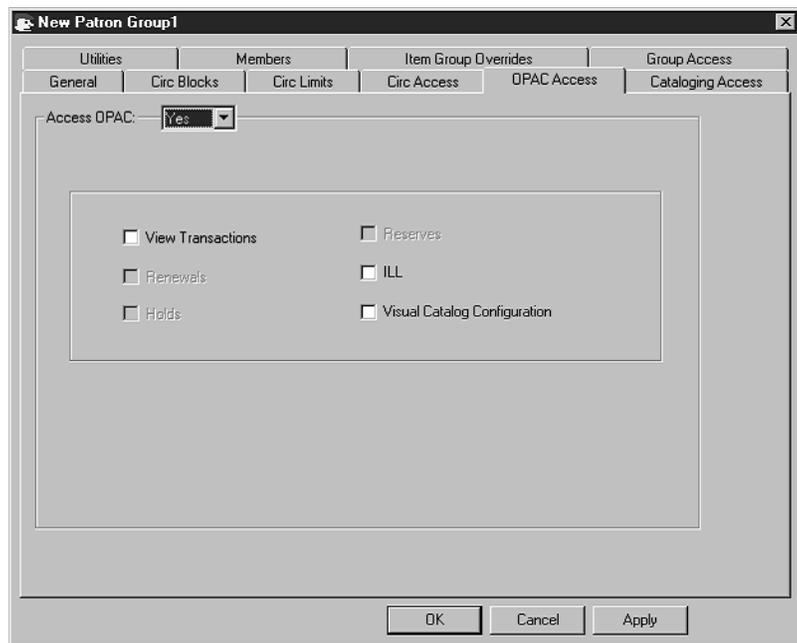
Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

OPAC Access Tab

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

OPAC functions.

FIGURE 3.8



Note: The Visual Catalog Configuration check box also controls the permission to modify the OPAC header.

1. In the **Access OPAC** list, select **Yes** or **No**.
 - If you click **Yes**, you can enable any available function listed on the tab by selecting the function.
 - If you click **No**, all functions listed on this tab are disabled.

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

OR

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

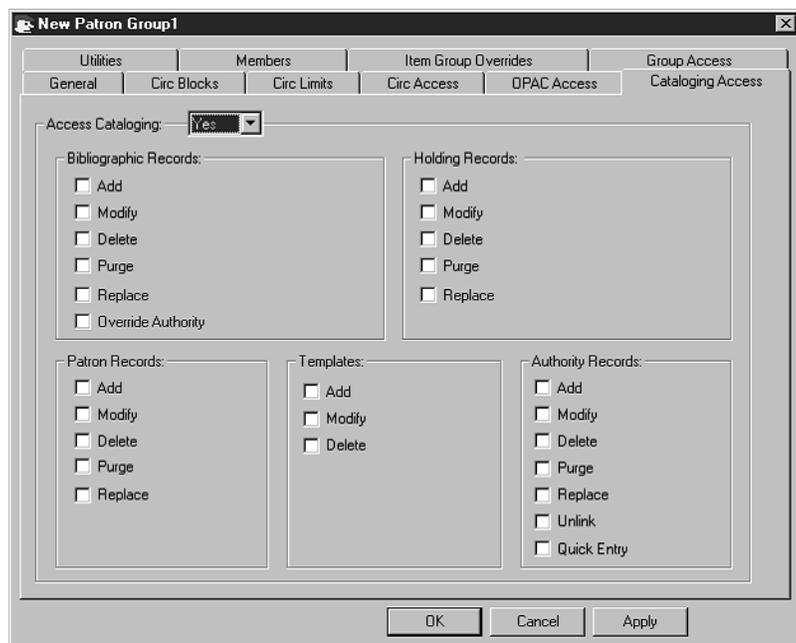
OR

Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

Cataloging Access Tab

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

FIGURE 3.9



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

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

1. In the **Access Cataloging** list, select **Yes** or **No**.

- If you click **Yes**, you can enable any available function listed on the tab by selecting the function. Functions are organized into five groups:
 - **Bibliographic Records** – pertains to bibliographic record maintenance.
 - **Holding Records** – pertains to holdings record maintenance.
 - **Patron Records** – pertains to patron record maintenance.
 - **Templates** – pertains to template maintenance.
 - **Authority Records** – pertains to authority record maintenance.
 - If you click **No**, all functions listed on this tab are disabled.

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

OR

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

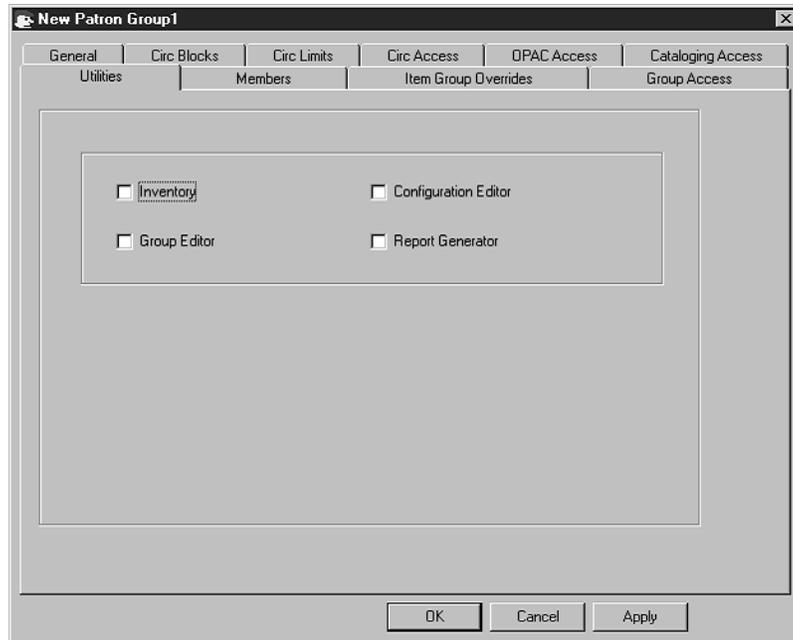
OR

Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

Utilities Tab

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

FIGURE 3.10



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

OR

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

OR

Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

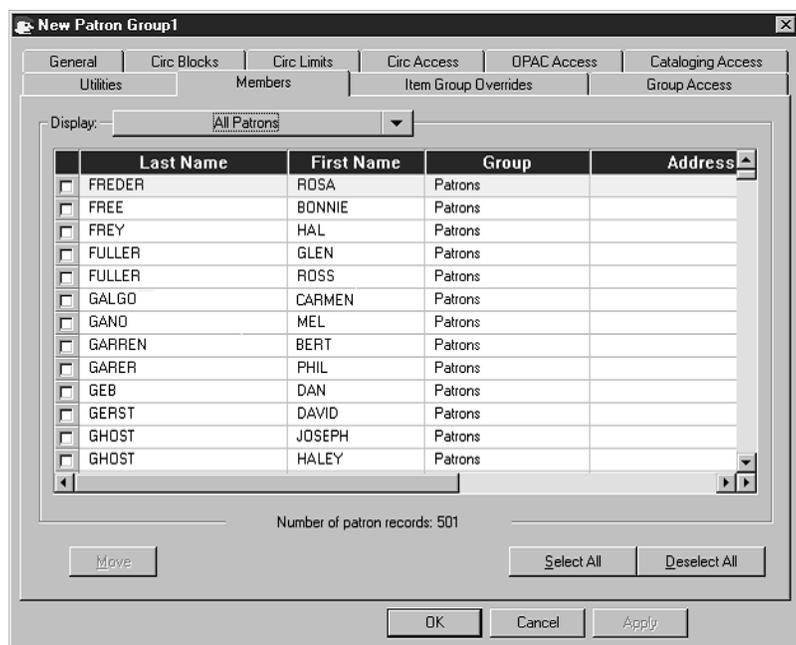
Members Tab

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

To add or remove patron records:

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

FIGURE 3.11



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

2. Select each patron you want to add to or remove from the patron group.

To locate specific patrons:

- Use the vertical scroll bar or your up and down arrow keys to move through the list.

OR

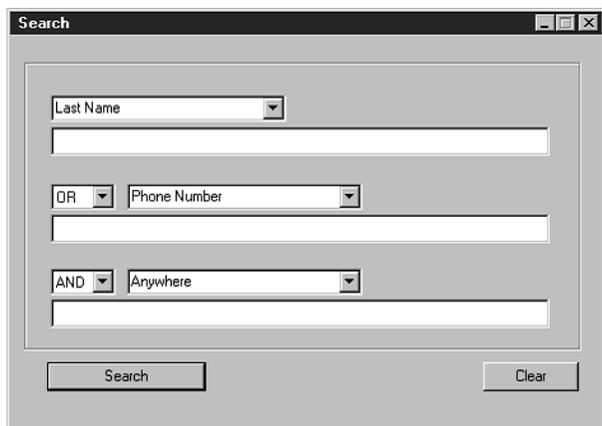
- Click a column heading to sort the list by that column.

OR

- Search for a patron by any field indexed in the patron records. To do so:

A. In the **Display** list, select **Search**. This displays the Search dialog box (Figure 3.12).

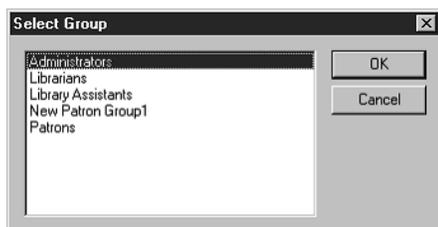
FIGURE 3.12



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

3. Select the desired patrons, then click **Move**. This displays the Select Group dialog box (Figure 3.13).

FIGURE 3.13



4. Select the group into which you want to move the patrons, then click **OK**.

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

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

OR

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

OR

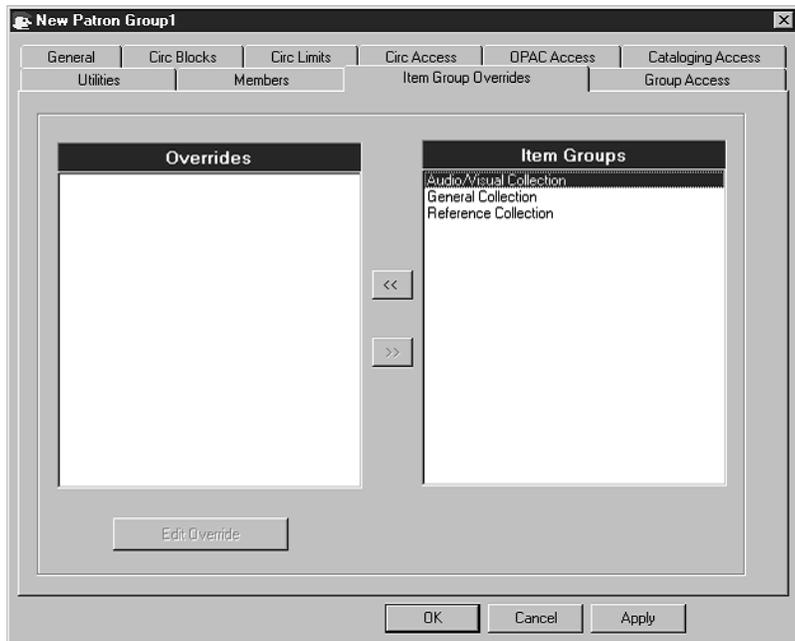
Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

Item Group Overrides Tab

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

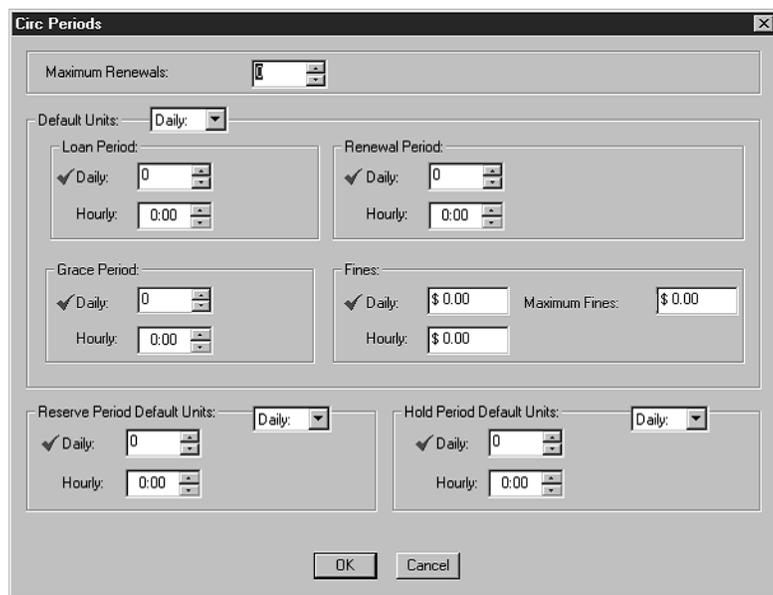
To assign item group overrides:

FIGURE 3.14



1. In the **Overrides** box, click the item group name. If it is not listed in the **Overrides** box, select the item group name in the **Item Groups** box, and then click the << button. This moves the name to the **Overrides** box.
2. While the item group name is selected, click **Edit Override**. The Circ Periods window appears, displaying the circulation limits for the selected item group (Figure 3.15).

FIGURE 3.15



3. In the **Maximum Renewals** list, select the maximum number of times that an item in this group can be renewed.
4. In the **Default Units** list, select **Daily** or **Hourly** as the default time unit for **Loan Period**, **Renewal Period**, **Grace Period**, and **Fines**.
5. In the **Loan Period**, **Renewal Period**, and **Grace Period** groups, enter the time limit for each period type.
6. In the **Fines** group, type the fine amount per time unit and the maximum fine amount.
7. In the **Reserve Period Default Units** and **Hold Period Default Units** groups, select **Daily** or **Hourly** in the list, and then specify the time limit for each.
8. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

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

OR

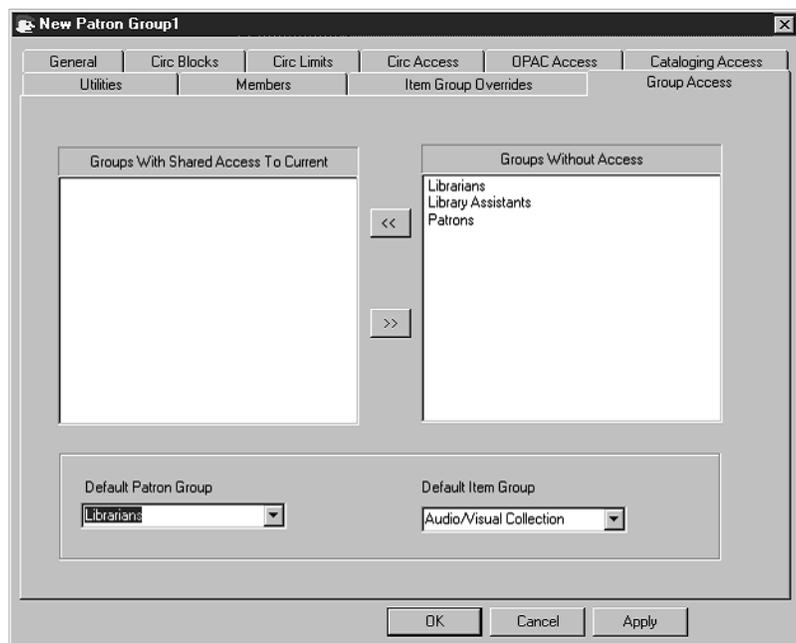
Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

Group Access Tab

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

To specify groups with access:

FIGURE 3.16



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

2. In the **Default Patron Group** list, select the patron group that you want to appear as the default group when a member of this patron group creates a patron record in the Cataloging and Circulation modules. This default group appears in patron records in the Standard Group (991#a) field.

3. In the **Default Item Group** list, select the item group that you want to appear as the default group when a member of this patron group creates a holding record in the Cataloging and Circulation modules. This default group appears in holding records in the Standard Group (991#a) field.

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

OR

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

OR

Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

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

Modifying Patron Group Permissions

To modify the permissions assigned to a patron group:

1. In the Group Editor window, select a catalog database in the **Database Set** list.



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

Deleting a Patron Group

To delete a patron group from the M3 system:

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

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

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

Warning: You cannot undo this deletion.

Working with Item Groups

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

Entering Item Records and Item Groups

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

Creating a New Item Group

To create a new item group:

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

FIGURE 3.17



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

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

FIGURE 3.18

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

To enter general information:

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

OR

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

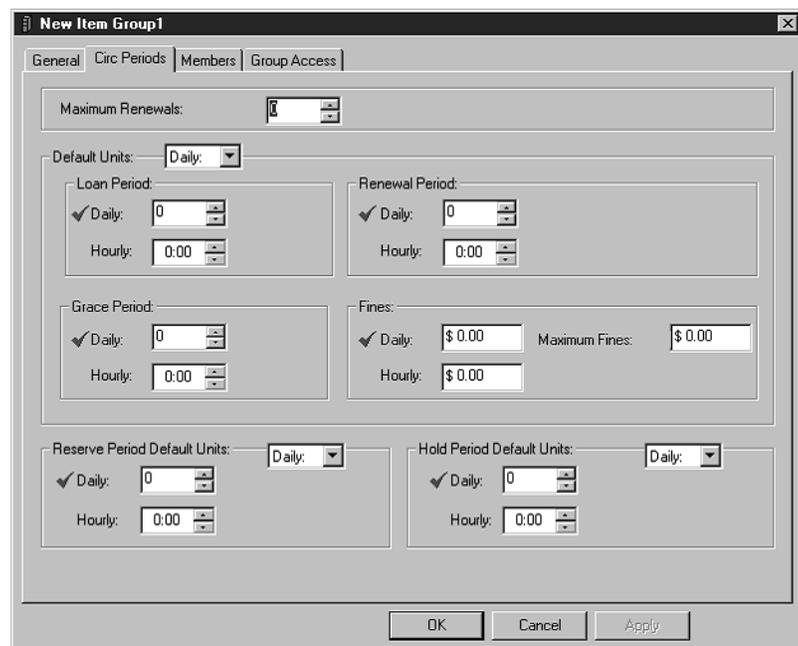
OR

Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

Circ Periods Tab

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

FIGURE 3.20



1. To enter different limits for this item group, see steps 3 through 7 on page 3-15.
2. Click **Apply** to save your entries in this tab, then click another tab to modify it.

OR

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

OR

Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

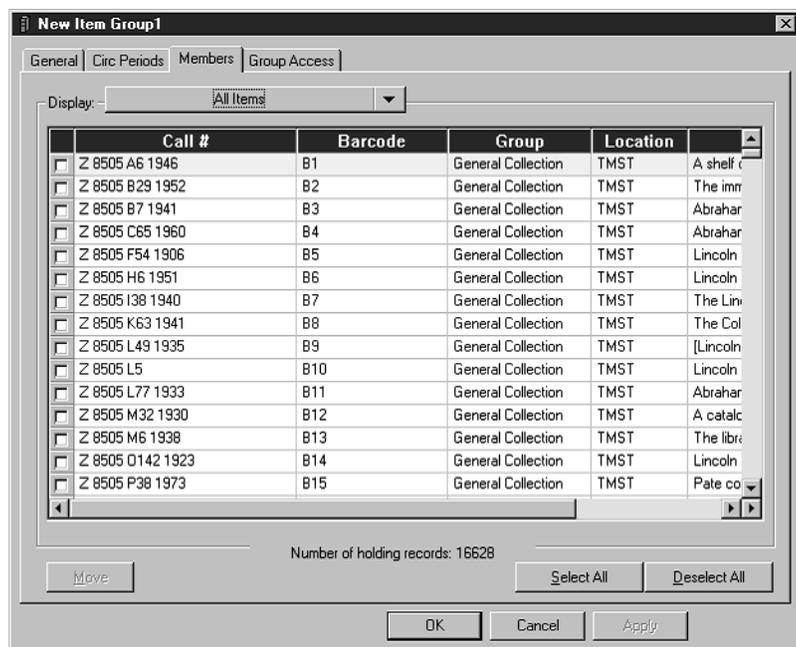
Members Tab

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

To add or remove holding records:

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

FIGURE 3.21



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

2. Select each item you want to add to or remove from the item group. To locate specific items:

- Use the vertical scroll bar or your up and down arrow keys to move through the list.

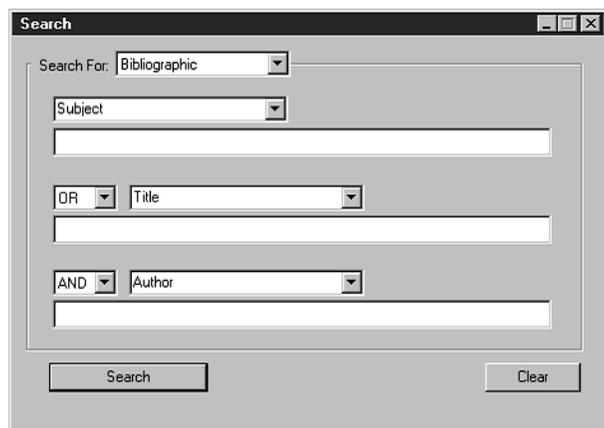
OR

- Click a column heading to sort the list by that column (not applicable to **Title** and **Author**).

OR

- Search for an item by any field indexed in the item records. To do so: A. In the **Display** list, select **Search**. This displays the Search dialog box (Figure 3.22).

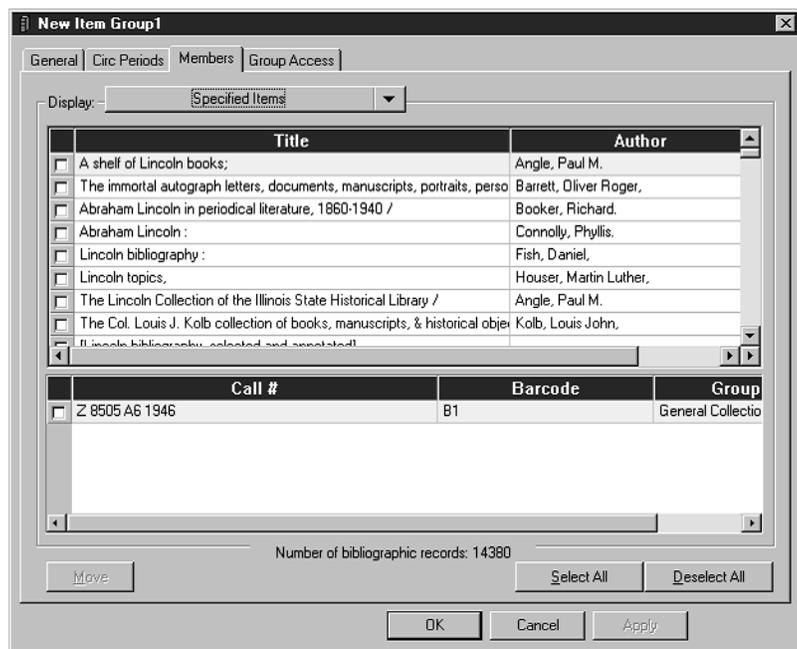
FIGURE 3.22



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

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

FIGURE 3.23



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

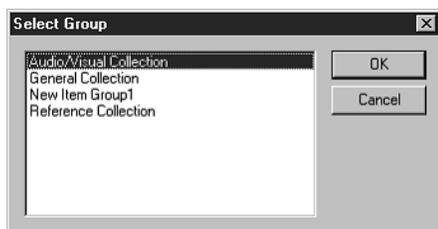


FIGURE 3.24

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

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

OR

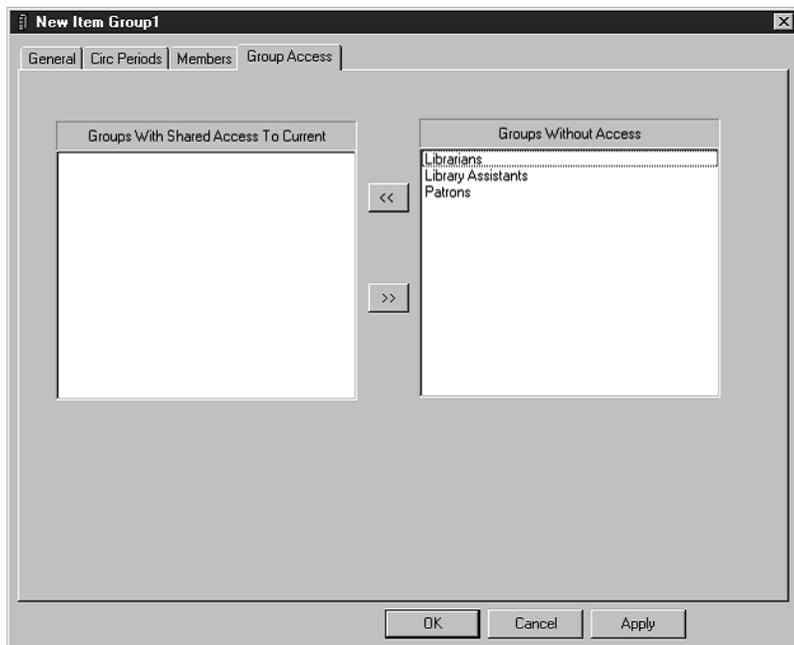
Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

Group Access Tab

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

To specify groups with access:

FIGURE 3.25



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

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

OR

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

OR

Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

Modifying Item Group Permissions

To modify the permissions assigned to an item group:

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

Deleting an Item Group

To delete an item group from the M3 system:

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

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

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

Warning; You cannot undo this deletion.

Working with Special Reserve Groups

With M3, you can create an unlimited number of special reserve groups with customized permissions for each group.

Creating a New Special Reserve Group

To create a new special reserve group:

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

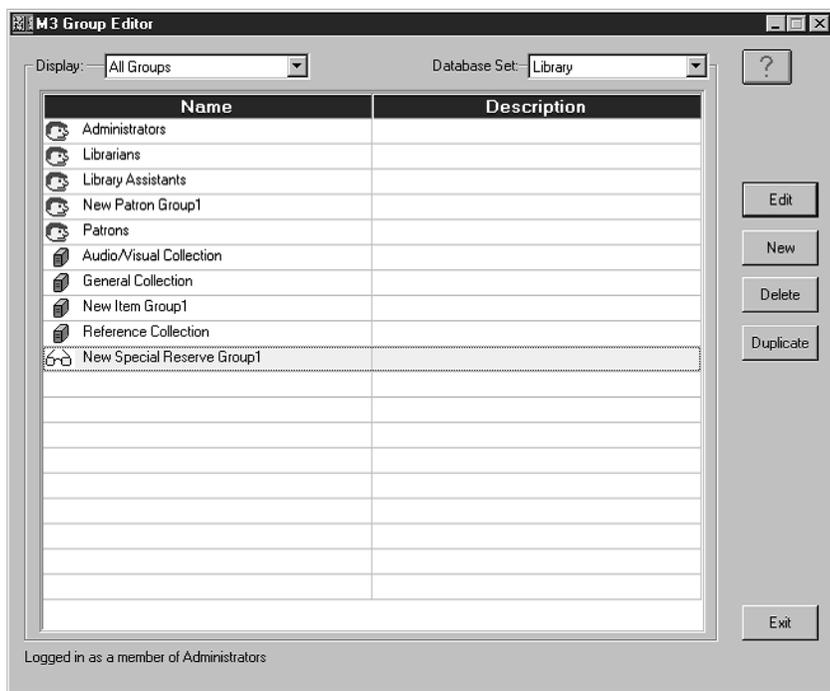
FIGURE 3.26



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

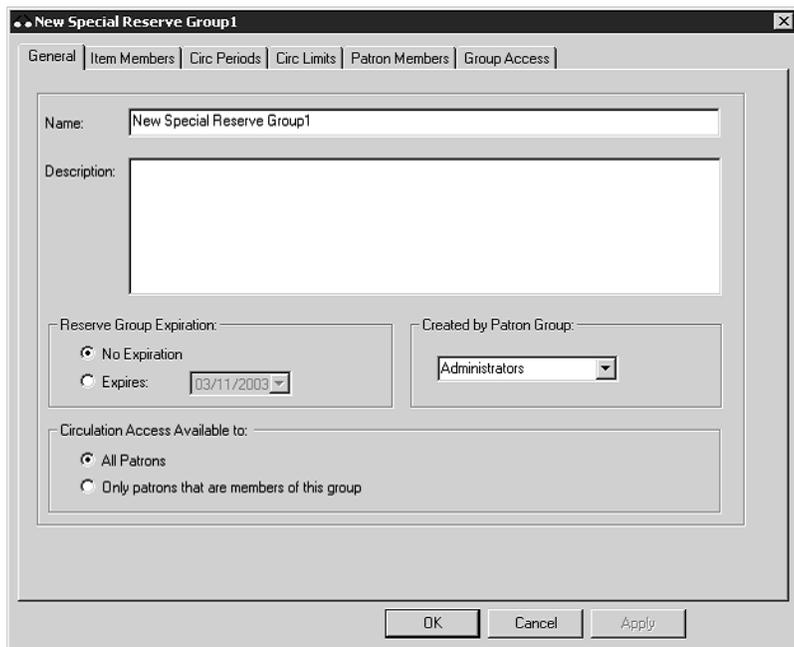
***NOTE:** If the new listing does not appear, verify that All Groups or Special Reserve Groups is selected in the Display list.*

FIGURE 3.27



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

FIGURE 3.28



General Tab

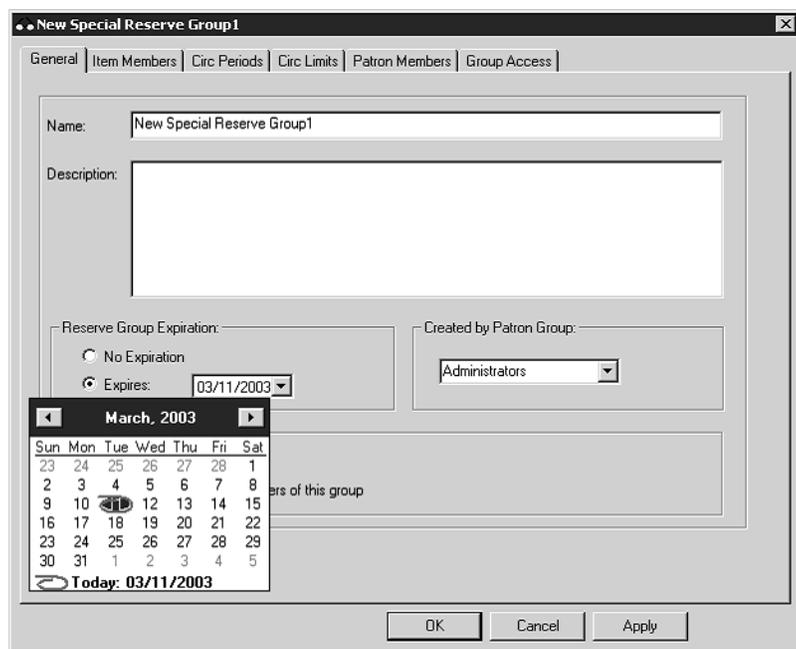
In this tab (shown in Figure 3.28), enter identification information for the group as well as information that impacts circulation behavior.

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

OR

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

FIGURE 3.29



4. The **Created by Patron Group** box displays the patron group of the user that created this group. Only administrators can modify this entry.

5. In the **Circulation Access Available to group**:

- Click **All Patrons** if you want all patrons to have access to items included in this special reserve group.

OR

- Click **Only patrons that are members of this group** if you want to restrict access to items in this special reserve group.

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

OR

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

OR

Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

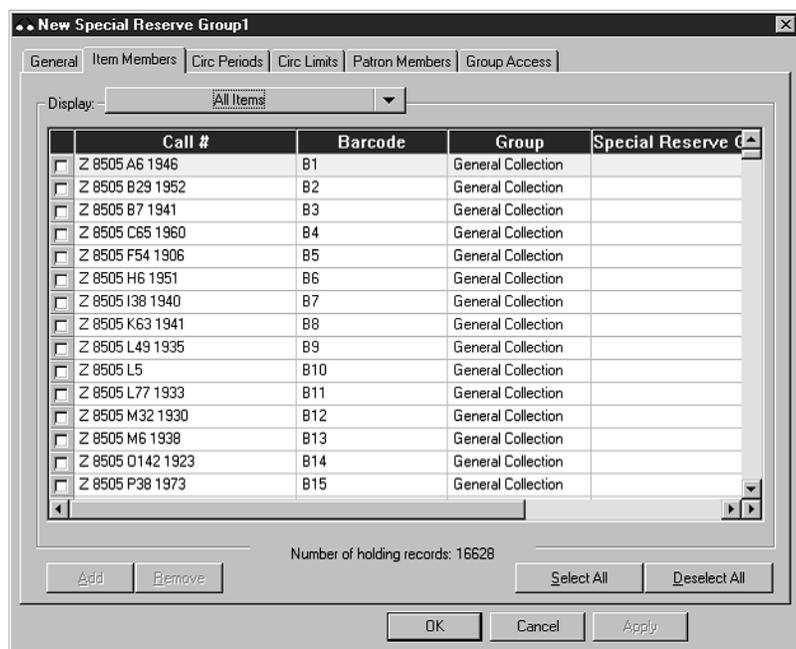
Item Members Tab

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

To add or remove holding records:

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

FIGURE 3.30



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

2. Select each item you want to add to the special reserve group. To locate specific items:

- Use the vertical scroll bar or your up and down arrow keys to move through the list.

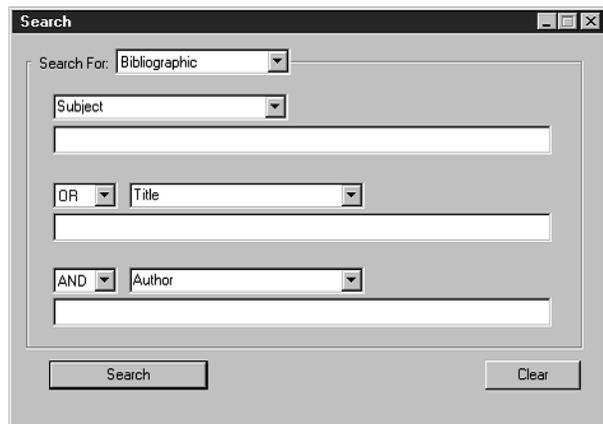
OR

- Click a column heading to sort the list by that column (not applicable to **Title** and **Author**).

OR

- Search for an item by any field indexed in the item records. To do so: A. In the **Display** list, select **Search**. This displays the Search dialog box (Figure 3.31).

FIGURE 3.31



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

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

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

OR

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

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

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

OR

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

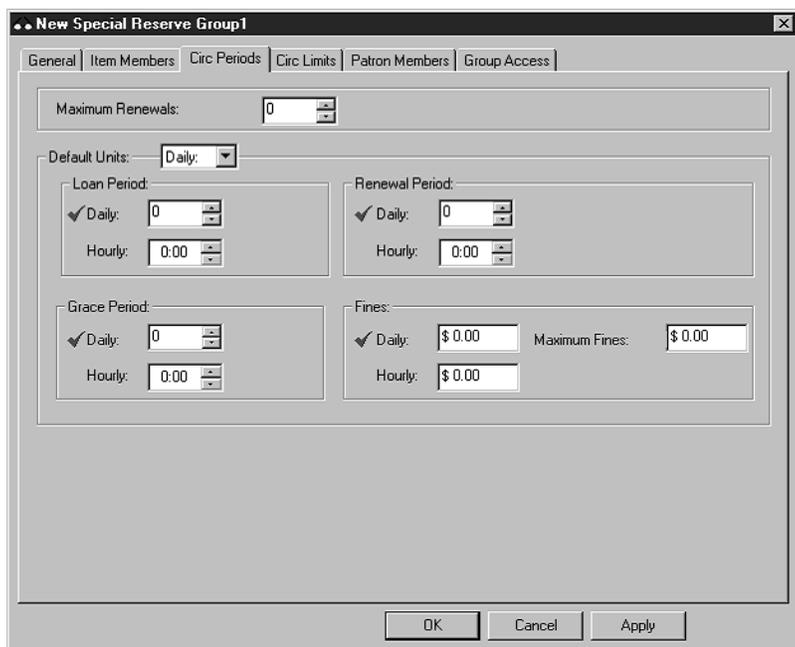
OR

Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

Circ Periods Tab

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

FIGURE 3.32



1. To enter different limits for this special reserve group, [see steps 3 through 5 on page 3-15](#).
 2. Click **Apply** to save your entries in this tab, then click another tab to modify it.
- OR**

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

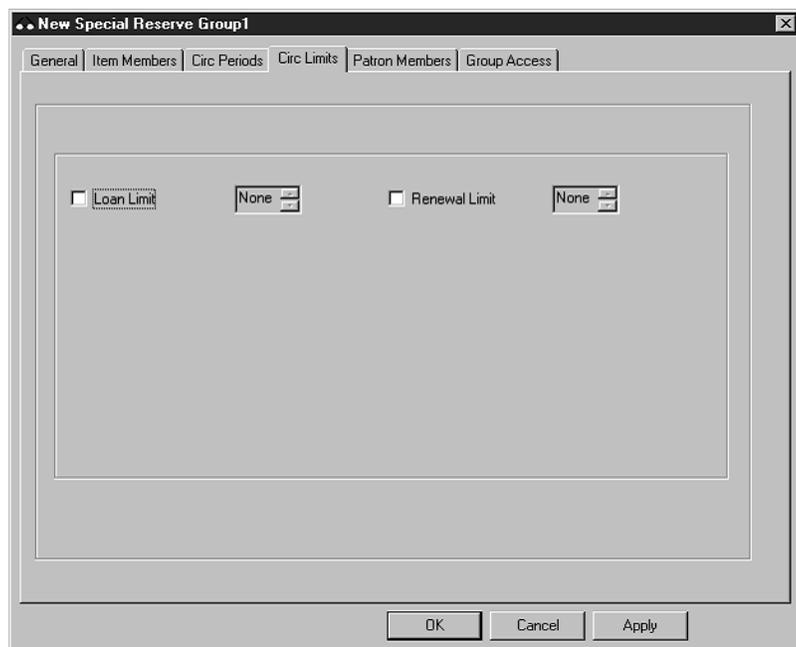
OR

Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

Circ Limits Tab

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

FIGURE 3.33



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

OR

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

OR

Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

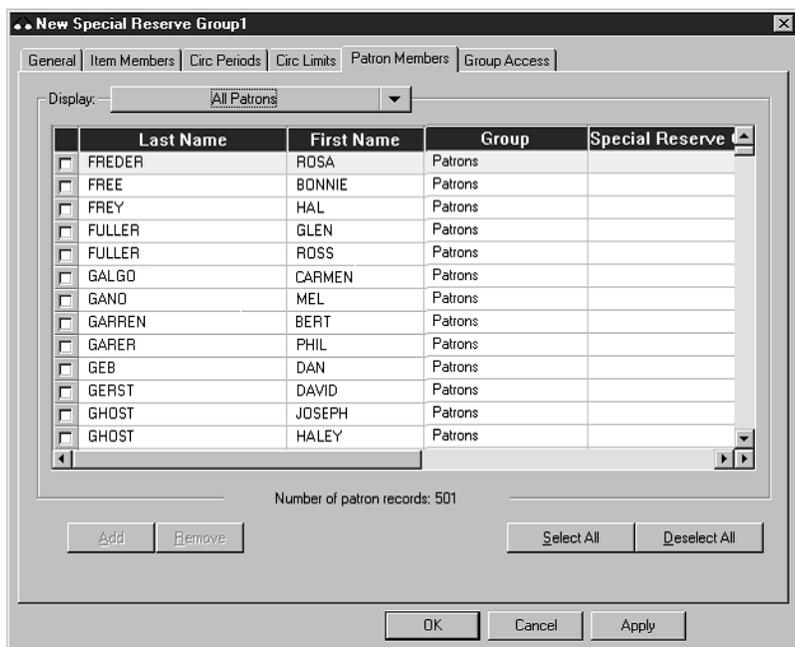
Patron Members Tab

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

To add or remove patron members:

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

FIGURE 3.34



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

2. Select each patron you want to add to the special reserve group. To locate specific patrons:

- Use the vertical scroll bar or your up and down arrow keys to move through the list.

OR

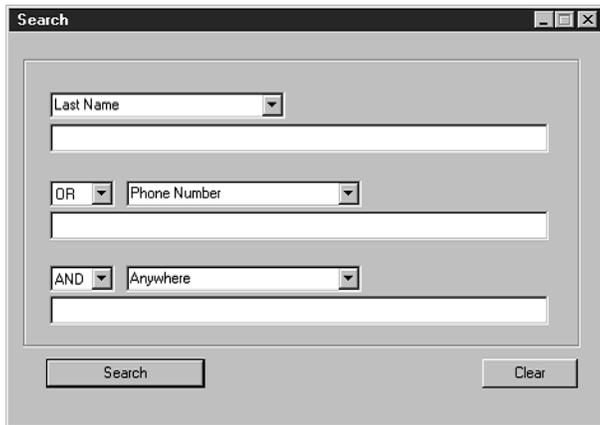
- Click a column heading to sort the list by that column.

OR

- Search for a patron by any field indexed in the patron records. To do so:

A. In the **Display** list, select **Search**. This displays the Search dialog box (Figure 3.35).

FIGURE 3.35



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

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

OR

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

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

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

OR

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

OR

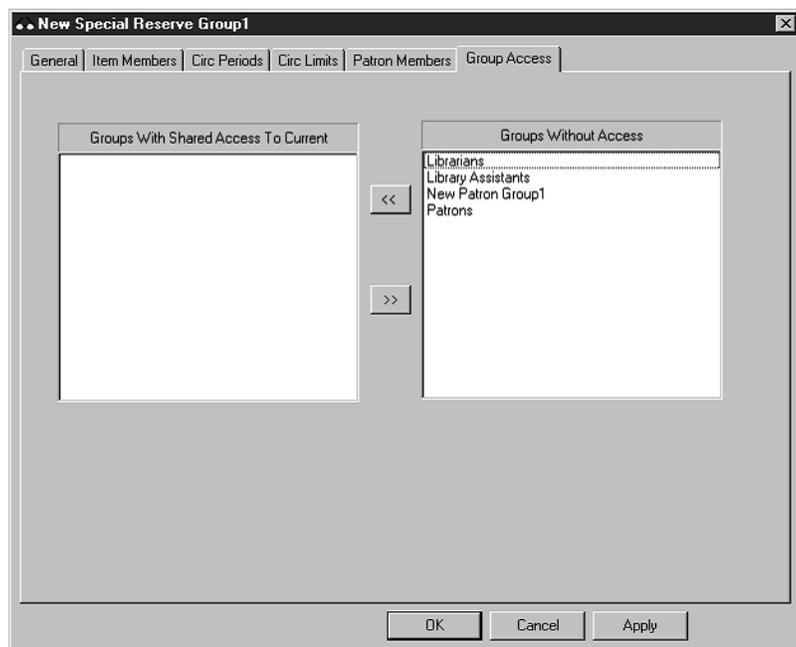
Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

Group Access Tab

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

To specify groups with access:

FIGURE 3.36



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

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

OR

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

OR

Click **Cancel** to discard your entries in this tab and return to the Group Editor window.

Modifying Special Reserve Group Permissions

To modify the permissions assigned to a special reserve group:

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

Deleting a Special Reserve Group

To delete a special reserve group from the M3 system:



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

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

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

Warning: You cannot undo this deletion.

Using Cataloging

This chapter explains:

- How to search for, create, and edit records
- How to update Authority Control
- How to use the find and replace utility
- How to mark records for deletion and purge marked records
- How to import records, including pictures
- How to export records

ABOUT CATALOGING

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

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

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

STARTING M3 CATALOGING

To start the Cataloging module:

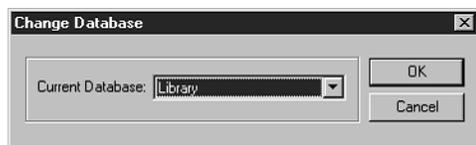
1. On the taskbar, click the **Start** button, select **Programs**, select **Mandarin M3**, and then click **Cataloging**. This displays the Cataloging Login dialog box.
2. Type your user ID in the **Login Name** box, your password in the **Password** box, and then click **OK**. This displays the Cataloging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

SELECTING A DATABASE

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

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

FIGURE 4.1



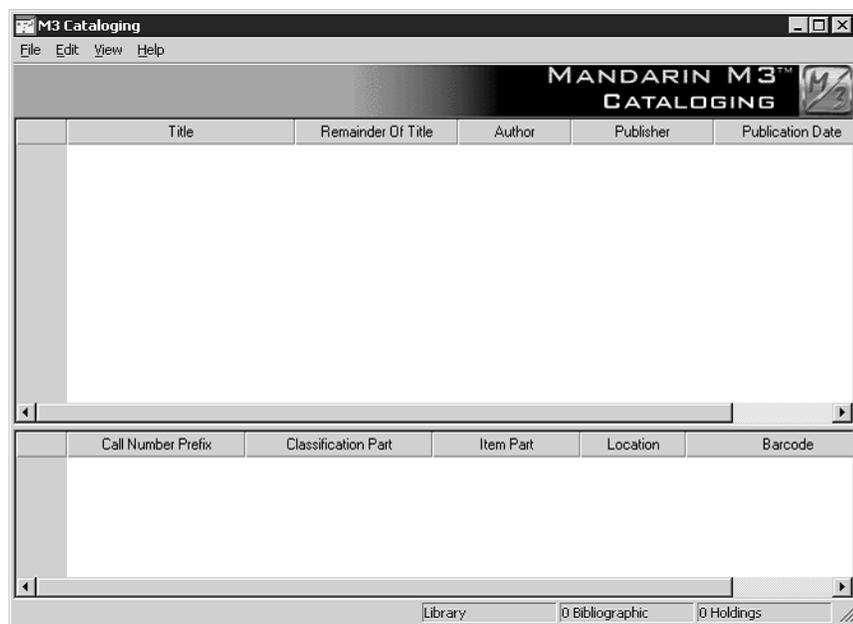
2. In the **Current Database** list, select the desired database.
3. When finished, click **OK**.

Working with Bibliographic Records

Cataloging Window Features

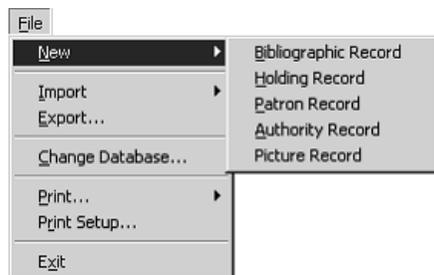
The bibliographic version of the Cataloging window (Figure 4.2) has a split window that displays brief bibliographic and holding records. The bibliographic record version of this window is shown in Figure 4.2.

FIGURE 4.2



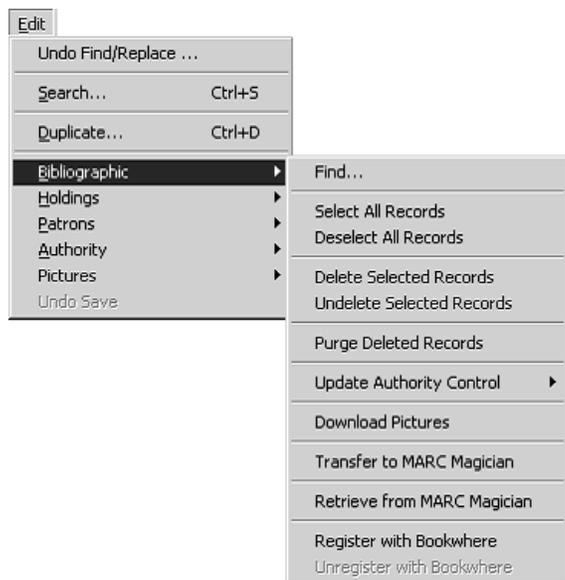
- **Cataloging menu bar** – Contains the File, Edit, View, and Help menus.
- From the **File** menu (Figure 4.3), create new records, import and export records, change databases, and access printing commands.

FIGURE 4.3



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

FIGURE 4.4



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

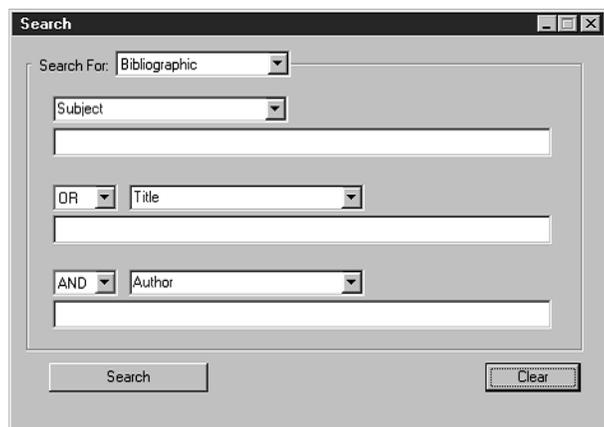
- From the **View** menu, enable/disable the status bar display on the Cataloging window.
- From the **Help** menu, access Cataloging Help topics and connect to the Mandarin Web page.
- **Column headings** – Each pane includes a set of column headings. These are names that identify the MARC record field displayed below each heading.
- **Bibliographic records pane** – After a bibliographic record search, this pane lists brief bibliographic records matching the search query. Your library can configure which MARC fields display in this pane.
- **Holding records pane** – After a bibliographic record search, this pane lists brief holding records matching the search query. The list of holding records corresponds to the bibliographic record selected in the upper pane. Your library can configure which MARC fields display in this pane.
- **Status bar** – The status bar displays the current database being used and the number of bibliographic and holding records found matching the search query.

Searching for a Bibliographic Record

The Search Dialog Box

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

FIGURE 4.5



Search Tips:

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

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

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

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

How to Search

To search for a bibliographic record:

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

FIGURE 4.6

M3 Cataloging

File Edit View Help

MANDARIN M3™
CATALOGING

	Title	Remainder Of Title	Author	Publisher	Publication Date
1	<input type="checkbox"/> Histories:	the rise and decline of the	Prescott, William Hickli	Viking Press	[1963]
2	<input checked="" type="checkbox"/> History of the reign of Ferdinand ar		Prescott, William Hickli	J. B. Lippincott Co.,	c1872.
3	<input type="checkbox"/> History of the reign of Philip the Sea		Prescott, William Hickli	Lippincott,	1882-1886.
4	<input type="checkbox"/> The conquest of Mexico,	The conquest of Peru, an	Prescott, William Hickli	Washington Square Press	[1966]

	Call Number Prefix	Classification Part	Item Part	Location	Barcode
1	<input type="checkbox"/> DP	162	P8 1872	ALPHA	BA10505
2	<input type="checkbox"/> DP	162	P8 1872	ALPHA	BA10506
3	<input type="checkbox"/> DP	162	P8 1872	ALPHA	BA10507

Union 4 Bibliographic 3 Holdings

5. From here, you can:

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

Creating a Bibliographic Record

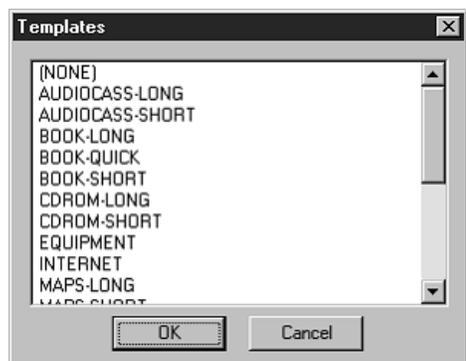
There are three ways to create a new bibliographic record: (1) You can use a template and edit it to match the new record; (2) You can duplicate an existing bibliographic record, then edit it to create

the new record: (3) You can click **New** in the **After Saving** group when creating or editing a different bib record. The first two methods are explained in the following sections, “From a Template” and “By Dupli- cating an Existing Bib Record.” The third method is explained in the **New** bullet in step 5 of “Editing a Bibliographic Record” on page 4-8.

From a Template

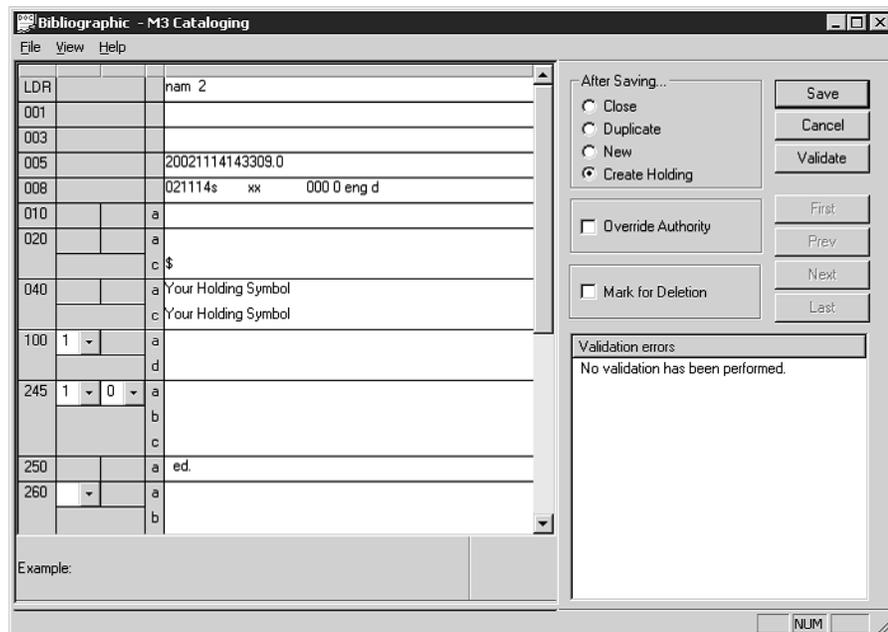
1. On the **File** menu, select **New**, and then click **Bibliographic Record**. This dis- plays the Templates dialog box (Figure 4.7).

FIGURE 4.7



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

FIGURE 4.8



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

FIGURE 4.9

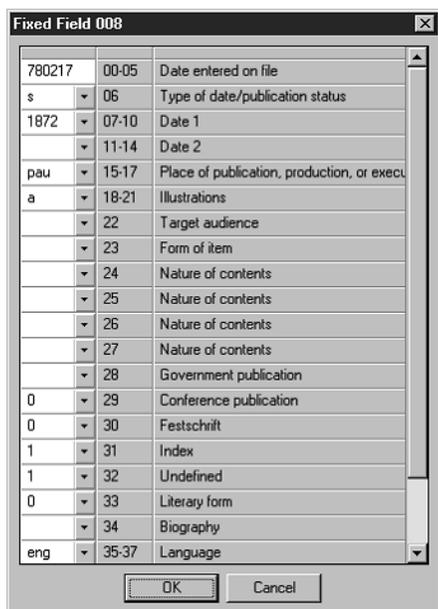
Insert Field...	Shift+Ins
Insert Subfield...	Ctrl+Ins
Delete Field	Shift+Del
Delete Subfield	Ctrl+Del
Cut Record	Shift+Ctrl+X
Cut Field	Shift+X
Cut Subfield	Ctrl+X
Copy Record	Shift+Ctrl+C
Copy Field	Shift+C
Copy Subfield	Ctrl+C
Paste	Ctrl+V
Move Field Up	Shift+Up
Move Field Down	Shift+Down
Move Subfield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

Tip: To insert a picture field in this record so a picture displays alongside the record when it is involved in a transaction, see “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-38.

3. Enter field and subfield data for the new record. To move through the record, use your keyboard up and down arrows. Notice that status bar information changes to identify the selected field and subfield.

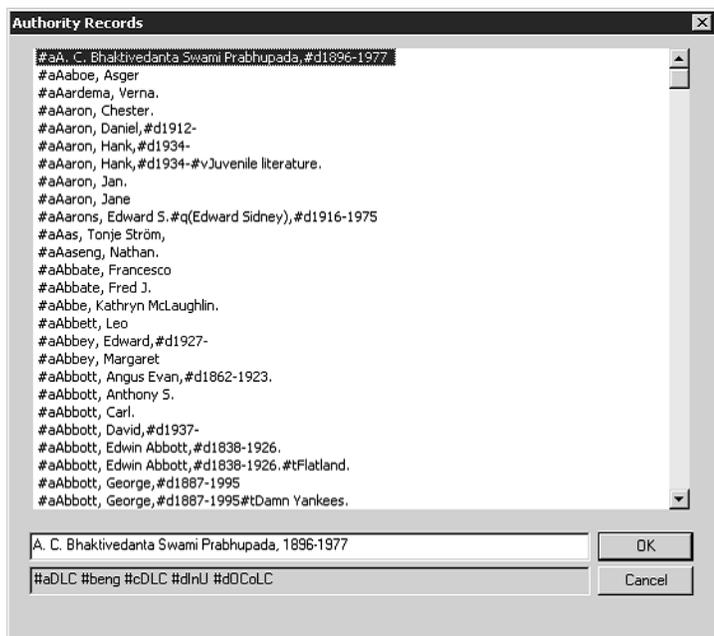
- To access a menu with edit commands (Figure 4.9), right-click the field or subfield you want to edit. From this menu, you can insert, delete, cut, copy, paste, and move fields. You can click **Find** to locate text within this record, or click **Toggle Prompts** to change the MARC field labels from numbers to text.
- To access a list of fixed field standard choices (including position and legal characters) pertaining to a particular fixed field, double-click in the field. The dialog box for fixed field 008 is shown in Figure 4.10. You can define your fixed field by typing in text or, where available, clicking the arrow button and selecting an option in the list. When finished, click **OK**.

FIGURE 4.10



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

FIGURE 4.11



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

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

4. Click **Validate** to check for errors in the record. If any errors appear in the **Validation Errors** box, fix or ignore them. To view information explaining each error, click the plus (+) sign to the left of the error.
5. When finished editing the record and validating errors (but before saving), click an option in the **After Saving** group to indicate what you want to happen after you save the record. The options are:
 - **Close** exits the saved record and returns to the Cataloging window.
 - **Duplicate** creates a new record identical to the one you are saving; you can edit the duplicate record to create another record.
 - **New** exits the saved record and displays a new template window to modify. (If more than one bib template is available, the Templates dialog box displays. Select a template, then click **OK**.)
 - **Create Holding** exits the saved record and displays a corresponding holding record template where you can add local information such as call number, barcode number, and location. If more than one template is available, the Templates dialog box displays, allowing you to select a template.
6. To mark this record for deletion, select the **Mark for Deletion** check box. For instructions on purging records marked for deletion, see “Step 2: Purging Records Marked for Deletion” on page 4-47.
7. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected in the **After Saving** group.

By Duplicating an Existing Bib Record

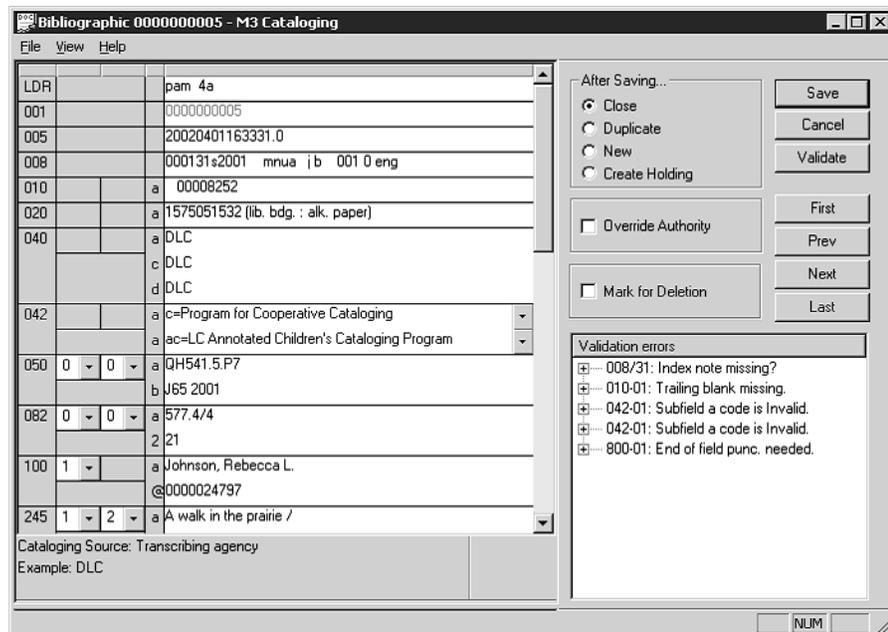
1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.5).
2. In the **Search For** list, select **Bibliographic**.
3. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list,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

Editing a Bibliographic Record

To edit a bib record:

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

FIGURE 4.12



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

Note: To have access to the Override Authority feature, the Override Authority check box must be selected in Group Editor.

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

Using the Override Authority Feature

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

To use the Override Authority feature:

1. Display the bibliographic record you want to edit in the Bibliographic - Cataloging window (Figure 4.12). (For instructions on locating and displaying a record, follow steps 1A through 1E in “Editing a Bibliographic Record” on page 4-9.)
2. Select the **Override Authority** check box. This makes all Authority Control-managed fields editable.
3. Click in the white edit area of the field you want to edit and type new entries as desired.
4. When finished, click **Save** in the Bibliographic - Cataloging window.
5. Verify your bibliographic records for consistency. To do so, see the following section, “Verifying Bibliographic Records with Authority Control.”

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

Verifying Bibliographic Records with Authority Control

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

Verifying Records

To verify all records or newly added records:

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

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

To verify selected records:

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

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



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

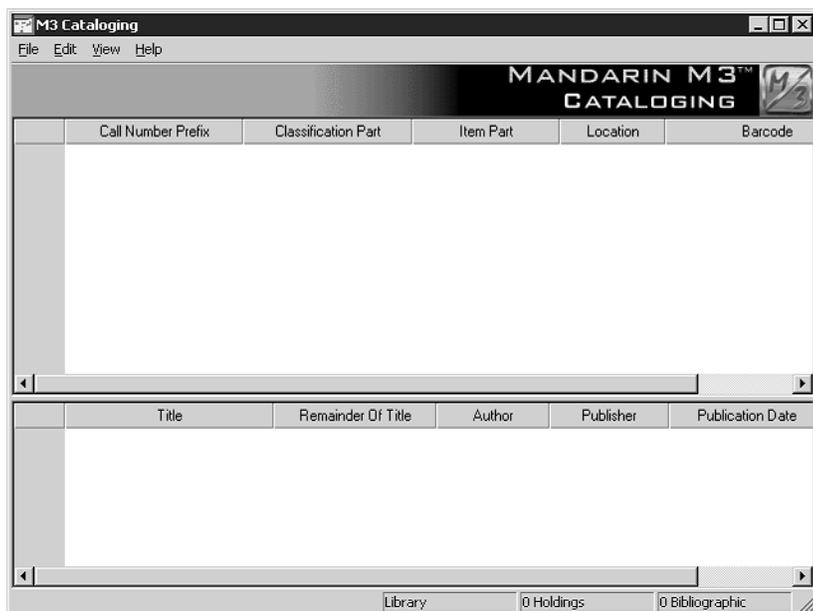
NOTE: To use Authority Control after performing this procedure, you must click Verify All to reverify your records. For instructions, see the preceding section, "Verifying Bibliographic Records with Authority Control."

Working with Holding Records

Cataloging Window Features

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

FIGURE 4.13

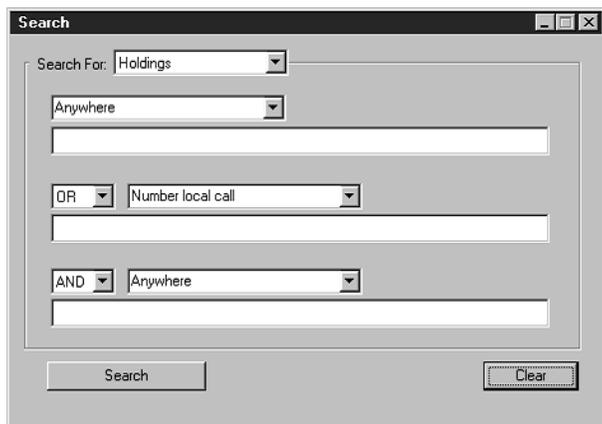


Searching for a Holding Record

The Search Dialog Box

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

FIGURE 4.14



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

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

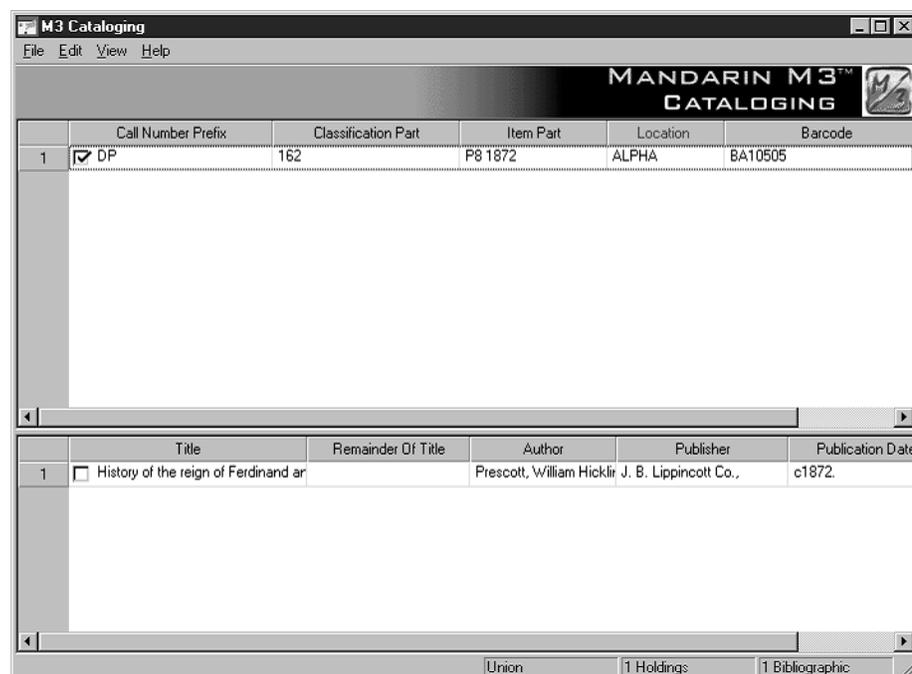
Your system can be configured to display different default MARC fields and Boolean operators.

How to Search

To search for a holding record:

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

FIGURE 4.15



5. From here, you can:
 - Double-click a brief holding or bib record to view its full MARC record. A full MARC holding record matching this search is shown in Figure 4.17.

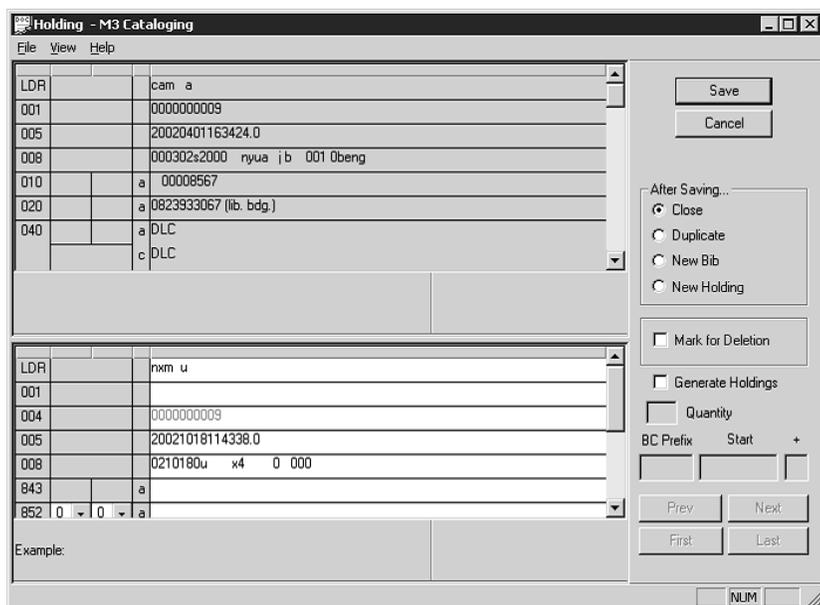
- Select a check box to tag the corresponding record for deletion or printing. To tag a block of records, select the first record and press SHIFT while selecting the last record; this tags all records in between.
- Print tagged records or all records in the list. To do so, select **Print** on the **File** menu, then click **Records** (to print tagged) or **List** (to print all).
- Create a new similar record by clicking **Duplicate** on the **Edit** menu. (For instructions, see “Creating a Holding Record” on page 4-14.)
- Start another search from the **Edit** menu.

Creating a Holding Record

To create a holding record:

1. Locate the bib record matching the holding record you want to create.
 - A. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.14).
 - B. In the **Search For** list, select **Bibliographic**.
 - C. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
 - D. Click **Search**. This displays a list of bib and holding records matching your search query (Figure 4.15).
2. Click the bib record matching the holding record you want to create.
 - If a holding record similar to the one you want to create appears in the lower pane, use this as a template. Click the brief holding record, then click **Duplicate** on the **Edit** menu.
OR
 - If no similar holding record exists, select **New** on the **File** menu, and then click **Holding Record**. (If more than one holding template is available, the Templates dialog box displays (Figure 4.7). Click the desired template, then click **OK**.) This displays the holding record template in the Holding - Cataloging window (Figure 4.16). The template displays some entries from the bib record you selected, including the prefix (852#k).

FIGURE 4.16



3. Enter field and subfield data for the new record. For instructions, see step 3 beginning on page 4-7. **NOTE:** Since Authority Control fields are not available for holding records, skip the Authority Control option explained on page 4-8.

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

4. When finished editing the record (but before saving), click an option in the **After Saving** group. This selection indicates what you want to happen once you save the record. The options are:

- **Close** exits the saved record and returns to the Cataloging window.
- **Duplicate** creates a new record identical to the one you are saving; you can edit the duplicate record to create another record.
- **New Bib** exits the saved record and displays the Templates dialog box, allowing you to select a new bib template to edit.
- **New Holding** exits the saved record and displays a new holding template to edit in the holding records pane. If more than one holding template is available, the Templates dialog box displays, allowing you to select a template.

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

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

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

OR

- Select the **Generate Holdings** check box to create multiple holding records, using the holding record displayed in the lower pane as a template.

A. Type the number of holdings you want to add in the **Quantity** box.

NOTE: This number is in addition to the holding records that already exist for this bibliographic record.

B. If the record's barcode has a prefix, it appears in the **BC Prefix** box. Modify if desired. If the barcode does not have a prefix and you would like to add one, type a value in the **BC Prefix** box.

C. The barcode suffix appears in the **Start** box. Modify if desired. The suffix must be a numeric value and will be the starting value for the barcodes of the new holding records.

D. In the + box, type the number by which you want the suffix to increment. For example, if the values are **1000** in the **Start** box and **2** in the + box, the first holding record will be assigned a barcode of **[Prefix]1000** and the next holding record will be assigned **[Prefix]1002**.

5. To mark this record for deletion, select the **Mark for Deletion** check box.

For instructions on purging records marked for deletion, see “Step 2: Purging Records Marked for Deletion” on page 4-47.

6. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected in step 4.

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

Editing a Holding Record

To edit a holding record:

1. If the record to be edited is not displayed:

A. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.14).

B. In the **Search For** list, select **Holdings**.

C. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)

D. Click **Search**. This displays a list of bib and holding records matching your search query.

E. Double-click the holding record you want to edit. This displays the selected record in full MARC format (Figure 4.17).

FIGURE 4.17

Holding 0000000008 - M3 Cataloging

File View Help

LDR		pam a
001		0000000008
005		20020401163407.0
008		000223s2001 mnua c b 001 0 eng
010		a 00008486
020		a 1575054817 (alk. paper)
040		a DLC
		c DLC

Fixed-Length Data Elements

001		0000000008
004		0000000008
005		20020308143729.0
008		0203080u 4 0
852		h 323.1
		i WEL
		k J

Location: Item part
Example: ADA

Save
Cancel

After Saving...

Close
 Duplicate
 New Bib
 New Holding

Mark for Deletion

Generate Holdings

Quantity

BC Prefix Start +

Prev Next
First Last

NUM

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

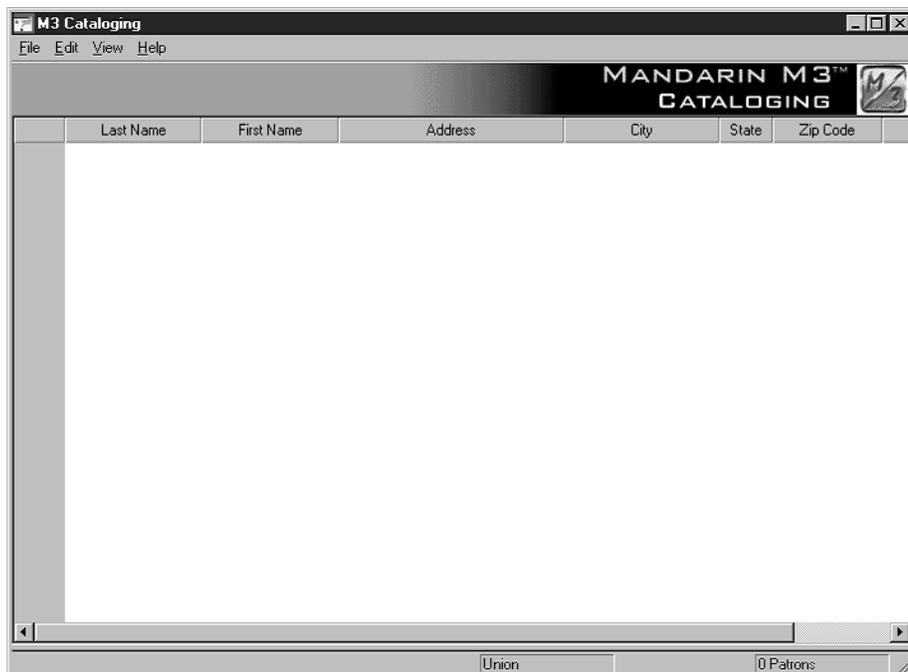
2. Edit this record as needed. For instructions, see step 3 beginning on page 4-7. NOTE: Since Authority Control fields are not available for holding records, skip the Authority Control option explained on page 4-8.
3. When finished editing the record (but before saving), click an option in the **After Saving** group or select the **Generate Holdings** check box. For instructions, see step 4 on page 4-15.
4. To mark this record for deletion, select the **Mark for Deletion** check box. For instructions on purging records marked for deletion, see “Step 2: Purging Records Marked for Deletion” on page 4-47.
5. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected in the **After Saving** group.

Working with Patron Records

Cataloging Window Features

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

FIGURE 4.18

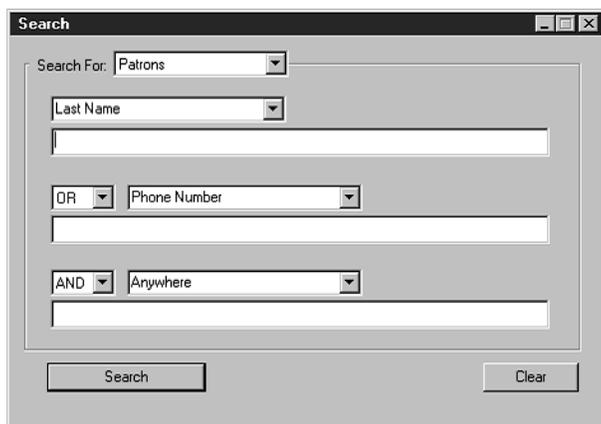


Searching for a Patron Record

The Search Dialog Box

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

FIGURE 4.19



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

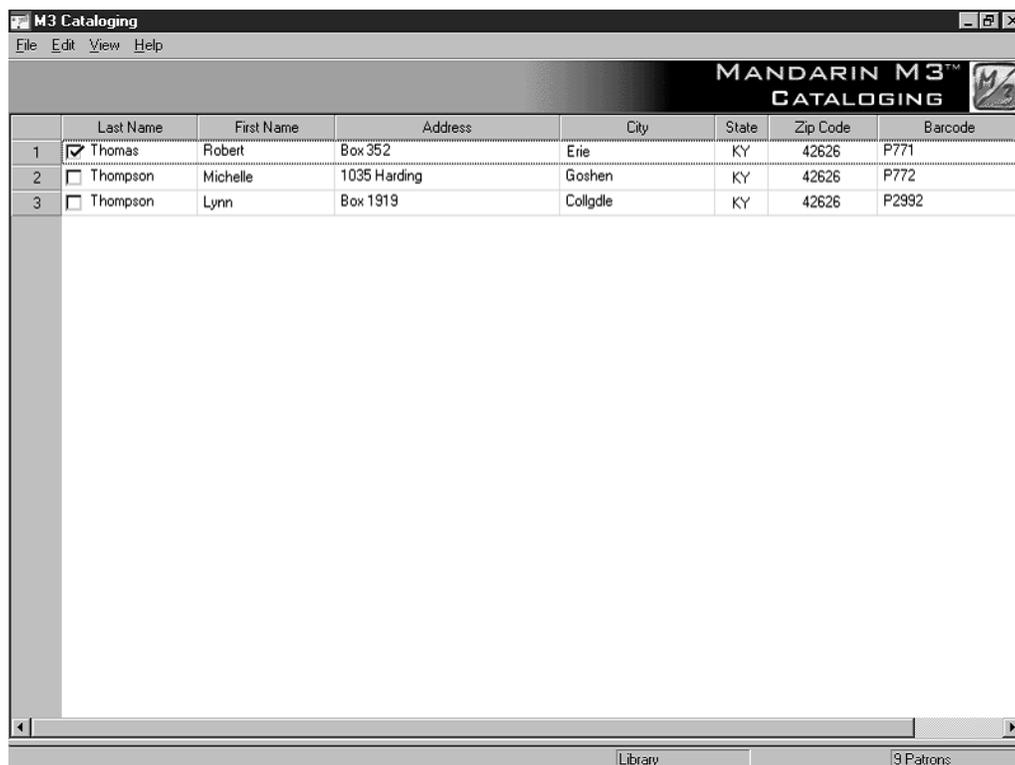
Your system can be configured to display different default patron record fields and Boolean operators.

How to Search

To search for a patron record:

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

FIGURE 4.20



5. From here, you can:

- Double-click a brief patron record to view its full MARC record. A full MARC patron record matching this search is shown in Figure 4.23.

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

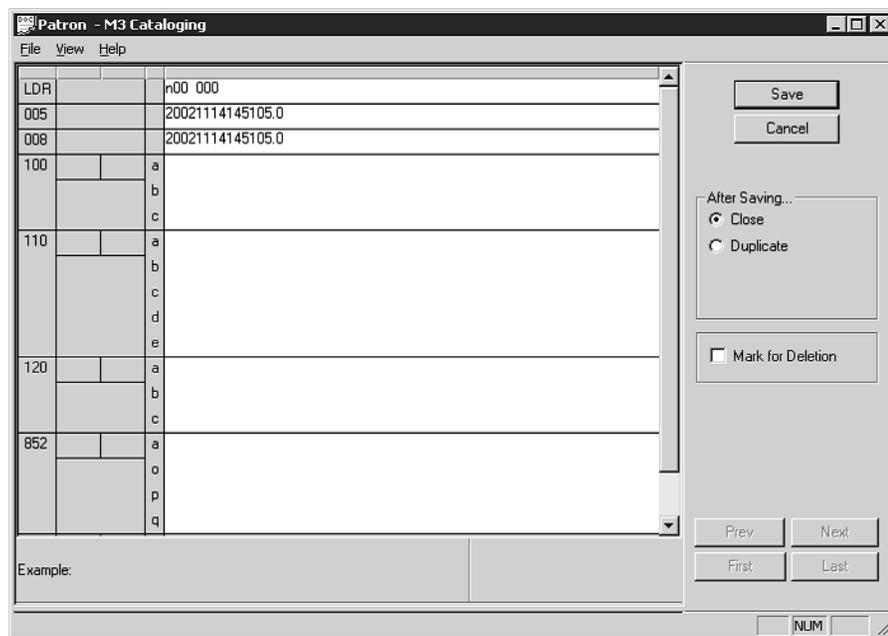
Creating a Patron Record

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

From a Template

1. On the **File** menu, select **New**, and then click **Patron Record**. (If more than one patron template is available, the Templates dialog box displays (Figure 4.7). Click the desired template, then click **OK**.) This displays the patron record template in the Patron - Cataloging window (Figure 4.21).

FIGURE 4.21



Note: To automatically delete all fields left empty when the record is saved, change the Strip Empty Fields entry in the ActiveMarcEdit.ini file (located in your M3 directory) to OVERRIDE=off, then restart the Cataloging module.

Tip: To insert a picture field in this record so a picture displays alongside the record- when it is involved in a transaction, see “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-38.

2. Enter field and subfield data for the new record. To move through the record, use your keyboard up and down arrows. Notice that status bar information changes to identify the selected field and subfield.

- To access a menu with edit commands (Figure 4.9), right-click the field or subfield you want to edit. From this menu, you can insert, delete, cut, copy, paste, and move fields. You can click **Find** to locate text within this record, or click **Toggle Prompts** to change the MARC field labels from numbers to text.
- To access a list of Leader field standard choices (including position and legal characters), double-click in the Leader field. This displays the Fixed Field dialog box (Figure 4.22). In the **Record Status** list, select a status, then click **OK**.

FIGURE 4.22



- To save a version of this record as a template for future use, click **Save As Template** on the **File** menu.
3. When finished editing the record (but before saving), click an option in the **After Saving** group to indicate what you want to happen after you save the record. The options are:
- **Close** exits the saved record and returns to the Cataloging window.
 - **Duplicate** creates a new record identical to the one you are saving; you can edit the duplicate record to create another record.
4. To mark this record for deletion, select the **Mark for Deletion** check box. For instructions on purging records marked for deletion, see “Step 2: Purging Records Marked for Deletion” on page 4-47.
5. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected in the **After Saving** group.

By Duplicating an Existing Patron Record

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

4. Click **Search**. This displays a list of records matching your search query (Figure 4.20).
5. Click the patron record to be duplicated. On the **Edit** menu, click **Duplicate**. This displays the Patron - Cataloging window (Figure 4.21) containing the corresponding full patron record. This is a duplicate patron record.
6. Edit the record as needed. For instructions, see steps 2 through 4 beginning on page 4-19.
7. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected in the **After Saving** group.

Editing a Patron Record

To edit a patron record:

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

FIGURE 4.23

Patron 000000045 - M3 Cataloging

File View Help

LDR			nam uu
001			000000045
005			20020911142143.0
008			20020911142143.0
100	1		a SHERRILL
			g STU
			s 33280
			c OLIVER
270			a 189 WOODSTER ST 3FL
			b NEW HAVEN
			c CT
			e 06511
			k 203 782 1771
271			g TANYA
271			g REED
852	1		a 56
			b M2
			g 08

Example:

Save

Cancel

After Saving...

Close

Duplicate

Mark for Deletion

Prev Next

First Last

NUM

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

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

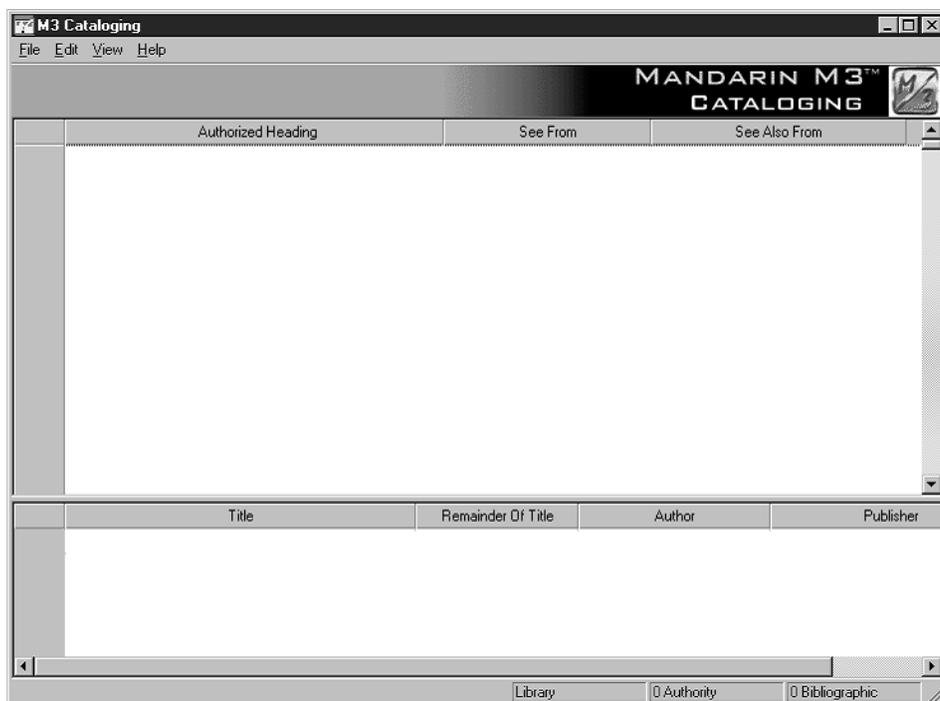
Working with Authority Records

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

Cataloging Window Features

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

FIGURE 4.24

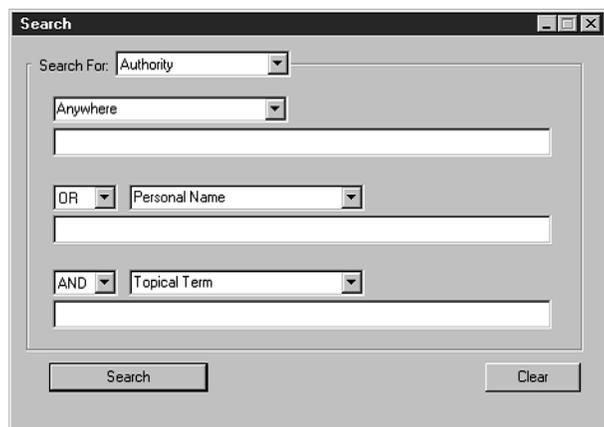


Searching for an Authority Record

The Search Dialog Box

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

FIGURE 4.25



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

- 'Search For:' dropdown menu set to 'Authority'.
- 'Anywhere' dropdown menu.
- Empty text input field.
- 'OR' dropdown menu.
- 'Personal Name' dropdown menu.
- Empty text input field.
- 'AND' dropdown menu.
- 'Topical Term' dropdown menu.
- Empty text input field.
- 'Search' button.
- 'Clear' button.

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

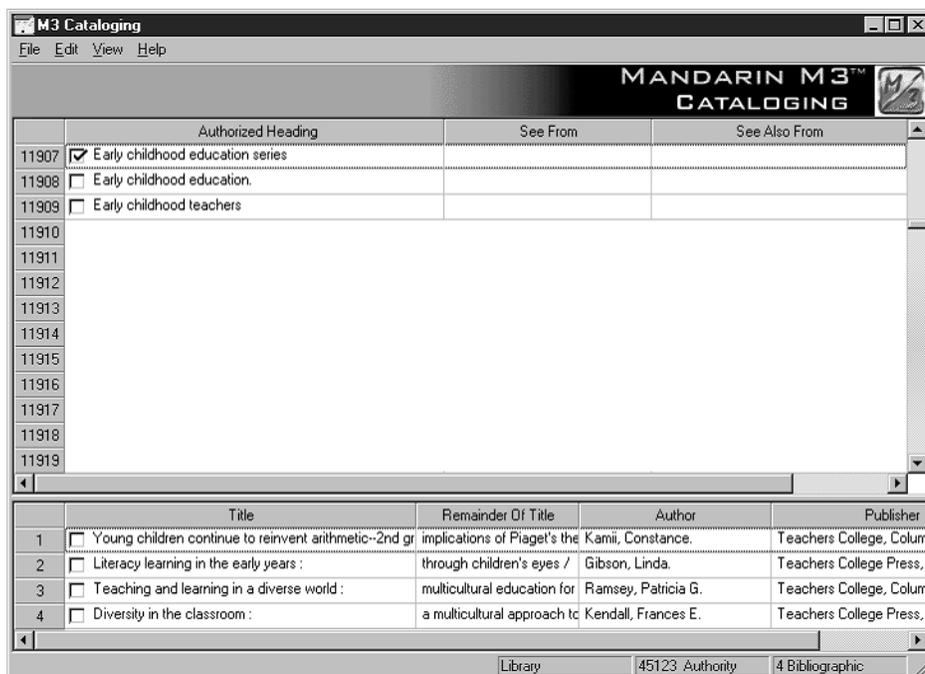
Your system can be configured to display different default authority record fields and Boolean operators.

How to Search

To search for an authority record:

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

FIGURE 4.26



5. From here you can:

- Double-click a brief authority record to view its full MARC record. A full MARC authority record matching this search is shown in Figure 4.29.
- Select a check box to tag the corresponding record for deletion or printing. To tag a block of records, select the first record and press **SHIFT** while selecting the last record; this tags all records in between.
- Print tagged records or all records in the list. To do so, select **Print** on the **File** menu, then click **Records** (to print tagged) or **List** (to print all).
- Create a new similar record by clicking **Duplicate** on the **Edit** menu. (For instructions, see the following section, “Creating an Authority Record.”)
- Start another search from the **Edit** menu.

Creating an Authority Record

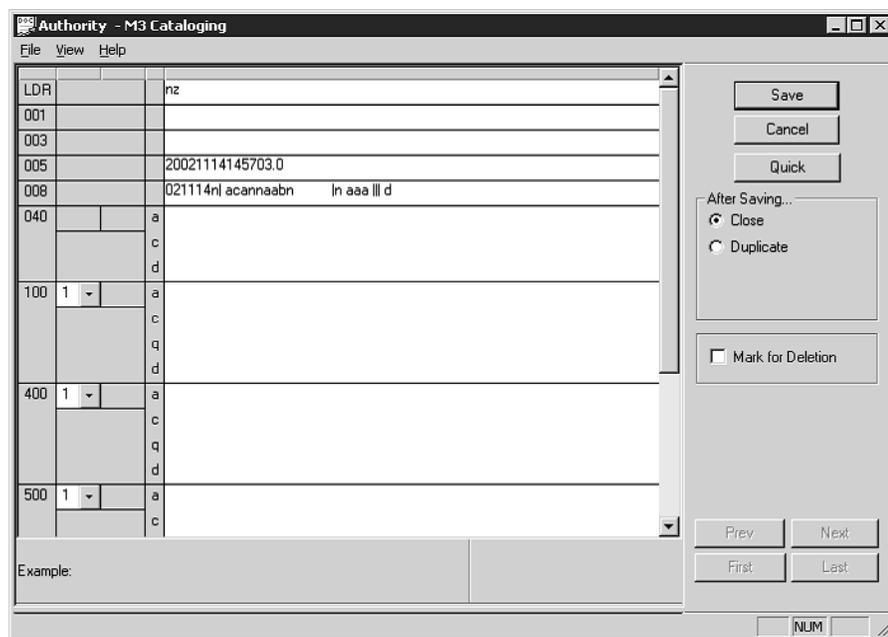
There are three ways to create a new authority record. (1) You can use a template and edit it to create the new record. (2) You can duplicate an existing authority record, then edit it to create the new record. (3) You can use the Quick Editor method (see “Using the Authority Record Quick Editor” beginning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

From a Template

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

(Figure 4.27).

FIGURE 4.27



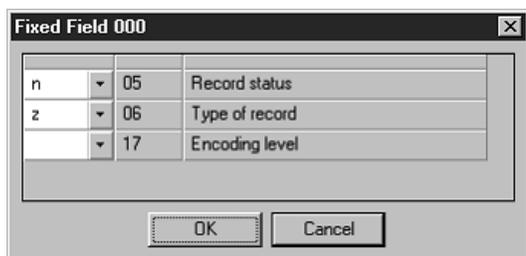
Tip: To add an authority record using the Quick Editor method, see “Using the Authority Record Quick Editor” beginning on page 4-27.

Note: To automatically delete all fields left empty when the record is saved, change the Strip Empty Fields entry in the ActiveMarcEdit.ini file (located in your M3 directory) to OVERRIDE=off, then restart the Cataloging module.

2. Enter field and subfield data for the new record. To move through the record, use your keyboard up and down arrows. Notice that status bar information changes to identify the selected field and subfield.

- To access a menu with edit commands (Figure 4.9), right-click the field or subfield you want to edit. From this menu, you can insert, delete, cut, copy, paste, and move fields. You can click **Find** to locate text within this record, or click **Toggle Prompts** to change the MARC field labels from numbers to text.
- To access a list of fixed field standard choices (including position and legal characters) pertaining to a particular fixed field, double-click in the field. The dialog box for fixed field 000 is shown in Figure 4.28. You can define your fixed field by typing in your text, or, where available, clicking the arrow button and selecting an option in the list. When finished, click **OK**.

FIGURE 4.28



- To save a version of this record as a template for future use, click **Save As Template** on the **File** menu.
3. When finished editing the record (but before saving), click an option in the **After Saving** group to indicate what you want to happen after you save the record. The options are:
 - **Close** exits the saved record and returns to the Cataloging window.
 - **Duplicate** creates a new record identical to the one you are saving; you can edit the duplicate record to create another record.
 4. To mark this record for deletion, select the **Mark for Deletion** check box. For instructions on purging records marked for deletion, see “Step 2: Purging Records Marked for Deletion” on page 4-47.
 5. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected in the previous step.

By Duplicating an Existing Authority Record

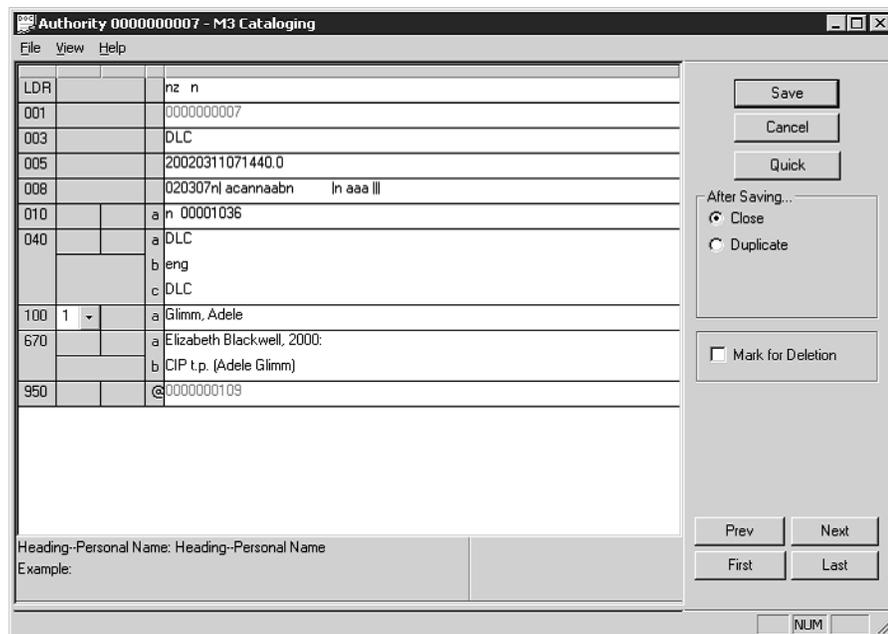
1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.19).
2. In the **Search For** list, select **Authority**.
3. Type your search query into the appropriate keyword boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
4. Click **Search**. This displays a list of records matching your search query (Figure 4.26).
5. Click the authority record to be duplicated. On the **Edit** menu, click **Duplicate**. This displays the Authority - Cataloging window (Figure 4.27) containing the corresponding full authority record. This is a duplicate authority record.
6. Edit this record as needed. For instructions, see steps 2 through 4 beginning on page 4-24.
7. When finished, click **Save**. This saves the record and displays another record or the Cataloging window, depending on which option you selected in the **After Saving** group.

Editing an Authority Record

To edit an existing authority record:

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

FIGURE 4.29



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

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

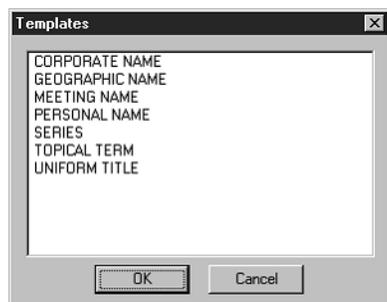
Using the Authority Record Quick Editor

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

Creating an Authority Record Using the Quick Editor

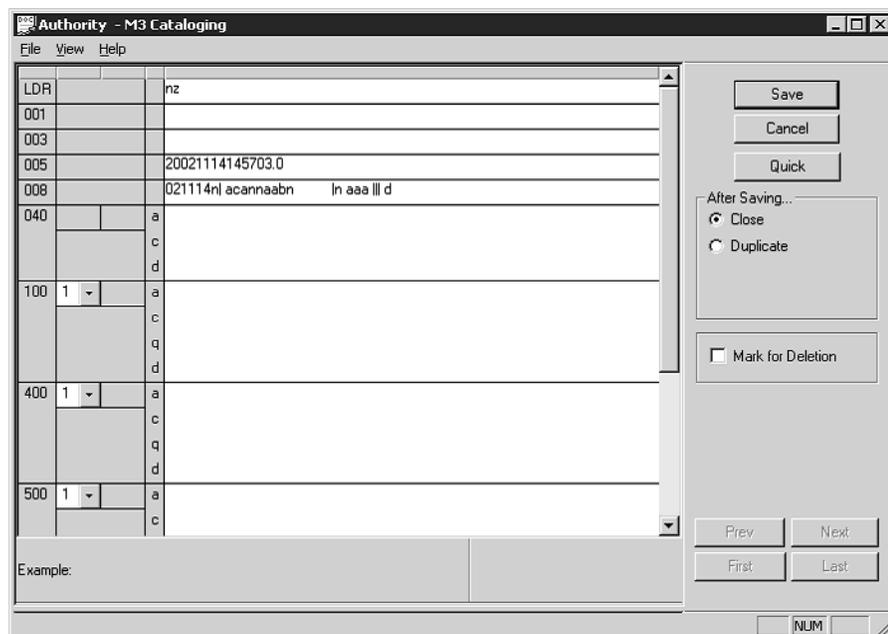
1. On the **File** menu, select **New**, and then click **Authority Record**. This displays the Templates dialog box (Figure 4.30).

FIGURE 4.30



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

FIGURE 4.31

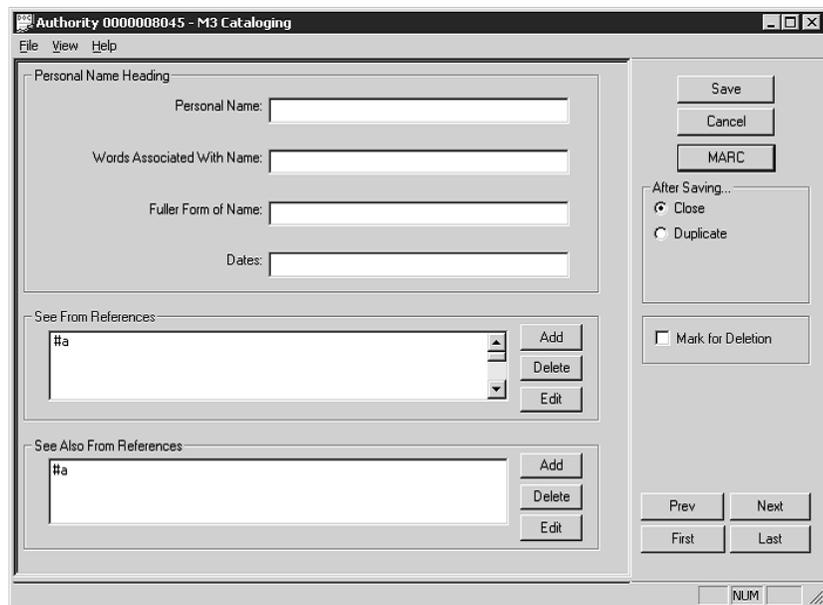


Tip: For information on the After Saving and Mark for Deletion options in this window, see steps 3 and 4 on page 4-25.

3. Click **Quick**. This displays the Authority - Cataloging Quick Editor window.

The fields available in the **Heading** group vary depending on the type of authority record selected in step 2. Shown in Figure 4.32 is the Quick Editor window for a Personal Name authority record.

FIGURE 4.32

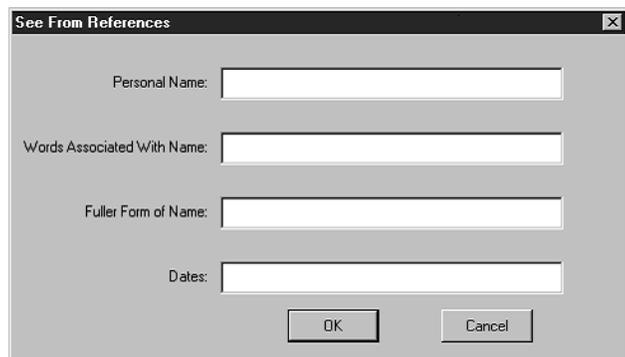


See From references (MARC authority field 4xx) lead a searcher from an unauthorized heading to an authorized heading. See Also From references (MARC authority field 5xx) lead a searcher from an authorized heading to another related authorized heading.

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

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

FIGURE 4.33



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

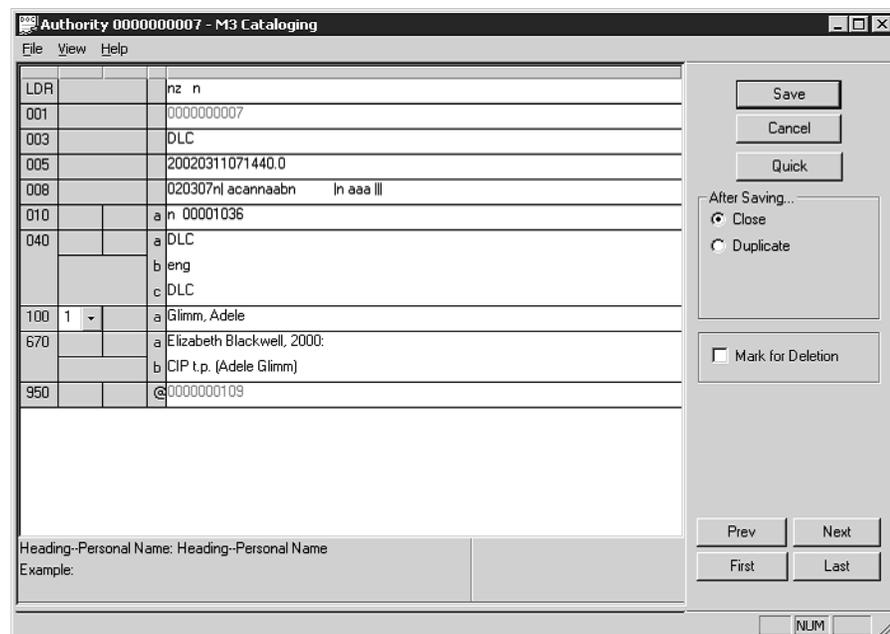
6. In the **See Also From References** group, click **Add**. This displays the See Also From References dialog box, which contains the same fields as the See From References dialog box (Figure 4.33). Type entries as desired, then click **OK**. This places the entries in the **See Also From References**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

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

Editing an Authority Record Using the Quick Editor

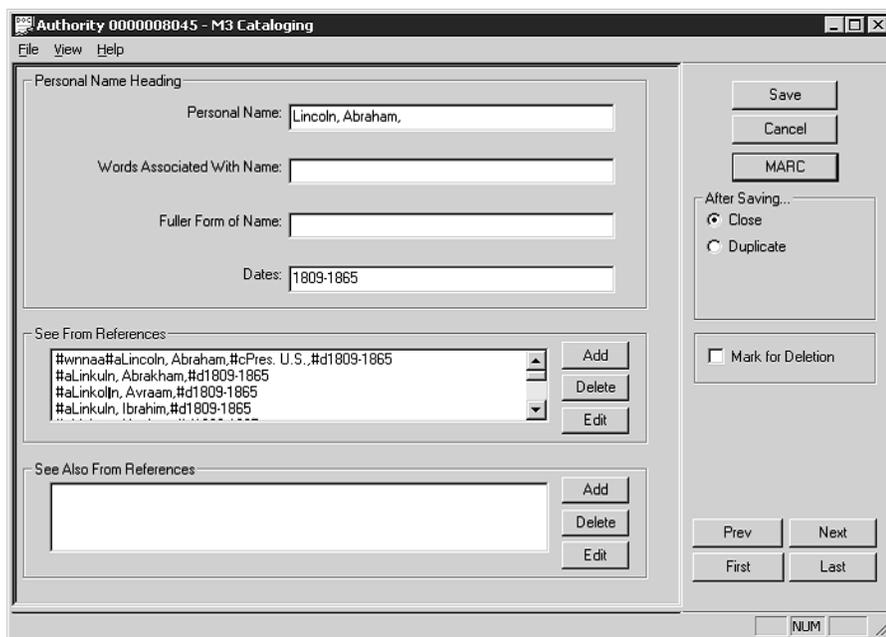
1. Display the record you want to edit in the Authority - Cataloging window (Figure 4.34). (For instructions on locating and displaying a record, follow steps 1A through 1E in “Editing an Authority Record” on page 4-26.)

FIGURE 4.34



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

FIGURE 4.35

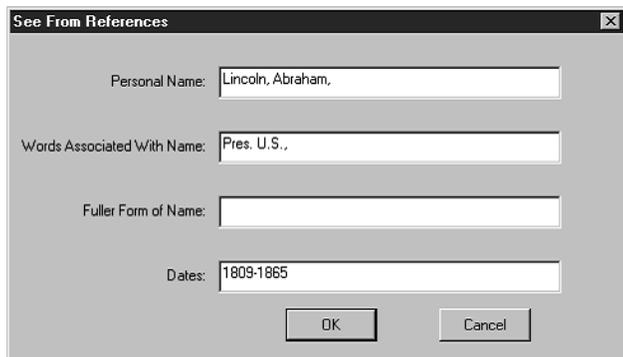


See From references (MARC authority field 4xx) lead a searcher from an unauthorized heading to an authorized heading. See Also From references (MARC authority field 5xx) lead a searcher from an authorized heading to another related authorized heading.

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

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

FIGURE 4.36



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

5. In the **See Also From References** group, select a reference, then click **Delete** or **Edit**.

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

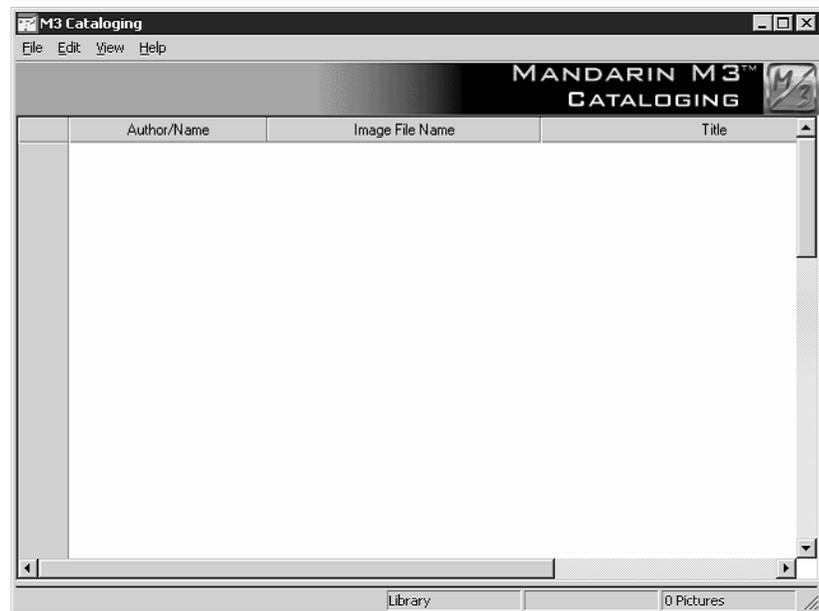
6. When finished, click **Save** in the Authority - Cataloging window.

Working with Picture Records

Cataloging Window Features

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

FIGURE 4.37



Displaying Item and Patron Pictures

Pictures can be imported into your M3 database and displayed in the OPAC and Circulation modules. Item pictures, such as cover images, can be displayed in the OPAC and Circulation; patron photos can be displayed in Circulation. For instructions on importing images, see “Using M3 Picture Manager” on page 4-49.

In the OPAC

After importing pictures into your M3 database, you must enable them in the M3Opac.ini file. For instructions, see “Enabling Cover Images” on page 6-31. The images can then be viewed in the OPAC Search Results, Record Details, Bookbag Record List, and Bookbag Record Details windows.

In Circulation

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

- Add a graphic cell to the Patron pane for each Circulation mode (Loan, Return, and so on) in which you want an image to display; changes made to one mode will not apply to the other modes. For instructions, see “Modifying the Patron Pane Display” on page 5-59.

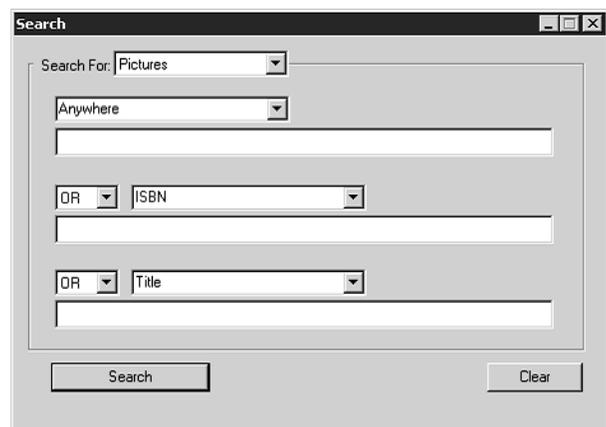
- Add a graphic cell to the Item pane for each Circulation mode (Loan, Return, and so on) in which you want an image to display; changes made to one mode will not apply to the other modes. For instructions, see “Mod- ifying the Item Pane Display” on page 5-64.

Searching for a Picture Record

The Search Dialog Box

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

FIGURE 4.38



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

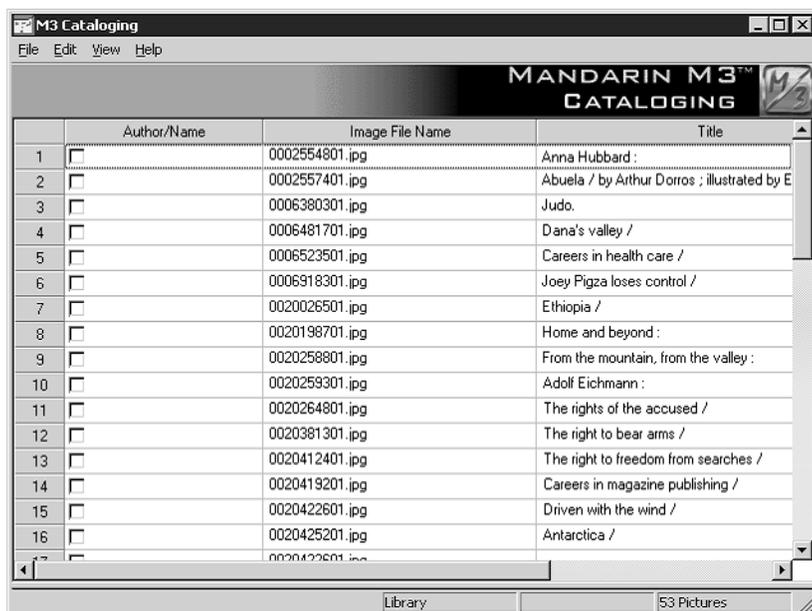
Your system can be configured to display different default picture record fields and Boolean operators.

How to Search

To search for a picture record:

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

FIGURE 4.39



5. From here, you can:

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

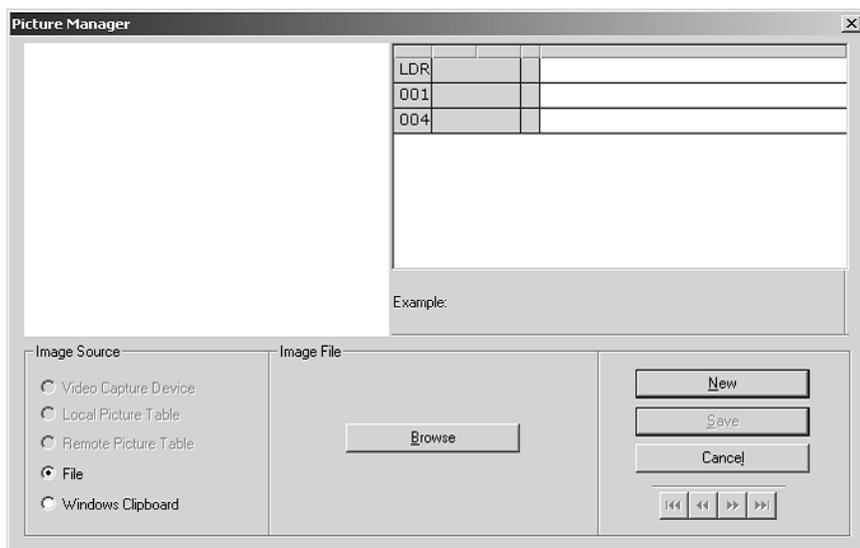
Creating a Picture Record

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

From a Template

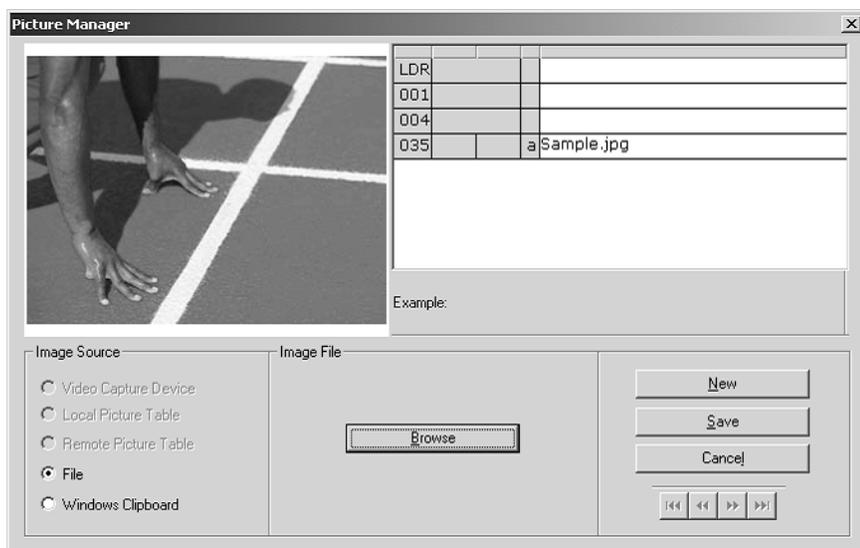
1. On the **File** menu, select **New**, and then click **Picture Record**. This displays the template in the Picture Manager dialog box (Figure 4.40)

FIGURE 4.40



2. In the **Image Source** group, select the source of the picture. Depending on the source selected, you must search for or navigate to the picture (for instructions on using the options in this group, see step 6 in “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-39). After the picture is selected, it appears in the Preview pane (Figure 4.41).

FIGURE 4.41



3. Enter field and subfield data for the new record. To access a menu with edit commands (Figure 4.9), right-click the field or subfield in the Record pane that you want to edit. From this menu, you can insert, delete, cut, copy, paste, and move fields. You can click **Find** to locate text within this record, or click **Toggle Prompts** to change the MARC field labels from numbers to text.

4. When finished, click **Save**. This displays the Cataloging window with the new picture record listed.

By Duplicating an Existing Picture Record

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.38).
2. In the **Search For** list, select **Pictures**.
3. Type your search query into the appropriate keyword boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
4. Click **Search**. This displays a list of records matching your search query (Figure 4.39).
5. Click the picture record to be duplicated. On the **Edit** menu, click **Duplicate**. This displays the Picture Manager window (Figure 4.41) containing the corresponding full picture record. This is a duplicate picture record.
6. Edit the record as needed.
 - To change the source of the picture, select an option in the **Image Source** group. Depending on the source selected, you must search for or navigate to the picture (for instructions on using the options in this group, see step 6 in “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-39.) After the picture is selected, it appears in the Preview pane (Figure 4.42).
 - To access a menu with edit commands (Figure 4.9), right-click the field or subfield in the Record pane that you want to edit. From this menu, you can insert, delete, cut, copy, paste, and move fields. You can click **Find** to locate text within this record, or click **Toggle Prompts** to change the MARC field labels from numbers to text.
7. When finished, click **Save**. This displays the Cataloging window with the new picture record listed.

Editing a Picture Record

To edit a picture record:

1. If the record to be edited is not displayed:
 - A. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.19).
 - B. In the **Search For** list, select **Pictures**.
 - C. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator. (For search tips, see page 4-4.)
 - D. Click **Search**. This displays a list of brief picture records matching your search query (Figure 4.39).
 - E. Double-click the picture record you want to edit. This displays the corresponding full record (Figure 4.42).

FIGURE 4.42



2. Edit the record as needed.

- To change the source of the picture, select an option in the **Image Source** group. Depending on the source selected, you must search for or navigate to the picture (for instructions on using the options in this group, see step 6 in “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-39). After the picture is selected, it appears in the Preview pane (Figure 4.42).
- To access a menu with edit commands (Figure 4.9), right-click the field or subfield in the Record pane that you want to edit. From this menu, you can insert, delete, cut, copy, paste, and move fields. You can click **Find** to locate text within this record, or click **Toggle Prompts** to change the MARC field labels from numbers to text.

3. When finished, click **Save**.

Using Find and Replace to Modify Records

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

To use the Find and Replace utility:

1. Verify that you are working with the correct database. For instructions, see “Selecting a Database” on page 4-2.
2. Isolate the records you want to modify. To do so:

- A. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.25).
- B. In the **Search For** list, select the type of records you want to modify.

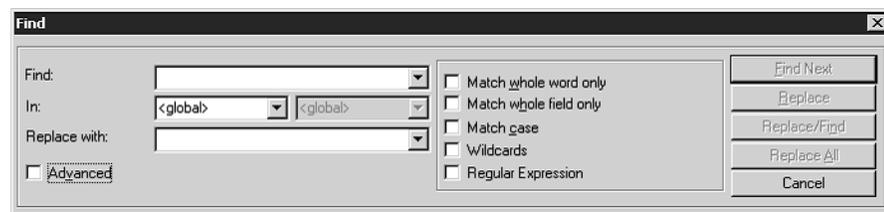
Note: During the Find and Replace operation, all Authority Control fields contained in a bibliographic record are ignored.

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

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

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

FIGURE 4.43



4. On the **Edit** menu, select the type of records you want to modify, and then click **Find**. This displays the Find dialog box (Figure 4.43).

5. Enter the desired find and replace parameters. To do so:

- A. In the **Find** box, type the existing text you want to find and replace. This text can be any alphabetic or numeric character string, including punctuation.
- B. In the **In** list, specify the MARC field that contains the text you want to replace.

- To indicate a specific field, type or select the desired field.
- To indicate any field (whether in the current record or all records isolated in step 2), select **<global>**. This looks for the text in all fields.

C. In the **Replace with** box, type the replacement text.

D. In the **Search options** group, select the appropriate options to fine-tune your search. Your choices are:

- **Match whole word only** – Locates exact text typed into the **Find** box, treating your text as a whole word. For example: If you type **cat**, only **cat** occurrences are found, and other words such as **catalog** and **scatter** are ignored. (**Match whole word only** and **Match whole field only** cannot be selected in the same operation.)
- **Match whole field only** – Locates exact text typed in the **Find** box, but only when that text is the entire content of a field.
- **Match case** – Locates exact text typed in the **Find** box, but only if the case matches.
- **Wildcards** – Allows a user to apply the truncation asterisk (*) to the beginning and/or end of text typed in the **Find** box, and the wildcard question mark (?) within text in the **Find** box. Wildcard usage broadens your search.
- **Regular expression** – Allows an advanced user to search using regular expression notation rather than plain text. Regular expressions allow you to use a character string that has special meaning when used in a pattern. For example, the string **/eg*/** would find **easy**, **egocentric**, **egg**, and all other words that have zero or more occurrences of the character preceding the asterisk (in this example, **g**). This is only one example of a regular expression search; there are many characters that can be used.

E. Select the **Advanced** check box if you plan to use the advanced options. These options are explained in “Using the Advanced Find and Replace Features” on page 4-39.

6. Click the appropriate option button to proceed with the find and replace operation. The button you choose depends on whether you want to find and replace in all records isolated in step 2, or in just the selected record. To do so:

- Click **Replace All** to replace text in all records isolated in step 2. This locates all occurrences in all the selected records and replaces them simultaneously. This option does not allow you to preview each occurrence prior to replacement. If you click **Replace All**, this completes the find and replace operation.

OR

- Click **Find Next** to limit the find operation to locating each occurrence of the search item, one by one. This button searches all records to find the next occurrence of the text. (If you

indicated a specific field in step 5B, **Find Next** limits the find operation to that specific field in the records.) When an occurrence is found, it is displayed and highlighted, waiting for you to preview the occurrence. Click in the Find dialog box and then select one of the following four option buttons.

- **Find Next** skips this occurrence without replacing the text, then finds and displays the next occurrence.
- **Replace** inserts replacement text for that one occurrence, then waits for you to indicate the next action. You must then click **Find Next** to look for the next occurrence.
- **Replace/Find** inserts replacement text for that one occurrence, then automatically finds and displays the next occurrence.
- **Replace All** inserts replacement text for all occurrences simultaneously.

NOTES:

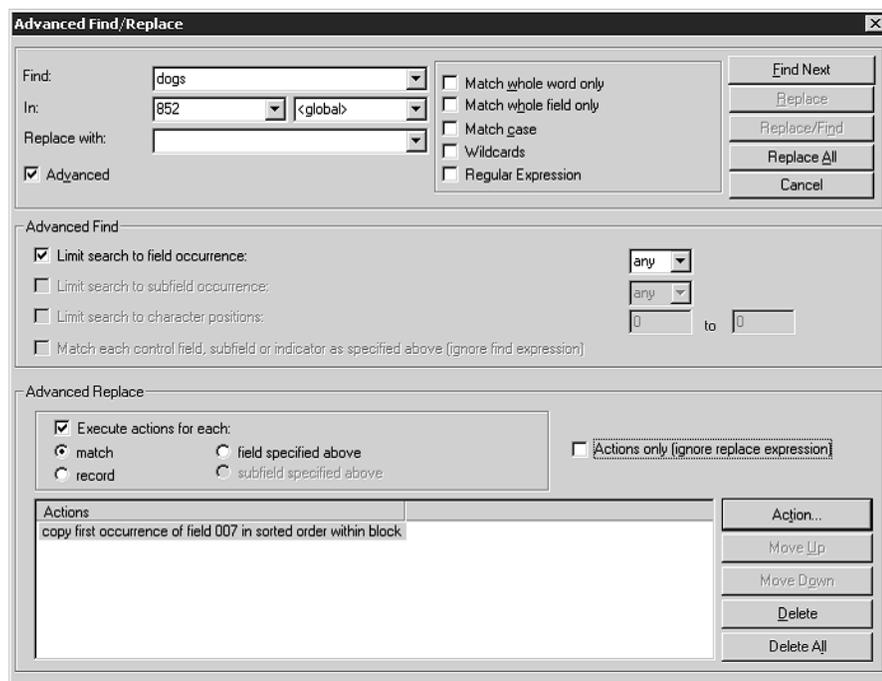
- To cancel the find and replace operation, click **Cancel** at any time. However, any changes made prior to clicking **Cancel** are saved.
- To “undo” the changes, click **Undo Find/Replace** on the **Edit** menu. You cannot undo once you have begun another find operation, saved a record, imported or exported records, begun a standard keyword search, or exited Cataloging.

Using the Advanced Find and Replace Features

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

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

FIGURE 4.44



Advanced Find/Replace

Find: dogs
 In: 852 <global>
 Replace with:
 Advanced

Match whole word only
 Match whole field only
 Match case
 Wildcards
 Regular Expression

Find Next
 Replace
 Replace/Find
 Replace All
 Cancel

Advanced Find

Limit search to field occurrence: any
 Limit search to subfield occurrence: any
 Limit search to character positions: 0 to 0
 Match each control field, subfield or indicator as specified above (ignore find expression)

Advanced Replace

Execute actions for each:
 match field specified above
 record subfield specified above
 Actions only (ignore replace expression)

Actions
 copy first occurrence of field 007 in sorted order within block

Action...
 Move Up
 Move Down
 Delete
 Delete All

In the **Advanced Find** group:

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

In the **Advanced Replace** group:

- **Execute actions for each:**
- **match** – Limits the replace action to any match in any record.
- **record** – Limits the replace action to any record regardless of match.
- **field specified above** – Limits the replace action to the specified field.
- **subfield specified above** – Limits the replace action to the specified subfield.

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

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

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

Example Find and Replace Operations

NOTE: The following examples assume that the M3 system is installed and properly running. The examples also assume the user has the Cataloging module running and all rights configured so that the Find and Replace utility operates properly.

Changing the Contents of a Field or Subfield

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

Example 1: Correcting a spelling problem

This example shows how to correct misspelled words in records.

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.25).
2. In the **Search For** list, select the type of records you want to search.
3. In the first keyword box, type the misspelled word. To select a different MARC field, select the preferred field in the record field list.
4. Click **Search**. This limits the find and replace operation to only the records containing the misspelled word, and reduces the time needed for the find and replace operation.
5. Select the check box by each brief record you want to include in the Find and Replace operation. Or, to include all records in the list: on the **Edit** menu, select the type of record you want to include, and then click **Select All Records**. This places a check mark by all brief records in the list.
6. On the **Edit** menu, select the same record type you selected in step 2, and then click **Find**. This displays the Find dialog box (Figure 4.43).
7. In the **Find** box, type the misspelled word.
8. In the **In** lists, specify the MARC field and subfield to which you want to limit the find and replace operation.
9. In the **Replace with** box, type the correct spelling of the word.
10. Select any of the search options check boxes needed to refine your search (**Match case**, **Wildcards**, and so on).
11. Click **Find Next**. This locates the first occurrence of the **Find** text.
12. If you want the text replaced, click **Replace**. If you do not want the text replaced, click **Find Next** to locate the next occurrence.

NOTES:

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

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

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

Example 2: Changing grade levels in a high school

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

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.25).
2. In the **Search For** list, select **Patron**.
3. In the first keyword box, type the highest grade level at your institution (for example, 12th grade). To select a different MARC field, select the preferred field in the record field list.
4. Click **Search**. This limits the find and replace operation to only the records containing the grade level you want to change, and reduces the time needed for the find and replace operation.
5. Select the check box by each brief record you want to include in the Find and Replace operation. Or, to include all records in the list: on the **Edit** menu, select **Patrons**, and then click **Select All Records**. This places a check mark by all brief records in the list.
6. On the **Edit** menu, select **Patrons**, and then click **Find**. This displays the Find dialog box (Figure 4.43).
7. In the **Find** box, type the number **12**.
8. In the **In** lists, select **852** and **g** to limit the find and replace operation to field 852#g.
9. In the **Replace with** box, type the number **13**.
10. Select the **Match whole word only** check box to make sure the find and replace does not find and possibly change text like 120 or 1213. While this might not be needed in this case, it is a good habit.
11. Click **Find Next**. This locates the first occurrence of the **Find** text.
12. If you want the text replaced, click **Replace**. If you do not want the text replaced, click **Find Next** to locate the next occurrence.
13. Repeat this procedure until all grades have been promoted. When finished, be sure to search for and delete all 13th graders.

NOTES:

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

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

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

Deleting and/or Obsoleting Unwanted Fields and/or Subfields

Example 3: Deleting all field occurrences of field 261

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

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.25).
2. In the **Search For** list, select **Bibliographic**.
3. In the record field list, type the field tag number (**261**) over the default field name.
4. In the first keyword box, type an asterisk (*).
5. Click **Search**. This limits the find and replace operation to only the records containing the unwanted field, and reduces the time needed for the find and replace operation.
6. Select the check box by each brief record you want to include in the Find and Replace operation. Or, to include all records in the list: on the **Edit** menu, select **Bibliographic**, and then click **Select All Records**. This places a check mark by all brief records in the list.
7. On the **Edit** menu, select **Bibliographic**, and then click **Find**. This displays the Find dialog box (Figure 4.43).
8. Select the **Advanced** check box. This displays the Advanced Find/Replace dialog box (Figure 4.44).
9. Click **Action**, select **Remove existing**, and then click **field**.
10. In the first **Field/occurrence** list, select **261**. If there are multiple occurrences of the field, select which occurrence should be replaced in the second **Field/occurrence** list, and then click **Next**.
11. Select the **Execute actions for each** check box, then click **record**.
12. Click **Find Next**. This locates the first occurrence of the **Find** text.
13. If you want the field removed, click **Replace**. If you do not want the field removed, click **Find Next** to locate the next occurrence.

NOTES:

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

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

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

Adding a Field or Subfield

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

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

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.25).
2. In the **Search For** list, select **Bibliographic**.
3. Search for the records in which you want to add the new field. To do so, type your search query into the appropriate keyword boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator.
4. Click **Search**. This limits the find and replace operation to only the records you want to modify, and reduces the time needed for the find and replace operation.
5. Select the check box by each brief record you want to include in the Find and Replace operation. Or, to include all records in the list: on the **Edit** menu, select **Bibliographic**, and then click **Select All Records**. This places a check mark by all brief records in the list.
6. On the **Edit** menu, select **Bibliographic**, and then click **Find**. This displays the Find dialog box (Figure 4.43).
7. Select the **Advanced** check box. This displays the Advanced Find/Replace dialog box (Figure 4.44).
8. Click **Action**, select **Insert new**, and then click **field/subfield**.
9. In the **Field** list, type or select **590**. In the **Subfield** list, type or select the letter **a**, and then click **Next**.
10. Select how you want the field positioned, and then click **Next**.
11. Click **Next** to skip this dialog box.
12. Type your note, and then click **Next**. This closes the dialog box.
13. Select the **Execute actions for each** check box, then click **record**.
14. Click **Find Next**. This locates the first occurrence of the **Find** text.

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

NOTES:

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

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

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

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

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

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.25).
 - A. In the **Search For** list, select **Bibliographic**.
 - B. In the first record field list, select a MARC field.
 - C. In the first keyword box, type an asterisk (*).
 - D. In the first Boolean operator list, select **NOT**.
 - E. In the next record field list, type **245#h** over the default field name.
 - F. In the keyword box below, type **video***.
2. Click **Search**. This limits the find and replace operation to only the records you want to modify, and reduces the time needed for the find and replace operation.
3. Select the check box by each brief record you want to include in the Find and Replace operation. Or, to include all records in the list: on the **Edit** menu, select **bibliographic**, and then click **Select All Records**. This places a check mark by all brief records in the list.
4. On the **Edit** menu, select **Bibliographic**, and then click **Find**. This displays the Find dialog box (Figure 4.43).
5. In the **Find** box, type the letter **g**.
6. In the **In** list, type **000** to limit the find and replace operation to the leader.
7. Select the **Advanced** check box. This displays the Advanced Find/Replace dialog box (Figure 4.44).
8. Select the **Limit search to character positions** check box. Type **6** in both of the boxes that follow.
9. Click **Action**, select **Insert new**, select **subfield**, and then click **into existing field**.
10. In the **Subfield** list, type or select **h**, and then click **Next**.

11. In the first **Field/occurrence** list, type or select **245**. Leave **first** as the value of the second **Field/occurrence** list, then click **Next**.
12. Click **after**. In the adjacent boxes, type or select **b** in the first box, and leave **first** as the value of the second box. Then click **Next**.
13. In the text box, type [**videorecording**], and then click **Next**.
14. Select the **Execute actions for each** check box, and then click **match**.
15. Click **Find Next**. This locates the first occurrence of the **Find** text.

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

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

NOTES:

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

Renaming a Field or Subfield

Example 6: Renaming a field or subfield with incorrect information

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

1. On the **Edit** menu, click **Search**. This displays the Search dialog box (Figure 4.25).
2. In the **Search For** list, select **Bibliographic**.
3. In the record field list, type the field tag number (**261**) over the default field name.
4. Click **Search**. This limits the find and replace operation to only the records containing the unwanted field, and reduces the time needed for the find and replace operation.
5. Select the check box by each brief record you want to include in the Find and Replace operation. Or, to include all records in the list: on the **Edit** menu, select **Bibliographic**, and then click **Select All Records**. This places a check mark by all brief records in the list.
6. On the **Edit** menu, select **Bibliographic**, and then click **Find**. This displays the Find dialog box (Figure 4.43).
7. Select the **Advanced** check box. This displays the Advanced Find/Replace dialog box (Figure 4.44).

8. Click **Action**, select **Rename existing**, and then click **field**.
9. In the first **Field/occurrence** list, type or select **261**. If there are multiple occurrences of the field, indicate which occurrence should be replaced in the second **Field/occurrence** list, and then click **Next**.
10. Type or select **262** as the new field tag, and then click **Next**. This closes the dialog box.
11. Select the **Execute actions for each** check box, then click **record**.
12. Click **Find Next**. This locates the first occurrence of the **Find** text.
13. If you want the field renamed, click **Replace**. If you do not want the field renamed, click **Find Next** to locate the next occurrence.

NOTES:

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

Deleting and Undeleting Records

For precautionary reasons, deleting records is a two-step process. You must first mark records for deletion, then purge the marked records. You can undelete records marked for deletion unless they have been purged.

Step 1: Marking Records for Deletion

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

From the Brief MARC Record List

Note: Use this method to delete picture records.

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

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

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

From the Full MARC Record

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

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

OR

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

Step 2: Purging Records Marked for Deletion

Warning: You cannot undo the Purge Deleted Records command; records are permanently removed.

To purge records marked for deletion:

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

Undeleting Records

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



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

Additional M3 Searching Capabilities

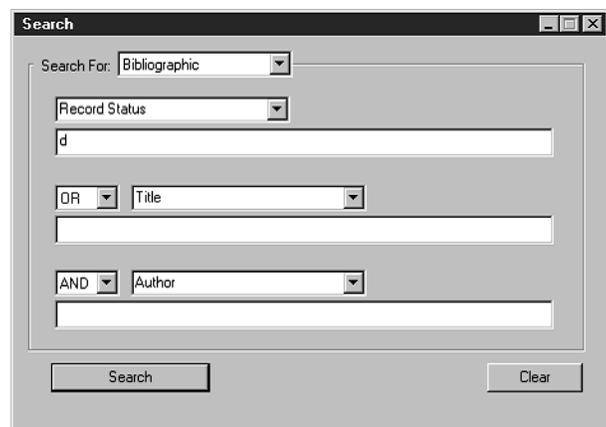
Searching by Record Status

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

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

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

FIGURE 4.45



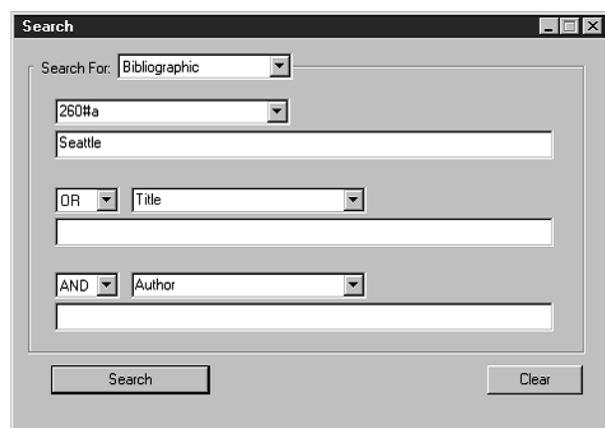
5. Click **Search**. This displays the Cataloging window listing all records with the selected record status.

Searching by MARC Field Tag Numbers

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

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

FIGURE 4.46



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

Using M3 Picture Manager

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

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

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

Displaying Imported Pictures

To display images in the OPAC, they must be enabled after import. For instructions, see “Enabling Cover Images” on page 6-31.

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

- Add a graphic cell to the Patron pane for each Circulation mode (Loan, Return, and so on) in which you want an image to display; changes made to one mode will not apply to the other modes. For instructions, see “Modifying the Patron Pane Display” on page 5-59.
- Add a graphic cell to the Item pane for each Circulation mode (Loan, Return, and so on) in which you want an image to display; changes made to one mode will not apply to the other modes. For instructions, see “Modifying the Item Pane Display” on page 5-64.

Importing Pictures

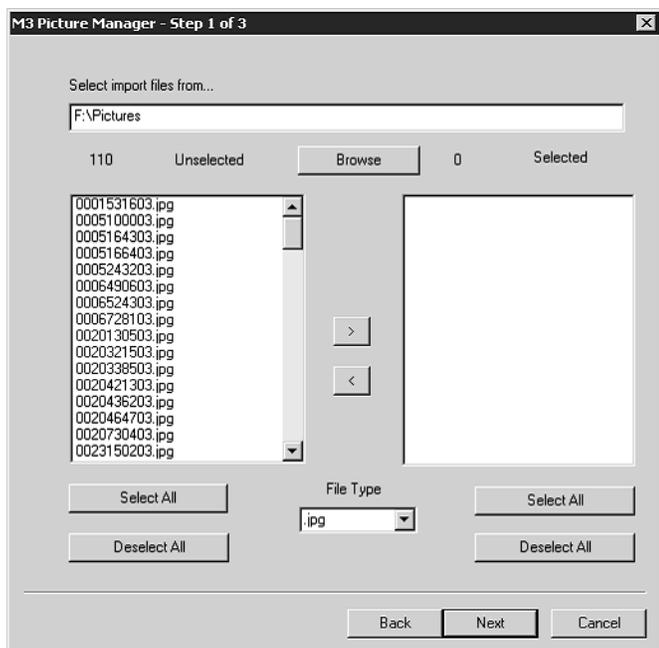
1. On the **File** menu, select **Import**, then click **Pictures**. This displays the M3 Picture Manager window (Figure 4.47).

FIGURE 4.47



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

FIGURE 4.48



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

OR

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

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

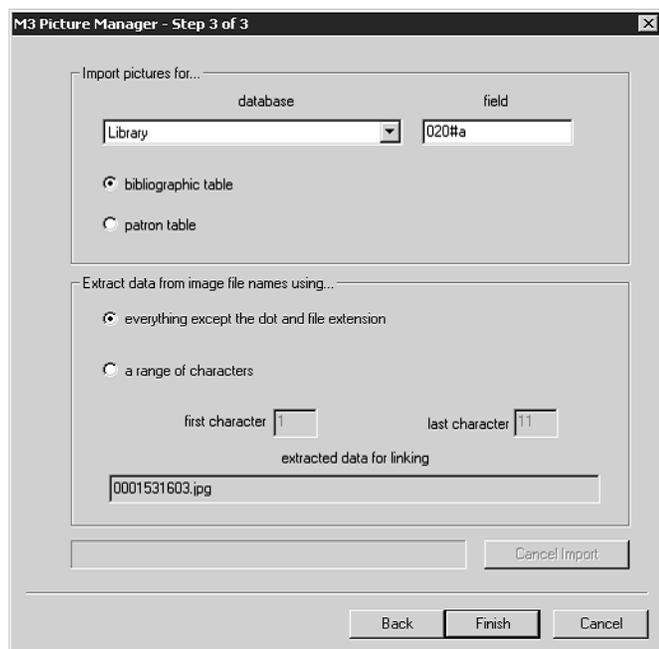
4. Move each file you want to import from the **Unselected** box to the **Selected** box. To do so, select each of the files you want to import, then click the > button. To move all files, click **Select All**, then click the > button.
5. Click **Next**. This displays the Step 2 dialog box (Figure 4.49)

FIGURE 4.49



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

FIGURE 4.50



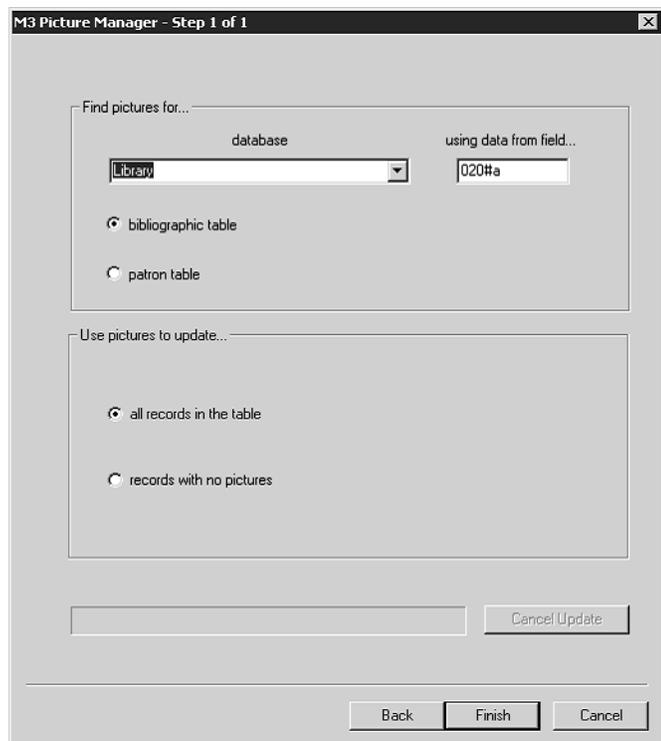
Note: To disable the field option, change the Allow Match Field Edit entry in the Global.ini.REG file (the default path is C:\M3 Server\Registry\Common) from 1 to 0. The default fields can also be modified in this file.

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

Updating Bibliographic or Patron Records with Pictures Use this feature to update your bibliographic or patron records with pictures that have already been imported. If you have not yet imported pictures, see “Importing Pictures” on page 4-50.

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

FIGURE 4.51



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

Adding a Picture Field to a Bibliographic or Patron Record To add a picture field to one bibliographic or patron record at a time, follow the procedure below. To import multiple image files at once, follow the procedure in “Importing Pictures” on page 4-50.



1. Display the desired bibliographic or patron record in the Bibliographic - Cataloging (Figure 4.8) or Patron - Cataloging (Figure 4.21) window.
2. Follow the procedure beginning with step 3 in “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-38.

Importing Bibliographic, Patron and Authority Records

Importing Overview

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

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

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

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

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

M3 also includes a Picture Manager utility to import pictures. To use this utility, see “Using M3 Picture Manager” beginning on page 4-49.

Optional High-Speed Import Option

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

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

To use the high-speed import option:

1. Press and hold CTRL, then click **Import** on the **File** menu. When an asterisk appears by the menu options on the **Import** submenu, release CTRL.
2. Proceed with the importing instructions in one of the following sections, depending on the type of data you are importing (MARC, delimited, or fixed width). (As the procedure progresses, a dialog box advises you that it is going to index. This is appropriate.)

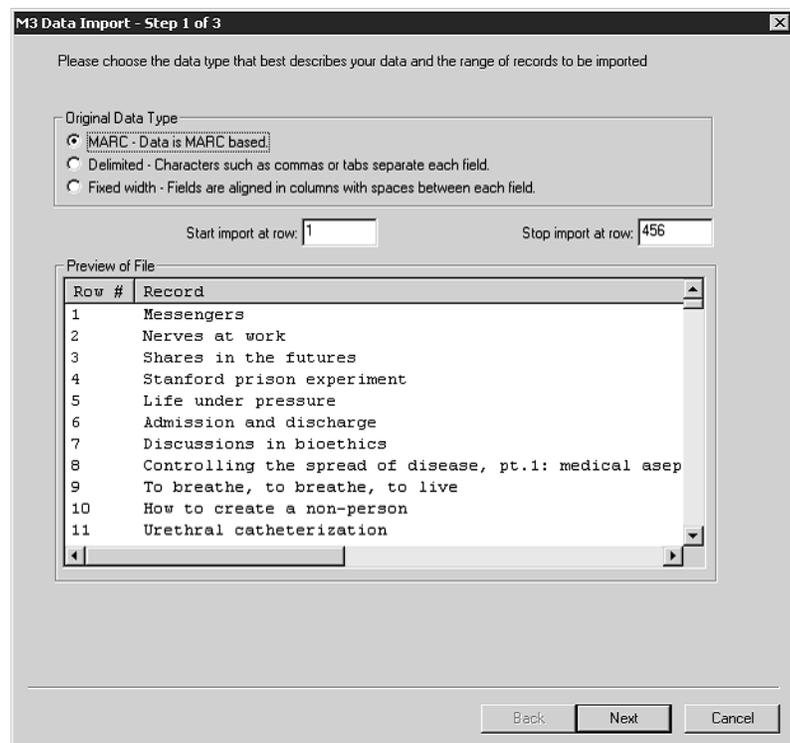
Importing MARC Records

To import records that are in MARC format:

1. Verify that you are working with the correct database.

2. On the **File** menu, select **Import**, and then click the type of records you are importing. This displays the Open dialog box.
3. Navigate to the file containing the records you want to import, and then click **Open**.
4. In the Step 1 dialog box (Figure 4.52), specify the range of records you want to import.

FIGURE 4.52



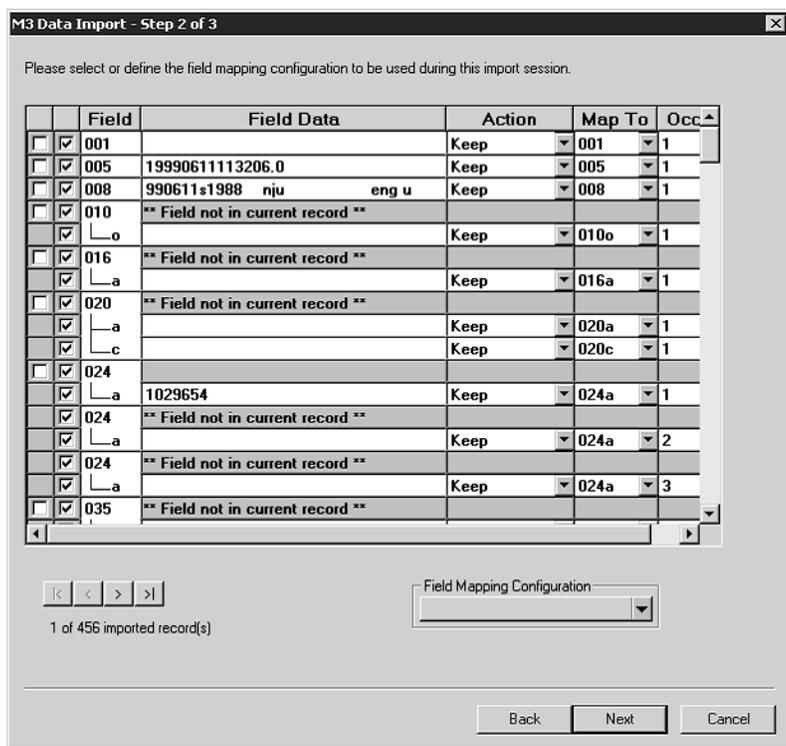
To do so:

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

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

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

FIGURE 4.53



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

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

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

Your options in this dialog box are:

- Accept the default field mapping configuration and continue the import process. To do so, click **Next**, and then skip to step 7 on page 4-60.
- Accept the default field mapping configuration and save it for future importing sessions before continuing. To do so:

- A. In the **Field Mapping Configuration** list, select **Save As**. This displays the Save Field Mapping As dialog box.
- B. Type a descriptive name for the new configuration, then click **OK**.
- C. After the Step 2 dialog box refreshes, click **Next**, and then skip to step 7 on page 4-60.

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

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

6. To modify a field mapping configuration:

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

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

B. In the **Include** check box column, select the fields and subfields you want to import among those listed in the **Field** column. In the default configuration, all fields and subfields are selected based on the assumption you want to import all data contained in the records you are

importing. If you do not want to import a particular field or subfield, clear the field's **Include** check box.

C. In the **Field** column, do nothing. The **Field** column provides a comprehensive list of the fields and subfields used by the records to be imported. Some records may not have entries in each field and subfield in this list.

D. The **Field Data** column works with the **Action** column. By default, the **Field Data** column displays the actual field and subfield data for the first record in the range you plan to import. To view the data contained in other records, click the navigation buttons in the lower left of this dialog box.

E. In the **Action** column, select **Keep** or **Replace** for each field and subfield you plan to import. In the default mapping configuration, **Keep** is selected for each field and subfield.

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

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

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

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

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

H. When finished:

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

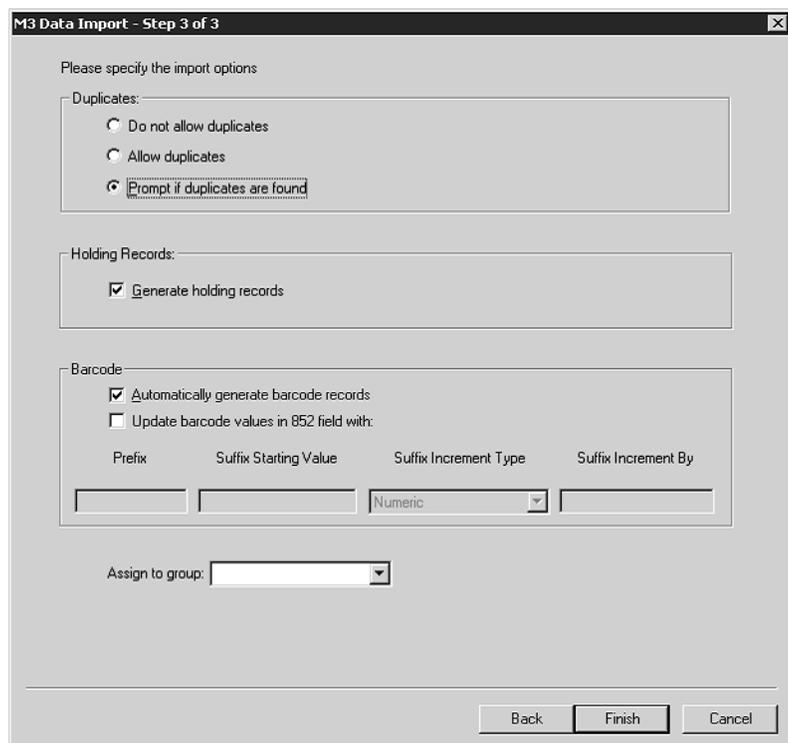
OR

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

I. In the Step 2 dialog box (Figure 4.53), click **Next**.

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

FIGURE 4.54



M3 Data Import - Step 3 of 3

Please specify the import options

Duplicates:

Do not allow duplicates

Allow duplicates

Prompt if duplicates are found

Holding Records:

Generate holding records

Barcode:

Automatically generate barcode records

Update barcode values in 852 field with:

Prefix Suffix Starting Value Suffix Increment Type Suffix Increment By

 Numeric

Assign to group:

Back Finish Cancel

To do so:

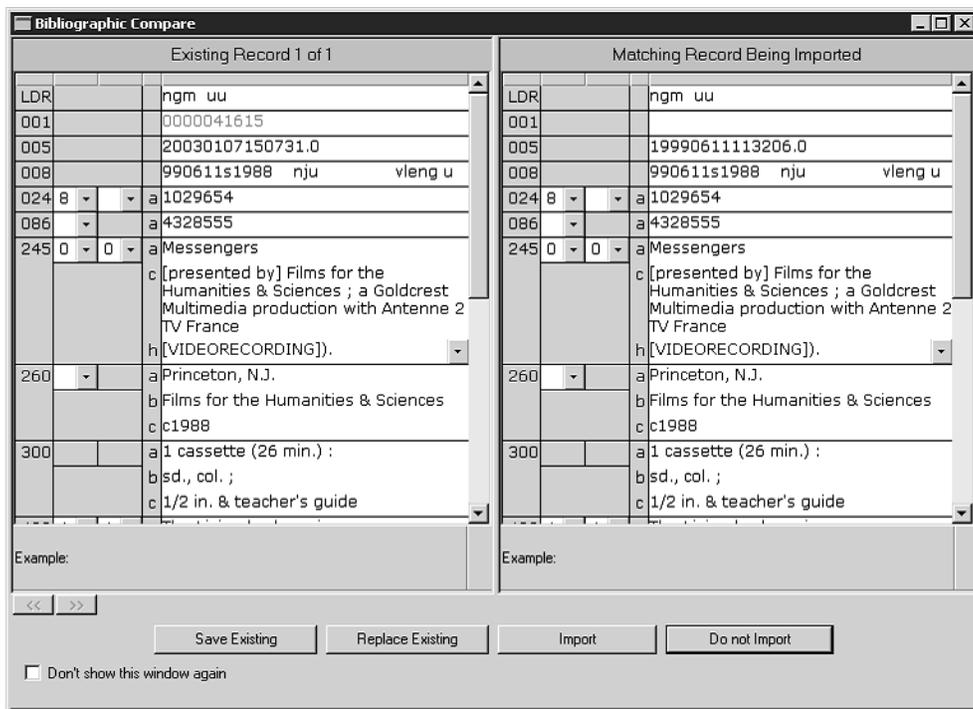
A. If you are importing bibliographic or authority records, the **Duplicates** group is available. Choose one of the following:

- To prevent the import of records that may duplicate existing records, click **Don't allow duplicates**. (All fields in two records need not match to consider the records as duplicates; matching is based upon specific vital field criteria. For example, two bibliographic records may be considered duplicates if just the ISBN field matches.)

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

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

FIGURE 4.55



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

Note: If you are importing authority records, only the Duplicates group is available.

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

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

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

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

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

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

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

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

C. In the **Barcode** group, specify how you want barcodes handled during the import procedure. Your options are:

- To transfer any barcode numbers in the 852#p field of the original records to M3, select the **Automatically generate barcode records** check box in the **Barcode** group. (This should be the only option selected in the **Barcode** group.) This allows you to continue using this barcode with the same record and places the barcodes you are importing into the M3 system (in the barcode table).
- To create new barcodes for the records being imported, whether barcodes exist in the original records or not, select the **Update barcode values in 852 field with** check box. You must then accept or change the values in the four boxes below it:

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

Suffix Starting Value – To assign an incrementing suffix to the barcodes in the order they import into the system, type the numeric starting value for these records (for example, type 1).

Suffix Increment Type – If you assign a suffix, you must select a format in this list.

Suffix Increment By – If you assign a suffix, type the number of increments you want the records to increase by (for example, 1 increment).

- If you do not want to transfer or assign any barcodes to the records being imported, clear both check boxes (**Automatically generate barcode records** and **Update barcode values in 852 field with**).

NOTE: If the first check box is unavailable, clear the second check box to make the first check box available.)

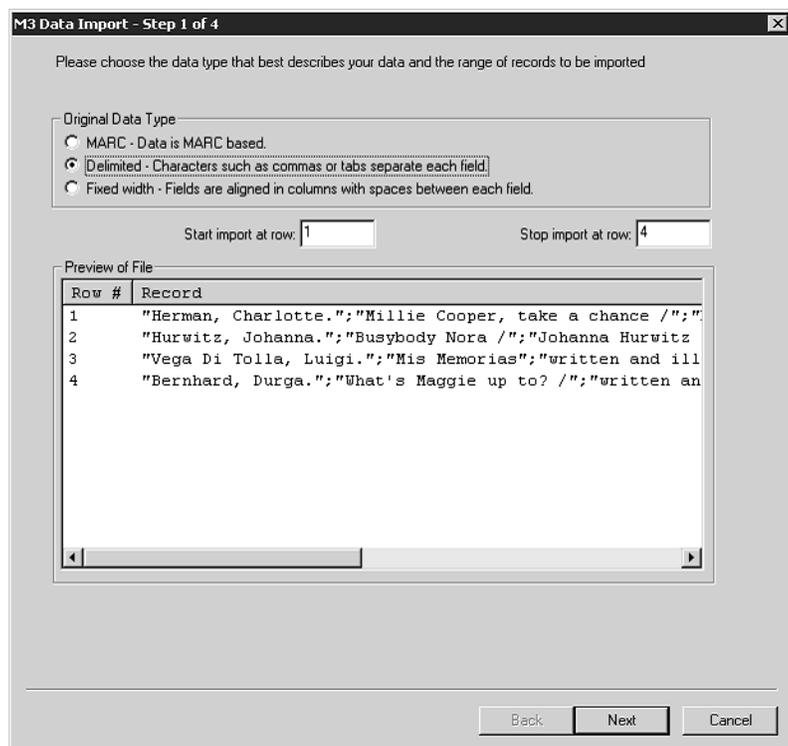
- D. In the **Assign to group** list, select the group to which you want the imported data assigned.
 - E. When finished, click **Finish**. While the import procedure takes place, the Import Progress bar displays on screen.
8. When the import procedure is complete, a confirmation prompt displays and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

Importing Delimited Records

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

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

FIGURE 4.56



To do so:

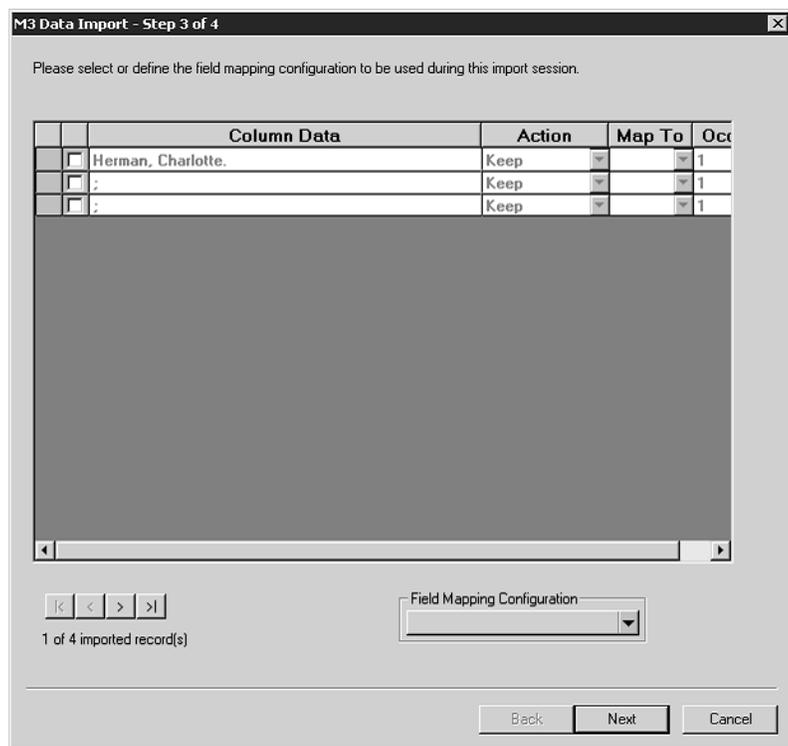
- A. Skip the **Original Data Type** group. The **Delimited** option should automatically be selected.
- B. In the **Start import at row** and **Stop import at row** boxes, select the range of records you want to import. By default, the first and last row numbers in the import file are displayed. If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

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

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

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

FIGURE 4.57

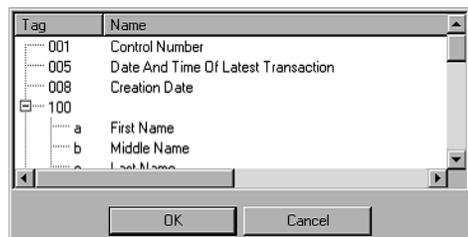


By default, the dialog box does not have a mapping structure selected. You must select or modify an existing mapping structure (if you've imported delimited records before), or create a new configuration.

- To select a field mapping configuration that was previously saved:
 - A. In the **Field Mapping Configuration** list, select **Load**. This displays the Load Field Mapping Configuration dialog box.
 - B. Select the desired configuration, then click **OK**.
 - C. After the Step 3 dialog box refreshes, click **Next**, and then skip to step 7 beginning on page 4-67.
- To create a new field mapping configuration by modifying a configuration that was previously saved:
 - A. In the **Field Mapping Configuration** list, select **Load**. This displays the Load Field Mapping Configuration dialog box.
 - B. Select the desired configuration, then click **OK**.
 - C. After the Step 3 dialog box refreshes, make any desired changes as explained in the next bullet.
- To create a new field mapping configuration:

- A. In the check box column, select each field you want to import in the **Column Data** column. By default, no fields are selected.
- B. The **Column Data** column provides a list of the fields used by the records to be imported. By default, the actual field data for the first record in the file is displayed. (To display the data for other records, click the navigation buttons in the lower left of this dialog box.) The **Column Data** column works with the **Action** column.
- C. In the **Action** column, select **Keep** or **Replace** for each field you plan to import. By default, **Keep** is selected for each field.
- Select **Keep** if you want to import all data currently stored in that field.
- Select **Replace** if you want to change the current data in a field to a constant value (such as a library name, a regional code, or a field label). This constant value then appears in this field in all imported records. If you select **Replace**, then in the **Column Data** column, type the information you want to appear in this field.
- D. In the **Map To** column, select the destination MARC field or subfield for each field listed in the **Column Data** column. To map to a destination field or subfield, click the **Map To** arrow and select the destination field. Patron record fields are shown in the example in Figure 4.59. (You can expand and collapse the field tree by clicking the field's corresponding plus (+) and minus (-) signs.)

FIGURE 4.59



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

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

- F. When finished:

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

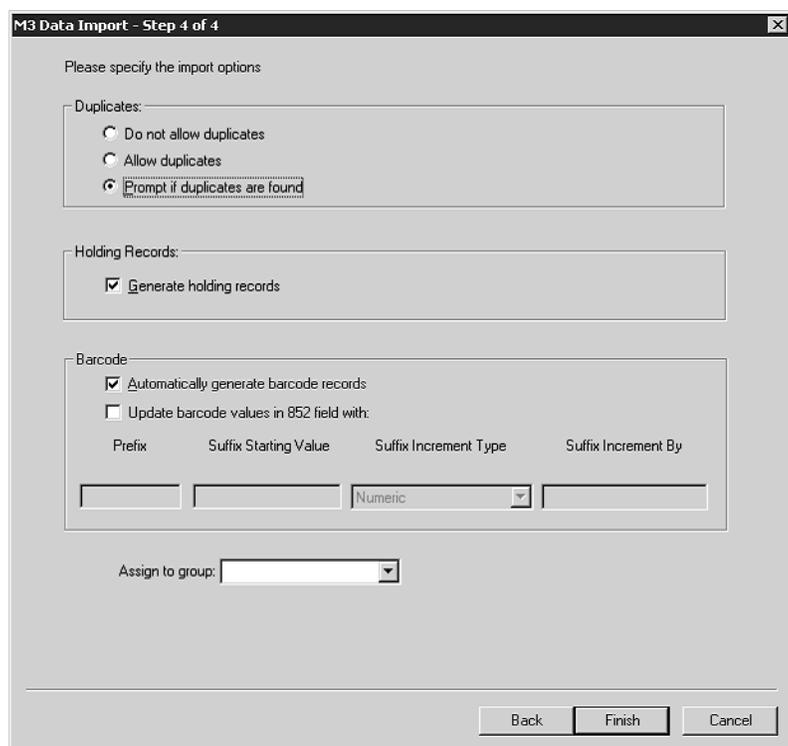
OR

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

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

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

FIGURE 4.60



To do so:

A. If you are importing bibliographic records, the **Duplicates** group is available. If so, do one of the following:

- To prevent the import of records that may duplicate existing records, click **Don't allow duplicates**. (All fields in two records need not match to consider the records as duplicates; matching is based upon specific vital field criteria. For example, two records may be considered duplicates if just the ISBN field matches.)
- To import records that may duplicate existing records, click **Allow duplicates**.

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

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

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

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

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

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

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

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

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

C. In the **Barcode** group, specify how you want barcodes handled during the import procedure. Your options are:

- To transfer any barcode numbers in the 852#p field of the original records to M3, select the **Automatically generate barcode records** check box in the **Barcode** group. (This should be the only option that is selected in the **Barcode** group.) This allows you to continue using this barcode with the same record and places the barcodes you are importing into the M3 system (in the barcode table).

- To create new barcodes for the records being imported, whether barcodes exist in the original records or not, select the **Update barcode values in 852 field with** check box. You must then accept or change the values in the four boxes below it:

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

Suffix Starting Value – To assign an incrementing suffix to the barcodes in the order they import into the system, type the numeric starting value for these records (for example, type 1).

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

Suffix Increment Type – If you assign a suffix, you must select a format in this list.

Suffix Increment By – If you assign a suffix, type the number of increments you want the records to increase by (for example, 1 increment).

- If you do not want to transfer or assign any barcodes to the records being imported, clear both check boxes (**Automatically generate barcode records** and **Update barcode values in 852 field with**).

NOTE: If the first check box is unavailable, clear the second check box to make the first check box available.

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

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

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

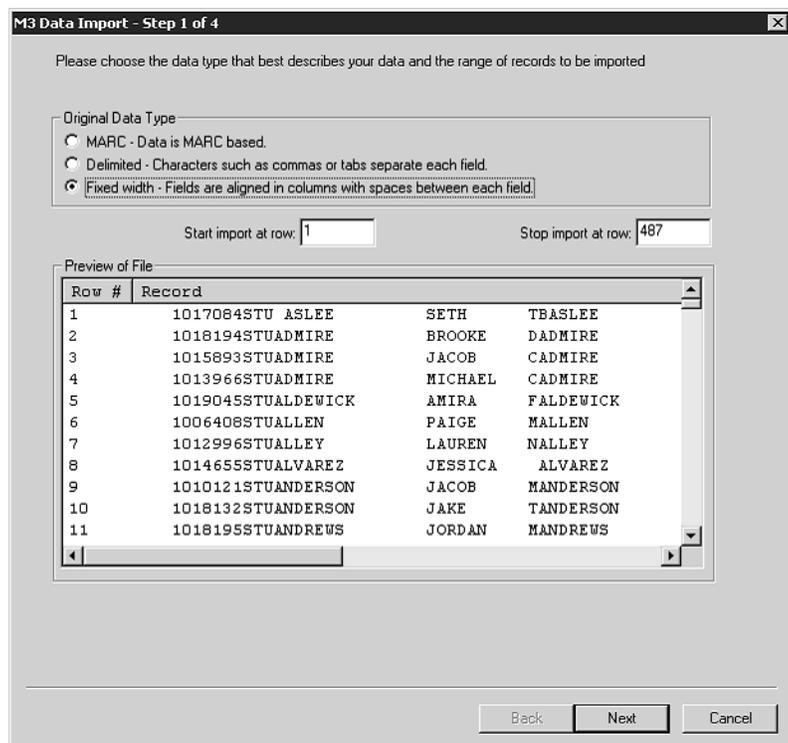
Importing Fixed Width Records

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

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

4. In the Step 1 dialog box (Figure 4.61), specify the range of records you want to import.

FIGURE 4.61



To do so:

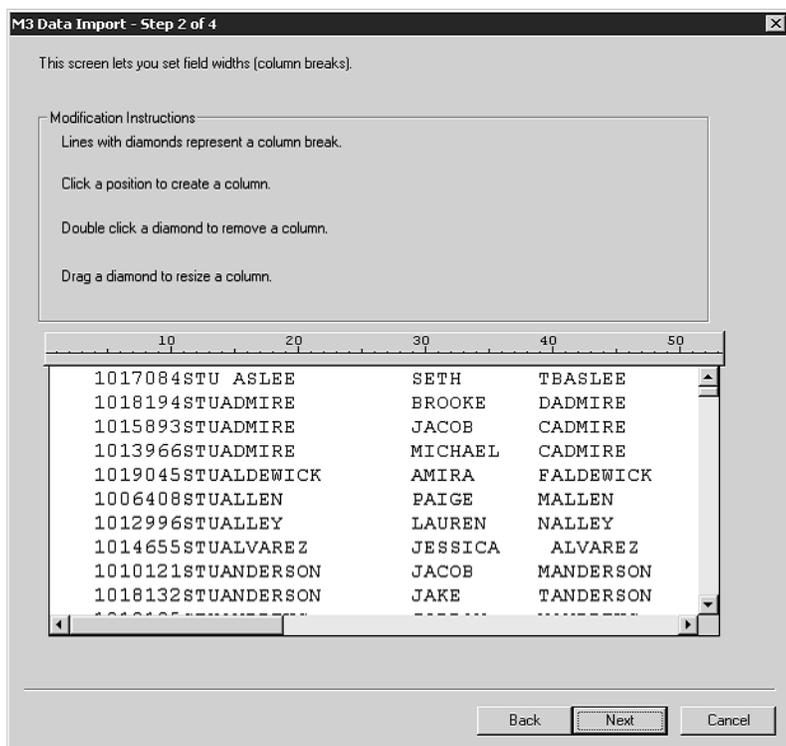
- A. Skip the **Original Data Type** group. The **Fixed width** option should automatically be selected.
- B. In the **Start import at row** and **Stop import at row** boxes, select the range of records you want to import. By default, the first and last row numbers in the import file are displayed. If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

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

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

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

FIGURE 4.62



To indicate a column break:

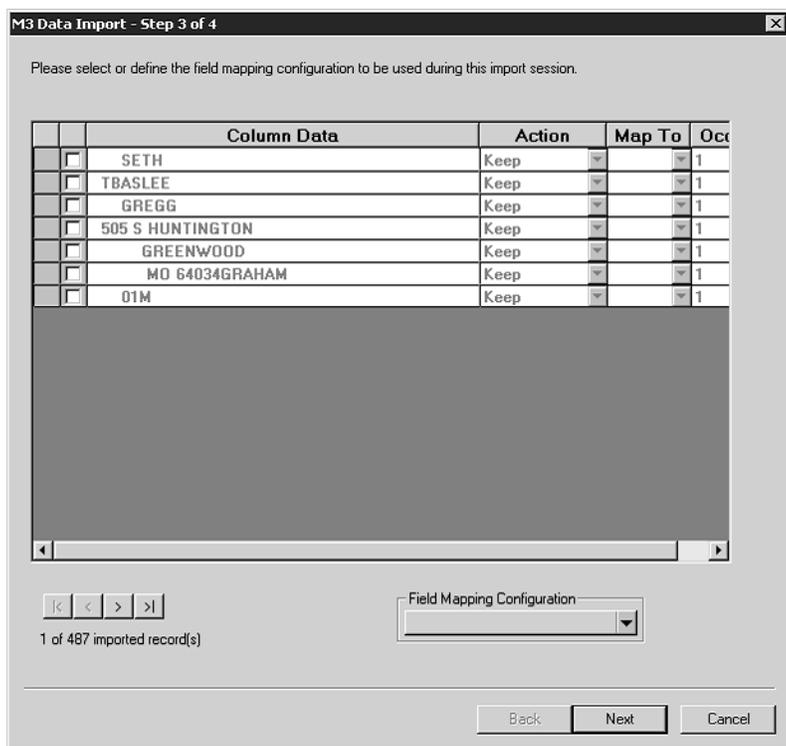
A. Click in the diamond row where a column break should occur, which is always to the left of the field data. This creates a vertical line at the column break point.

- To move a column break, click and drag the diamond in the diamond row.
- To remove a column break, double-click the diamond in the diamond row.

B. Repeat this for each desired column break. When finished, click **Next**.

6. In the Step 3 dialog box (Figure 4.63), indicate the MARC field mapping structure that you want the records to conform to once they are imported. (M3 is designed to work with MARC records; therefore, all data fields must map to a MARC field.)

FIGURE 4.63



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

- To select a field mapping configuration that was previously saved:
 - A. In the **Field Mapping Configuration** list, select **Load**. This displays the Load Field Mapping Configuration dialog box.
 - B. Select the desired configuration, then click **OK**.
 - C. After the Step 3 dialog box refreshes, click **Next**, and then skip to step 7 on page 4-74.
- To create a new field mapping configuration by modifying a configuration that was previously saved:
 - A. In the **Field Mapping Configuration** list, select **Load**. This displays the Load Field Mapping Configuration dialog box.
 - B. Select the desired configuration, and then click **OK**.
 - C. After the Step 3 dialog box refreshes, make any desired changes as explained in the next bullet.
- To create a new field mapping configuration:

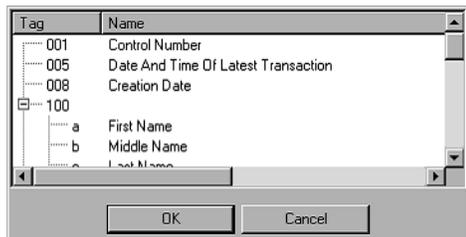
- A. Select the check box by each field you want to import. By default, no fields are selected.
- B. The **Column Data** column provides a list of the fields used by the records to be imported. By default, the actual field data for the first record in the file is displayed. (To display the data for other records, click the navigation buttons in the lower left of this dialog box.) The **Column Data** column works with the **Action** column.
- C. In the **Action** column, select **Keep** or **Replace** for each field you plan to import. By default, **Keep** is selected for each field.

Select **Keep** if you want to import all data currently stored in that field.

Select **Replace** if you want to change the current data in a field to a constant value (such as a library name, a regional code, or a field label). This constant value then appears in this field in all imported records. If you select **Replace**, then in the **Column Data** column, type the information you want to appear in this field.

- D. In the **Map To** column, select the destination MARC field or subfield for each field listed in the **Column Data** column. To map to a destination field or subfield, click the **Map To** arrow and select the destination field (Figure 4.64). (You can expand and collapse the field tree by clicking the field's corresponding plus (+) and minus (–) signs.)

FIGURE 4.64



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

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

- F. When finished:

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

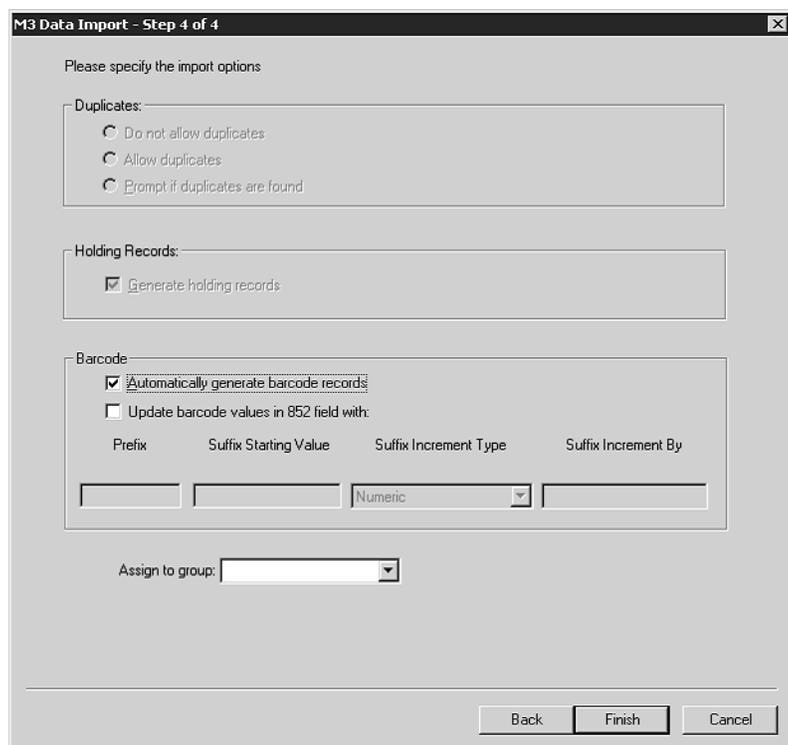
OR

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

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

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

FIGURE 4.65



To do so:

A. If you are importing bibliographic records, the **Duplicates** group is available. If so, do one of the following:

- To prevent the import of records that may duplicate existing records, click **Don't allow duplicates**. (All fields in two records need not match to consider the records as duplicates; matching is based upon specific vital field criteria. For example, two records may be considered duplicates if just the ISBN field matches.)
- To import records that may duplicate existing records, click **Allow duplicates**.

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

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

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

M3 system, and then decide whether to import the duplicate record.

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

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

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

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

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

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

C. In the **Barcode** group, specify how you want barcodes handled during the import procedure. Your options are:

- To transfer any barcode numbers in the 852#p field of the original records to M3, select the **Automatically generate barcode records** check box in the **Barcode** group. (This should be the only option selected in the **Barcode** group.) This allows you to continue using this barcode with the same record and places the barcodes you are importing into the M3 system (in the barcode table).

- To create new barcodes for the records being imported, whether barcodes exist in the original records or not, select the **Update barcode values in 852 field with** check box. You must then accept or change the values in the four boxes below it:

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

Suffix Starting Value – To assign an incrementing suffix to the barcodes in the order they import into the system, type the numeric starting value for these records (for example, type 1).

Suffix Increment Type – If you assign a suffix, you must select a format in this list.

The Import Summary is a log containing the start and end time of the import session, the number of records in the import file, the number of records imported successfully, any duplicate barcodes, and the barcode creation summary.

Duplicate

barcodes are changed to a barcode of "SIRS" followed by the ISN number.

Suffix Increment By – If you assign a suffix, type the number of increments you want the records to increase by (for example, 1 increment).

- If you do not want to transfer or assign any barcodes to the records being imported, clear both check boxes (**Automatically generate barcode records** and **Update barcode values in 852 field with**).

NOTE: If the first check box is unavailable, clear the second check box to make the first check box available.

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



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

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

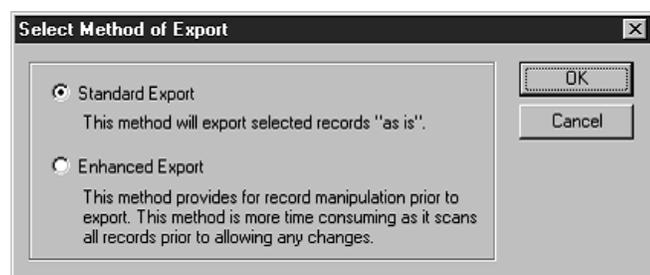
Exporting Bibliographic, Patron and Authority Records

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

To export MARC records:

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

FIGURE 4.66



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

5. Select a method of export, then click **OK**.
 - **Standard Export** – This method exports the records “as is,” maintaining the current MARC field structure.
 - **Enhanced Export** – This method allows you to revise the MARC field structure during the export process. Fields can be remapped or excluded during the export procedure. This method of export takes longer as all records are scanned prior to allowing any changes.

6. If you selected **Standard Export** in step 5, continue with step 7. If you selected **Enhanced Export**, skip to the next section, “Completing the Enhanced Export,” for instructions.
7. In the Export Records dialog box, select the path and type the file name for the records you are exporting, and then click **Save**. This exports the records.
8. When the export is finished, a confirmation prompt appears. Click **OK**.

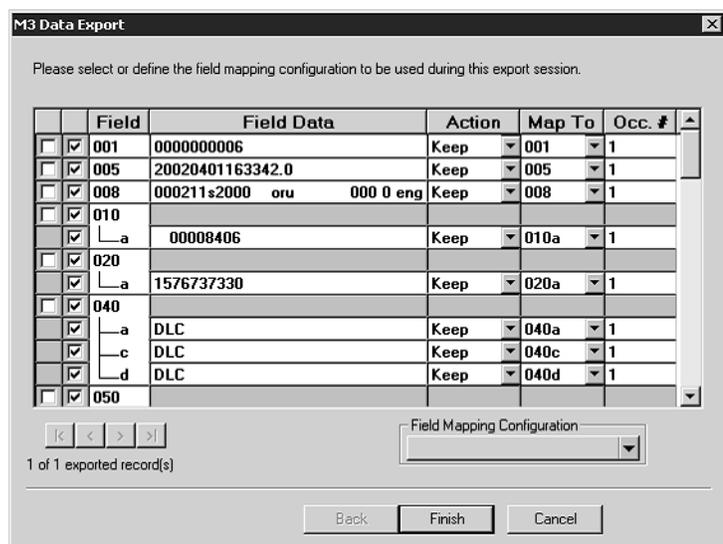
Completing the Enhanced Export

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

1. Complete steps 1 through 5 in “Exporting Bibliographic, Holding, Patron, and Authority Records” beginning on page 4-76, selecting **Enhanced Export** in step 5.
2. In the M3 Data Export dialog box (Figure 4.67), select the field mapping structure you want the records to conform to once they are exported. By default, the dialog box is set to export the field mapping configuration currently used by the records being exported.

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

FIGURE 4.67



Your options in this dialog box are:

- Accept the default field mapping configuration and continue the export process. To do so, click **Finish**, then skip to step 5 on page 4-80. (This is equivalent to selecting **Standard Export**.)

- Accept the default field mapping configuration and save it for future exporting sessions before continuing. To do so:

A. In the **Field Mapping Configuration** list, select **Save As**. This displays the Save Field Mapping As dialog box.

B. Type a descriptive name for the new configuration, then click **OK**. C. After the M3 Data Export dialog box refreshes, click **Finish**, and then skip to step 5 on page 4-80.

- Use a field mapping configuration that was previously saved. To do so: A. In the **Field Mapping Configuration** list, select **Load**. This displays the Load Field Mapping Configuration dialog box.

B. Select the desired configuration, then click **OK**.

C. After the M3 Data Export dialog box refreshes, click **Finish**, and then skip to step 5 on page 4-80.

- Create a new field mapping configuration by modifying the default configuration. To do so, skip to step 3.

- Create a new field mapping configuration by modifying a configuration that was previously saved. To do so:

A. In the **Field Mapping Configuration** list, select **Load**. This displays the Load Field Mapping Configuration dialog box.

B. Select the desired configuration, then click **OK**.

C. After the M3 Data Export dialog box refreshes, make any desired changes as explained in the next step.

Tip: To map most but not all occurrences of a repeating field to the same destination field, you can still use the optional Unite procedure explained in step A, with one modification. After selecting the Unite check box and revising the Map To destination as explained in step F on page 4-79, then clear the Unite check box. This separates the repeating field listings once again but maintains the Map To modification entered while the fields were united. You can then modify the mapping as explained in step F for those few listings that do not match the global change you entered while the fields were united.

3. To modify a field mapping configuration:

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

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

B. In the **Include** check box column, select the fields and subfields you want to export among those listed in the **Field** column. In the default configuration, all fields and subfields are selected based on the assumption you want to export all data contained in the records you are exporting. If you do not want to export a particular field or subfield, clear the field's **Include** check box.

C. In the **Field** column, do nothing. The **Field** column provides a list of the fields and subfields used by the records to be exported. Some records may not have entries in each field and subfield in this list.

D. The **Field Data** column works with the **Action** column. By default, the **Field Data** column displays the actual field and subfield data for the first record in the range you plan to export. To view the data contained in other records, click the navigation buttons in the lower left of this dialog box.

E. In the **Action** column, select **Keep** or **Replace** for each field and subfield you plan to export. In the default mapping configuration, **Keep** is selected for each field and subfield.

- Select **Keep** if you want the data currently stored in that field to be kept during the export procedure.
- Select **Replace** if you want to change the current data in a field to a constant value (such as a library name, regional code, or field label) during the export procedure. This constant value overwrites all data contained in the field during the export process. If you select **Replace**, then in the **Field Data** column, type the information you want to appear in this field.

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

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

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

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

H. When finished:

- If you want to save the mapping configuration to use during another export session, select **Save As** in the **Field Mapping Configuration** list. In the Save Field Mapping As dialog box, type a descriptive name for the new mapping configuration, and then click **OK**.
OR
- If you do not want to save the mapping configuration, proceed to the next step.

4. In the M3 Data Export dialog box, click **Finish**.

5. In the Export Records dialog box, select the path and type the file name for the records you are exporting, and then click **Save**. This exports the records.

6. When the export is finished, a confirmation prompt appears. Click **OK**. The export procedure is complete.

Using Circulation

This chapter describes:

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

CIRCULATION SETUP STEPS

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

- Create item groups. See “Creating a New Item Group” on page 3-17.
- Create patron groups. See “Creating a New Patron Group” on page 3-4.
- Import item barcodes, assigning items to item groups as part of this process. See “Importing Bibliographic, Patron, and Authority Records” on page 4-55.

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

- Enter patron records, assigning patrons to patron groups as part of this process. See “Importing Bibliographic, Patron, and Authority Records” on page 4-55.
- Set up your library schedules. See “System Schedule Setup” on page 5-50.
- Set up your receipt printer, assuming you plan to print transaction receipts. See “Setting Up Your Receipt Printer” on page 5-21.
- Add standard patron and item messages to your system. See “Adding Messages to the Circulation System” on page 5-42.

STARTING CIRCULATION

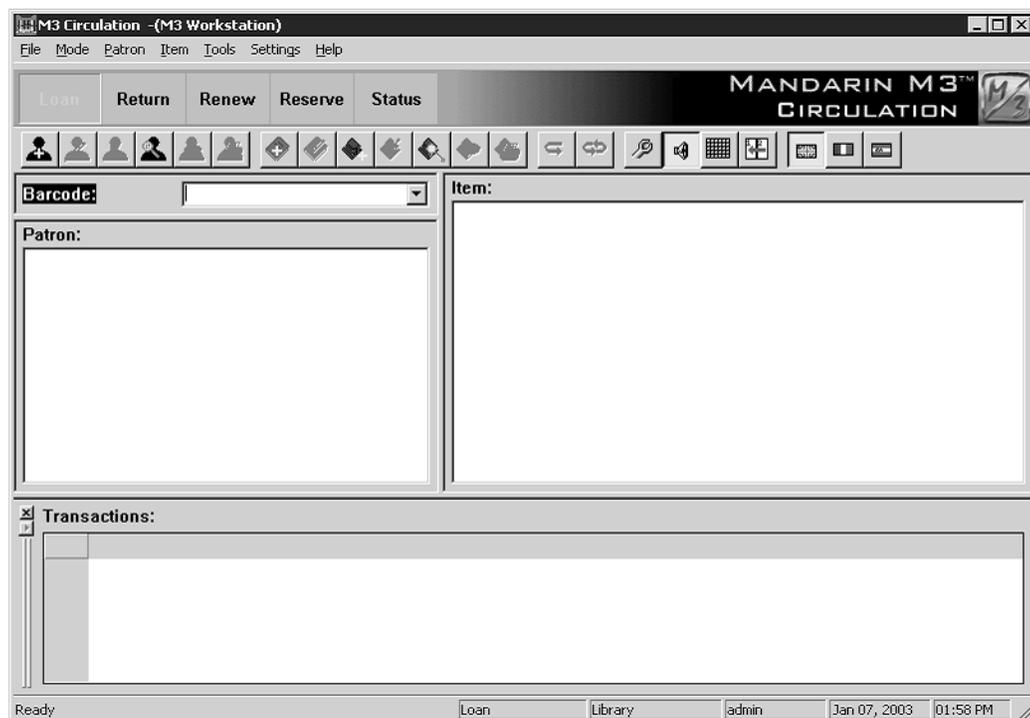
To start the Circulation module:

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

CIRCULATION WINDOW FEATURES

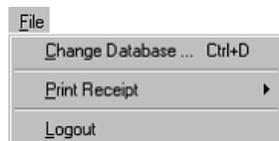
Circulation transactions are processed at the main M3 Circulation window (Figure 5.1). This window consists of three panes: a patron pane, an item pane, and a transactions pane. Window features are summarized in this section.

FIGURE 5.1



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

FIGURE 5.2



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

FIGURE 5.3



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

FIGURE 5.4



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

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

FIGURE 5.5



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

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

FIGURE 5.6



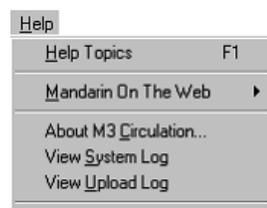
- Settings menu (Figure 5.7): Turn the Transactions pane display off/ on, enable/disable transaction identification sounds, and access circulation options for timeout periods, item and patron history displays, due date overrides, and more (see “Modifying Circulation Options” on page 5-6).

FIGURE 5.7



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

FIGURE 5.8

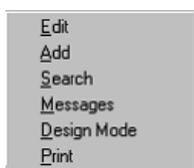


Note: To enable the shortcut toolbar, change the Shortcut Toolbar entry in the Mcircsys.ini file (located in the Circulation folder in your M3 directory) from OFF to ON, then restart the Circulation module.

- **Circulation toolbar** – Contains buttons for frequently-used transactions: Loan, Return, Renew, Reserve, and Status. These functions are also available through the Mode menu.
- **Shortcut toolbar** – Contains buttons for commonly-used functions, such as adding an item or patron, accessing circulation options and the schedule, and changing the interface language. To view the function of each button, rest your mouse pointer on the button for a moment to display a ToolTip. To turn the shortcut toolbar on or off for the current session, press CTRL+T.

- **Barcode box** – Allows you to type an item or patron barcode to access the matching record.
- **Patron pane** – Displays vital statistics for the selected patron. The information displayed in this pane is customizable, but typically contains data such as the patron name, ID number, address, phone number, and patron transaction statistics. Any MARC record field tag and set of statistics can be configured to appear in this pane. The font size, style, and color in this pane can also be customized. (See “Modifying the Patron Pane Display” on page 5-59 for customization information.) A convenient right-click transaction menu (Figure 5.9) can be accessed when information appears in this pane.

FIGURE 5.9



- **Item pane** – Displays brief information about the selected item. As with the Patron pane, the type of information displayed here can be configured. The font size, style, and color in this pane can also be customized. (See “Modifying the Item Pane Display” on page 5-64 for customization information.) A convenient right-click transaction menu can be accessed when information appears in this pane (shown in Figure 5.9).
- **Transactions pane** – Lists the transactions related to the active patron or item in the upper panes. The type of information displayed here can be configured. The font size, style, and color in this pane can also be customized. (See “Modifying the Transactions Pane Display” on page 5-65 for customization information.) A convenient right-click transaction menu (Figure 5.10) can be accessed when information appears in this pane.

FIGURE 5.10



- **Display button** – Switches the Transactions pane display between all transactions, patron transactions, and item transactions. A “head” icon on the Display button represents patron transactions; a “book spine” icon represents item transactions; and no icon represents all transactions.

- **Check box column** – When information appears in the Transactions pane, a check box corresponding to each transaction appears in this column.
- **Status bar** – Provides details about the information displayed in the Circulation window. In addition to the status message on the left of the status bar, there are five boxes on the right (shown in Figure 5.11).

FIGURE 5.11



- **Mode box** – identifies the active transaction mode.
- **Database box** – identifies the active database.
- **User name box** – identifies who is logged onto the circulation system.
- **Date box** – identifies today’s date based on the circulation system calendar.
- **Time box** – identifies the current system time based on the circulation clock.

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

FIGURE 5.12

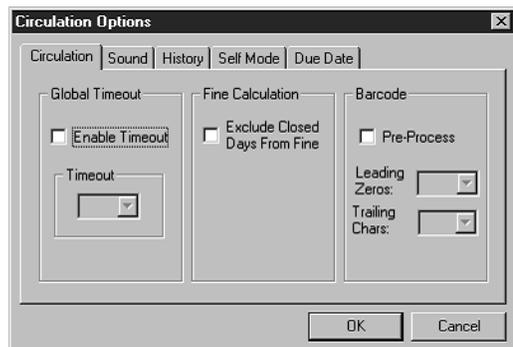


MODIFYING CIRCULATION OPTIONS

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

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

FIGURE 5.13

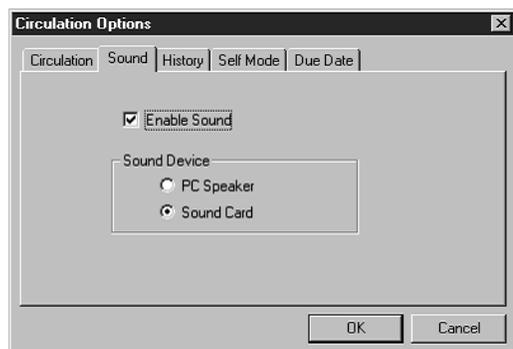


Note: To access the Circulation, History, and Self Mode tabs, the Circulation Options check box must be selected in Group Editor. See Figure 3.7 on page 3-8.

2. Click the appropriate tab, and modify as desired.

- **Circulation tab** (Figure 5.13):
 - **Global Timeout** – Select the **Enable Timeout** check box to enable the timeout feature. In the **Timeout** list, select the desired number of seconds before the Circulation window automatically clears after a transaction.
 - **Fine Calculation** – Select the **Exclude Closed Days From Fine** check box if your institution does not want to include closed days in fine accruals.
 - **Barcode** – Select the **Pre-Process** check box to have the system pre-process barcodes as they are scanned into the system. Some barcode scanners automatically add leading zeros or following characters to barcodes as they are scanned into the system. You can select the number of leading or trailing characters to be removed from scanned barcodes in the **Leading Zeros** and **Trailing Chars** lists.
- **Sound tab** (Figure 5.14):

FIGURE 5.14



- **Enable Sound** – Select to enable the sound cues that accompany each circulation transaction.

- **Sound Device** – Select the type of sound device installed on your computer.
- **History tab** (Figure 5.15):

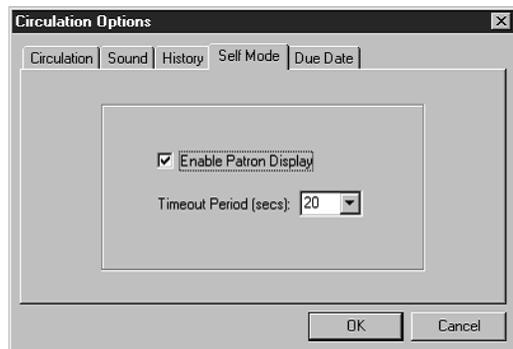
FIGURE 5.15



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

- **Enable Patron History** – Select if you want the option to view patron transaction histories during standard circulation transactions. If enabled, a **History** option appears on the Patron menu (Figure 5.4). When **History** is selected, the Transactions pane can be switched to display Patron History.
- **Enable Item History** – Select if you want the option to view item transaction histories during standard circulation transactions. If enabled, a **History** option appears on the Item menu (Figure 5.5). When **History** is selected, the Transactions pane can be switched to display Item History.
- **Self Mode tab** (Figure 5.16):

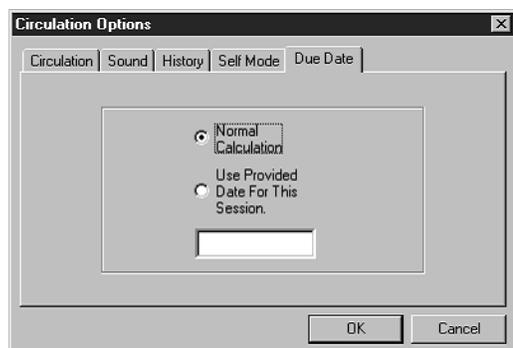
FIGURE 5.16



- **Enable Patron Display** – Select to display active patron transaction information in the Transactions pane during self-checkout and self-return modes.

- **Timeout Period (secs)** – Select the number of seconds that a self-checkout or self-return transaction displays after a transaction is completed. After the timeout period elapses without any workstation activity, data in the Circulation window clears.
- **Due Date tab** (Figure 5.17):

FIGURE 5.17



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

3. When finished, click **OK**.

SELECTING AN INTERFACE LANGUAGE

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

To select an interface language:

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

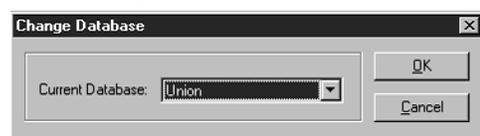
1. On the **Tools** menu, click **Change Language**. This displays a sub-menu with the languages available for selection.
2. Click the language you want to use. This refreshes your circulation interface to display the selected language.

SELECTING A CIRCULATION DATABASE

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

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

FIGURE 5.18



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

CONDUCTING TRANSACTIONS

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

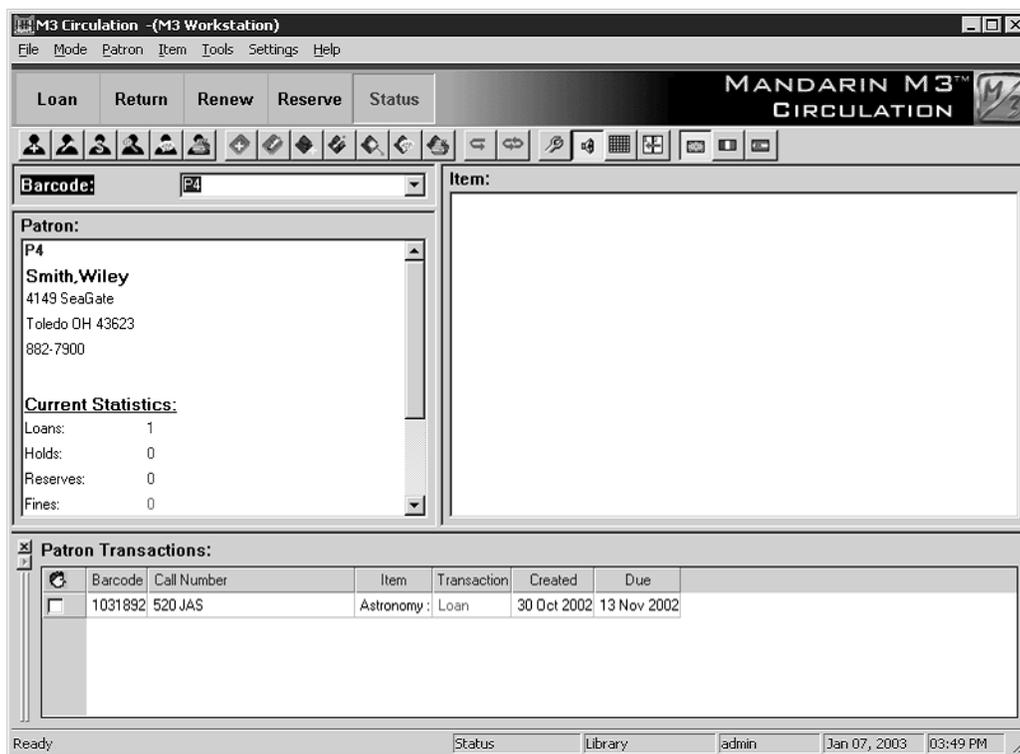
All circulation transactions are accessed from the Circulation window. You can view patron and item status, loan items, return items, renew items, reserve and hold items, book equipment and rooms, attach patron and item messages, process fine payments, forgive fines, and record patron claims of lost,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

Viewing Patron and Item Status

To view the status of a patron or item:

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

FIGURE 5.19



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

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

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

Loaning Items

To loan one or more items to a patron:

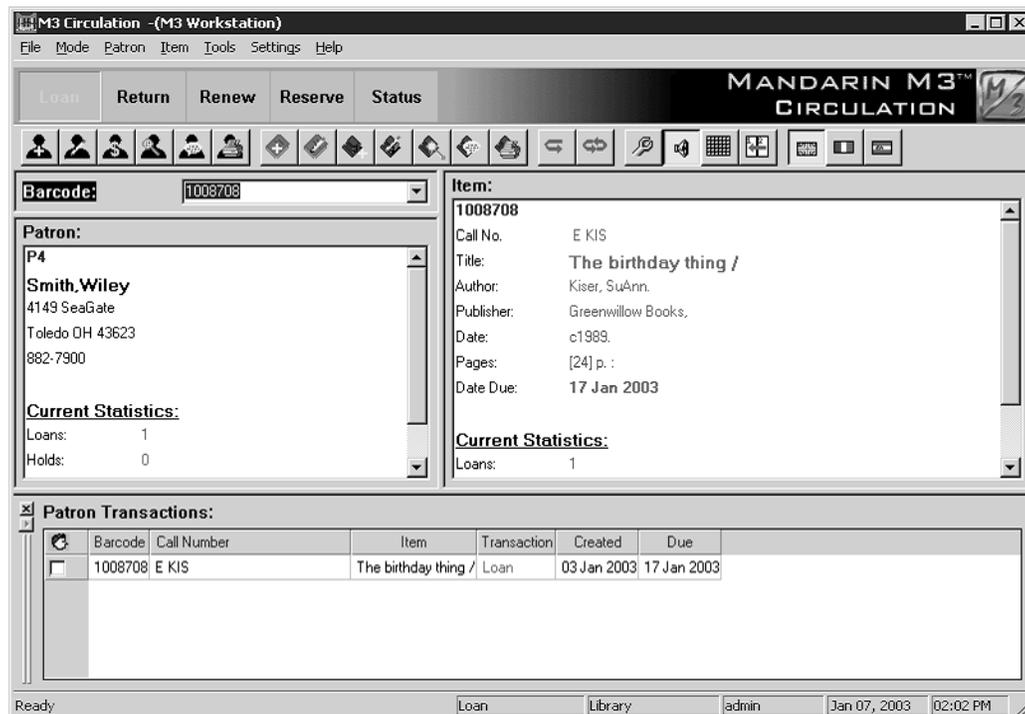
- On the toolbar, click **Loan**.
- In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the code).

NOTES:

- If your library has not yet established a circulation schedule, an error message displays. For information on establishing a circulation schedule, see “System Schedule Setup” on page 5-50.
- If any patron has a fine associated with it, a fine message displays. You can:
 - Click **Override** to ignore the message and continue with the transaction.
 - Click **Payment** to display the Payment dialog box.
 - Click **Cancel** to stop the transaction.

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

FIGURE 5.20



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

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

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

Returning Items

M3 Circulation provides five methods to return items. Four methods are described here, and Self-Return is described on page 5-23.

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

Returning One Item

To return an item:

1. On the toolbar, click **Return**.

2. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the code). This returns the item.

Returning Multiple Items for the Same Patron

To return multiple items for one patron:

1. On the toolbar, click **Loan, Reserve, or Status**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the code).
3. In the Transactions pane, select the check box by each item the patron is returning.
4. Right-click on the Transactions pane to open a transaction menu (Figure 5.10).
5. Click **Return**. This returns all selected items.

Quick Return

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

To return items using the Quick Return method:

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

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

In-House Circulation Returns

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

To perform In-House Circulation returns:

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

Recording an Item as Lost or Damaged

When an item is returned and recorded as damaged, a fine is attached to the patron's record. The fine amount is the maximum amount established for members of the item group (see step 6 on page 3-15).

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

NOTE: If you want to be prompted to add an additional transaction fee to a lost or damaged item, change the **Transaction Fee** entry in the Global.ini.REG file (the default path is C:\M3 Server\Registry\Common) to **Prompt for fee=on**. In the **amount** entry, the default is \$5.00; change if desired.

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

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

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

Claiming an Item as Returned or Never Had

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

Renewing a Loan on an Item

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

Renewing One Item

To renew an item:

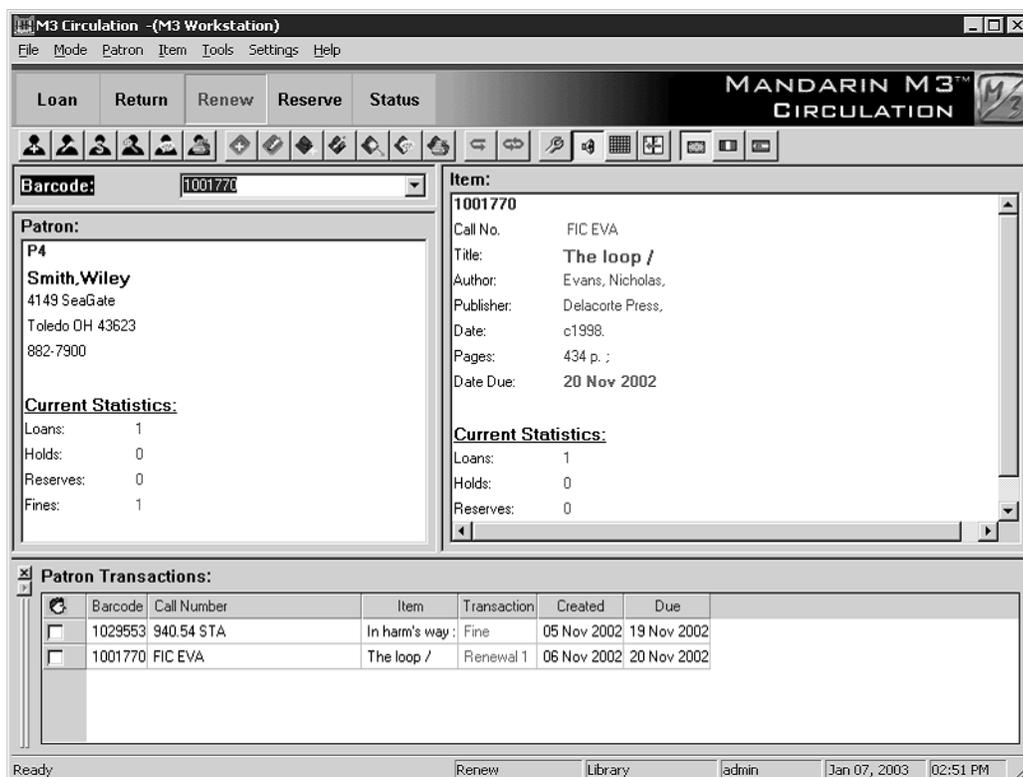
1. On the toolbar, click **Renew**.
2. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the code).

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

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

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

FIGURE 5.21



Notes:

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

Renewing Multiple Items for the Same Patron

To renew multiple items for one patron:

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

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

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

3. To renew one or more items listed in the Transactions pane, select the check box by each item the patron is renewing, and then right-click. This opens a transaction menu (Figure 5.10). Click **Renew**. Or, to renew all items listed in the Transactions pane, click **Renew All**.

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

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

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

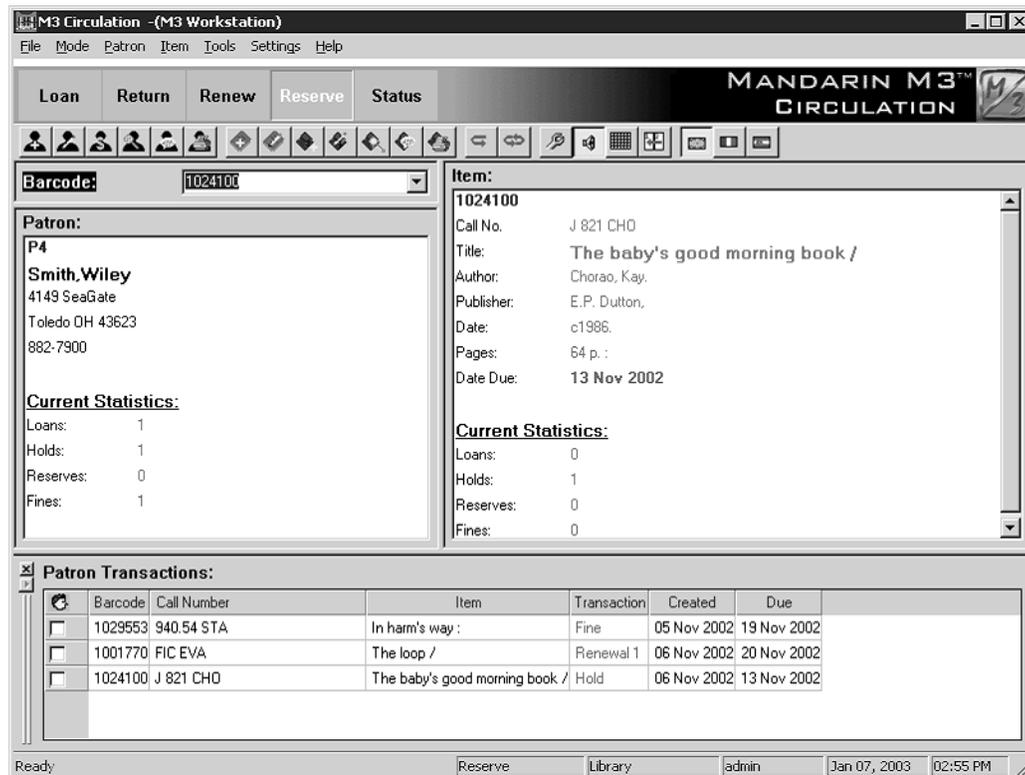
Reserving or Holding an Item

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

To reserve or hold an item:

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

FIGURE 5.22



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

Sending E-Mail Notifications for Items on Hold

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

1. In the Global.ini.REG file (the default path is **C:\M3 Server\Registry\Common**), do the following:
 - A. The default fields for patron notification are as follows. Change if desired. **[PATRON INFO FIELD] email=110#m phone=110#k**
 - B. Type the name of your e-mail server.

[SMTP SERVER]
name=
 - C. Type the e-mail address that will appear in the “From” field in the e-mail notifications.

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

Note: You cannot book a deleted item.

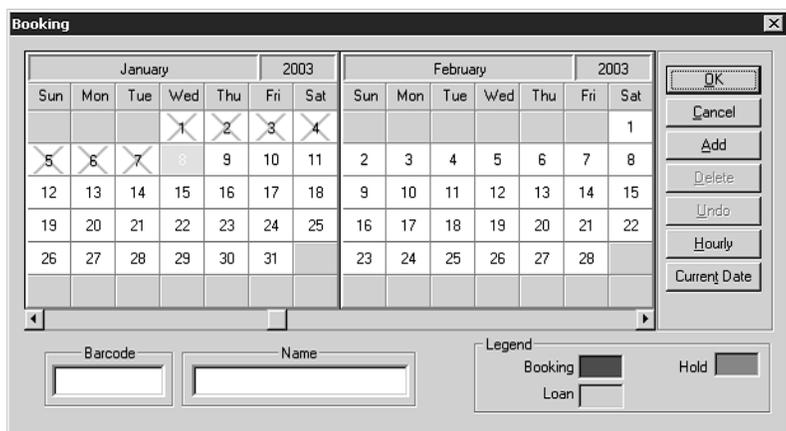
Booking an Item

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

To book an item:

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

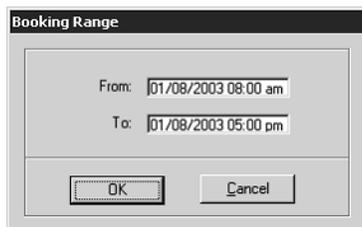
FIGURE 5.23



4. Select the date and, if applicable, the time to book the item. To do so:

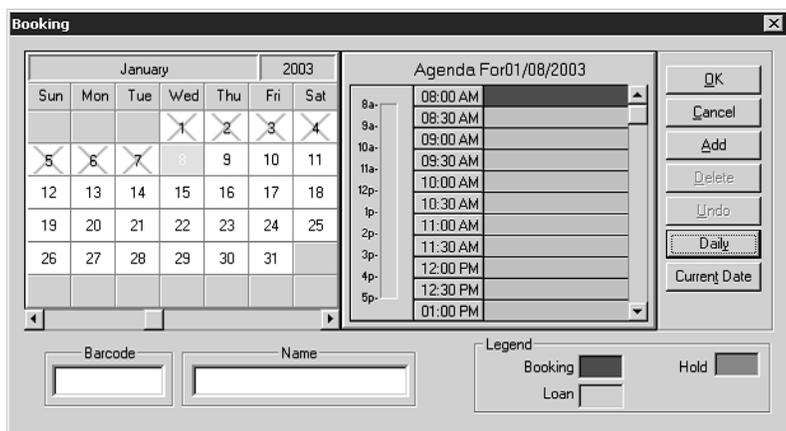
- To book an item for one day, click the day you want the item, and then click **Add**. This displays the Booking Range dialog box (Figure 5.24) with the date selected. Click **OK** to return to the Booking dialog box and place a marker on the selected day. When finished, click **OK**.

FIGURE 5.24



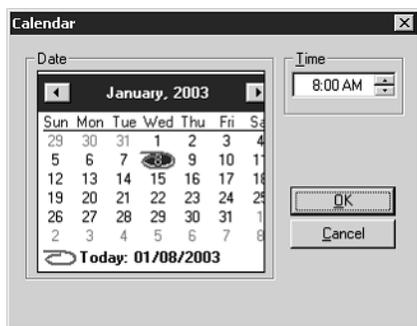
- To book an item for more than one day, click the first day you want the item and drag the mouse to the last day you want the item. Then click **Add**. This places a marker within the selected range of days. When finished, click **OK**.
- To book an item for a few hours, click the **Calendar/Hourly**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

FIGURE 5.25



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

FIGURE 5.26



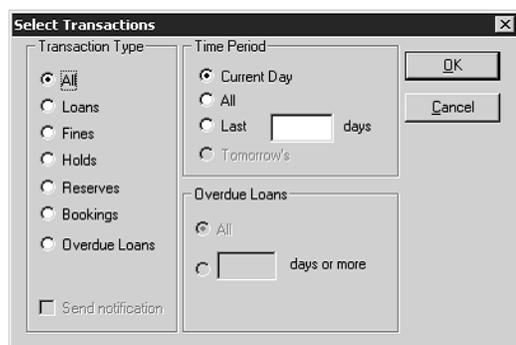
- C. In the calendar, click the first date in the range you want to book. In the **Time** box, select the start time. When finished, click **OK**. This returns you to the Booking Range dialog box.
 - D. Click in the **To** box, then repeat step C to enter the date and time you want to return the booked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

Sending E-mail Notifications for Fines and Overdue Items

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

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

FIGURE 5.27



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

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

OR

 - If you clicked **Overdue Loans**, select an option in the **Overdue Loans** group.
5. Click **OK**. All patrons with transactions that meet the fine or overdue criteria are sent a notification, and these transactions display in the Transactions pane.

Processing Patron Fines

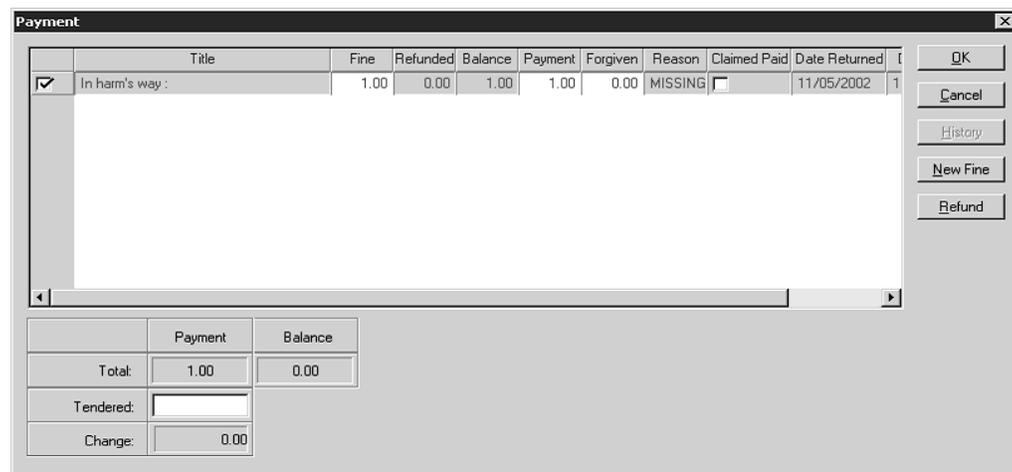
Before you can receive payment or forgive a fine, the overdue item must be returned or claimed as lost or damaged. The item status changes from Overdue Loan to Fine when the item is returned.

Recording a Payment

1. On the toolbar, click **Loan**, **Reserve**, or **Status**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the code). This displays a message stating the patron has unpaid fines.

3. Click **Payment**. This displays the Payment window (Figure 5.28), which lists the patron's overdue items and related fine information. A Totals box appears in the lower left; the current fine total appears in the **Total** box in the **Payment** column.

FIGURE 5.28



Tip: To view refunds, click History.

4. Review the current fine total in the Totals box. If the patron intends to pay the full fine amount now, skip to step 5.

- If the patron wants to exclude an item from payment at this time, clear the **Pay** check box. This changes the color of the amount in the **Balance** column from green to red.
- If the patron wants to make a partial payment on a specific item's fine, click the item's listing in the **Payment** column and type the amount being paid now.
- If you want to forgive all or part of a fine on an overdue item, click the item's listing in the **Forgiven** column and type the amount to be for- given.
- If the patron claims that he or she previously paid a particular fine, click **History** to review the payment history. If you want to record that this item was previously paid, select the **Claimed Paid** check box by that item. This eliminates the item's fine amount in the **Payment** column, and reduces the payment amount in the **Total** box.
- If you want to increase an item's fine amount, click the item's listing in the **Fine** column and type the new amount. (This is useful if you want to charge for not rewinding a tape, damage, and so on.)
- To add a new fine, click **New Fine**. Type the amount of the fine and a note, if desired (the note will display in the **Title** column of the Pay- ment window). Click **OK**.
- To apply a refund, click **Refund**. Type the amount of the refund and a note, if desired (the note will display in the **Title** column of the Pay- ment window). Click **OK**.

5. Type the amount of currency received in the **Tendered** line, then click **OK**.

If change is due back, a dialog box displays the amount to be returned to the patron. To close the dialog box, click **Close**.

6. This displays a dialog box asking if you want to print a receipt. Click **Yes** or **No**.

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

Reviewing the Patron's Fine History

1. On the toolbar, click **Status**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the code).
3. On the **Patron** menu, click **Payments**. This displays the Payment window (Figure 5.28).
4. Click **History**. This displays the patron's list of previously paid fines, if any are on record.

Printing Transaction Receipts

You can print several transaction receipts through Circulation, including:

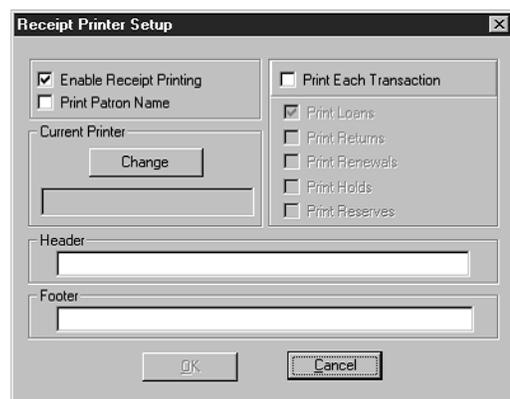
- Status – Lists all transactions for the selected patron.
- Today's All – Lists all transactions for the current day for the selected patron.
- Today's Loans – Lists all loans for the current day for the selected patron.
- Today's Returns – Lists all returns for the current day for the selected patron.

Setting Up Your Receipt Printer

Before you can print transaction receipts, you must set up your receipt printer. To do so:

1. On the **File** menu, select **Print Receipt**, and then click **Printer Setup**. This displays the Receipt Printer Setup dialog box (Figure 5.29).

FIGURE 5.29





2. To print receipts, select the **Enable Receipt Printing** check box. This activates several functions on this dialog box.
3. If you want the patron's name to appear on the receipt, select the **Print Patron Name** check box.
4. In the **Current Printer** group, click **Change**. This displays the Print Setup dialog box.

NOTE: Verify that your receipt printer is connected to your computer and that the printer device drivers are installed.

- A. In the **Name** list, select the appropriate printer.
 - B. Change settings as desired, then click **OK**.
5. If you want the system to print receipts automatically for specific transaction types, select the **Print Each Transaction** check box, and then select the check box next to each appropriate transaction type.
 6. To place header and/or footer text on each receipt, type the desired text in the **Header** and/or **Footer** boxes.
 7. When finished, click **OK** to save your entries and return to the Circulation window.

Printing Receipts

To print a transaction receipt:

- On the **File** menu, click **Print Receipt**, and then select the appropriate receipt type.
- OR**
- If you are in Loan mode, press **F12** on your keyboard while the transaction is displayed.

Printing Transaction Information

You can print patron information from the Patron pane, item information from the Item pane, transaction information from the Transactions pane, and historical library circulation reports from the Transactions pane while in the Library Transactions mode. To print circulation reports, see "Viewing, Sorting, and Printing Circ Reports" on page 5-55.

To print patron, item, or transaction information:

1. On the Circulation window, right-click the pane you want to print. This displays a transaction menu (Figure 5.9).
 2. Click **Print**. If a Print dialog box appears, change settings if desired, and then click **OK**.
- OR**
3. If you want to see a preview before printing, click **Print Preview**. When the preview appears, click the desired option on the preview toolbar.
(NOTE: Print Preview is not available when in the Library Transactions display mode.)

Using Self-Checkout and Self-Return

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

- For system security, once the Self-Check transaction mode is selected, the patron cannot perform any other type of circulation transaction. The patron's only options are to self-checkout or log out of the Circulation module. Similarly, if the Self-Return transaction mode is selected, then the patron is limited to self-return or log out. Libraries using the Self mode can set up a network workstation restricted to self-checkout transactions, and a separate workstation restricted to self-return transactions.
- For privacy, the Self mode can be configured so patron and item transactions do not display. See "Modifying Circulation Options" on page 5-6.
- To enable override messages in Self-Check mode, change the **Self Mode** entry in the Global.ini.REG file (the default path is C:\M3 Server\Registry\Common) to **Skip Override=off**. Otherwise, the only override that will display is if the item is non-circulating.

Using Self-Checkout

To conduct self-checkout transactions:

1. On the **Mode** menu, click **Self-Check**. The workstation remains in this mode until you log out of circulation.
2. Type the patron barcode in the **Barcode** box, then press ENTER (or just scan the code).
3. Type the item barcode in the **Barcode** box, then press ENTER (or just scan the code). The loan transaction appears in the Transactions pane.

NOTE: If a Self mode timeout period has been set, the transaction information clears automatically. (See "Modifying Circulation Options" on page 5-6.)

Using Self-Return

To conduct self-return transactions:

1. On the **Mode** menu, click **Self-Return**. The workstation remains in this mode until you log out of circulation.
2. Type the item barcode in the **Barcode** box, then press ENTER (or just scan the code). This returns the item.

NOTE: If a Self mode timeout period has been set, the transaction information clears automatically. (See "Modifying Circulation Options" on page 5-6.)

Working with Item Records

You can search for, edit, and create new bibliographic and holding records from both the M3 Circulation module and the M3 Cataloging module. Because the M3 Cataloging module includes templates and record duplicating functions, it is a better choice when creating a number of records. To delete records, you must use the M3 Cataloging module.

In this section, items are sometimes divided into bibliographic records and holding records.

Searching for an Item Record

You may want to search for an item record if you do not know the item's barcode. There are two methods of searching in Circulation: from the main window and with the Search dialog box.

Searching from the Main Window

This procedure is a quick and simple method of searching for an item by title.

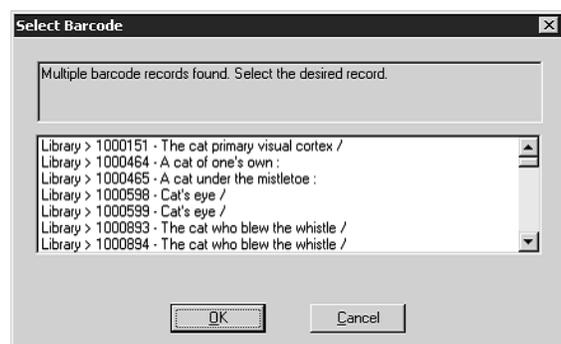
NOTE: If you are in Loan, Reserve, or Booking mode, there should be an active patron in the Patron pane before searching by this method.

1. Type a keyword in the **Barcode** box.
2. If a match is found, the record displays in the Item pane of the Circulation window, ready for a transaction. *NOTE: If no match is found for an item but a match is found for a patron, the patron results display.*

OR

If more than one match is found, the Select Barcode dialog box displays (Figure 5.30). Click the desired record, then click **OK**. The record displays in the Item pane of the Circulation window, ready for a transaction.

FIGURE 5.30

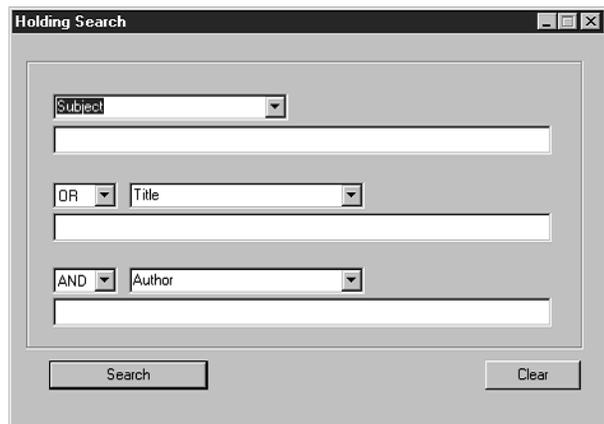


Searching with the Search Dialog Box

This procedure offers more search options. It also locates both the bib and any corresponding holding records.

1. On the **Item** menu, click **Search**. This displays the Holding Search dialog box (Figure 5.31).

FIGURE 5.31

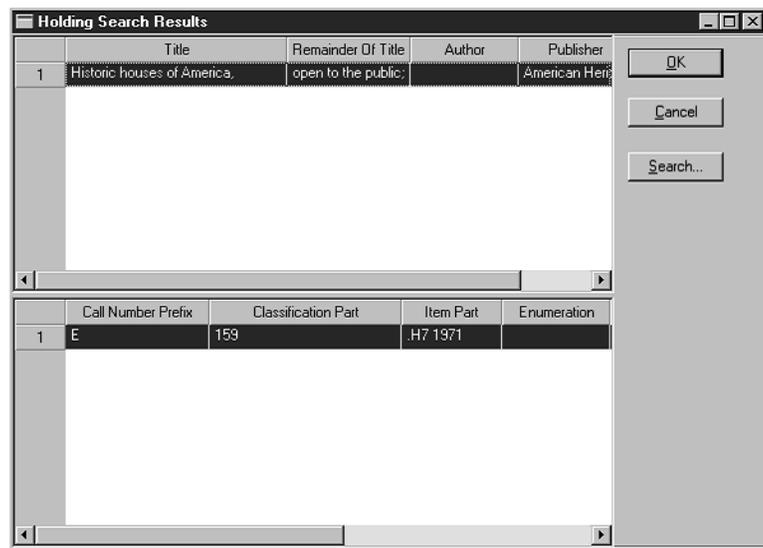


Boolean operator list Note: Your system can be configured to display different bib record fields and Boolean operators, as well as different options within the record field lists.

Search Tips:

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

FIGURE 5.32



2. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator.
3. Click **Search**. This displays the Holding Search Results window (Figure 5.32) with your search results listed.

Tip: You can also double-click a bib or holding record to transfer the information to the Circulation window.

4. From here, you can:

- Select a bibliographic or holding record, then click **OK**. This transfers the item information to the Item pane in the Circulation window.

OR

- Click **Search** to display the Holding Search dialog box (Figure 5.31) and begin a new search.

OR

- Click **Cancel** to return to the Circulation window.

Creating an Item Record

The procedure to create a bibliographic record varies from the procedure to create a holding record. Both procedures are covered in this section.

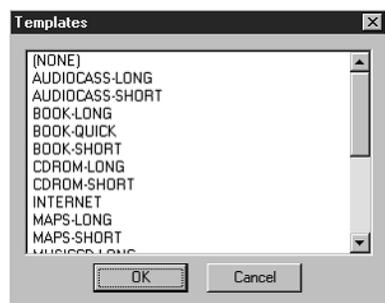
Creating a Bibliographic Record

At times, it may be convenient to create a bibliographic record while using the M3 Circulation module. You can also create records from the M3 Cataloging module. If you have several records to add, you may find it more efficient to import them using the M3 Cataloging module. To do so, see “Importing Bibliographic, Patron, and Authority Records” on page 4-55.

To create a bibliographic record:

1. On the **Item** menu, click **Add Bibliographic**. This displays the Templates dialog box (Figure 5.33) containing a list of available bibliographic record templates.

FIGURE 5.33



2. Select a template, then click **OK**. This displays the Create New Bibliographic Record window (Figure 5.34 shows the template “Book-Long”).

FIGURE 5.34

Create New Bibliographic Record		
Leader		nam
Control Number		
Control Number Identifier		
Date and Time of Last		19981109095533.0
Fixed-Length Data Element		981109s xx 000 0 eng d
LC control number		
International Standard B		
Terms of availability		\$
Original cataloging agency		Your Holding Symbol
Transcribing agency		Your Holding Symbol
Language code of text/s	1	
Language code of summ		
Language code of origin		
Personal name	1	
Dates associated with a		
Uniform title	1	0
Title	1	0
Remainder of title		
Remainder of title page t		
Title proper/short title	3	
Edition statement		ed.
Place of publication, distri		
Name of publisher, distrib		
Leader		

Note: To automatically delete all fields left empty when the record is saved, change the Strip Empty Fields entry in the ActiveMarcEdit.ini file (located in your M3 directory) to OVERRIDE=off, then restart the Circulation module.

- Enter field and subfield data for the new record. To move through the record, use your keyboard up and down arrows. Notice that status bar information changes to identify the selected field and subfield.
 - To access a menu with edit commands (Figure 5.35), select the field you want to edit and right-click. You can insert, copy, paste, cut, delete, and move fields from this menu. You can click **Find** to display a dialog box that allows you to locate text within this record. In addition, you can click **Toggle Prompts** to change the MARC field labels from text to tag numbers.

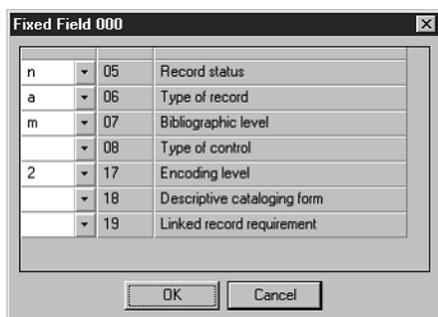
FIGURE 5.35

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

Tip: To insert a picture field in this record so a picture displays in the Item pane when the item is selected, see “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-38.

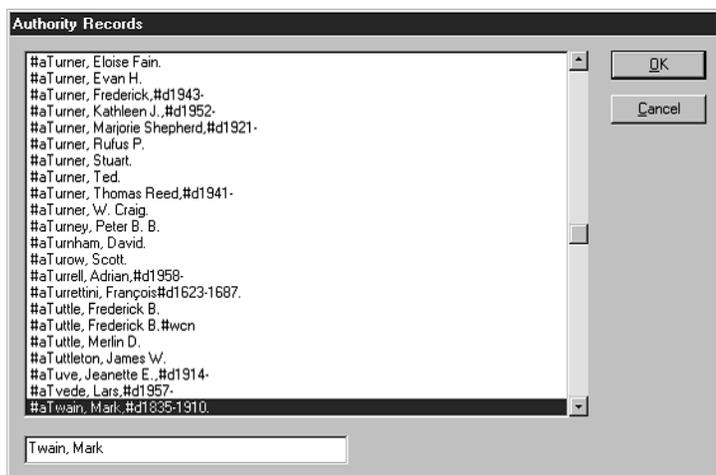
- To access a list of fixed field standard choices (including position and legal characters) pertaining to a particular fixed field, double-click in the field. The dialog box for fixed field 000 is shown in Figure 5.36. You can define your fixed field by typing in text or, where available, clicking an arrow button and selecting an option in the list. When finished, click **OK**.

FIGURE 5.36



- If you are using a version of M3 that supports Authority Control, and the field you want to enter is managed under Authority Control, then you must select a predefined authority record. To do so, click in the white edit area of the field (as shown in Figure 5.34). This displays the Authority Records dialog box (Figure 5.37).

FIGURE 5.37



Select the authority record you want to use, then click **OK**. This returns you to the Create New Bibliographic Record window (Figure 5.34) and enters the new record in the selected field.

4. When finished adding information to this bibliographic record, click **OK** in the Create New Bibliographic Record window. This places the new record in your library's bibliographic record database, now available for circulation purposes and searching.
5. At the prompt "Create Holding Record?" click **Yes** or **No**.

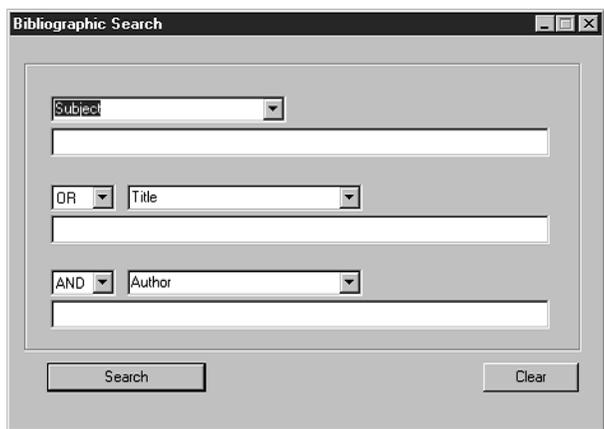
Creating a Holding Record

At times, it may be convenient to create a holding record while using the M3 Circulation module. You can also create a holding record from the M3 Cataloging module.

To create a holding record:

1. Locate the bib record matching the holding record you want to create.
 - A. On the **Item** menu, click **Add Holding**. This displays the Bibliographic Search dialog box (Figure 5.38).

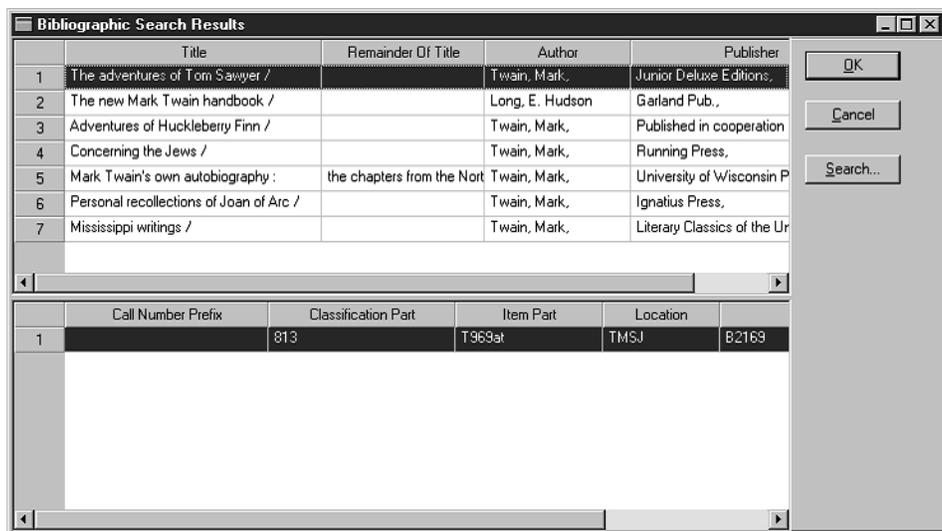
FIGURE 5.38



B. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator.

2. Click **Search**. This displays the Bibliographic Search Results window with your search results listed (Figure 5.39).

FIGURE 5.39



	Title	Remainder Of Title	Author	Publisher
1	The adventures of Tom Sawyer /		Twain, Mark,	Junior Deluxe Editions,
2	The new Mark Twain handbook /		Long, E. Hudson	Garland Pub.,
3	Adventures of Huckleberry Finn /		Twain, Mark,	Published in cooperation
4	Concerning the Jews /		Twain, Mark,	Running Press,
5	Mark Twain's own autobiography :	the chapters from the Nort	Twain, Mark,	University of Wisconsin P
6	Personal recollections of Joan of Arc /		Twain, Mark,	Ignatius Press,
7	Mississippi writings /		Twain, Mark,	Literary Classics of the Ur

	Call Number Prefix	Classification Part	Item Part	Location	
1		813	T969a:	TMSJ	B2169

3. Click the bib record in the upper pane that corresponds to the holding record you want to create, then click **OK**. This displays the Create New Holding Record window (Figure 5.40).

FIGURE 5.40

Create New Holding Record

Leader		nam
Control Number		
Control Number For Release		0000000765
Date And Time Of Lates		20000221090201.0
Fixed-Length Data Elem		000221 xx 000
Location	1	
Standard Group		General Collection

Example:

Notes:

- If you want temporary items to remain in the catalog after being returned, change the Temporary Holding option in the Mcircsys.ini file.
- Contact your system administrator for assistance.
- Temporary items cannot be placed on reserve.

4. Enter field and subfield data for the new record. For instructions, see step 3 beginning on page 5-27. **NOTE:** Since Authority Control fields are not available for holding records, skip the Authority Control option explained on page 5-28.
5. Select the **Temp** check box if this record is temporary. When the item is returned, the record is marked for deletion, and the barcode record is labeled “detached” so it can be used again.
6. When finished:

- Click **OK** to save your entries and return to the Circulation window. If M3 Circulation is in Loan mode and a patron is currently active, the new item is now on loan; if Circulation is in the Reserve mode, the new item is now placed on reserve.
- OR**
- Click **Cancel** to erase your new entries and return to the Circulation window.
- OR**
- Click **Get Biblio** to display the Bibliographic Search dialog box (Figure 5.38) and begin a new search.

Editing an Item Record

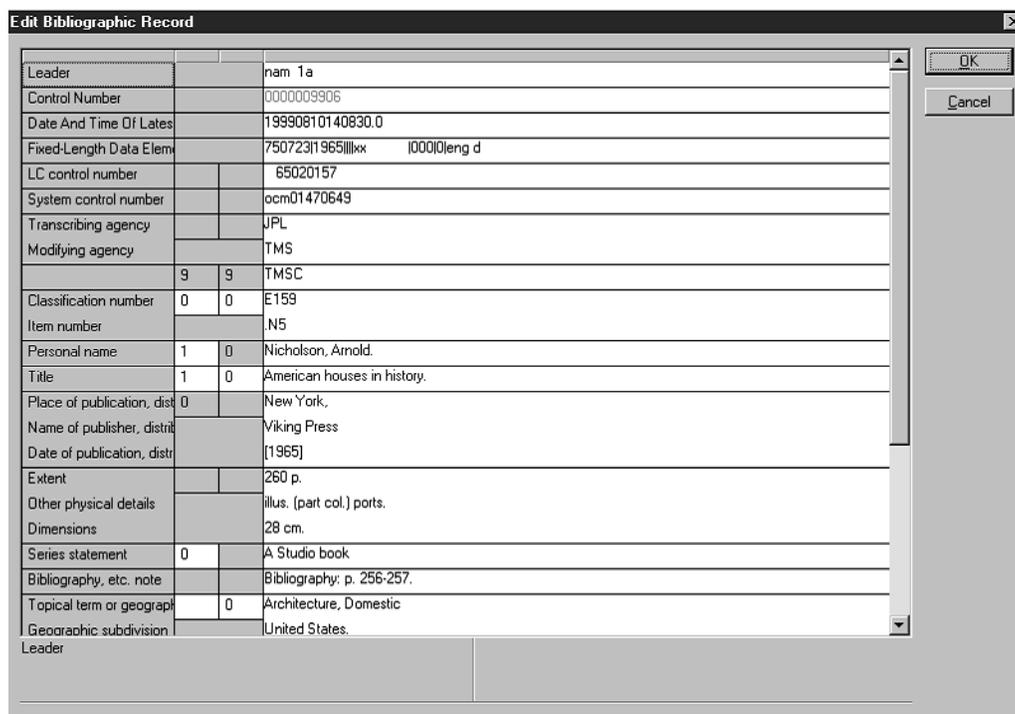
The procedure to edit a bibliographic record differs from the procedure to edit a holding record. Both procedures are covered in this section.

Editing a Bibliographic Record

To edit a bib record:

1. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the code). This displays item information in the Item pane of the Circulation window.
2. On the **Item** menu, click **Edit Bibliographic**. This displays the Edit Bibliographic Record window (Figure 5.41).

FIGURE 5.41



Leader		nam 1a
Control Number		000009906
Date And Time Of Latest		19990810140830.0
Fixed-Length Data Element		750723 1965 llkx 000 0leng d
LC control number		65020157
System control number		ocm01470649
Transcribing agency		JPL
Modifying agency		TMS
	9 9	TMSC
Classification number	0 0	E159
Item number		N5
Personal name	1 0	Nicholson, Arnold.
Title	1 0	American houses in history.
Place of publication, distributor	0	New York.
Name of publisher, distributor		Viking Press
Date of publication, distributor		[1965]
Extent		260 p.
Other physical details		illus. (part col.) ports.
Dimensions		28 cm.
Series statement	0	A Studio book
Bibliography, etc. note		Bibliography: p. 256-257.
Topical term or geographic subdivision	0	Architecture, Domestic
Geographic subdivision		United States.
Leader		

3. Edit this record as needed. For instructions, see step 3 beginning on page 5-27.
4. When finished, click **OK** to save your changes.

Editing a Holding Record

To edit a holding record:

1. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the code). This displays item information in the Item pane of the Circulation window.
2. On the **Item** menu, click **Edit Holding**. This displays the Edit Holding Record window (Figure 5.42).

FIGURE 5.42

Edit Holding Record		
Leader		
Control Number		0000012844
Control Number For Field		0000009906
Date And Time Of Latest		19990810140830.0
Location	1	Alpha Library
Shelving location		G
Classification part		159
Item part		N5
Call number prefix		E
Piece designation		BA12844
Standard Group		Alpha Item Access Group
Renewal Count		2
Current Renewal Count		0
Hold Count		1
Current Hold Count		0
Damaged Count		4
Current Fines Count		0
Current Due Amount		0.00
Loan Count		8
Current Loan Count		1
Due Date		19991123170000.0
Last Borrower		0000000154
Status 1		Normal
Leader		

Buttons: OK, Cancel, Temp

3. Edit this record as needed. For instructions, see step 3 beginning on page 5-27. NOTE: Since Authority Control fields are not available for holding records, skip the Authority Control option explained on page 5-28.

4. When finished, click **OK** to save your changes.

Deleting an Item Record

You cannot delete a bibliographic or holding record from the M3 Circulation module. For security reasons, you can only delete item records from the M3 Cataloging module. For instructions, see “Deleting and Undeleting Records” on page 4-47.

Working with Patron Records

You can search for, edit, and create patron records from both the M3 Circulation module and the M3 Cataloging module. When adding several records, M3 Cataloging is the best module to use. To delete records, you must use the M3 Cataloging module.

Patron records are treated as a separate MARC database within M3 Circulation.

Searching for a Patron Record

You may want to search for a patron record if you do not know the patron's barcode. There are two methods of searching in Circulation—from the main window and with the Search dialog box.

Searching from the Main Window

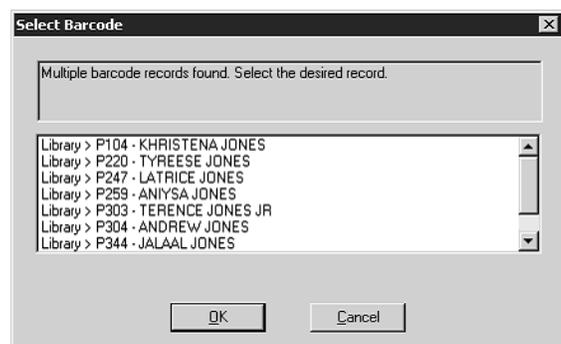
This procedure is a quick and simple method of searching for a patron by name.

NOTE: If you are in Loan, Reserve, or Booking mode and another patron already appears in the Patron pane, press ESC to clear the pane before searching by this method.

1. Type the patron's last name in the Barcode box.
2. If a match is found, the record displays in the Patron pane of the Circulation window, ready for a transaction. *NOTE: If no match is found for a patron but a match is found for an item, the item results display.*

OR
If more than one match is found, the Select Barcode dialog box displays (Figure 5.30). Click the desired record, then click OK. The record displays in the Patron pane of the Circulation window, ready for a transaction.

FIGURE 5.43

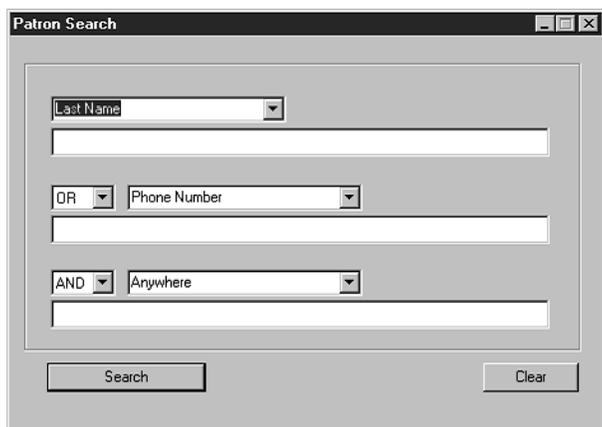


Searching with the Search Dialog Box

This procedure offers more search options.

1. On the **Patron** menu, click **Search**. This displays the Patron Search dialog box (Figure 5.44).

FIGURE 5.44



Patron Search

Last Name

OR Phone Number

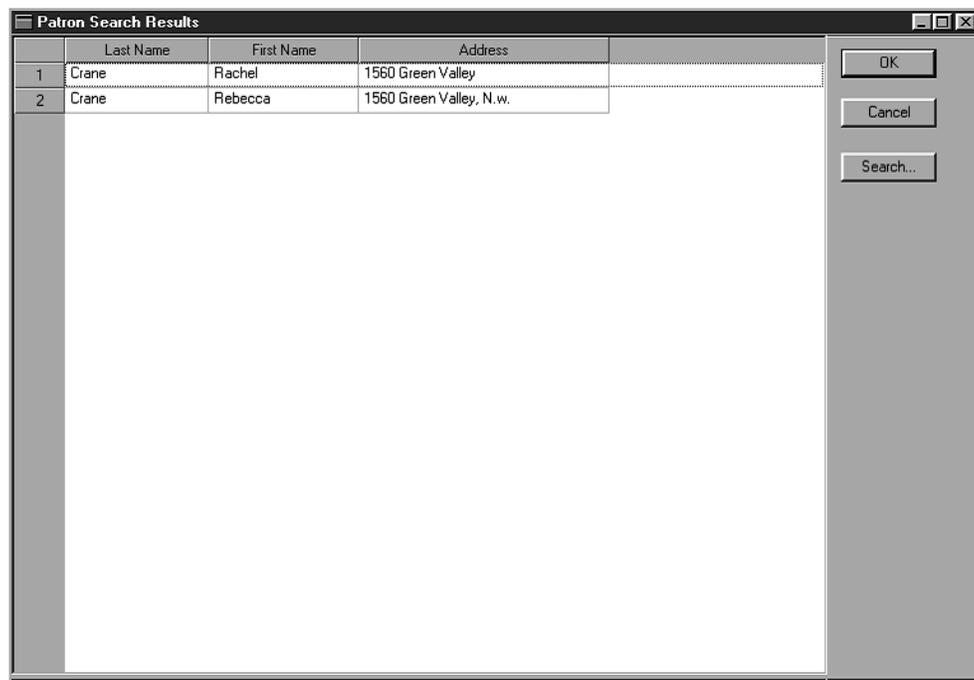
AND Anywhere

Search Clear

Note: Your system can be configured to display different patron record fields and Boolean operators, as well as different options within the record field lists.

2. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator.
3. Click **Search**. This displays the Patron Search Results window (Figure 5.45) with your search results listed.

FIGURE 5.45



	Last Name	First Name	Address
1	Crane	Rachel	1560 Green Valley
2	Crane	Rebecca	1560 Green Valley, N.W.

OK
Cancel
Search...

Tip: You can also double-click a patron record to transfer the information to the Circulation window.

Tip: If you think the name may be misspelled in the system, use truncation to broaden your keyword search. For example, type whitn to locate whitney, whitnee, whitnie, and so on.*

4. From here, you can:

- Select a patron, then click **OK**. This transfers the patron information into the Patron pane in the Circulation window.

OR

- Click **Search** to display the Patron Search dialog box (Figure 5.44) and begin a new search.

OR

- Click **Cancel** to return to the Circulation window.

Creating a Patron Record

At times, it may be convenient to create a patron record while using the M3 Circulation module. You can also create records from the M3 Cataloging module. If you have several records to add, you may find it more efficient to import them using the M3 Cataloging module. To do so, see “Importing Bibliographic, Patron, and Authority Records” on page 4-55.

When adding a patron record, you must first conduct a search to confirm that the patron is not already entered in the system.

To create a patron record:

1. On the **Patron** menu, click **Add Patron**.

- If more than one patron template exists, the Templates dialog box displays. Select the template you want to use, then click **OK**. This displays the Patron Search dialog box (Figure 5.44).

OR

- If only one patron template exists, the Patron Search dialog box (Figure 5.44) displays.

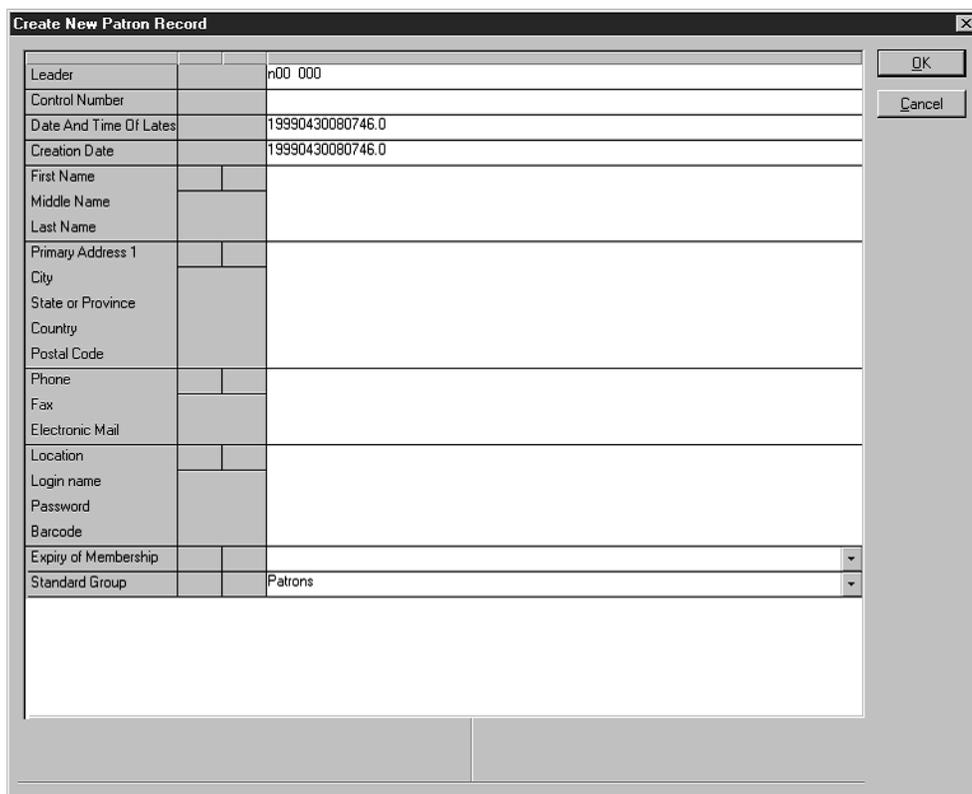
2. To make sure the patron is not already in the system, type the patron’s information in the appropriate keyword boxes, then click **Search**.

- If there is no patron in the system with this information, the Create New Patron Record window displays (Figure 5.46).

OR

- If there is a patron in the system with this information, the Patron Search Results window displays the search results (Figure 5.45). Review the list to confirm that the patron you are entering is not included, then click **Cancel**. This displays the Create New Patron Record window (Figure 5.46).

FIGURE 5.46



Leader		n00 000
Control Number		
Date And Time Of Lates		19990430080746.0
Creation Date		19990430080746.0
First Name		
Middle Name		
Last Name		
Primary Address 1		
City		
State or Province		
Country		
Postal Code		
Phone		
Fax		
Electronic Mail		
Location		
Login name		
Password		
Barcode		
Expiry of Membership		
Standard Group		Patrons

Tip: To insert a picture field in this record so a picture displays in the Patron pane when the patron is selected, see “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-38.

3. Edit this record as needed. For instructions, see step 3 beginning on page 5-27. NOTE: Since Authority Control fields are not available for patron records, skip the Authority Control option explained on page 5-28.
4. When finished, click **OK** to save your changes.

Editing a Patron Record

To edit a patron record:

1. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the code). This displays patron information in the Patron pane of the Circulation window.
2. On the **Patron** menu, click **Edit Patron**. This displays the Edit Patron Record window (Figure 5.47).

FIGURE 5.47

Edit Patron Record		
Leader		nam
Control Number		0000000022
Date And Time Of Lates		20010710065029.0
Creation Date		20010710065029.0
First Name	1	Courtnie
Last Name		Brown
ID or Social Security Num		00308895180223
City		Boca Raton
		Record created from NonMARC resource by marcout.
Barcode	1	PA154
Standard Group		Patrons

Leader

3. Edit this record as needed.

NOTE: Since Authority Control fields are not available for patron records, skip the Authority Control option.

4. When finished, click **OK** to save your changes.

Deleting a Patron Record

You cannot delete a patron record from the M3 Circulation module. For security reasons, you must delete patron records from the M3 Cataloging module. For instructions, see “Deleting and Undeleting Records”

Displaying Item and Patron Picture

Pictures, such as cover images and patron photos, can be displayed alongside items and patrons in the Circulation window.

To import and link multiple image files at once, use the M3 Picture Manager utility, which can be accessed through the M3 Cataloging module. To add a picture to one item or patron record at a time, see the following section, “Adding a Picture Field to a Bibliographic or Patron Record.”

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

- Add a graphic cell to the Patron pane for each Circulation mode (Loan, Return, and so on) in which you want an image to display; changes made to one mode will not apply to the other modes. For instructions, see “Modifying the Patron Pane Display” on page 5-59.
- Add a graphic cell to the Item pane for each Circulation mode (Loan, Return, and so on) in which you want an image to display; changes made to one mode will not apply to the other modes. For instructions, see “Modifying the Item Pane Display” on page 5-64.

Adding a Picture Field to a Bibliographic or Patron Record

To add a picture field to a bibliographic or patron record:

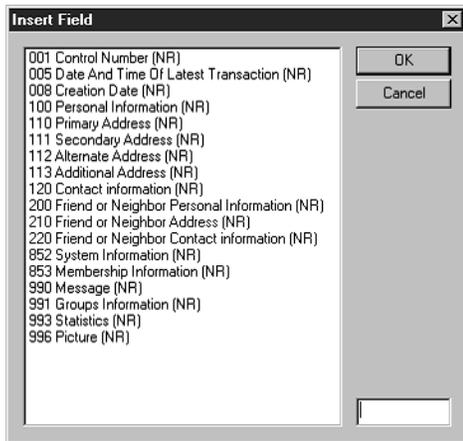
1. In the **Barcode** box, type the barcode of the item or patron to which you want to assign the picture, and then press ENTER (or scan the code). This displays the item or patron information in the Item or Patron pane of the Circulation window.
2. If you are working with an item record, click **Edit Bibliographic** on the **Item** menu. This displays the Edit Bibliographic Record window (Figure 5.41).

OR

If you are working with a patron record, click **Edit Patron** on the **Patron** menu. This displays the Edit Patron Record window (Figure 5.47).

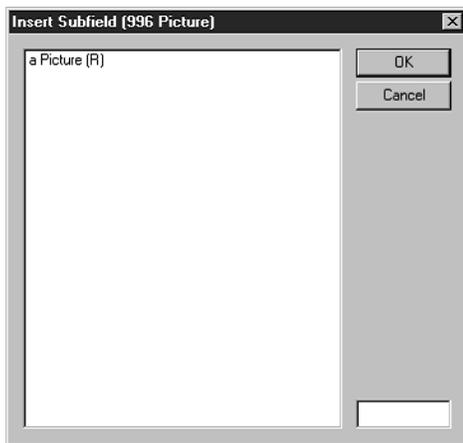
3. Right-click in the window to open a command menu (Figure 5.35), then click **Insert Field**. This displays the Insert Field dialog box (Figure 5.48 shows the Insert Field dialog box for patron records).

FIGURE 5.48



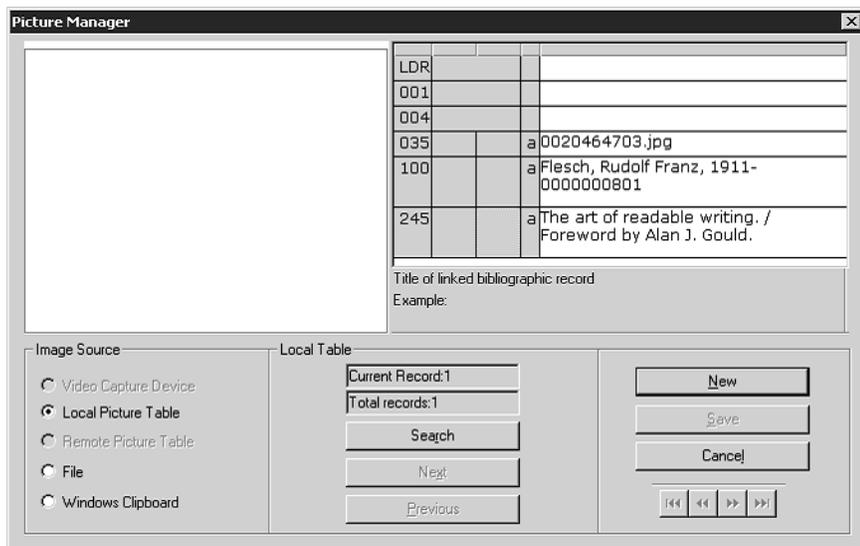
4. Select field **996 Picture**, then click **OK**. This displays the Insert Subfield dialog box (Figure 5.49).

FIGURE 5.49



5. Click subfield **a**, then click **OK**. This displays the Picture Manager dialog box (Figure 5.50).

FIGURE 5.50



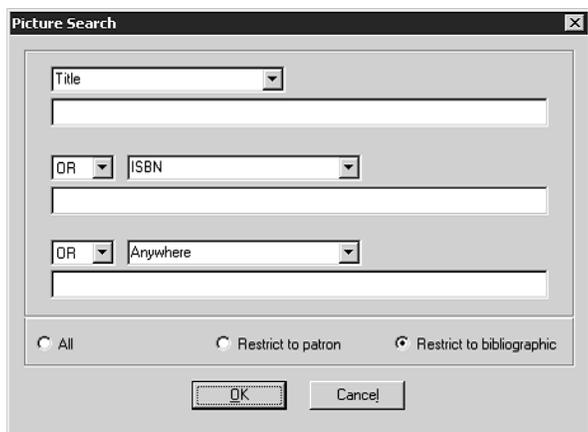
Tip: You can also double-click the 996 field in the record window to display the Picture Manager dialog box.

Note: The video capture device driver must be Microsoft DirectX® compatible.

6. In the **Image Source** group, select the source of the picture. After you click an option, the name of and the options available in the Image Selection pane (shown in Figure 5.50) change.

- **Video Capture Device** – Use a video capture device (preferably a USB camera) hooked to your computer to capture a picture. To do so, point the camera at the subject for the picture. The image appears in the Preview pane (shown in Figure 5.52). Click **Capture**. If satisfied with the image, click **Save**; if not, click **Preview** to view the image and capture it again.
- **Local Picture Table** – Search a local table for picture records. To do so, click **Search**. This displays the Picture Search dialog box (Figure 5.51).

FIGURE 5.51



Tip: To copy a picture to the Clipboard:

- While viewing the picture, press **ALT+PRINT SCREEN**.
- Open the picture in a word processing or drawing program, then click **Copy** (usually on the **Edit** menu).

A. Type your search query into the appropriate boxes. To select a different MARC field or Boolean operator, click the arrow next to the appropriate list, and then select the preferred field or operator.

B. Click **All**, **Restrict to patron**, or **Restrict to bibliographics** to search for all pictures, pictures assigned a **p** (patron) in the 991#a field, or pictures assigned a **b** (bibliographic) in the 991#a field.

C. Click **OK**. This displays the picture of the first search result in the Preview pane, and the record's fields and subfields in the Record pane (shown in Figure 5.52).

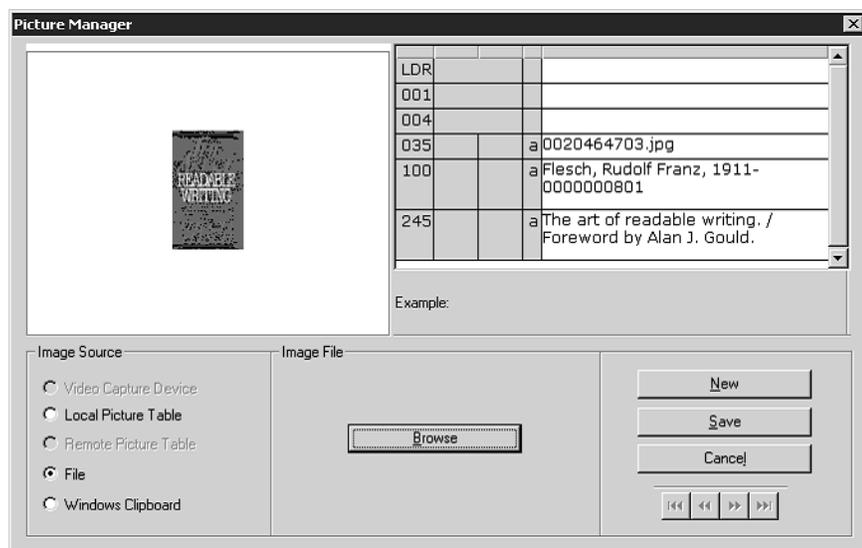
- **Remote Picture Table** – Search a remote table for picture records. This option is intended for bibliographic records. The procedure is identical to the procedure for the Local Picture Table option.

- **File** – Use a previously-saved picture file (in .jpg or .bmp format). To do so, click **Browse**. In the Open Image File dialog box, navigate to the desired file, and then click **Open**. This displays the picture in the Preview pane and the record's fields and subfields in the Record pane (shown in Figure 5.52).

- **Windows Clipboard** – Use a picture copied to the Windows Clipboard.

To do so, copy the picture to the Clipboard, then click **Paste**. This displays the picture in the Preview pane and the record's fields and subfields in the Record pane (shown in Figure 5.52).

FIGURE 5.52



7. To add fields to this picture record (such as file name or title), right-click in the Record pane and repeat steps 3 through 5, selecting the field and subfield you want to add.

8. When finished, click **Save**. This returns you to the Edit Patron Record window or the Edit Bibliographic Record window, and inserts a picture subfield in field 996.



Using the Message Utility

About Messages and Block Types

You can attach one or more messages to a patron record so the messages appear whenever the patron barcode is entered. Similarly, you can attach messages to an item record that appear each time the item's barcode is entered.

When attaching a message to a record, the attacher must also assign a block type to the attachment. The four block types are:

- **Information Blocks** – When an information block message appears, the user can bypass the message by clicking anywhere on the Circulation window. This is the least intrusive block type.
- **Blocking Blocks** – When a blocking block message appears, the user must select an option in the message dialog box in order to proceed.
- **Nudge Blocks** – When a nudge block message appears for the first time, the user must select an option in the dialog box in order to proceed, as with a blocking block message. Any time this message appears again with this record, it acts as an information block (no decision required to bypass).
- **Privilege Blocks** – When a privilege block message appears, a password is required to bypass the message dialog box. This is the most intrusive block type.

Adding Messages to the Circulation System

As part of the initial circulation setup, a bank of patron and item messages appropriate for your library should have been defined. You can add, edit, and delete messages within the bank at any time.

Generally, when you want to modify your message bank, you use the Messages utility on the Tools menu. However, if you need to create or edit a message while conducting a circulation transaction, you can also access and modify the message bank “on the fly.”

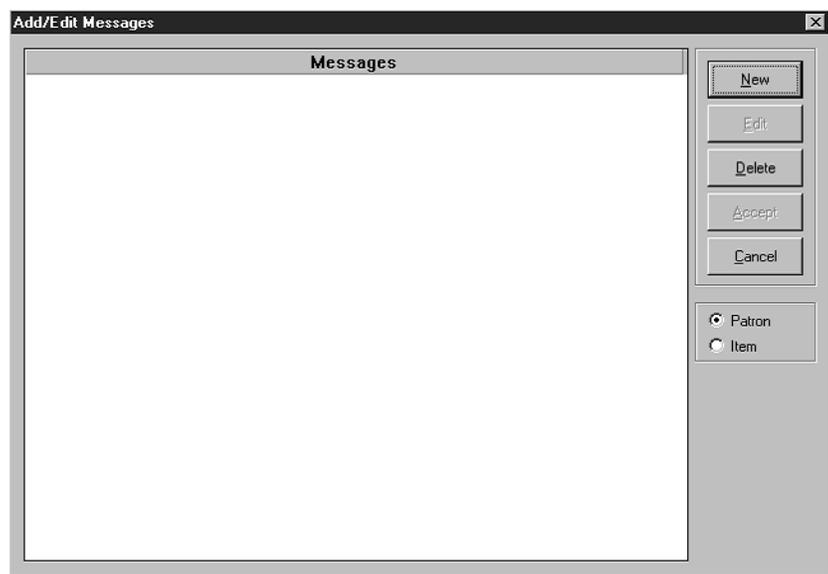
Both options are described in the following sections.

Creating a Bank of Patron and Item Messages

To add messages to the bank when not conducting a transaction:

1. On the **Tools** menu, click **Messages**. This displays the Add/Edit Messages window (Figure 5.53). If no messages have been added at your library, this window is empty.

FIGURE 5.53



2. Click **Patron** or **Item**, depending on the type of messages you want to add.
3. Click **New**. This displays the Add New Message dialog box (Figure 5.54).

FIGURE 5.54



Tip: General messages provide greater flexibility.

4. Type the message, then click **OK**. Your new message appears in the Add/ Edit Messages window.
5. Repeat steps 3 and 4 for each message you want to include. After adding several messages, the Add/Edit Messages window looks similar to the example in Figure 5.55.

FIGURE 5.55



Note: Only messages not in use can be deleted.

6. When finished, click **Cancel**.

Deleting a Message from the System

To delete a message from the circulation message bank:

1. On the **Tools** menu, click **Messages**. This displays the Add/Edit Messages window (Figure 5.55).
2. Click the message type you want to delete, **Patron** or **Item**.
3. Select the message you want to delete, then click **Delete**. Repeat this step for each message you want to delete.

NOTE: If Delete is not active, the selected message is attached to a record and cannot be deleted.

4. When finished, click **Cancel**.

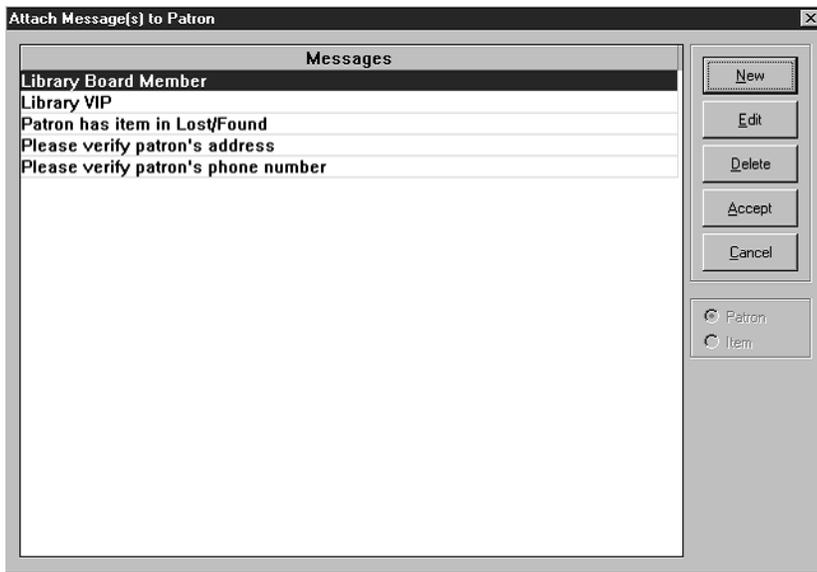
Attaching a Message to a Patron Record

While conducting a circulation transaction, you can attach, create, and edit a patron message.

Attaching an Existing Message to a Record

1. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the code).
2. On the **Patron** menu, click **Messages**. This displays the Attach Message(s) to Patron window (Figure 5.56), listing all available patron messages.

FIGURE 5.56

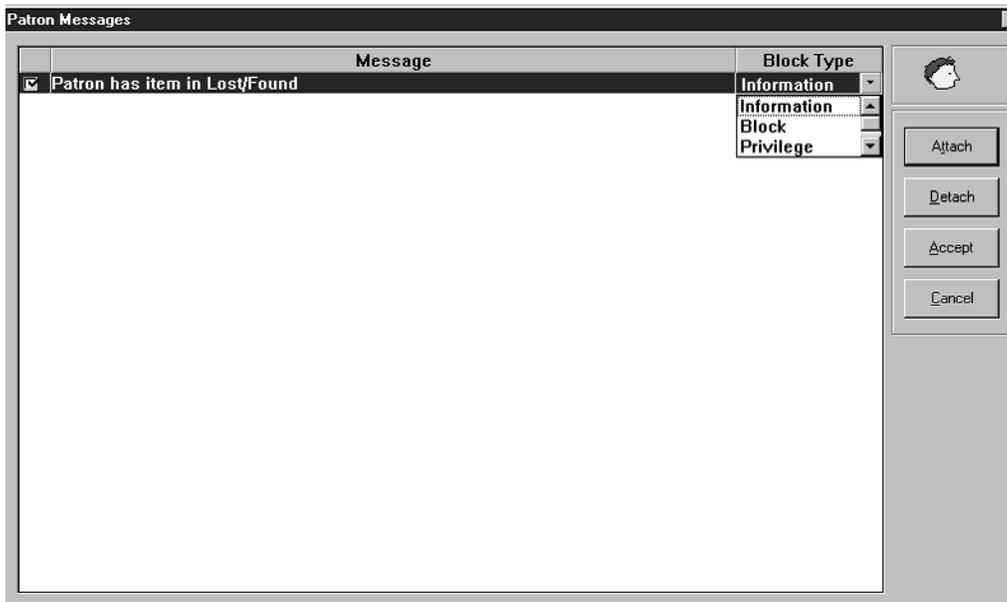


3. From here, do one of the following:

- If the list includes any appropriate messages:

A. Select all desired messages, then click **Accept**. This displays the Patron Messages window (Figure 5.57).

FIGURE 5.57

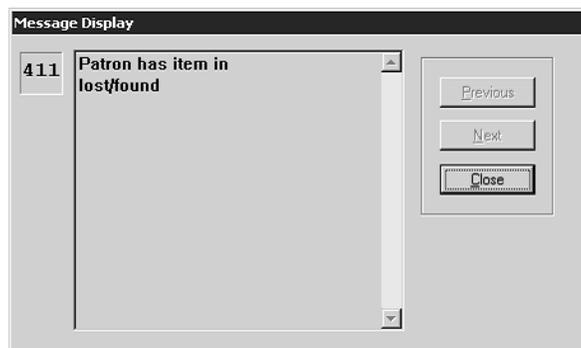


*If this patron already has messages attached, the Patron Messages window (Figure 5.57) lists all attached messages. Click **Attach** to attach a different message, or **Detach** to detach this message.*

B. Select a block type in the **Block Type** list. Do this for each selected message. (Block types are defined on page 5-41.)

C. When finished, click **Accept**. The attached messages (as shown in Figure 5.58) appear whenever this patron record is accessed from M3 Circulation.

FIGURE 5.58



This procedure assumes you are working with a patron message; however, the procedure also works for item messages.

- If the message you need does not appear in the list, follow the procedure in the next section, “Creating a Message “On the Fly”.”
- If a similar message exists that you want to edit before attaching, follow the procedure in “Editing a Message “On the Fly”” on page 5-46.

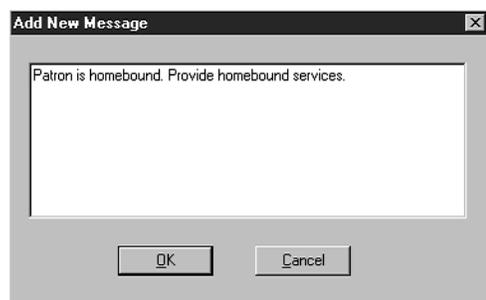
NOTE: If you edit a message that is attached to other records, the edited version displays for all records.

Creating a Message “On the Fly”

If you are conducting a circulation transaction and the message you want to attach does not exist in the message bank, you can create the new message during the transaction, or “on the fly.” To do so:

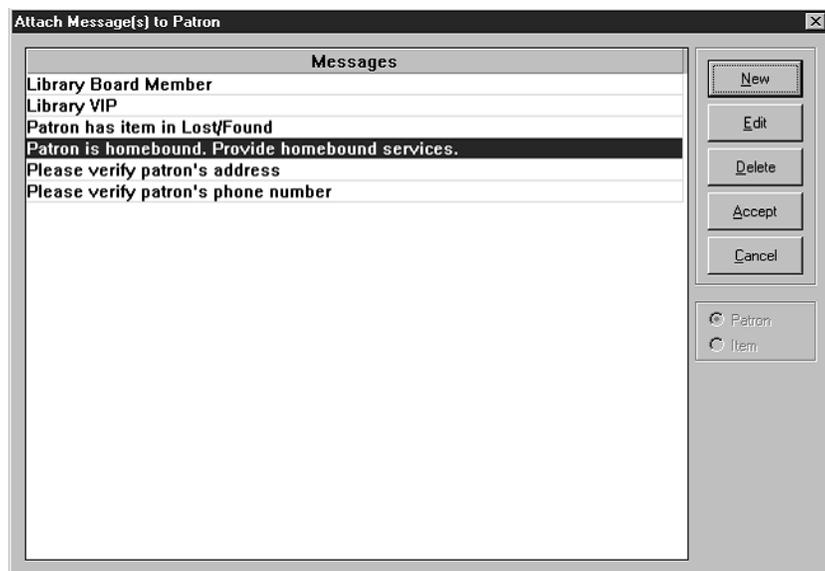
1. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the code).
2. On the **Patron** menu, click **Messages**. This displays the Attach Message(s) to Patron window (Figure 5.56).
3. Click **New**. This displays the Add New Message dialog box (Figure 5.59).

FIGURE 5.59



4. Type the message, then click **OK**. The new message appears in the Attach Message(s) to Patron window (Figure 5.60).

FIGURE 5.60



5. If you are satisfied with the message, click **Accept**. This displays the Patron Messages window (Figure 5.57).

6. Select the new message, then click a block type in the **Block Type** list.

7. When finished, click **Accept**. The attached message (as shown in Figure 5.58) appears whenever this patron record is accessed from M3 Circulation.

Editing a Message “On the Fly”

If you are conducting a library transaction and the message you want to attach requires editing, you can do so during the transaction, or “on the fly.” To do so:

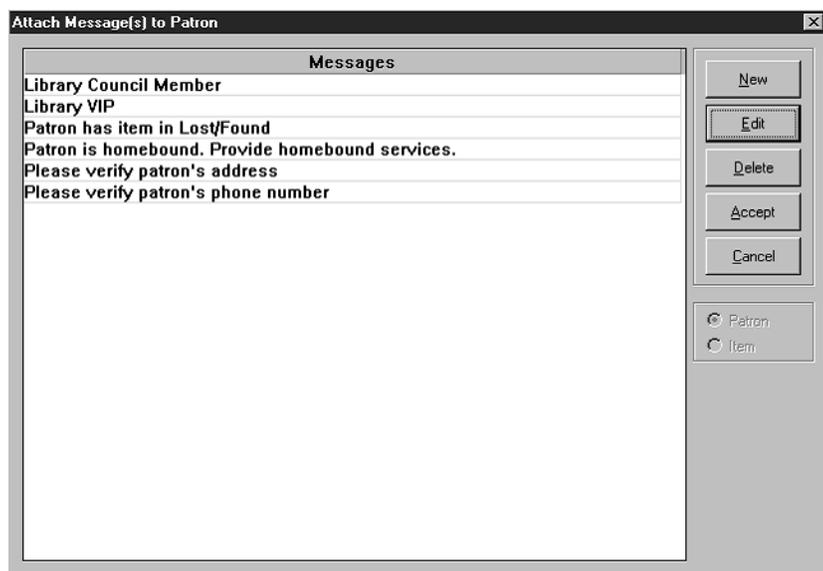
1. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the code).
2. On the **Patron** menu, click **Messages**. This displays the Attach Message(s) to Patron window (Figure 5.60).
3. Select the message you want to edit, then click **Edit**. This displays the Edit Message dialog box (Figure 5.61) with the selected message displayed.

FIGURE 5.61



4. Edit the message as desired, then click **OK**.
5. Your edited message appears in the Attach Message(s) to Patron window (Figure 5.62).

FIGURE 5.62



6. If satisfied with the message, click **Accept**. This displays the Patron Messages window (Figure 5.57).
7. Select the new message, then click a block type in the **Block Type** list.
8. When finished, click **Accept**. The attached message (as shown in Figure 5.58) appears whenever this patron record is accessed from M3 Circulation.

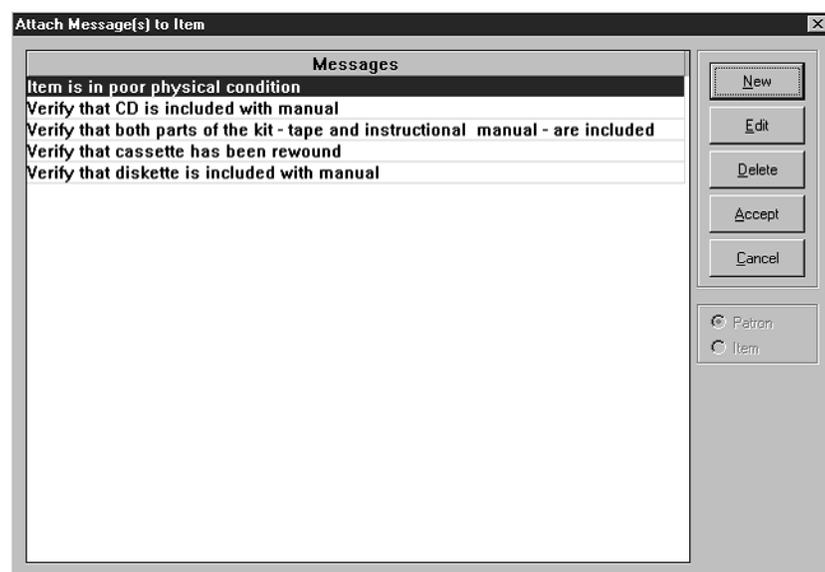
Attaching a Message to an Item Record

While conducting a circulation transaction, you can attach, create, and edit an item message. The procedure to attach a message to an item record is similar to the procedure for patron records; only the access path and window names are different.

To attach a message to an item record:

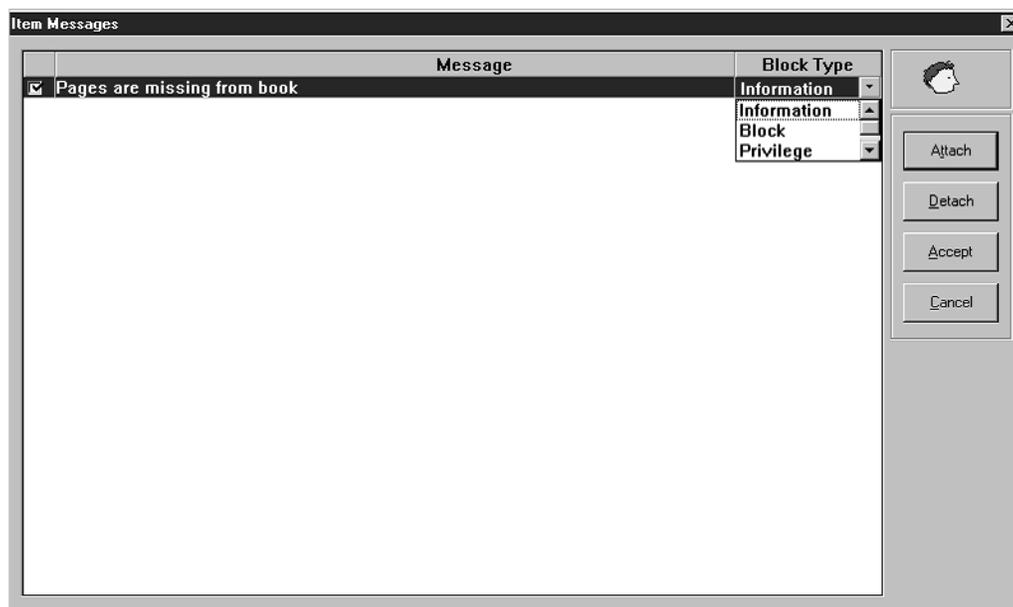
1. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the item's barcode).
2. On the **Item** menu, click **Messages**. This displays the Attach Message(s) to Item window (Figure 5.63), listing all available item messages.

FIGURE 5.63



3. From here, do one of the following:
 - If the list includes any appropriate messages:
 - A. Select the desired messages, then click **Accept**. This displays the Item Messages window (Figure 5.64).

FIGURE 5.64



If this item already has messages attached, the Item Messages window (Figure 5.64) lists all attached messages. Click **Attach** to attach a different message, or **Detach** to detach this message.

B. Select a block type in the **Block Type** list. Do this for each selected message. (Block types are defined on page 5-41.)

C. When finished, click **Accept**. The attached messages (as shown in Figure 5.58) appear whenever this item record is accessed from M3 Circulation.

- If the message you need does not appear in the list, follow the procedure in “Creating a Message “On the Fly”” on page 5-45.
- If a similar message exists that you want to edit before attaching, follow the procedure in “Editing a Message “On the Fly””.

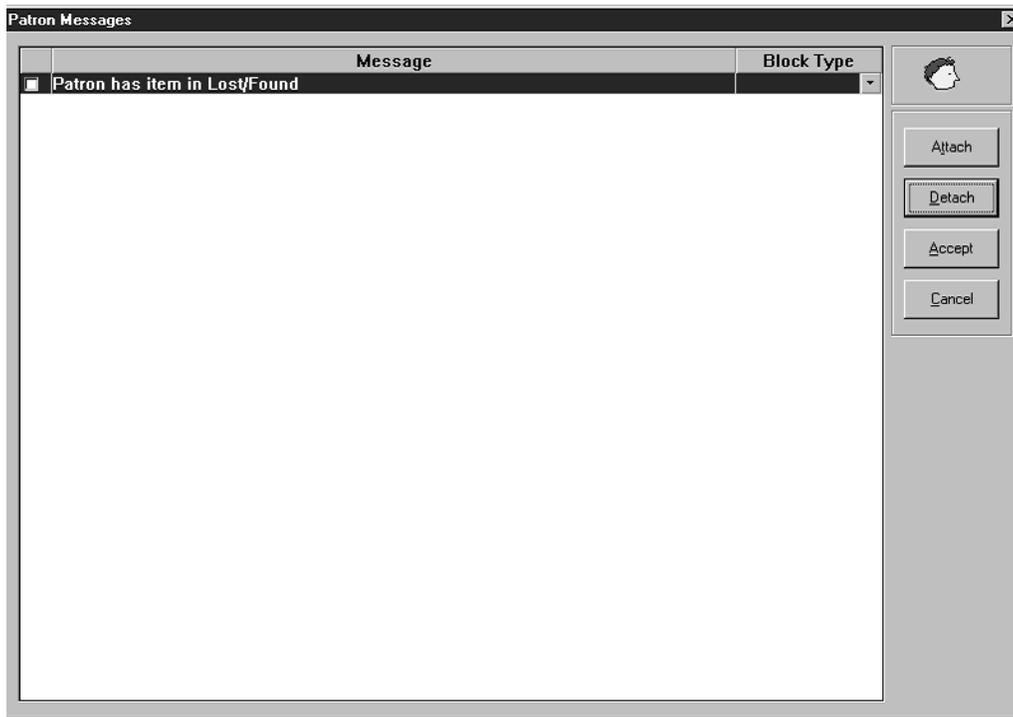
NOTE: If you edit a message that is attached to other records, the edited version displays for all records.

Detaching a Message

If a message displays after you enter a patron or item barcode, you can detach the message during the transaction. To do so:

1. Close the message. On the **Patron** or **Item** menu (depending on which type of record the message is attached to), click **Messages**. This displays the Item Messages or Patron Messages window (Figure 5.65),

FIGURE 5.65



2. Select the message you want to detach, and then click **Detach**.
3. Click **Accept**. This detaches the message.

Modifying Library Dates and Circulation Periods

After your library's circulation calendar is set up, you can modify it for special circumstances. For example, you can backdate the circulation date, which is helpful if you have an evening bookdrop. You can also change the loan expiration date for circumstances when you want to temporarily override the typical loan period. The following sections explain how to establish your library schedules, then temporarily revise the setup to accommodate backdating and date changes.

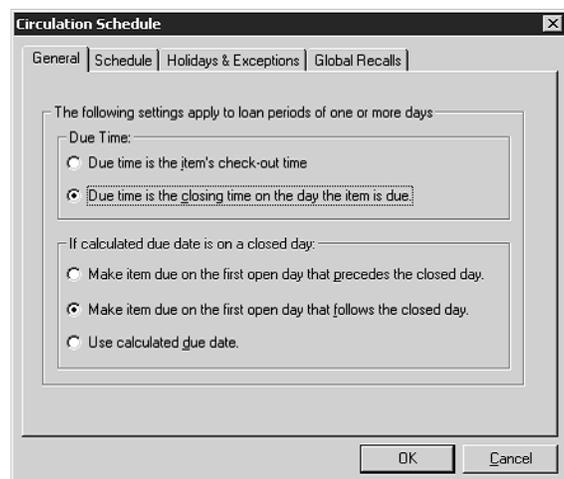
System Schedule Setup

When you install M3 Circulation, you should set up your library's system schedule. You can set up multiple schedules to accommodate different times of the year. For example, your summer schedule may differ from the rest of the year.

To set up your library circulation schedule:

On the **Tools** menu, click **Schedule**. This displays the Circulation Schedule window (Figure 5.66). Enter the appropriate information in each tab as described in the following sections.

FIGURE 5.66



General Tab

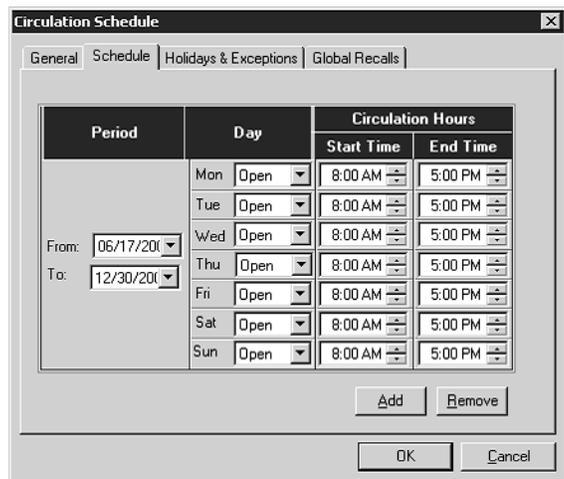
In this tab (shown in Figure 5.66), establish general loan period rules.

1. In the upper group, click the **Due Time** option appropriate for your library.
2. In the lower group, click the option appropriate for your library.
3. When finished, click **OK**.

Schedule Tab

In this tab (Figure 5.67), establish your library's opening and closing day for each day of the week. You can create multiple schedules to apply to different times of the year.

FIGURE 5.67

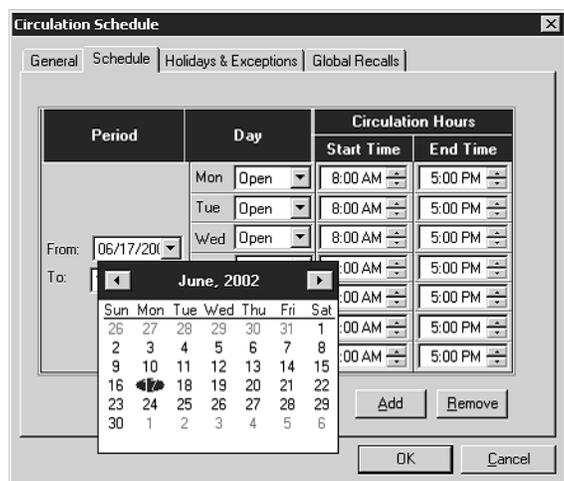


- In the **Period** group, specify this schedule's starting date in the **From** box. To do so:
 - Select the date, then type the new date in MM/DD/YY format.

OR

- Click the **Calendar** arrow to display a calendar (Figure 5.68). Click the calendar's left (<) and right (>) arrows to select a month, then click the desired date. The date appears in the **From** box.

FIGURE 5.68



- Repeat step 1 for the **To** box.
- In the **Day** group, click the **Mon** arrow, and then click **Open** or **Closed**. Repeat for all days of the week.

4. In the **Circulation Hours** group, select the **Start Time** and **End Time** for each day of the week. To do so, click a time box, then click the adjoining arrows to select a time. Repeat this for each box until the correct times display for each day of the week.

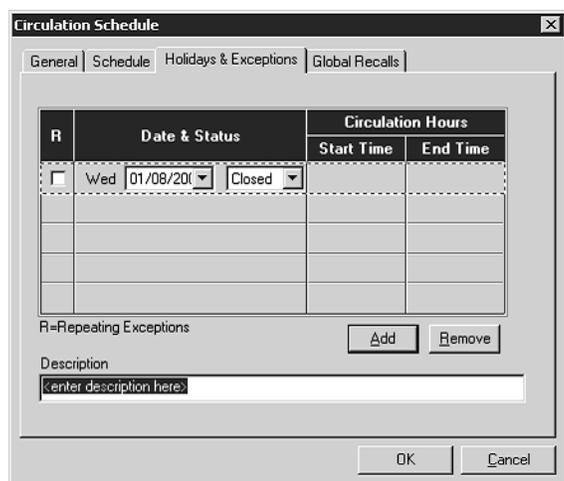
*NOTE: If you want to create an additional schedule, wait until you have completed the **Holidays & Exceptions** tab and the **Global Recalls** tab for this schedule.*

5. When finished, click **OK**.

Holidays & Exceptions Tab

In this tab (Figure 5.69), eliminate or add irregular dates within the schedule you created in the Schedule tab.

FIGURE 5.69



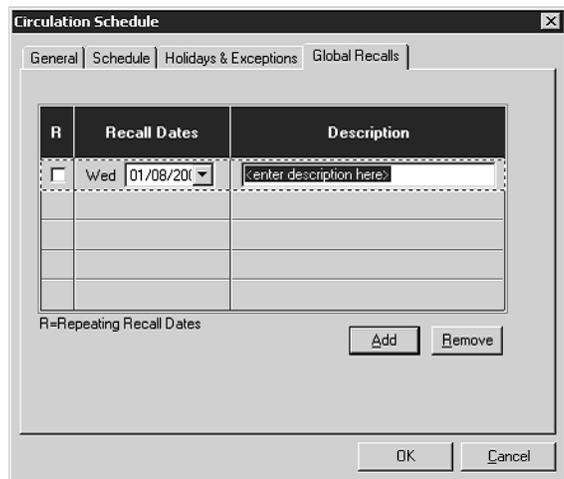
1. In the **Holidays & Exceptions** tab, click **Add**. This activates a line.
2. In this line, enter information for the exception date as follows:
 - A. Select the **R** check box if this exception date should repeat every year. This would be appropriate for holidays that always occur on the same date each year, such as New Year’s Day.
 - B. In the date box in the **Date & Status** group, enter the exception date. To do so, select the date, then type the new date using MM/DD/YY format. Or, click the **Calendar** arrow (shown in Figure 5.69) to display a calendar. Click the calendar’s left (<) and right (>) arrows to select a month, then click the desired date. The date appears in the box.
 - C. In the box beside the date box, click **Open** or **Closed** to indicate whether the library is open or closed on the date entered in step B.
 - D. If you clicked **Open** in step C, enter the **Start Time** and **End Time** for this exception day. Follow the procedure in step 4 page 5-52. If you clicked **Closed** in step C, no times can be entered.
 - E. In the **Description** box, type any information necessary to clarify this exception date.

3. To enter more dates, click **Add** and repeat step 2.
4. When finished, click **OK**.

Global Recalls Tab

In this tab (Figure 5.70), specify the date all items have to be back in the library, such as the end of a school term or an inventory date.

FIGURE 5.70



1. In the **Global Recalls** tab, click **Add**. This activates a line.
2. In this line, enter information for the closing date as follows:
 - A. Select the **R** check box if this closing date should repeat every year.
 - B. In the **Recall Dates** group, enter the closing date. To do so, select the date, then type the new date using MM/DD/YY format. Or, click the **Calendar** arrow (shown in Figure 5.70) to display a calendar. Click the calendar’s left (<) and right (>) arrows to select a month, then click the desired date. The date appears in the box.
 - C. In the **Description** box, type any text necessary to clarify this closing date.
3. To enter more dates, click **Add** and repeat step 2.
4. When finished, click **OK**.
5. If you want to add another circulation period (such as a “summer hours” schedule), repeat the procedures for the **Schedule**, **Holidays & Exceptions**, and **Global Recalls** tabs beginning with “Schedule Tab” on page 5-51.

Temporarily Backdating the Library System Calendar Occasionally, the circulation desk needs to backdate the system calendar to process a return. This is standard practice for libraries with evening bookdrops.

There are two ways to backdate the system calendar; one is through the menu bar, and the other is through a right-click procedure.

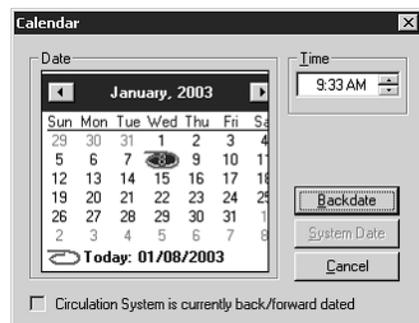
To backdate the system calendar:

1. On the toolbar, click **Return**.
2. On the **Tools** menu, click **Backdate**. This displays the Calendar dialog box with today's system date highlighted (Figure 5.71).

OR

In the Circulation window, right-click today's system date on the status bar. This displays the Calendar dialog box with today's system date highlighted (Figure 5.71).

FIGURE 5.71



After this change date transaction is completed, the date automatically returns to the default loan expiration date.

3. Click the desired earlier day. If you need to select a day in the previous month, click the left (<) arrow to select a month, then click the desired day.
4. Click **Backdate**. The system date on the Circulation window status bar changes to the earlier date you selected.
5. Enter all the item barcodes that you want to return based on this revised system date.
6. To return the system to today's date:
 - On the **Tools** menu, click **Backdate**. When the calendar displays, click **System Date**.

OR

- In the Circulation window, right-click the system date on the status bar. In the Calendar dialog box, click **System Date**.

OR

- Click a different transaction mode on the toolbar.

Temporarily Changing the Loan Expiration Date

Occasionally, the circulation desk needs to make the default loan period shorter or longer. For example, the default loan period may be too short for someone traveling out of town, or too long when you know the item will soon be needed for a special project.

To change the loan expiration date:

1. On the toolbar, click **Loan**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER (or scan the code).
3. In the **Barcode** box, type the item barcode, and then press ENTER (or scan the code). If multiple items are involved, enter the barcode for each item. This processes the loan transactions based on the default loan period. The items on loan appear in the Transactions pane. You now need to revise the expiration date.
4. In the Transactions pane, select the check box or boxes corresponding to the items you just loaned. Right-click an item to display a transaction menu.
5. Click **Change Date**. This displays a calendar.
6. Click the desired expiration date. If you need to select a day in the next month, click the right (>) arrow to select a month, and then click the expiration date.
7. Click **OK**. The revised expiration date appears in the Transactions pane.

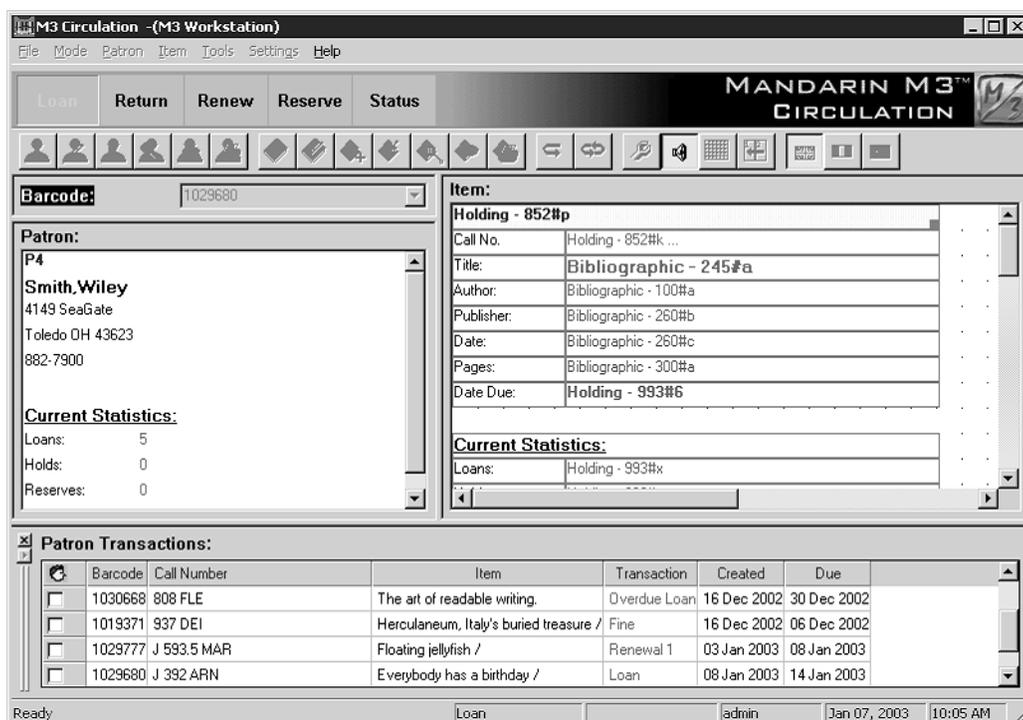
Using the Transactions Report Utility

M3 Circulation provides transaction reports to monitor your library status and activity. These reports are discussed in the following section, “Viewing, Sorting, and Printing Circ Reports.” (More system reports are available through the report generator; see page 7-1.)

Viewing, Sorting, and Printing Circ Reports

1. On the **Mode** menu, click **Library Transactions**. This displays a listing of all transactions in the Transactions pane except returns for the current circulation period (as defined in your system’s Schedule tab; see “Schedule Tab” on page 5-51).

FIGURE 5.72

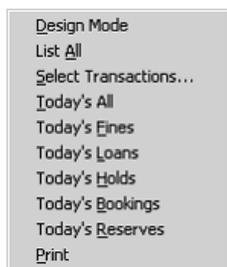


2. From here, your options are:

- To view the patron and/or item information related to one of the listed transactions, double-click the transaction in the Transactions pane. This displays any relevant patron or item information in the two upper panes.

To return to the full transaction list, click List All on the command menu.

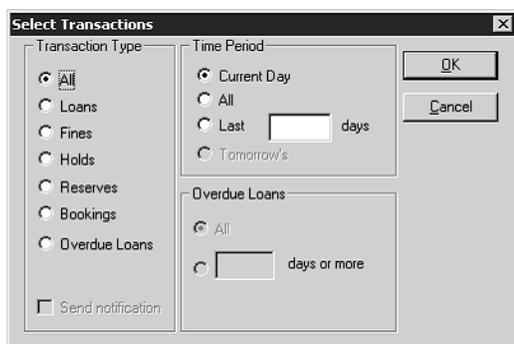
FIGURE 5.73



To return to the full transaction list, click **List All** on the command menu.

- To switch the view in the Transactions pane between all transactions, patron transactions, and item transactions, double-click a transaction in the Transactions pane. Then click the **Display** button (shown in Figure 5.72) until the desired transaction type displays. A “head” icon on the Display button represents patron transactions; a “book spine” icon represents item transactions; and no icon represents all transactions.
- To limit the displayed transactions to today’s data, right-click in the Transactions pane. This opens a command menu (Figure 5.73) with sorting and other commands. Click the sort option that suits your needs: **Today’s All**, **Today’s Fines**, **Today’s Loans**, **Today’s Holds**, **Today’s Bookings**, or **Today’s Reserves**.
- To sort transactions by transaction type or a time period, click **Select Transactions** on the command menu (Figure 5.73). In the Select Transactions dialog box (Figure 5.74), click a transaction type and a time period, and then click **OK**.

FIGURE 5.74



To send e-mail notifications to patrons with fines or overdue items, see “Sending E-mail Notifications for Fines and Overdue Items” on page 5-19.

- To print the transactions listed in the Transactions pane, click **Print** on the command menu (Figure 5.73). If a Print dialog box displays, change the settings if desired, and then click **OK**.
- To configure which information displays and how it displays in the Transactions pane while in the Library Transactions mode, click **Design Mode** on the command menu (Figure 5.73). This procedure is explained in “Modifying the Transactions Pane for Library Transactions”



Using the TriCoder to Conduct Transactions

Note: The following instructions describe the scanning procedure using a Worthington TriCoder™. If you are using a different type of scanner, your procedure may differ.

Note: You can also type the patron and/or item barcodes into the TriCoder; be sure to press ENTER on the TriCoder between each barcode.

You may want to conduct transactions using a portable scanning device such as a TriCoder. This is useful when your main M3 Circulation system is not available, such as while working from a bookmobile.

This procedure includes scanning the patron and/or item barcodes using the TriCoder, then uploading them into Circulation. You can scan and upload barcodes for only one transaction mode at a time (unless you use the Transaction Barcodes sheet; see “Using the Transaction Barcodes Sheet” on page 5-58).

Scanning Barcodes

1. On the TriCoder, press **ON**, then press any key.
2. At the data collection prompt, press **YES**.
3. At the program number prompt, press **0**.
4. Scan the patron and/or item barcodes.
 - If you are conducting a loan or reserve transaction, scan the patron barcode and then scan the item barcodes. Repeat for each transaction you are conducting.
 - If you are conducting a return or renew transaction, scan the item barcodes only.
5. Press **END**. You are now ready to upload the data into Circulation.

Uploading Data

1. Connect the TriCoder to your Circulation workstation.
2. In Circulation, click the toolbar button corresponding to the type of transaction you are conducting (**Loan**, **Return**, **Renew**, or **Reserve**).
3. On the **Tools** menu, click **Upload Transactions**. This displays the Upload Transactions dialog box (Figure 5.75).

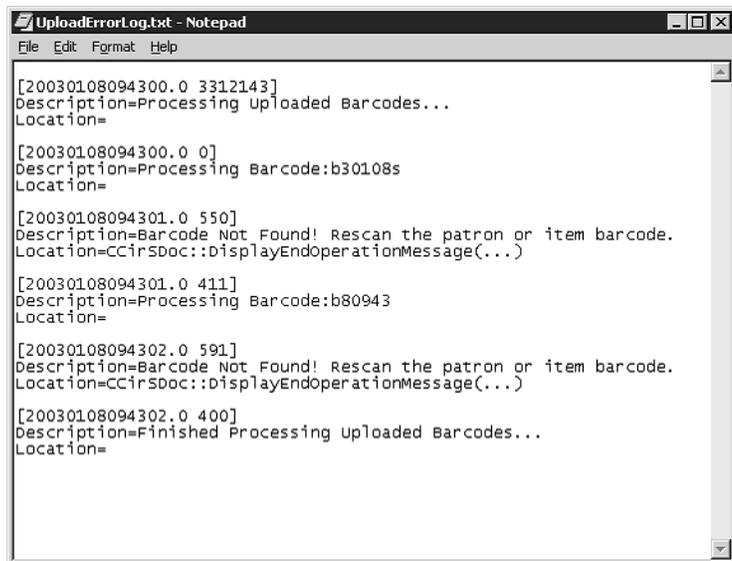
FIGURE 5.75



4. Click in the text box.
5. On the TriCoder, press **NO** at the data collection prompt, then press **YES** at the data upload prompt.
6. The barcodes display in the Upload Transactions dialog box. Click **OK** to upload the transactions to the database.
7. When the upload process is complete, a message displays confirming a successful upload or alerting you to errors that occurred during the upload procedure.

NOTE: If an error message displays, click View Upload Log on the Help menu. This displays a log identifying the errors (as shown in the example in Figure 5.76).

FIGURE 5.76



Using the Transaction Barcodes Sheet

Included with your M3 documentation is a laminated sheet titled *Transaction Barcodes*. You can use this barcode sheet to conduct transactions using a TriCoder.

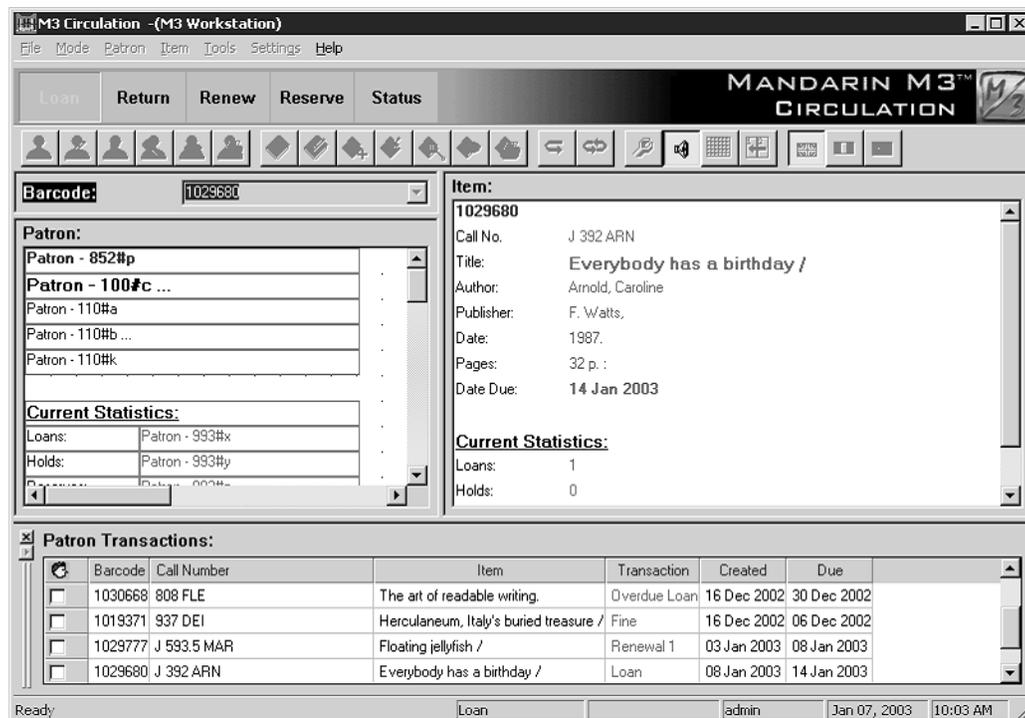
1. Follow steps 1 through 3 in “Scanning Barcodes” on page 5-57.



2. Scan the desired transaction mode barcode on the Transaction Barcodes sheet (**Loan Mode, Return Mode**, and so on).
3. Scan the patron and/or item barcodes.
 - If you are conducting a loan or reserve transaction, scan the patron barcode and then scan the item barcodes. Repeat for each transaction you are conducting in the current mode.
 - If you are conducting a return or renew transaction, scan the item barcodes only.
4. Repeat steps 2 and 3 as desired.
5. Press **END**.
6. Connect the TriCoder to your Circulation workstation.
7. In Circulation, click any toolbar button.
8. Upload the data into Circulation. To do so, follow steps 3 through 7 in “Uploading Data”

Modifying Circulation Window Displays

FIGURE 5.77



Tip: If a grid does not display in the Patron pane, right-click in the pane, then click **Show Grid**.

You can modify the MARC fields and font characteristics that display in the Circulation window. You can also configure different displays for each transaction mode (Loan, Return, Renew, Reserve, and Status) in each pane (Patron, Item, Transactions). M3 Circulation includes default settings for all of these situations, but you can reconfigure as appropriate for your library.

Modifying the Patron Pane Display

1. Click the toolbar button corresponding to the transaction mode to be modified (**Loan, Return, Renew, Reserve, or Status**). Changes made to one mode will not apply to the other modes; you must modify each mode individually.
2. Right-click in the Patron pane. This opens a command menu (Figure 5.9).
3. Click **Design Mode**. This changes the Patron pane to the Design mode, with information displaying in data cells (Figure 5.77).
4. To create a new cell, click where you want the cell in the Patron pane, then drag to the desired size. This displays the New Cell dialog box (Figure 5.78).

FIGURE 5.78

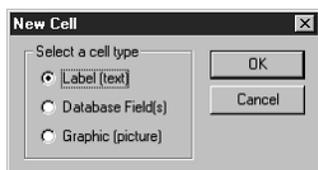


FIGURE 5.79



Tips:

- *When selected, a cell appears with a yellow back- ground.*
- *To resize a cell, drag the box in the lower right corner of the cell to the desired size.*
- *To move a cell, drag it to the desired location. If it is part of a group of cells (displaying in blue), this moves the entire group.*

Tip: You can also double-click a cell to display the Properties dialog box.

Tip: You can create a group of cells by pressing CTRL and dragging the mouse to select the desired cells. Cells in a group appear outlined in blue. Groups allow you to cut, copy, paste, delete, and align multiple cells. You can ungroup a group of cells by clicking outside of the group.

5. Click the type of cell you want to create, then click **OK**.
6. To modify cells, right-click a cell or group of cells. This opens a command menu (Figure 5.79).

Several of the options in this menu are explained here:

- **Properties** – Depending on the type of cell you select (label cell, data- base field cell, or graphic cell), a Properties dialog box appears. See the following three sections, “Modifying a Label (Text) Cell,” “Modi- fying a Database Field Cell,” and “Modifying a Graphic Cell” for instructions on modifying each cell type.

- **Send To Front** and **Send To Back** – If cells are overlapping, select a cell and click one of these options to send the cell to the front or back of the overlapping cells.
- **Select All** – Creates a group of all cells, including any cells that are out of view. Use the scroll bar to view all cells.
- **Cut Cell** and **Cut Group** – Deletes the cells from the display and stores it on the clipboard.
- **Copy Group** – If you use this option to copy a group, then click **Paste**, the new group is pasted on top of the original group. You can then drag the new cells to a new location.
- **Paste** – Pastes the last cut or copy operation. To paste multiple cells, create a group, click **Copy Group**, and then click **Paste**.
- **Move Left to Grid** – Aligns the selected cell with the grid line to the left of the cell.
- **Move Up to Grid** – Aligns the selected cell with the grid line directly above the cell.
- **Align Group Vertically** – Vertically aligns the group with the selected cell.
- **Align Group Horizontally** – Horizontally aligns the group with the selected cell.

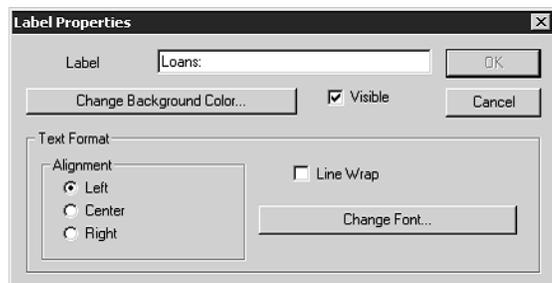
7. When finished modifying the display, right-click in the Patron pane. In the command menu, click **Save**.

8. Right-click again in the Patron pane. In the command menu, click **Exit Design Mode**. This exits the Design mode.

Modifying a Label (Text) Cell

To make changes in the Label Properties dialog box (Figure 5.80):

FIGURE 5.80



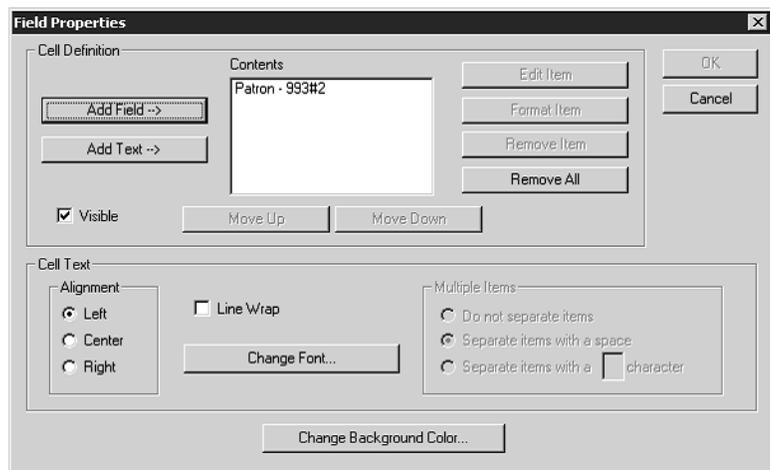
1. In the **Label** box, type any new text you want to display in the cell.
2. To change the background color of the cell, click **Change Background Color**. This displays the Color dialog box. Choose a color, then click **OK**.
3. To make the cell and its contents invisible in Display mode, clear the **Visible** check box.

4. In the **Alignment** group, select the desired text alignment.
5. If you want the text to wrap to the next line if it is too long to display in the cell, select the **Line Wrap** check box. NOTE: You may need to increase the height of the cell to make the wrapped text visible.
6. To change the font, click **Change Font**. This displays the Font dialog box. Change settings as desired, then click **OK**.
7. When finished, click **OK**.

Modifying a Database Field Cell

To make changes in the Field Properties dialog box (Figure 5.81):

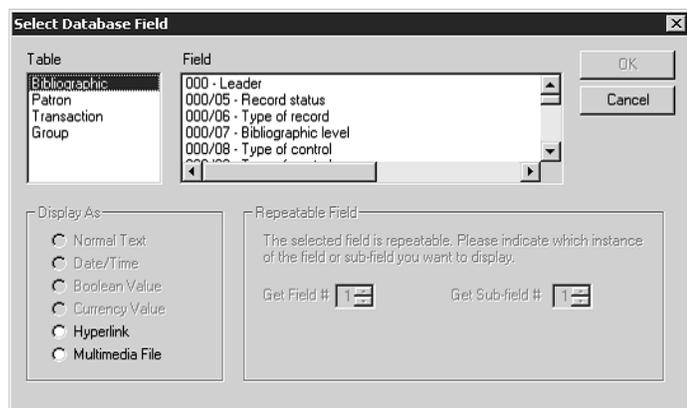
FIGURE 5.81



The *Contents* box displays items in the order they appear in the cell. To change the order, select an item and click *Move Up* or *Move Down*.

1. To add a field to a cell, click **Add Field**. This displays the Select Database Field dialog box (Figure 5.82).

FIGURE 5.82



2. To make changes in this dialog box:

- A. In the **Table** list, select the table containing the data you want to display.
- B. In the **Field** list, select the record field you want to display.
- C. In the **Display As** group, select the format in which you want the field to display.
- D. If the field is repeatable, select an option in the **Repeatable Field** group.
- E. When finished, click **OK**. This returns you to the Field Properties dialog box (Figure 5.81).

3. To add text to the cell, click **Add Text**. This displays the Add Text dialog box. Type the text you want to display, then click **OK**.

4. To make the cell and its contents invisible in Display mode, clear the **Visible** check box.

Tip: You can also double-click the item to display the Select Database Field dialog box.

5. To edit an item, select the item in the **Contents** box, then click **Edit Item**. This displays the Select Database Field dialog box (Figure 5.82). To make changes, follow the procedure explained in step 2.

6. To format an item, select the item in the **Contents** box, then click **Format Item**. This displays a Format dialog box corresponding to the format you selected in step 2C. Make changes as desired, then click **OK**.

7. To remove an item from the cell:

- To remove one item, select the item in the **Contents** box, then click **Remove Item**. This removes the item.
- To remove all items, click **Remove All**. This removes all items and places an “Undefined Field” entry in the cell.

8. In the **Alignment** group, select the desired text alignment.

9. To make the text wrap to the next line if it is too long to display in the cell, select the **Line Wrap** check box.

10. To change the font, click **Change Font**. This displays the Font dialog box. Change settings as desired, then click **OK**.

11. In the **Multiple Items** group, indicate how you want to separate multiple items in this cell.

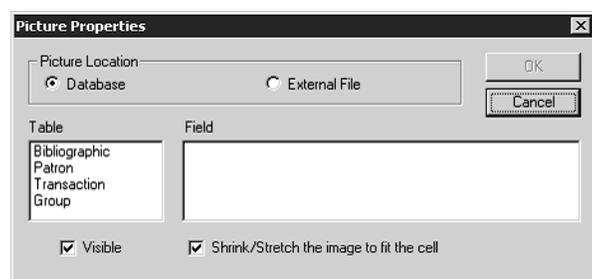
12. To change the background color of the cell, click **Change Background Color**. This displays the Color dialog box. Select a color, then click **OK**.

13. When finished, click **OK**.

Modifying a Graphic Cell

To make changes in the Picture Properties dialog box (Figure 5.83):

FIGURE 5.83



1. In the **Picture Location** group, click **Database** or **External File**.
 - If you choose **Database**, select the table containing the data you want to display in the **Table** list, then select the field you want to display in the **Field** list.
 - If you choose **External File**, click **Select File**. This displays the Open dialog box. Navigate to the location of the file you want to open, then click **Open**. This displays the path and file name in the Picture Properties dialog box, as shown in Figure 5.84.

FIGURE 5.84

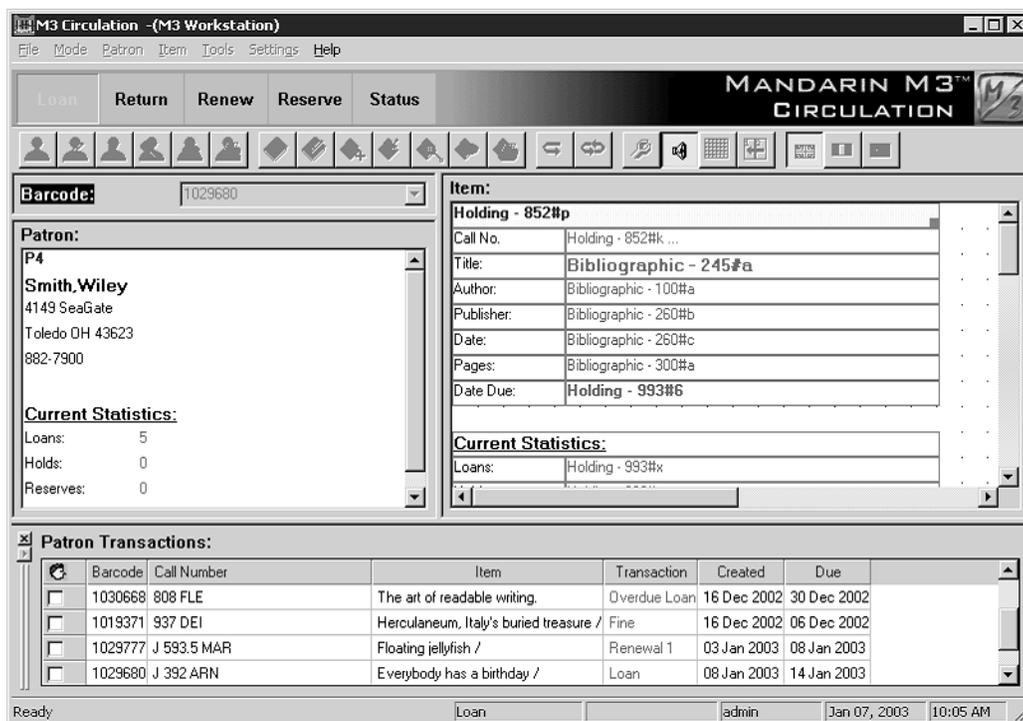
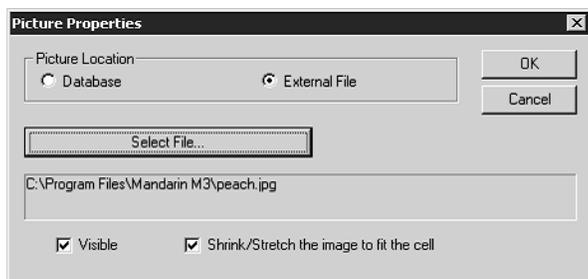


FIGURE 5.85



Tip: If a grid does not display in the Item pane, right-click in the pane, then click Show Grid.

2. To make the image invisible in Display mode, clear the **Visible** check box.
3. If you want the image to fit the dimensions of the cell, select the **Shrink/ Stretch the image to fit the cell** check box. NOTE: If the image is larger than the cell and you do not select this check box, only a portion of the image will appear in the cell.
4. When finished, click **OK**.

Modifying the Item Pane Display

1. Click the toolbar button corresponding to the transaction mode to be modified (**Loan, Return, Renew, Reserve, or Status**). Changes made to one mode will not apply to the other modes; you must modify each mode individually.
2. Right-click in the Item pane. This opens a command menu (Figure 5.9).

3. Click **Design Mode**. This changes the Item pane to the Design mode, with data displaying in cells (Figure 5.85).
4. Follow steps 4 through 8 beginning on page 5-60 to modify the data displayed in the Item pane, substituting the word “item” for “patron” in the procedure.

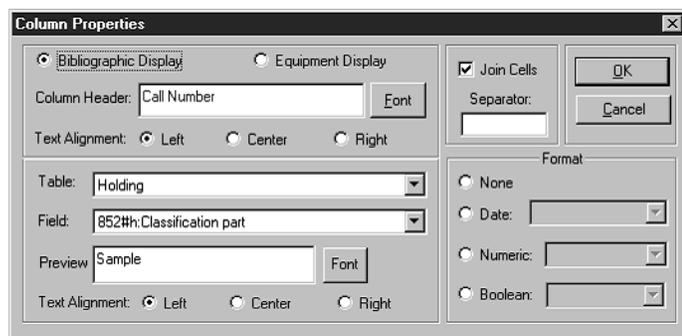
Modifying the Transactions Pane Display

There are three Transactions pane displays: Patron, Item, and Library Transactions. Each has a different display configuration. This section explains how to modify the Patron and Item displays for the Transactions pane. To modify the Library Transactions display, see “Modifying the Transactions Pane for Library Transactions” on page 5-67.

To modify the Patron or Item displays for the Transactions pane:

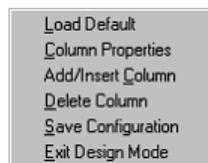
1. Click the toolbar button corresponding to the transaction mode to be modified (**Loan, Return, Renew, Reserve, or Status**).
2. In the **Barcode** box, type the patron (or item) barcode, and then press ENTER (or scan the code).
3. Right-click in the Transactions pane. This opens a command menu (Figure 5.10).
4. Click **Design Mode**. This changes the Transactions pane to the Design mode and clears the pane.
5. In the Transactions pane, right-click the column heading of the column you want to edit. This opens a command menu (Figure 5.86).

FIGURE 5.86



Tip: You can also double-click the column heading to open the Column Properties dialog box.

FIGURE 5.87



6. If you want to delete the column or insert a new column, click the appropriate command.

OR

If you want to revert to the default settings for the Transactions pane, click **Load Default**.

OR

If you want to edit the properties of the selected column, click **Column Properties**. This displays the Column Properties dialog box (Figure 5.87).

Edit the column properties as desired:

- **Display options** – Each column has different display properties for bibliographic items and equipment items. Bibliographic display settings apply when the transaction involves a bibliographic item, and equipment display settings apply when the transaction involves an equipment item. Therefore, you may want to click **Bibliographic Display** and select the settings used for bibliographic items, then click **Equipment Display** and select the settings used for equipment items.

- **Header group** – To establish display properties for the column header:

A. In the **Column Header** box, type the column heading text.

B. To change the font properties for the column data, click **Font**. This displays the Font dialog box. Modify the font properties as desired, then click **OK**.

C. Click a **Text Alignment** option to establish the text justification for the column header.

- **Join group** – If the information in this cell should be joined with the information displayed in the cell to the right (the information is combined and displays in the left cell):

A. Select the **Join Cells** check box.

B. In the **Separator** box, type a space, comma, or any other text to separate the content of the two cells.

- **Data group** – To set up the data that displays in this column:

A. In the **Table** list, select the table containing the data you want to display.

B. In the **Field** list, select the record field you want to display.

C. To change the font properties for the column data (as shown in the sample text in the **Preview** box), click **Font**. This displays the Font dialog box. Modify the font properties as desired, then click **OK**.

D. Click a **Text Alignment** option to establish the text justification for data in the column.

- **Format group** – If the column data requires a consistent format, click an option (**Date**, **Numeric**, **Boolean**), and then click the desired format in the corresponding list.

7. When finished editing entries for this column, click **OK**.
8. Repeat steps 5 through 7 for each column you want to modify in the Transactions pane.
9. When finished, right-click in the Transactions pane. In the command menu (Figure 5.86), click **Save Configuration**. (Or, to revert to the default settings for the Transactions pane, click **Load Default**.)
10. Repeat steps 1 through 9 for each transaction mode you want to modify in the Transactions pane.
11. When finished, right-click in the Transactions pane. In the command menu (Figure 5.86), click **Exit Design Mode**. This exits the Design mode.

Modifying the Transactions Pane for Library Transactions

To modify the Library Transactions display for the Transactions pane:

1. On the **Mode** menu, click **Library Transactions**.
2. Right-click in the Transactions pane. This opens a command menu (Figure 5.73).
3. Click **Design Mode**. This changes the Transactions pane to the Design mode and clears the pane.
4. Follow the procedure in steps 5 through 11 beginning on page 5-65.

Using the OPAC

This chapter provides instructions for searching your library's databases and working with the search results. It describes:

- How to select an interface language
- How to select databases and database types to search
- How to conduct a Standard, Enhanced, and Visual Catalog search of your library's holdings
- How to determine item availability and location
- How to work with search results in brief and expanded record formats
- How to add records to the Bookbag
- How to print and save records
- How to use Shelf Browse
- How to review your search session history and return to prior searches
- How to use the My Account tab
- How to use the Reset feature to reset defaults and clear the search history
- How to use the Bulletin Board
- How to modify the OPAC header
- How to display cover images
- How to customize the Visual Catalog interface using Configuration Mode

ABOUT THE M3 OPAC

The M3 Online Public Access Catalog (OPAC) is a flexible, multilingual search interface that enables the patron to search for records using three different search methods. The patron can then work with the search results in a variety of brief and expanded record formats.

The three available search methods are:

- **Standard Search** – A basic keyword search method that recognizes Boolean logic, truncation, and phrase searches, and allows index browsing.

- Enhanced Search – A more advanced search method that offers search flexibility and options. Patrons can enter simple or complex keyword search queries, and use index browsing.
- Visual Catalog Search – An easy point-and-click graphical search method. Patrons click colorful buttons to narrow their searches from broad topics to more defined sub-topics, ultimately reaching search results.

The following five features enhance the patron's search session.

- The Bookbag allows a patron to set aside selected records throughout the course of the search session for additional review or batch printing.
- The Shelf Browse function quickly locates records with a call number similar to that of a selected record. This is equivalent to looking at items to the left or right of a specific item on a library shelf.
- The History function keeps a cumulative list of Enhanced Search queries. A time-saving AutoSearch feature lets you select a search in the list and return to that search by clicking a button. To ensure privacy, a patron can clear this cumulative list at any time.
- The Reset feature deletes all information stored in the History, and returns all OPAC settings to their default positions.
- The Bulletin Board links to either a local HTML file or a World Wide Web address that your library wants patrons to view.

Displaying the M3 OPAC

To display the M3 OPAC correctly, set the resolution on your monitor to 800x600 or higher. If necessary, refer to your Windows documentation for detailed instructions.

STARTING THE M3 OPAC

To start the M3 OPAC module:

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

On the taskbar, click the **Start** button, select **Programs**, select **Mandarin M3**, and then click **OPAC**. This displays the main M3 OPAC window (Figure 6.1).

OPAC WINDOW FEATURES

The default M3 OPAC window is shown in Figure 6.1. The main window consists of four distinct areas.

FIGURE 6.1



- **Header bar** – This area contains the Reset, Bulletin Board, and Help buttons. The header can be configured to display your library’s logo. For instructions, see “Modifying the OPAC Header” on page 6-30.
- **Function tabs** – Five tabs allow you to move between different OPAC functions: Search, Results, Bookbag, Databases, and My Account. Each tab is subdivided into two sections: a data pane on the left and an option pane on the right.
 - Search tab (shown in Figure 6.1) – Select a search method and perform a search.
 - Results tab – View and work with search results in brief and expanded record formats.
 - Bookbag tab – View and work with records added to the Bookbag.
 - Databases tab – Select the database type and databases to be searched.
 - My Account tab (optional) – View personal information and transaction history.
- **Data pane** – Within each tab, this area displays information related to the selected tab.
- **Option pane** – Within each tab, this area contains the option buttons appropriate for the information displayed in the data pane. Each tab includes a different set of option buttons.

SELECTING AN INTERFACE LANGUAGE

The M3 OPAC allows patrons to select a language for the interface. Changing the interface language affects screen elements such as names of windows, buttons, and text boxes; it does not change the language of the information in the database.

To select a different interface language:

1. On the **Search** tab, click **Languages**. This displays the Languages dialog box (Figure 6.2).

FIGURE 6.2



2. Select the interface language, then click **OK**. This changes the interface language.

SELECTING A DATABASE TO SEARCH

Overview

Before beginning a search, you should always verify you are connected to the appropriate database type and databases.

Two database types are predefined in the M3 OPAC. Your system administrator can add, modify, and delete database types to suit your institution's needs. The two predefined database types are:

- **Standard** – Intended for standard catalog databases. The field labels and tag structure conform to USMARC standards, as defined by the Library of Congress.
- **Equipment** – Applicable for databases that contain equipment. Field labels and structure have been modified to correspond to the needs of equipment databases.

NOTE: The M3 system is specifically designed to manage MARC records. All record types (bibliographic, holdings, patrons, equipment, transaction, specialty databases) conform to a standard or customized MARC record structure.

Databases Tab Features

A sample Databases tab is shown in Figure 6.3.

FIGURE 6.3



- **Database Type list** – Lists the types of databases available to search. Each type has a different MARC field structure. By default, **standard** (appropriate for catalog databases) is selected.
- **Available Databases box** – Lists the databases available to search.
- **Option buttons** – The Apply/Cancel Changes buttons allow the patron to apply or cancel any changes just made in the Databases tab. The other two buttons access menus with the following options listed:

Reset Defaults options:

- **Revert To Application Defaults** – Changes all M3 OPAC settings back to their default positions, including default search fields, formats, database selections in all database types, and so on.
- **Revert To [selected database type] Defaults** – Changes all settings for the selected database type back to default positions.
- **Revert To Default Databases** – For the selected database type, reverts back to the default selection of databases.
- **Revert To Default Database Restrictions** – Not applicable unless searching a centralized (union) database.

Tag options:

- Tag/Untag All – Tags or untags all databases within the selected database type.
- Tag/Untag Database Restrictions – Not applicable unless searching a centralized (union) database.

Selecting a Database

Before sending a search query, verify that you are connected to the appropriate database type and databases. To do so:

1. Click the **Databases** tab. A sample Databases tab is shown in Figure 6.4.

FIGURE 6.4



Tip: When several databases are available, click Tag to access a shortcut menu.

2. If you are already connected to the correct database type and databases, click the **Search** tab and conduct your search as described in “Conducting a Standard Search” on page 6-7, “Conducting an Enhanced Search” on page 6-10, or “Conducting a Visual Catalog Search” on page 6-15.

OR

If you are not connected to the appropriate database type and databases:

- A. In the **Database Type** list, select the desired database type. **Standard** is appropriate for catalog databases; **equipment** is appropriate for equipment databases. (Your system administrator may have modified this list.)

B. In the **Available Databases** box, select the check box by each database you want to search, and clear the check box by each database you do not want to search. (Many institutions only have one available data- base per database type.)

C. Click **Apply**. This sends a connection query to each selected database.

NOTE: If you receive a warning message stating you deselected a data- base that still contains search results in the Results tab:

- Click **No** to go back and add any search results to the Bookbag.

OR

- Click **Yes** to connect to the selected databases. This sends connecting queries to the selected databases and deletes any search information in the Results tab. Any information stored in the Bookbag or History are not deleted.

D. Click the **Search** tab and conduct your search query as explained in “Conducting a Standard Search” in the following section, “Conducting an Enhanced Search” on page 6-10, or “Conducting a Visual Catalog Search” on page 6-15.

Standard Search

Tip: The three default MARC record fields are indexes of multiple fields rather than single fields. For simplicity, this Users Guide refers to all of them as fields. Entries conform to Z39.50 use attribute standards.



FIGURE 6.5

The Standard Search method suits basic search needs; patrons are limited to keyword searches within three specific MARC record fields. Boolean logic, truncation, and phrase searching are available to the patron, as well as index browsing.

Standard Search Window Features

The default Search tab with Standard Search selected is shown in Figure 6.5. A sample search has been entered; your window will be empty.

Search Tips:

- You can apply the truncation asterisk (*) to the beginning and/or end of a keyword; the wildcard question mark (?) character within a keyword (*wom?n*); and quotation marks (" ") around a phrase.
 - You can use the AND, OR, and NOT Boolean operators to connect keywords within a keyword box. Be sure to type operators in capital letters.
- **MARC record fields** – Indicate the MARC record fields available for searching. (The default fields and the fields included in the lists can be reconfigured by your system administrator.)
 - **Keyword boxes** – Allow the patron to enter keywords to search the selected MARC record fields.

- **Browse buttons** – Display a list of all data currently contained in the selected MARC record field. This allows patrons to select a search term from existing data, particularly useful to those unsure of the search they want to enter. This search selection technique is known as Index Browse.
- **Option buttons** – The Languages button displays a list of available interface languages. The Standard, Enhanced, and Visual buttons select the search method to be used.
- **Total box** – Displays the number of records found matching the search query.
- **Function buttons** – The Clear and Search buttons perform the following functions:

Clear – Erases any keywords entered in the keyword boxes and any results listed in the Results tab.

Search – Submits the search query typed into the keyword boxes and, if matches are found, automatically proceeds to the Results tab.

How to Search

This procedure assumes the appropriate interface language (see “Selecting an Interface Language” on page 6-4) and the databases to be searched (see “Selecting a Database to Search” on page 6-4) are already selected. To conduct a Standard Search of the selected databases:

1. On the **Search** tab, click **Standard**. This displays the Standard Search window (Figure 6.5).
2. Type your search query into one or more of the three keyword boxes, as shown in Figure 6.5. Each box is labeled to indicate the MARC record field it searches. The two lower labels also indicate the Boolean operator applied to the box below. (The default MARC record fields and Boolean operators can be reconfigured by your system administrator.)

NOTE: You can also use the Index Browse technique to enter a search term. See “Using Index Browse in a Search Query” on page 6-12.

3. Click **Search**. The Search Results window displays a list of search results (Figure 6.6).

NOTE: If no matches are found, a Browse window (Figure 6.9) displays the indexed entries for the selected MARC field and takes you to the closest alphabetical match for your keywords. Double-click a listing to enter it into the keyword box in the search window, then click Search again.

FIGURE 6.6

M3 OPAC

Your Library Name

Reset Bulletin Board Help

Search Results Bookbag Databases

Search Results For: dog

See also - American Eskimo dog
 See also - Guide dogs
 See also - Pekingese dog
 See also - Sled dog racing
 See also - Animals as aids for the handicapped

<input type="checkbox"/>		J FIC CRI	Crisp, Marty Private Captain : a story of Gettysburg / Marty Crisp. -- New York : Philomel Books, 2001.
<input type="checkbox"/>		E DOD	Dodd, Lynley A dragon in a wagon / Lynley Dodd. -- Milwaukee, Wis. : Gareth Stevens Pub., 2000. -- (Gold star first readers.)
<input type="checkbox"/>		E DOD	Dodd, Lynley Hairy Maclary and Zachary Quack / Lynley Dodd. -- Milwaukee, Wis. : Gareth Stevens Pub., 2000. -- (Gold star first readers.)

0 record(s) tagged Record 1 of 248 Font Size 10

Record Format
 Add To Bookbag
 Print
 Tag
 Sort
 Save
 Record Details

mandarin
LIBRARY AUTOMATION

Note: The Cross-Reference box displays only if you are using a version of M3 that supports Authority Control and the search term you entered is managed under Authority Control.

4. See “Working with Search Results” on page 6-18 for more information on options within the Results tab.

Enhanced Search

The Enhanced Search method provides search flexibility. Patrons can enter simple or complex keyword search queries, select the fields and Boolean operators for the search, and use index browsing.

Enhanced Search Window Features

The Search tab with the default fields of the Enhanced Search window displayed is shown in Figure 6.7.

FIGURE 6.7



Tip: Many entries in the MARC record field lists are indexes of multiple fields rather than single fields. For simplicity, this Users Guide refers to all of them as fields. Entries conform to Z39.50 use attribute standards.

- **MARC record field lists** – List the MARC record fields available for searching. (The default fields and the fields listed here can be reconfigured by your system administrator.)
- **Keyword boxes** – Allow the patron to enter keywords to search the selected MARC record fields.
- **Boolean operator lists** – List all Boolean operators available for patron use. Each Boolean operator list applies to the keywords in the keyword box below it. (The default operators and the operators included in the lists can be reconfigured by your system administrator.)
- **Browse buttons** – Display a list of all data currently contained in the selected MARC record field. This allows patrons to select a search term from existing data, particularly useful to those

unsure of the search they want to enter. This search selection technique is known as Index Browse.

- **Option buttons** – The Languages button displays a list of available interface languages. The Standard, Enhanced, and Visual buttons select the search method to be used.

Search Tips:

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

- **Total box** – Displays the number of records found matching the search query.
- **Function buttons** – The Clear, History, Total, and Search buttons perform the following functions:

Clear – Erases any keywords entered in the keyword boxes and any results listed in the Results tab.

History – Displays the History Selection dialog box (Figure 6.10), which lists all Enhanced Search queries submitted by the patron during the current search session, along with the number of resulting records. The patron can use the History function as a shortcut to return to a previous search. For more information, see “Using the Search History” on page 6-13.

Total – Submits the search query typed into the keyword boxes and displays the number of records found matching the search query in the Total box.

Search – Submits the search query typed into the keyword boxes and, if matches are found, automatically proceeds to the Results tab.

How to Search

This procedure assumes the appropriate interface language (see “Selecting an Interface Language” on page 6-4) and the databases to be searched (see “Selecting a Database to Search” on page 6-4) are already selected. To conduct an Enhanced Search of the selected databases:

1. On the **Search** tab, click **Enhanced**. This displays the Enhanced Search window (Figure 6.7).
2. Type a search query into one or more of the three keyword boxes, as shown in Figure 6.8. To use different MARC record fields or Boolean operators, select a different field or operator from the appropriate list.

NOTE: You can also use the Index Browse technique to enter a search term. See “Using Index Browse in a Search Query” on page 6-12.

FIGURE 6.8



You can also click **Total** to determine how many records match your search query. Use this feature to fine-tune the search query before viewing the list of search results.

3. Click **Search**. The Search Results window displays a list of search results (Figure 6.6).

NOTE: If no matches are found, a Browse window (Figure 6.9) displays the indexed entries for the selected MARC field and takes you to the closest alphabetical match for your keywords. Double-click a listing to enter it into the keyword box in the search window, then click Search again.

4. See “Working with Search Results” on page 6-18 for more information on options in the Results tab.

Using Index Browse in a Search Query

In addition to typing a keyword into a keyword box, a patron can review and select a search term from existing field data. This is possible because most MARC record fields have been indexed. A patron can browse a field index (such as subject, title, or author) to make a search term selection. This is particularly useful to patrons who are unsure of the search they want to enter.

The Index Browse feature can be used while entering a Standard or Enhanced Search query. An Index Browse term can be entered into a keyword box by itself or along with typed keywords.

To use Index Browse:

1. In the Standard Search or Enhanced Search window, type a keyword in the appropriate keyword box. In an Enhanced Search, you can select a MARC record field in the list above the box. Then click the corresponding **Browse** button. This displays the indexed entries for the selected MARC field and takes you to the closest alphabetical match for your keywords (Figure 6.9).

NOTE: In an Enhanced Search, if the selected field is not indexed, and therefore cannot be browsed, the corresponding Browse button is not available.

FIGURE 6.9



2. If you are searching multiple databases and want to switch to a different database, select a database in the **Database** list.

3. Double-click a listing. This enters the listing into the keyword box in the search window.

NOTE: You can only enter one listing into each keyword box. You can type additional keywords into the same keyword box, if desired.

4. When finished entering your search query into one or more of the three keyword boxes, click **Search**.

Using the Search History

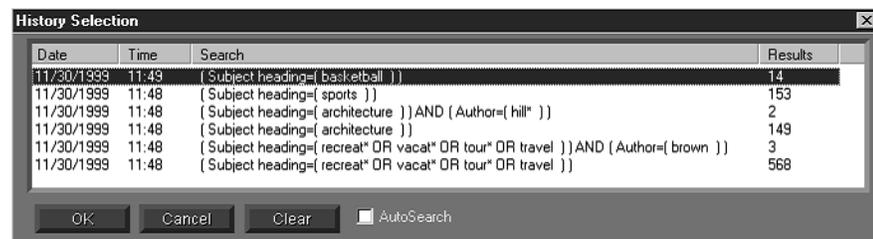
For convenience, a list of Enhanced Search queries accumulates during each patron's Enhanced Search session. (This feature is not included in the Standard or Visual Catalog search method.)

A patron can use the search history to return to a previous search query in the Search tab. This allows the patron to fine-tune the query before accessing the Search Results window.

A patron can also use the search history to return to the Search Results window for any search listed in the History Selection dialog box. The AutoSearch feature is used to accomplish this.

A sample search history is shown in Figure 6.10.

FIGURE 6.10



As seen in this example, the search history includes the date and time of the search, the search query, and the number of records resulting from the search.

Returning to a Previous Search Query

To return to a previous Enhanced Search query:

1. In the Enhanced Search window, click **History**. This displays the History Selection dialog box.
2. Select the search you want to return to, then click **OK**. This displays the query in the Search tab.

Returning to Previous Results

To return to a previous list of search results:

1. In the Enhanced Search window, click **History**. This displays the History Selection dialog box.
2. Select the **AutoSearch** check box.
3. Select the search you want to return to, then click **OK**. This displays the previous list of search results in the Search Results window. For details on working with the list of search results, see “Search Results (Brief Records)” on page 6-18.

Deleting the Search History

For privacy, all information in the History Selection dialog box can be deleted. All information is deleted automatically when the OPAC workstation times out after a designated time period of inactivity. (The default time-out period can be reconfigured by your system administrator.)

To delete the history, use one of the following methods:

At any point in the search session, click **Reset** in the header bar. This deletes all information in the History Selection dialog box and resets all workstation settings to the system default settings. Patrons should be encouraged to click Reset before starting a search session and when ending a search session.

OR

1. In the Enhanced Search window, click **History**. This displays the History Selection dialog box (Figure 6.10).



2. Click **Clear**. This deletes all information in the History Selection dialog box. It does not change any settings the patron has established during the search session.

Search History Interface Language

The M3 OPAC remembers which interface language was used during each Enhanced Search query. As a result, when the search history function is used to return to a previous search, the interface always displays in the same language as the original search.

Visual Search

Visual Catalog Overview

The Visual Catalog search method provides patrons with an easy point-and-click graphical search method. From a patron's perspective, a search is just a click on a topic button and then a related sub-topic button; this generates a list of search results. In actuality, it is a keyword search method disguised behind a graphical interface; topic buttons are connected to query buttons, which are linked to pre-defined search queries. A query button launches a search of the selected databases and returns a list of results.

These graphical buttons can also be configured to launch other software applications. Launcher buttons are optional; you can add, modify, and delete them from the interface.

The simplicity of the Visual Catalog search method makes it ideal for novice researchers and those unfamiliar with computers. It should be noted that this design does not provide the type of search flexibility found in the Standard and Enhanced keyword search methods, which contributes to its ease of use.

The Visual Catalog interface is easily customized. Topics and their related search queries can be added, modified, and deleted. The number of levels before a search results list appears can be reduced or increased. Sound and visual effects can be changed and disabled. For details on these customizations and more, see "Customizing the Visual Catalog" on page 6-32.

Visual Catalog Search Window Features

The Search tab with the default version of the Visual Catalog interface displayed is shown in Figure 6.11.

FIGURE 6.11



Tip: Topic, query, and launcher buttons look the same. The result of selecting them is what makes them different. A topic button opens a sub-menu. A query button returns search results. A launcher button opens another application or Web page.

How to Search

This procedure assumes that the appropriate interface language (see “Selecting an Interface Language” on page 6-4) and the databases to be searched (see “Selecting a Database to Search” on page 6-4) are already selected. To conduct a Visual Catalog Search of the selected databases:

1. On the **Search** tab, click **Visual**. This displays a button menu that can contain any combination of topic, query, and launcher buttons. The default button menu (shown in Figure 6.11) consists of topic buttons.
2. Click a topic button. Unless extra topic levels have been added to the default interface, this opens a sub-menu of related query buttons, as shown in Figure 6.12 for the Animals topic.

FIGURE 6.12



Tip: At the sub-menu level, the selected topic is listed at the top of the tab.

Tip: Two navigation buttons function as follows:

- *Back returns to the previous button menu level.*
- *Start Over returns to the first button menu level.*

3. Click a query button. This searches the selected databases, then displays the Search Results window in the Results tab.

NOTE: The button menus shown in this procedure are based on the default buttons. Your Visual Catalog interface may have been reconfigured to add or delete menu levels, to change the topic or query buttons, or to include launcher buttons.

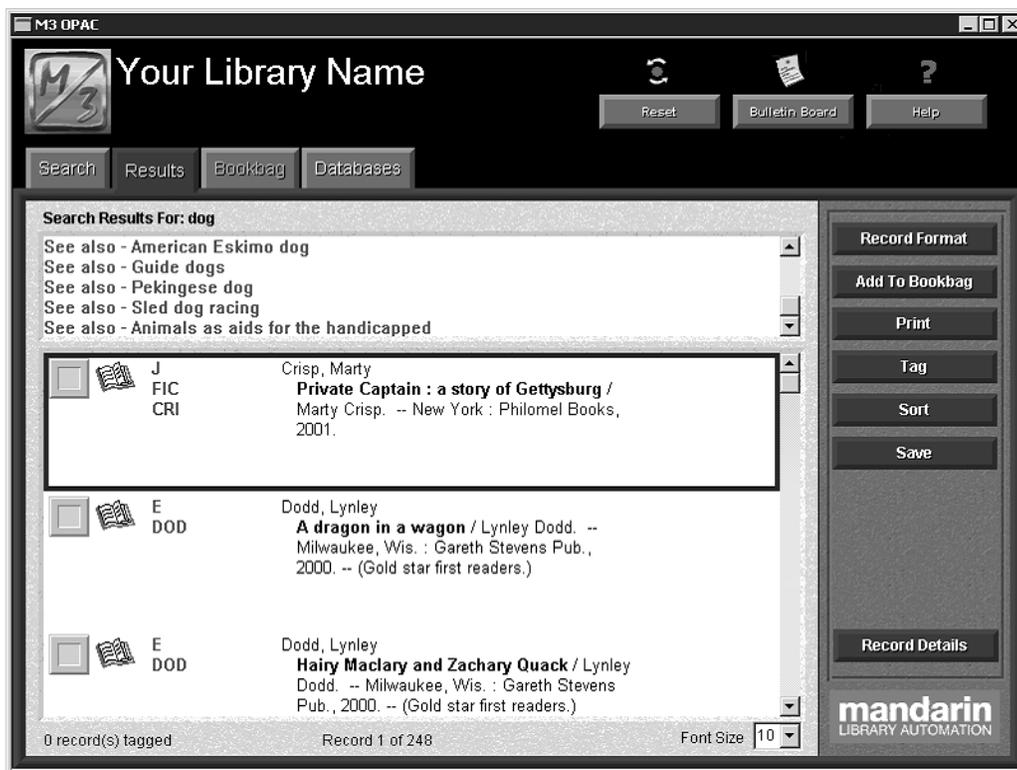
4. See the next section, “Working with Search Results,” for details on your options in the Results tab.

Search Results

Search Results (Brief Records)

Once a search query is sent, the Results tab appears listing all items found matching the query. By default, records appear in a brief record format, similar to the example shown in Figure 6.13.

FIGURE 6.13



Note: The **Cross-Reference** box displays only if you are using a version of M3 that supports Authority Control and the search term you entered is managed under Authority Control.

A patron can perform several functions from this window. These functions are described in the following sections.

Using Cross-References

The **Cross-Reference** box displays links to more appropriate headings used by your library or related headings that may also be useful. Click a “See” or “See also” link to view the search results for that heading.

Determining Item Media Type

To determine the media type of an item listed in the search results, refer to Table 6.1. The media type icon is shown beside the item. (Media type icons also appear in the Search Results Record Details window and the Bookbag windows.)

TABLE 6.1

	Artifact
	Book
	Photo
	Music Cassette
	Data CD
	Movie
	Electronic Media
	Journal
	Library Kit
	Map
	Book on tape
	Music CD
	Sheet Music
	Video Recording
	Online Resource

Determining Item Availability

To determine each item's availability, refer to the color of the **Availability & Tagging** check box. Green represents available and red represents unavailable.

Changing the Record Format

To select a different format for the records displayed:

1. Click **Record Format**. This displays the Record Format dialog box (Figure 6.14).

FIGURE 6.14



Note: No duplicate listings are placed in the Bookbag.

Note: To enable the printing of holdings information, change the Print Holdings entry in the M3Opac.ini file (located in your M3 directory) from 0 to 1, then restart the OPAC module. Holdings will then be listed in the printed item records.

2. Select a record format, then click **OK**.

NOTE: If an expanded format is selected, the amount of information in a record may exceed the amount of space in the list of search results. When this occurs, ellipses appear in the lower right corner of the box. To view the entire record, click Record Details.

Adding Records to the Bookbag

To add records to the Bookbag for later viewing or printing:

1. If you want to add:

- all records in the list, click **Add To Bookbag**, and then click **Add All**.
- several records in the list, select the **Availability and Tagging** check box next to each record you want to add. Click **Add To Bookbag**, then click **Add Tagged**.
- the active record only, click **Add To Bookbag**, and then click **Add Active**.

2. A message appears confirming the addition of the records to the Bookbag.

Printing Records

To print records from the Search Results or Bookbag Record List windows:

1. If you want to print:

- all records in the list, click **Print**, and then click **Print All**.
- several records in the list, select the **Availability and Tagging** check box next to each record you want to print. Click **Print**, then click **Print Tagged**.
- the active record only, click **Print**, and then click **Print Active**.

2. This displays the Print dialog box. Change settings if desired, then click **OK**.

To print records from the Search Results Record Details or Bookbag Record Details windows, click **Print** while viewing the record you want to print. This displays the Print dialog box. Change settings if desired, then click **OK**.

Tagging Records

The Tag button is a time-saving feature that allows you to select or deselect all records in the Search Results or Bookbag Record List windows at once.

- To tag all records in the list, click **Tag**, and then click **Tag All**.
- To untag all records in the list, click **Tag**, and then click **Untag All**.

Sorting Records

To sort the records displayed in the Search Results or Bookbag Record List windows by a different sort formula:

1. Click **Sort**. This displays the Sort Choices dialog box (Figure 6.15).

FIGURE 6.15



Note: To enable the saving of holdings information, change the Save Holdings entry in the M3Opac.ini file (located in your M3 directory) from 0 to 1, then restart the OPAC module. Holdings will then be listed in the saved RTF files.

2. Select a sort formula, then click **OK**.

Saving Records to a File

To save records in the Search Results or Bookbag Record List windows to a file:

1. If you want to save:
 - all records in the list, click **Save**, and then click **Save All**.
 - several records in the list, select the **Availability and Tagging** check box next to each record you want to save. Click **Save**, then click **Save Tagged**.
 - the active record only, click **Save**, and then click **Save Active**.
2. This displays the Save As dialog box. Navigate to the location where you want to save the records.

3. In the **File name** box, type a name for the file, and then click **Save**. This saves the records in rich text format (RTF).

Accessing Record Details

To access more information about a specific brief record, including the expanded record and location of items (copies) held by the library, see the next section, “Record Details (Expanded Records).”

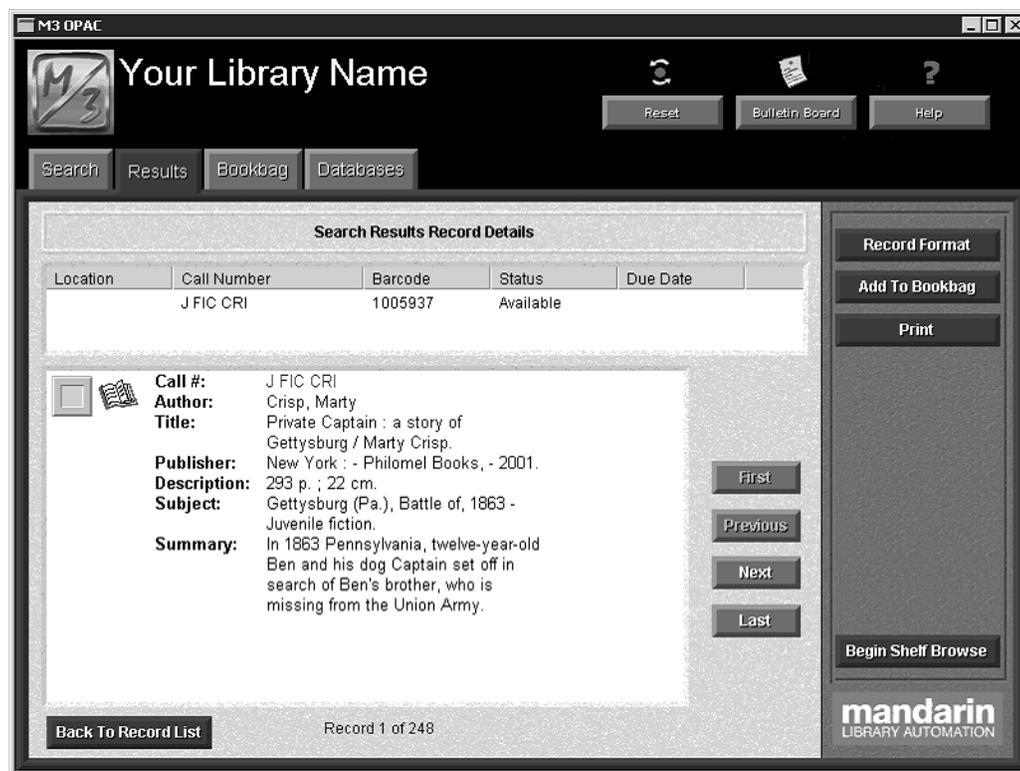
Tip: You can also double-click the brief record to view the Search Results Record Details window.

Record Details (Expanded Records)

To view details about a specific item including location, status information, and the expanded record:

1. In the Search Results or Bookbag Record List windows, select the record you want to view.
2. Click **Record Details**. This displays the Search Results Record Details or Bookbag Record Details window (the Search Results Record Details is shown in Figure 6.16).

FIGURE 6.16



- **Holdings box** – Lists each copy of the item selected in the results list. By default, this holding record information includes the location, call number, availability status, and, if applicable, due date. (The default fields can be reconfigured by your system administrator.)
- **Expanded Record box** – Displays an expanded version of the bibliographic record selected in the Search Results window, along with an availability check box and media type icon. (Media type icons are defined on page 6-19.)

- **Navigation buttons** – Access other records in the list of Search Results: First – Displays the first record in the list.
Previous – Displays the previous record in the list. Next – Displays the next record in the list.
Last – Displays the last record in the list.
- **Option buttons** – These buttons in the Search Results Record Details window provide the patron with a variety of options:

Record Format – Allows the patron to change the format for the record displayed in the Expanded Record box.

Add To Bookbag – Adds the record to the Bookbag for later viewing or printing.

Print – Prints the record displayed in the tab.

Begin Shelf Browse – Allows the patron to conduct a Shelf Browse from the Search Results Record Details. For more information, see the next section, “Using Shelf Browse.”

Back To Record List – Returns to the Search Results window.

Using Shelf Browse

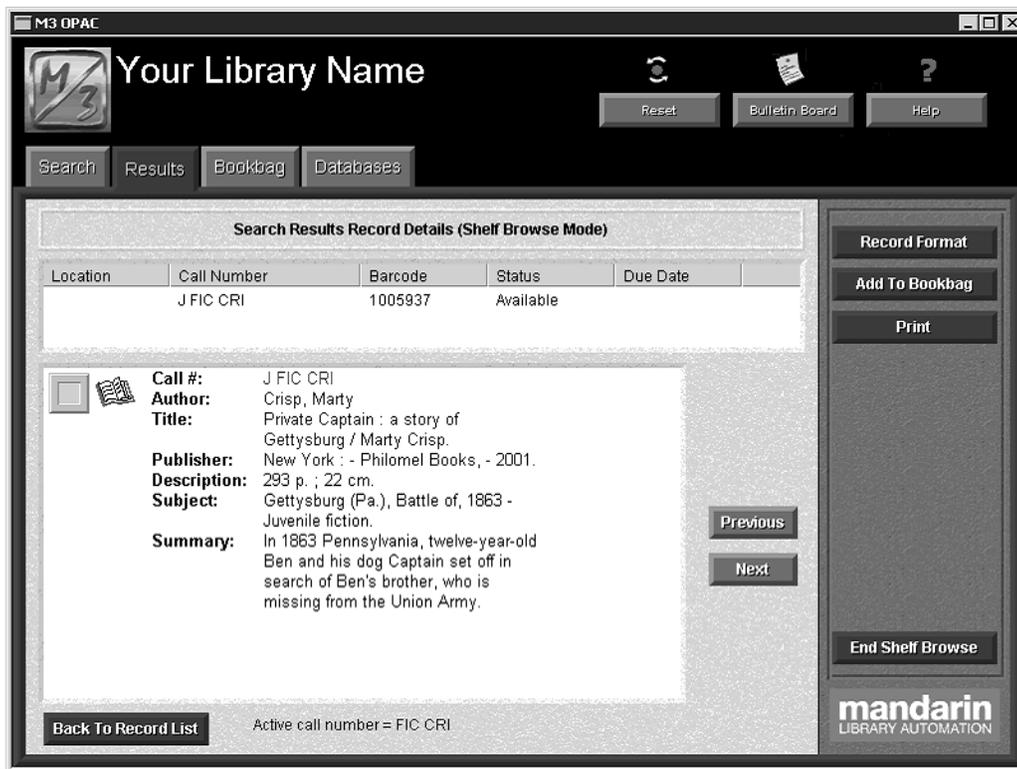
Shelf Browse allows a patron to quickly find records with a call number similar to that of a selected record. The patron can move one bibliographic record at a time forward or back. This is similar to looking at items to the left or right of a selected item on a library shelf.

NOTE: The call number system used by your shelf browse option is established when your library collection is indexed during system setup. To change to the other call number system, your collection must be re-indexed.

To use Shelf Browse:

1. In the Search Results Record Details window (Figure 6.16), click **Begin Shelf Browse**. This changes the window to Shelf Browse mode (Figure 6.17). Notice that the active call number for this record appears in the status bar.

FIGURE 6.17



M3 OPAC

Your Library Name

Reset Bulletin Board Help

Search Results Bookbag Databases

Search Results Record Details (Shelf Browse Mode)

Location	Call Number	Barcode	Status	Due Date
	J FIC CRI	1005937	Available	

Call #: J FIC CRI
Author: Crisp, Marty
Title: Private Captain : a story of Gettysburg / Marty Crisp.
Publisher: New York : - Philomel Books, - 2001.
Description: 293 p. ; 22 cm.
Subject: Gettysburg (Pa.), Battle of, 1863 - Juvenile fiction.
Summary: In 1863 Pennsylvania, twelve-year-old Ben and his dog Captain set off in search of Ben's brother, who is missing from the Union Army.

Previous Next

End Shelf Browse

Back To Record List Active call number = FIC CRI

Record Format
Add To Bookbag
Print

mandarin
LIBRARY AUTOMATION

2. From here, you have the following options:

- To view the previous record “on the shelf,” click **Previous**.
- To view the next record “on the shelf,” click **Next**.
- To modify the format in which the record is displayed, click **Record Format**, select the preferred format, and then click **OK**.
- To add a record to the Bookbag, click **Add To Bookbag**.
- To print the record, click **Print**.
- To end this Shelf Browse session, click **End Shelf Browse**.
- To return to the Search Results window, click **Back To Record List**.

The Bookbag

During a search session, you may want to set aside promising records for additional review or batch printing. The Bookbag temporarily stores records during the search session. The Reset feature deletes any records stored in the Bookbag.

Adding Records to the Bookbag

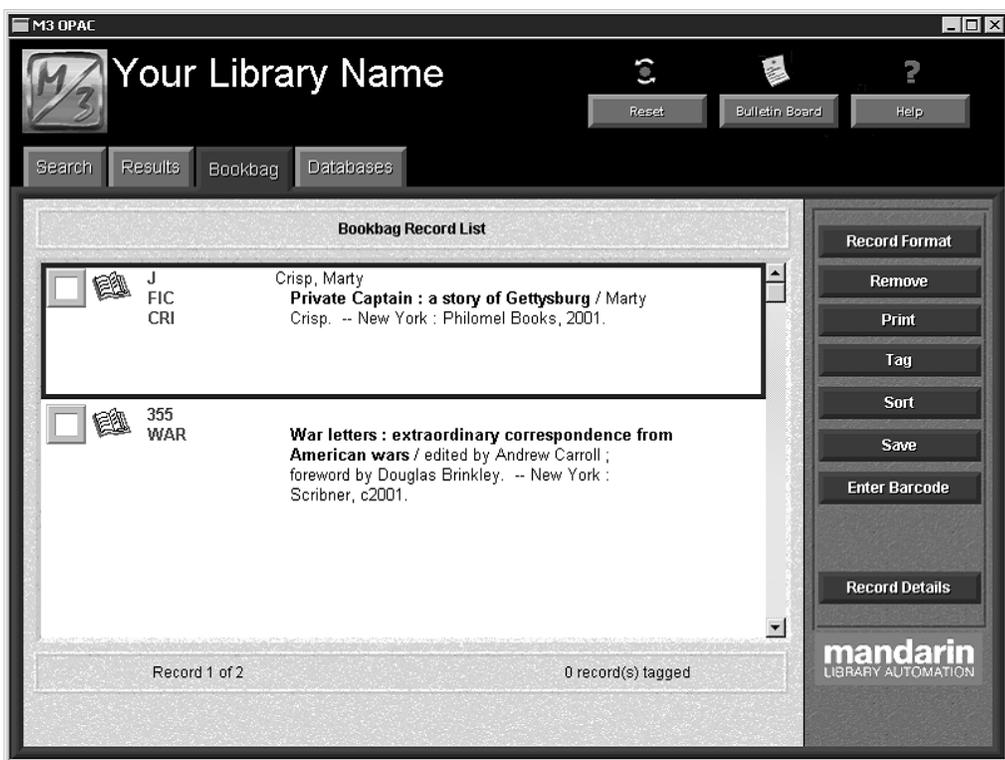
To add records to the Bookbag from the Search Results window, see “Adding Records to the Bookbag” on page 6-20.

To add records to the Bookbag from the Search Results Record Details window, click **Add To Bookbag**.

Viewing and Working with Bookbag Records

To view the records placed in the Bookbag during the active search session, click the **Bookbag** tab at any time. A sample Bookbag tab is shown in Figure 6.18.

FIGURE 6.18



The option buttons provide the following options:

- To display records listed in the Bookbag by a different format, click **Record Format**, and then select a display format. For more information, see “Changing the Record Format” on page 6-20.
 - To remove records from the Bookbag, click **Remove**, and then select an option in the list.
 - To print records, follow the procedure in “Printing Records” on page 6-20.

- To tag or untag all records currently in the Bookbag, click **Tag**, and then select an option in the list.
- To sort the records listed in the Bookbag by a different sort formula, click **Sort**, and then select a sort formula. For more information.
- To save records to a file, follow the procedure in “Saving Records to a File”
 - To enter barcodes to create a list, follow the procedure in the next section, “Using the Bookbag to Create a List.”
 - To view the record details for a selected record, click **Record Details**.

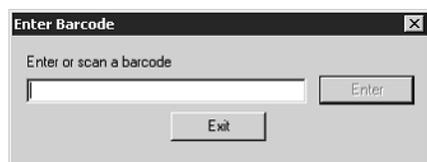
Note: This option must be enabled in the M3Opac.ini file. For instructions, see “BOOKBAG SCREEN setting” on page A-2.

Using the Bookbag to Create a List

You can enter or scan barcodes into the Bookbag to create a list of items. To do so:

1. If the Bookbag tab is not enabled, conduct a search for the first item in your list and add it to the Bookbag.
2. Click the **Bookbag** tab. This displays the Bookbag Record List window (Figure 6.18).
3. Click **Enter Barcode**. This displays the Enter Barcode dialog box (Figure 6.19).

FIGURE 6.19



4. Type or scan the barcode, then click **Enter**. Repeat for each item you want to add to the list.
5. When finished, you can print or save the list. To do so, follow the procedure in “Printing Records” on page 6-20 or “Saving Records to a File” on page 6-21.

USING THE MY ACCOUNT TAB (OPTIONAL)

The My Account tab is an optional tab that your system administrator can activate if the library chooses to use it. Once activated, patron access must be enabled in the Group Editor. Patrons may then view their current transactions, past transactions, and personal information that is on record with the library.

Warning: The following information is only for the use of system administrators. If you do not possess a comprehensive understanding of configuration files, do not attempt to change the



M3Opac.ini file. Improper procedures could affect the OPAC performance. Before you proceed, it is suggested that you perform a complete backup of your system.

Activating the My Account Tab

To activate the My Account tab:

1. Using a simple text editor such as Notepad or WordPad, open the M3Opac.ini file (the default path is **C:\Program Files\Mandarin M3**).
2. Under **[PATRON HISTORY SCREEN]**, change **Patron_Tab_Visible=0** to **Patron_Tab_Visible=1**.
3. When finished, save the file. The customized configuration becomes active the next time you start the OPAC.

Allowing Patron Access to the My Account Tab

To allow patrons access to this tab, you must enable the option in the Group Editor module. To so do:

1. Start the Group Editor as explained in “Starting Group Editor” on page 3-3.
2. In the Group Editor main window, select the patron group you want to grant access to the tab, and then click **Edit**.
3. In the **OPAC Access** tab:
 - A. In the **Access OPAC** list, select **Yes**.
 - B. Select the **View Transactions** check box.
4. Click **OK**.

My Account Tab

Using the My Account Tab

After the system administrator activates the My Account tab, the next time you start the OPAC, the tab appears to the right of the Databases tab as shown in Figure 6.20.

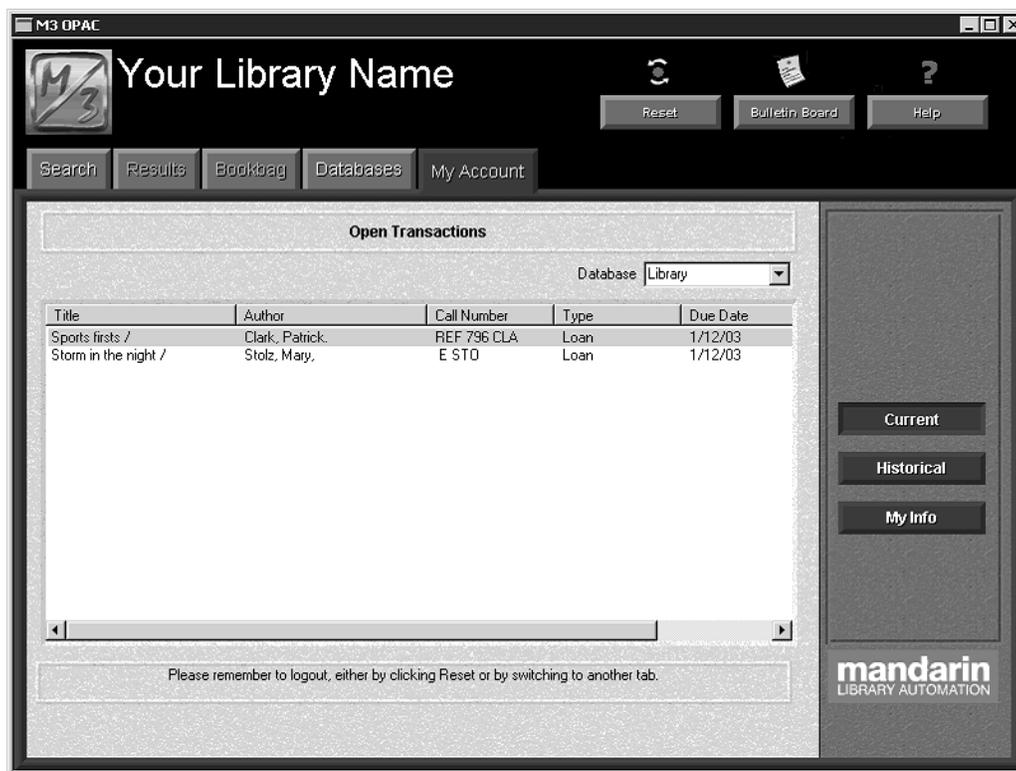
FIGURE 6.20



To access your account:

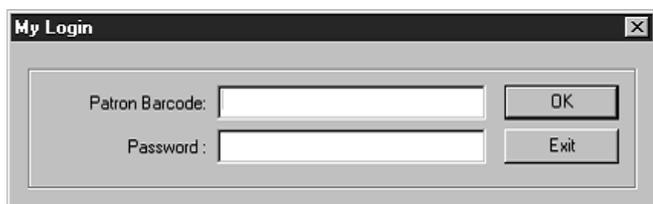
1. Click the **My Account** tab. This displays the My Login dialog box (Figure 6.21).

FIGURE 6.21



Tip: Individual user IDs and passwords are assigned and modified in patron records. See “Working with Patron Records” on page 5-33 for more information.

FIGURE 6.22



2. In the **Patron Barcode** box, type the barcode from your library card. If your patron record has a password assigned to it, type your password in the **Password** box (if not, no password is required). Then click **OK**. This displays the **My Account** tab with your transactions listed (Figure 6.22).

The option buttons provide the following options:

- **Current** – View your open, or current, transactions.
- **Historical** – View your closed, or historical, transactions.
- **My Info** – View personal information that the library has on file for you, such as name, address, and telephone number.



The Reset Button

The Reset button in the OPAC header bar clears all information stored in the Search, Results, and Bookbag tabs during a search session. It also returns all settings to their default positions.

Although the OPAC automatically resets after a few minutes without activity, it is a good idea to click **Reset** before beginning a search session to clear any information from a previous user. Click it again after completing a search session to ensure privacy.

The amount of elapsed time prior to an automatic reset can be modified by a system administrator. (See “Appendix A: Customizing the Windows .ini Files” on page A-1.)

The Bulletin Board

The Bulletin Board is a simple way for library administrators to deliver information to patrons. The Bulletin Board button can be linked to a local HTML file or a Web page. A preconfigured HTML file (BulletinBoard.html) is included with M3 and can be modified using any HTML editor.

Many libraries use the Bulletin Board button to link to the library home page or pages containing public service announcements. Because the button connects to a page created in HTML format, the bulletin board can include graphics as well as text.

Using the Preconfigured Bulletin Board

If the preconfigured Bulletin Board was not set up during M3 installation, it can be configured by a system administrator at any time. To do so:

1. On the taskbar, click the **Start** button, select **Programs**, select **Mandarin M3**, select **Utilities**, and then click **Setup Bulletin Board**.
2. In the Choose Setup Language dialog box, select the desired language and click **OK**. This determines the language of the Bulletin Board setup only.
3. In the Welcome dialog box, click **Next** to begin the setup.
4. In the Choose Destination Location dialog box, either:
 - Click **Next** to save the file BulletinBoard.html into the default folder location on your hard disk (C:\Program Files\Mandarin M3).
 - OR**
 - Click **Browse** and navigate to the desired folder location. When the desired folder has been selected, click **OK**, and then click **Next**.
5. In the Bulletin Board Configuration dialog box, type your library's name, a greeting, and your library's hours in the appropriate boxes. Then click **Next**.
6. Click **Finish** to complete the setup. This Bulletin Board can now be accessed by clicking the **Bulletin Board** button in the OPAC window (example shown in Figure 6.23).

FIGURE 6.23



Note: To add text or graphics to this Bulletin Board, open the file `BulletinBoard.html` (located in your M3 directory) in an HTML editor. Modify as desired.

Linking to an HTML File or Web Page

Configuring the Bulletin Board button to link to another HTML file or a Web page is performed in the M3Opac.ini file.

These instructions are also outlined in “Bulletin Board settings” on page A-3 in “Appendix A: Customizing the Windows .ini Files.”

1. Using a simple text editor such as Notepad or WordPad, open the M3Opac.ini file (the default path is `C:\Program Files\Mandarin M3`).
2. Under Bulletin Board settings:
 - A. Change `Use_External_Browser=0` to `Use_External_Browser=1`.
 - B. Change `Source=LOCAL`, where LOCAL is the path to the Web page you want to link to. For example, `Source= http://www.franklinhs.com/library`

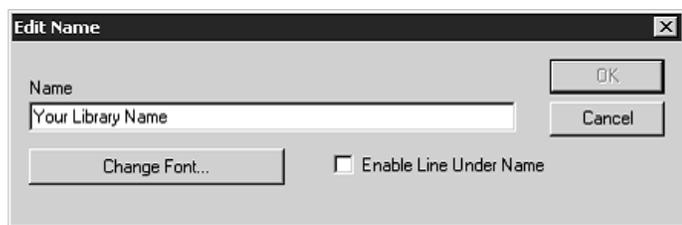
The OPAC Header

Permission to modify the OPAC header is established in the Group Editor module. See your system administrator for assistance.

To display your library name in the header bar of the OPAC:

1. Right-click in the header bar, then click **Edit Name**. This displays the Login dialog box.
2. Type your user name in the **Login Name** box, your password in the **Password** box, and then click **OK**. This displays the Edit Name dialog box (Figure 6.24).

FIGURE 6.24



3. In the **Name** box, type the name you want to display in the header bar.
4. To change the font of the title, click **Change Font**. Modify settings as desired, then click **OK**.
5. If you want a dividing line to appear between the header bar and the tabs, select the **Enable Line Under Name** check box. Otherwise, no line will display.
6. Click **OK**. The new name displays in the header bar.

Displaying Cover Image in the OPAC

To display cover images in the OPAC, you must import the images into your M3 database and enable them in the M3Opac.ini file. The images can then be viewed in the OPAC in the Search Results, Record Details, Bookbag Record List, and Bookbag Record Details windows.

Importing Cover Images

The M3 Picture Manager utility allows you to import multiple image files and automatically link the images to the appropriate bibliographic records. This utility can be accessed through the Cataloging module. For instructions, see “Using M3 Picture Manager” beginning on page 4-49.

To add an image to one record at a time, see “Adding a Picture Field to a Bibliographic or Patron Record” on page 5-38.

Enabling Cover Images

To enable the display of cover images in the OPAC:

1. Using a simple text editor such as Notepad or WordPad, open the M3Opac.ini file (the default path is **C:\Program Files\Mandarin M3**).
2. In the entry **Display Cover Images=0**, change the **0** to **1**.
3. Save the file. This feature will be available the next time you start the OPAC.

Customizing the Visual Catalog

Customization Overview

The Visual Catalog is a keyword search method disguised behind a graphical interface; topic buttons are connected to query buttons, which are linked to predefined search queries. A query button launches a search of the selected databases and returns a list of results.

These graphical buttons can also be configured to launch software applications or Web pages rather than search databases. M3 ships with a default interface that includes several topic and query buttons. M3 also includes over 75 images that can be displayed on the buttons; these can be found in the VisualCatalogResources folder in your M3 directory.

Many Visual Catalog features are easily customized through a password-protected interface accessed from this search method. This interface, Configuration Mode, categorizes the Visual Catalog graphical interface into the following main components:

- **Topic Component** – A topic button that opens a sub-menu of additional buttons. The resulting sub-menu might contain more topic buttons, query buttons, and/or launcher buttons.
- **Query Component** – A query button linked to a search query, which launches a database search and potentially returns a list of results.
- **Launcher Component** – A launcher button that launches a software application or opens a Web page.
- **Global Options** – Options that globally alter the animation, sound, and visual properties on all button menus.

Customization options available through Configuration Mode are:

- Topic buttons can be added, modified, deleted, and moved at any menu level.
- Query buttons can be added, modified, deleted, and moved at any menu level. Additionally, the search query linked to a query button can be modified.
- Launcher buttons can be added, modified, deleted, and moved at any menu level.
- Visual and sound effects can be globally changed and disabled.

All Configuration Mode customization options are explained in the following sections. Other OPAC customizations (such as printing details and reset timing) are entered in the M3Opac.ini file, and should be performed by a system administrator.

Accessing Configuration Mode

To customize the Visual Catalog, you must access Configuration Mode. To do so:

1. Click the **Search** tab, then click **Visual**. This displays the Visual Catalog Search window (Figure 6.11).
2. Right-click any open area of the data pane. This opens a menu (shown in Figure 6.25).

FIGURE 6.25



Tip: Individual user IDs and passwords are assigned and modified in patron records. See “Working with Patron Records” on page 5-33 for more information.

3. Click **Enter Configuration Mode**. This displays the Login dialog box.
4. Type your user name in the **Login Name** box and your password in the **Pass- word** box. (If the default name and password have not yet been changed, type **admin** in the **Login Name** box and **boca raton** in the **Password** box, all in lower-case characters.) Then click **OK**. This changes the Visual Catalog interface to Configuration Mode, as identified in the tab heading (shown in Figure 6.26).

FIGURE 6.26



Note: Only eight buttons can be placed on a Visual Catalog button menu. If the menu already contains eight buttons, you must delete one before you can add a new one.

Working with Topic Components

About Topic Components

A topic component consists of a topic button that opens a sub-menu of additional buttons. The sub-menu can contain more topic buttons leading to more sub-menus, query buttons that launch database searches, and/or launcher buttons that access different applications. You can add, modify, and delete a topic component, and reposition a topic button. These procedures are covered in the following sections.

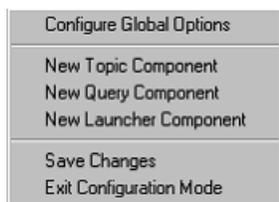
Adding a Topic Component

Adding a topic component consists of adding a topic button, and then adding the desired topic and/or query and/or launcher buttons to the sub-menu attached to the new topic button. A topic component can be added at any menu level.

To add a topic component:

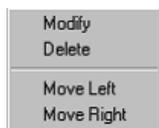
1. Access Configuration Mode as explained beginning on page 6-33.
2. Go to the button menu that is to receive the new topic button.
3. Right-click any open area of the data pane. This opens a shortcut menu (Figure 6.27).

FIGURE 6.27



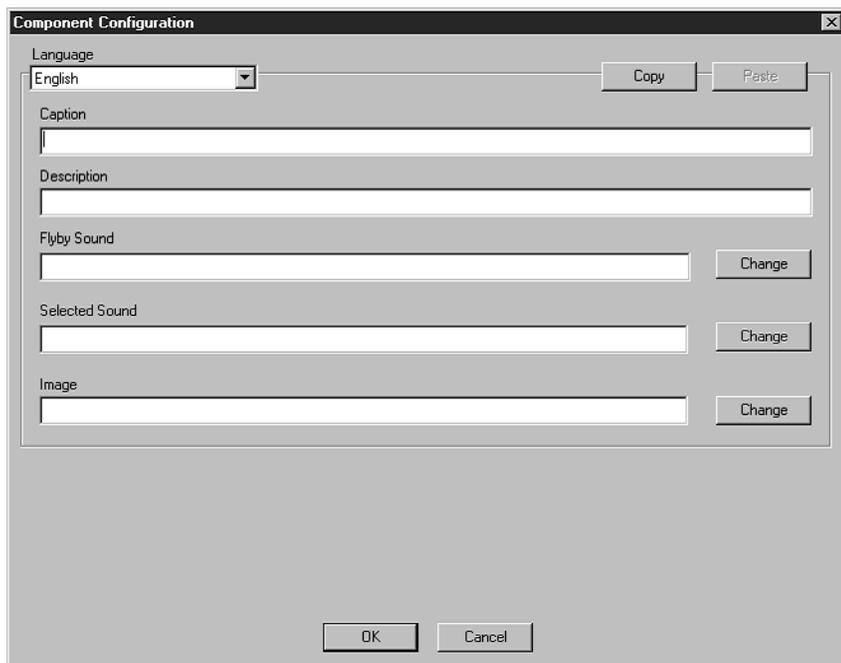
4. Click **New Topic Component**. This places a blank topic button on the button menu.
5. Right-click the new topic button. This opens a button-specific menu (Figure 6.28).

FIGURE 6.28



6. Click **Modify**. This displays the Component Configuration dialog box (Figure 6.29).

FIGURE 6.29



Tips:

- Entries are only required in the Language, Caption, and Image boxes.
- Use the Copy and Paste buttons to create matching topics for a different interface language. This is explained in “Creating a Matching Translated Interface”.

7. Complete the boxes in the dialog box to add text, sound, and visual properties to the new button. Press the TAB key to move from box to box.

- **Language** – Specify the interface language that applies to this new button. If you are offering the OPAC in multiple interface languages, you need to enter a caption and description for each language. (See “Creating a Matching Translated Interface” on page 6-48 for shortcut instructions.)
 - **Caption** – Type the text you want to appear under the button. Keep it short or the text will extend beyond the button frame.
 - **Description** – Type any descriptive text. This appears near the bottom of the button menu when the mouse points to the button.
 - **Flyby Sound** – Select the sound that plays when the mouse points to the button. To select a sound file, either type the path and file name, or click **Change** and navigate to the location of the sound file.
 - **Selected Sound** – Select the sound that plays when you click the button. To select a sound file, either type the path and file name, or click **Change** and navigate to the location of the sound file.
 - **Image** – Select the image that appears on the new button. To select an image file, either type the path and file name, or click **Change** and navigate to the location of the image file.
8. When finished, click **OK**. This applies the entries to the new topic button, but does not save those entries. To save your entries, right-click any open area of the data pane, then click **Save Changes**.
 9. Click the new topic button. This displays the empty sub-menu linked to this button. The next step is to add buttons to this sub-menu.
 10. To add topic buttons (that will in turn create deeper levels), repeat steps 2 through 9 in this procedure. To add query buttons, see “Adding a Query Component” on page 6-38. To add launcher buttons, see “Adding a Launcher Component” on page 6-42.
 11. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

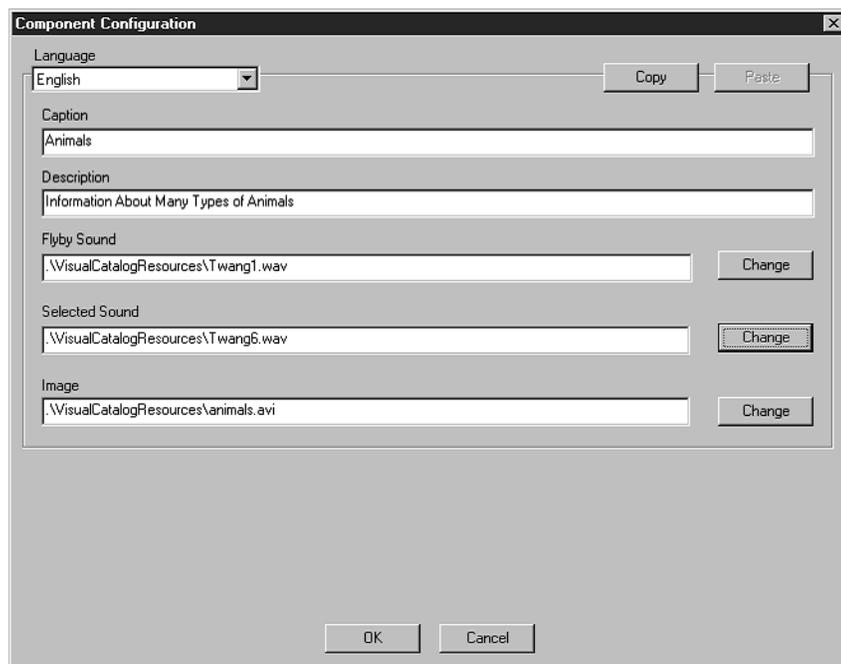
Modifying A Topic Component

A topic component can be modified to change the button caption, description, and visual or sound effects.

To modify a topic component:

1. Access Configuration Mode as explained beginning on page 6-33.
2. Go to the button menu that contains the button to be modified.
3. Right-click the topic button. This opens a button-specific menu (Figure 6.28).
4. Click **Modify**. This displays the Component Configuration dialog box (Figure 6.30) containing properties for this component.

FIGURE 6.30



5. Modify any entries as needed. For information about these options, see step 7 in “Adding a Topic Component” on page 6-35.
6. When finished, click **OK**. This applies the changes to the topic button, but does not save those changes. To save your changes, right-click any open area of the data pane, then click **Save Changes**.
7. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Deleting a Topic Component

A topic component (button and the linked sub-menu system) can be deleted by simply deleting the topic button.

To delete a topic component:

1. Access Configuration Mode as explained beginning on page 6-33.
2. Go to the button menu that contains the topic button to be deleted.
3. Right-click the topic button. This opens a button-specific menu (Figure 6.28).
4. Click **Delete**. This deletes the topic component. If additional menu levels are connected below that sub-menu, they are also deleted.
5. To save your changes, right-click any open area of the data pane, and then click **Save Changes**.

Note: Only eight buttons can be placed on a Visual Catalog button menu. If the menu already contains eight buttons, you must delete one before you can add a new one.

6. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Moving a Topic Component

The procedure to reposition a topic button on the button menu is explained in “Repositioning Buttons on a Button Menu” on page 6-45.

Working with Search Query Components

About Query Components

A query component consists of a query button and the search query linked to the button. When a query button is clicked, the search query is sent, the Results tab becomes active, and the Search Results window appears. You can add, modify, and delete a query component, and reposition a query button. These procedures are covered in the following sections.

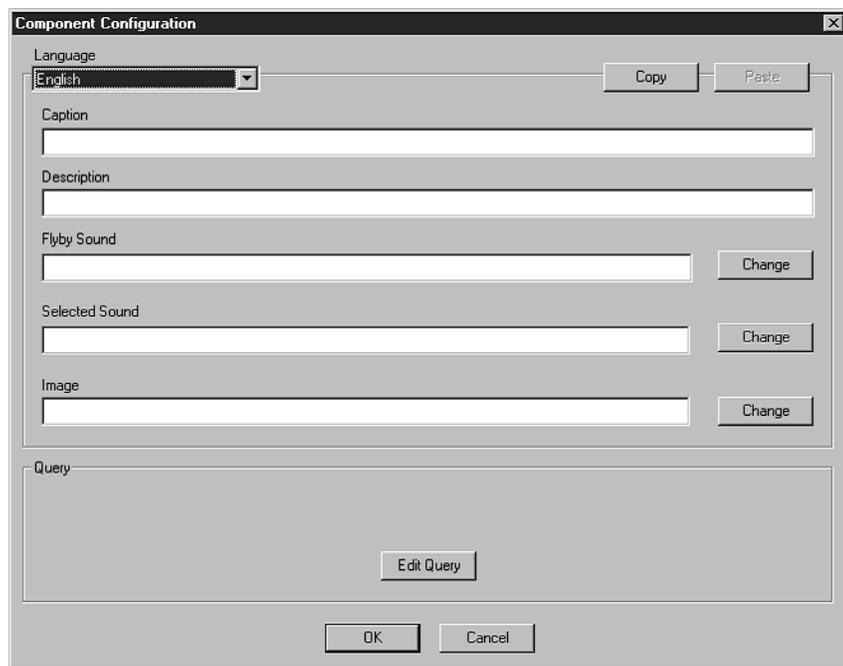
Adding a Query Component

Adding a query component consists of adding a query button and defining the query linked to it.

To add a query component:

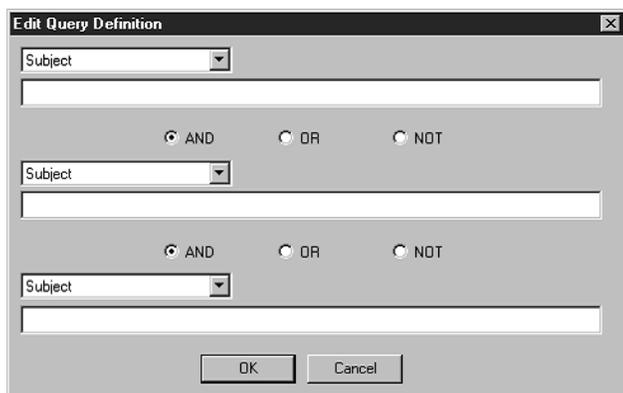
1. Access Configuration Mode as explained beginning on page 6-33.
2. Go to the button menu that is to receive the new query button.
3. Right-click any open area of the data pane. This opens a shortcut menu (Figure 6.27).
4. Click **New Query Component**. This places a blank query button on the button menu.
5. Right-click the new query button. This opens a button-specific menu (Figure 6.28).
6. Click **Modify**. This displays the Component Configuration dialog box (Figure 6.31).

FIGURE 6.31



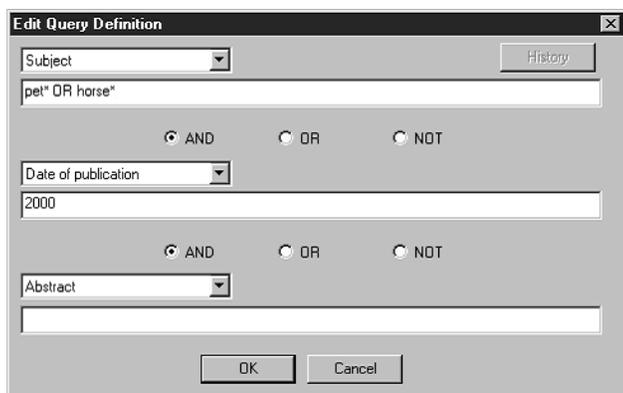
7. Complete the options in the dialog box to add text, sound, and visual properties to the new button. Press the TAB key to move from box to box. For information about these options, see step 7 on page 6-35.
8. Click **Edit Query**. This displays the Edit Query Definition dialog box (Figure 6.32).

FIGURE 6.32



9. Enter the search query you want this button to submit. To do so:
- A. In the first MARC record field list, select the field you want to search.
 - B. Type the search query into the corresponding keyword box, as shown in Figure 6.33. The query can be a keyword or multiple keywords joined by Boolean operators AND, OR, and NOT (AND is assumed if no Boolean is typed between keywords). The query recognizes truncation, wildcard character, and phrase search techniques.
 - C. If you want the query to include other MARC fields, repeat steps A and B in the remaining boxes of this dialog box. Be sure to specify the correct Boolean operator between the sets of boxes.

FIGURE 6.33



D. When finished, click **OK**. This closes the Edit Query Definition dialog box. The new query appears above the Edit Query button in the Component Configuration dialog box (see Figure 6.34).

10. When finished, click **OK**. This applies the entries to the new query button, but does not save those entries. To save your entries, right-click any open area of the data pane, then click **Save Changes**.

11. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.

- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

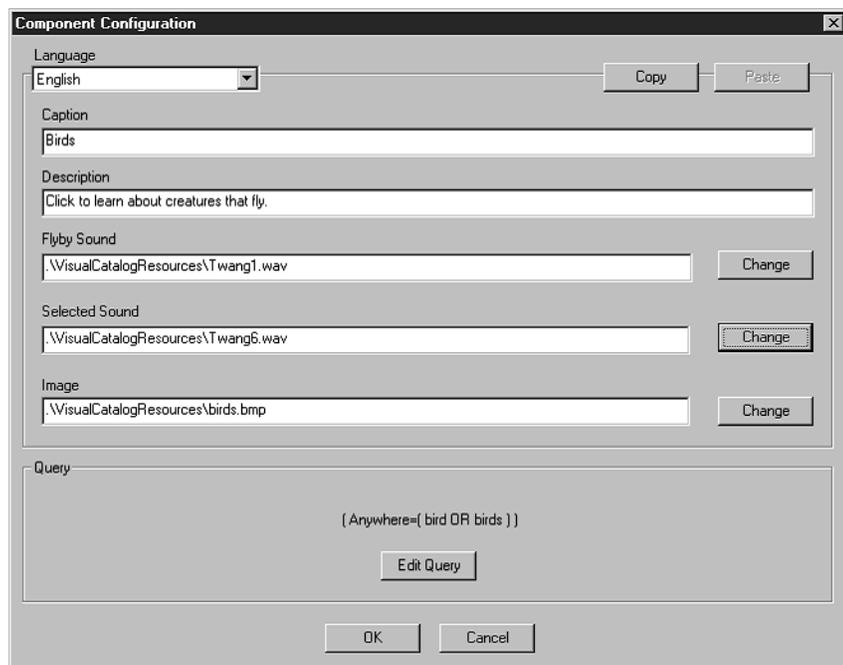
Modifying a Query Component

A query component can be modified to change the button caption, description, visual or sound effects, and search query.

To modify an existing query component:

1. Access Configuration Mode as explained beginning on page 6-33.
2. Go to the button menu that contains the button to be modified.
3. Right-click the query button. This opens a button-specific menu (Figure 6.28).
4. Click **Modify**. This displays the Component Configuration dialog box (Figure 6.34) containing properties for this component.

FIGURE 6.34



5. To modify text, sound, or visual properties, see step 7 on page 6-35. To modify the search query, see steps 8 and 9 in “Adding a Query Component,” beginning on page 6-39.
6. When finished, click **OK**. This applies the changes to the query button, but does not save those changes. To save your changes, right-click any open area of the data pane, then click **Save Changes**.

7. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Deleting a Query Component

A query component (button and the linked search query) can be deleted by simply deleting the query button.

To delete a query component:

1. Access Configuration Mode as explained beginning on page 6-33.
2. Go to the button menu that contains the query component to be deleted.
3. Right-click the query button. This opens a button-specific menu (Figure 6.28).
4. Click **Delete**. This deletes the query component.
5. To save your changes, right-click any open area of the data pane, and then click **Save Changes**.

Note: Only eight buttons can be placed on a Visual Catalog button menu. If the menu already contains eight buttons, you must delete one before you can add a new one.

6. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Moving a Query Component

The procedure to reposition a query button on the button menu is explained in “Repositioning Buttons on a Button Menu” on page 6-45.

Working with Launcher Components

About Launcher Components

A launcher component consists of a launcher button and a link to an application or Web page to be launched by the button. You can add, modify, and delete a launcher component, and reposition a launcher button. These procedures are covered in the following sections.

NOTE: The software to be launched must be Windows compatible.

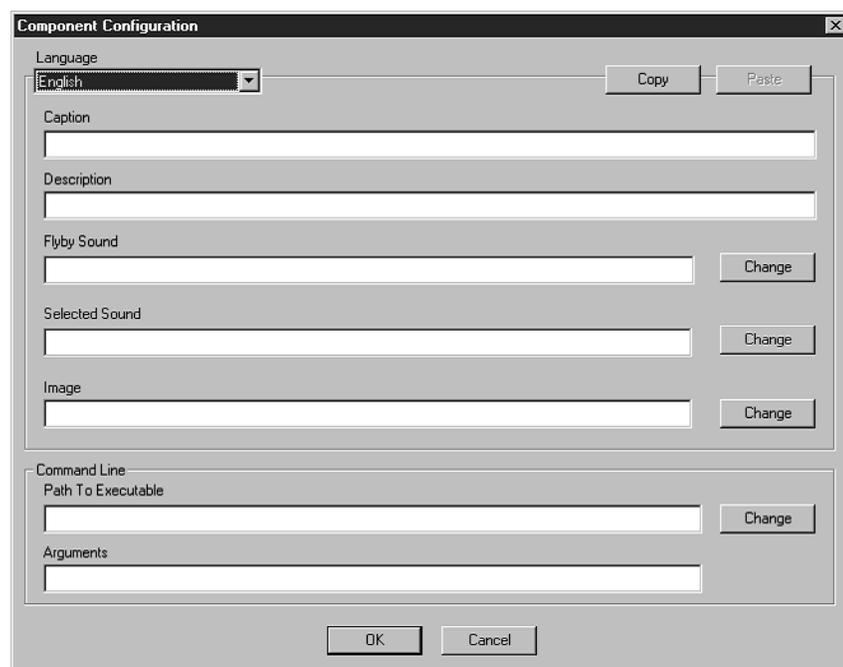
Adding a Launcher Component

Adding a launcher component consists of adding a launcher button and entering a Web page address or the path/file name of an application to be launched.

To add a launcher component:

1. Access Configuration Mode as explained beginning on page 6-33.
2. Go to the button menu that is to receive the new launcher button.
3. Right-click any open area of the data pane. This opens a shortcut menu (Figure 6.27).
4. Click **New Launcher Component**. This places a blank launcher button on the button menu.
5. Right-click the new launcher button. This opens a button-specific menu (Figure 6.28).
6. Click **Modify**. This displays the Component Configuration dialog box (Figure 6.35).

FIGURE 6.35



An example of a completed Component Configuration dialog box is shown in Figure 6.36.

7. Complete the options in the dialog box to add text, sound, and visual properties to the new button. Press the TAB key to move from box to box. The first six options control text, sound, and visual

properties of the button. For information about these options, see step 7 on page 6-35. To complete the last two boxes, which refer to the application or Web page to be launched:

- **Path To Executable** – To connect to an application, either type the path and file name, or click **Change** and navigate to the location of the application. To connect to a Web page, type the path and file name for your Web browser.
- **Arguments** – To connect to an application, type any optional arguments or parameters needed to run the application. To connect to a Web page, type the address.

8. When finished, click **OK**. This applies the entries to the new launcher button, but does not save those entries. To save your entries, right-click any open area of the data pane, then click **Save Changes**.

9. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

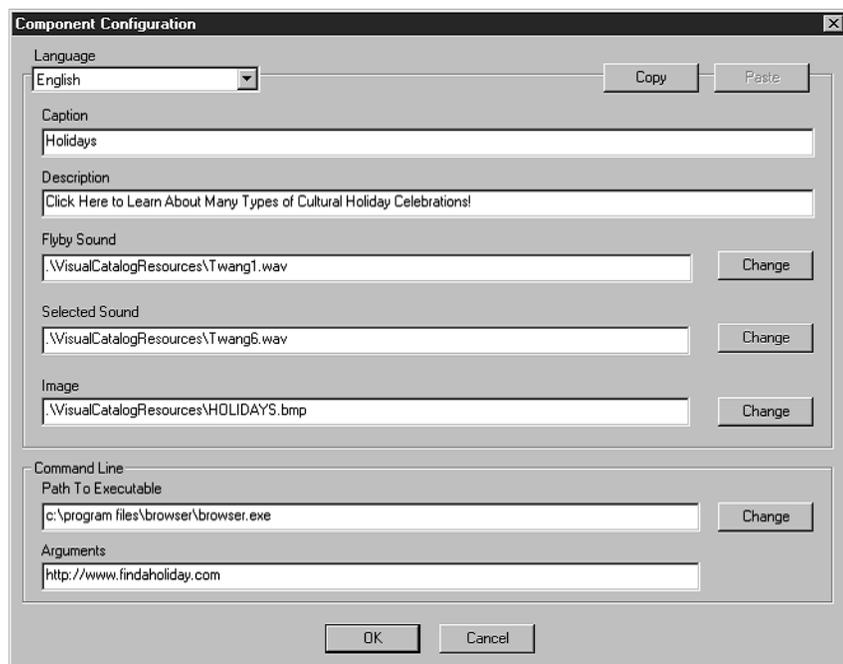
Modifying a Launcher Component

A launcher component can be modified to change the button caption, description, and visual or sound effects, the path and/or file name of the application to be launched, or the address of the Web page to be opened.

To modify an existing launcher component:

1. Access Configuration Mode as explained beginning on page 6-33.
2. Go to the button menu that contains the button to be modified.
3. Right-click the launcher button. This opens a button-specific menu (Figure 6.28).
4. Click **Modify**. This displays the Component Configuration dialog box (Figure 6.36) containing properties for this component.

FIGURE 6.36



The screenshot shows a 'Component Configuration' dialog box with the following fields and buttons:

- Language:** A dropdown menu set to 'English', with 'Copy' and 'Paste' buttons to its right.
- Caption:** A text box containing 'Holidays'.
- Description:** A text box containing 'Click Here to Learn About Many Types of Cultural Holiday Celebrations!'.
- Flyby Sound:** A text box containing '\VisualCatalogResources\T wang1.wav' and a 'Change' button to its right.
- Selected Sound:** A text box containing '\VisualCatalogResources\T wang6.wav' and a 'Change' button to its right.
- Image:** A text box containing '\VisualCatalogResources\HOLIDAYS.bmp' and a 'Change' button to its right.
- Command Line:** A section containing:
 - Path To Executable:** A text box containing 'c:\program files\browser\browser.exe' and a 'Change' button to its right.
 - Arguments:** A text box containing 'http://www.findaholiday.com'.

At the bottom of the dialog are 'OK' and 'Cancel' buttons.

5. To modify text, sound, or visual properties, see step 7 on page 6-35. To modify the path or file name in the **Command Line** boxes, see step 7 in “Adding a Launcher Component” on page 6-43.
6. When finished, click **OK**. This applies the changes to the launcher button, but does not save those changes. To save your changes, right-click any open area of the data pane, then click **Save Changes**.
7. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Deleting a Launcher Component

A launcher component (button and link to an application .exe file or Web page) can be deleted by simply deleting the launcher button.

To delete a launcher component:

1. Access Configuration Mode as explained beginning on page 6-33.
2. Go to the button menu that contains the launcher component to be deleted.

3. Right-click the launcher button. This opens a button-specific menu (Figure 6.28).
4. Click **Delete**. This deletes the launcher component.
5. To save your changes, right-click any open area of the data pane, and then click **Save Changes**.
6. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Moving a Launcher Component

The procedure to reposition a launcher button on the button menu is explained in the next section, “Repositioning Buttons on a Button Menu.”

Repositioning Buttons on a Button Menu

Any topic, query, or launcher button can be moved to a different position on a button menu. The procedure is the same for all three types of buttons.

To move a button:

1. Access Configuration Mode as explained on page 6-33.
2. Go to the button menu that contains the button to be moved.
3. Right-click the button. This opens a button-specific menu (Figure 6.28).
4. Click **Move Left** or **Move Right**, depending on which way you want to move the button.
5. Repeat steps 3 and 4 until the button reaches the desired position. (A button automatically wraps to the top or bottom level when moved between the fourth and fifth button positions.)
6. To save your entries, right-click any open area of the data pane, then click **Save Changes**.
7. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.

- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

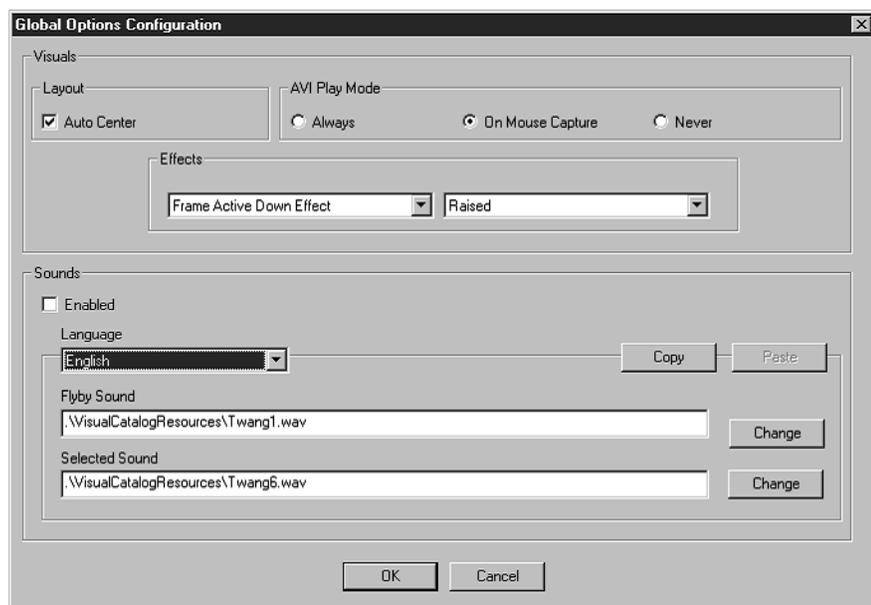
Globally Modifying Visual and Sound Effects

From Configuration Mode, you can globally modify, enable, and disable interface visual and sound effects. These changes impact all translated interfaces. To modify effects for a specific button, refer instead to the instructions for modifying topic, query, or launcher components in preceding sections.

To globally change interface visual or sound effects:

1. Access Configuration Mode as explained beginning on page 6-33.
2. Right-click any open area of the data pane. This opens a shortcut menu (Figure 6.27).
3. Click **Configure Global Options**. This displays the Global Options Configuration dialog box (Figure 6.37).

FIGURE 6.37



4. Modify one or more of the following options:
 - **Layout** – Controls the button alignment on all button menus. Select the **Auto Center** checkbox for buttons to appear centered, or clear **Auto Center** for left alignment.
 - **AVI Play Mode** – Controls button animation behavior:
 - Click **Always** for all animations to play continuously.
 - Click **On Mouse Capture** for an animation to play only when the mouse points to the button.

- Click **Never** to disable all animations.
- **Effects** – Controls how button frames and button images display on all button menus. To modify, select a button section and button phase in the left list, then select the desired effect in the right list.

The button sections are:

- **Frame** – the outer perimeter of the button
- **Image** – the graphical image within the button

The button phases are:

- **Active Down** – when the button is clicked
- **Active Up** – when the mouse is pointing to the button
- **Inactive** – when the mouse is not pointing to or clicking the button

The right list specifies the available display effects:

- **Raised** – the entire button or image appears to be raised
- **Recessed** – the entire button or image appears to be recessed
- **Trench** – a narrow recessed trench outlines the button or image
- **Wall** – a narrow raised wall outlines the button or image
- **Enabled** – Controls all Visual Catalog sound effects. Select the **Enabled** check box to enable sound effects, or clear to disable.
- **Language** – Identifies the language interface of the global sound effects. This only applies if you offer the OPAC in multiple interface languages and want to use different sound effects for the different interface languages. If your institution offers multiple languages, you must complete a separate Global Options Configuration dialog box for each interface language. To do so, see steps 11 through 15 in the next section, “Creating a Matching Translated Interface.”
- **Copy/Paste** – Used only when you need to create a separate Global Options Configuration dialog box for a different interface language. This is explained in the next section, “Creating a Matching Translated Interface.”
- **Flyby Sound** – Identifies the sound that plays when the mouse points at a button. A default flyby sound is entered. To select a sound file, either type the path and file name, or click **Change** and navigate to the location of the sound file.

- **Selected Sound** – Identifies the sound that plays when a button is clicked. A default sound is entered. To select a sound file, either type the path and file name, or click **Change** and navigate to the location of the sound file.

5. When finished, click **OK**. This applies the changes, but does not save them. To save your changes, right-click any open area of the data pane, then click **Save Changes**.

6. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Tip: If you are the system administrator for your institution and are familiar with the file system of the M3 OPAC, there is another way to create a parallel interface. For information, contact Mandarin Tech Support.

Creating a Matching Translated Interface

The Visual Catalog interface can be offered to patrons in other interface languages. Each language requires its own set of global options and topic/query/launcher components; this creates a parallel translated interface.

A shortcut feature, **Copy/Paste**, makes it easy to create a parallel interface. The Copy and Paste buttons appear in every Component Configuration dialog box and in the Global Options Configuration dialog box.

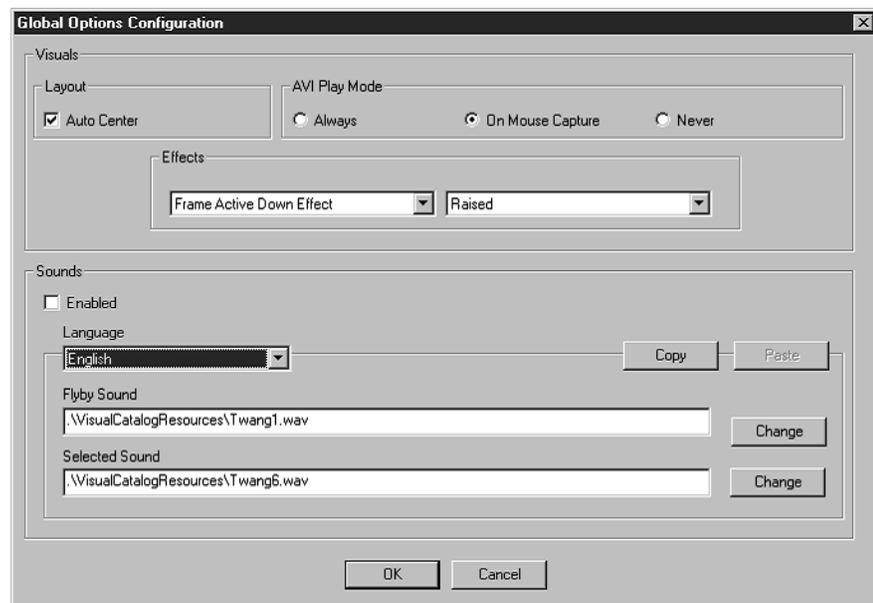
NOTE: The Visual Catalog ships with a default set of English topic components and query components. Before creating a parallel translated interface, make sure the English version has been customized to meet your library's needs; this saves customization time.

To create a parallel translated interface:

1. At the main button menu level, access Configuration Mode as explained beginning on page 6-33.
2. Click **Languages**, select the interface language you are translating from, and then click **OK**. This is the master interface you will copy from to create the new parallel interface. (In most cases, this is the English interface.)
3. Right-click the first button on the button menu. (It can be a topic button, query button, or launcher button.) This opens a button-specific menu (Figure 6.28).
4. Click **Modify**. This displays the Component Configuration dialog box (Figure 6.36) containing the properties for this component.

5. Click **Copy**.
6. In the **Language** list, select the interface language you are adding.
7. Click **Paste**. This creates a duplicate dialog box containing all the original entries.
8. In the **Caption** and **Description** boxes, type the translated text. Assuming you want to keep all other entries the same between the two languages, click **OK**. This applies the entries to the parallel interface, but does not save those entries.
9. Right-click any open area of the data pane, then click **Save Changes**. This saves your entries, but does not exit Configuration Mode.
10. Repeat steps 3 through 9 for each topic, query, and launcher button in your Visual Catalog. This creates a parallel Component Configuration dialog box for each component.
11. Right-click any open area of the data pane. This opens a shortcut menu (Figure 6.27).
12. Click **Configure Global Options**. This displays the Global Options Configuration dialog box (Figure 6.38).

FIGURE 6.38



13. Click **Copy**.
14. In the **Language** list, select the interface language you are adding.

15. Click **Paste**. This creates a duplicate Global Options Configuration dialog box containing all the original entries. Assuming you want to keep all effects the same between the two languages, click **OK**.

16. Your new parallel language interface is now complete. Right-click any open area of the data pane, and then click **Exit Configuration Mode**. This displays a warning dialog box. Click **Yes** and exit Configuration Mode.

17. To review and use the new parallel interface, click **Languages** on the **Search** tab, and then click the language of the parallel interface you just created. Then click **OK**. This refreshes the Visual Catalog, changing all interface text to the new language.

Modifying a Translated Interface

You can modify a translated topic, query, or launcher component. You can also modify the global sound effects for a translated interface. If you modify an existing interface in one language, you may need to make matching changes in all interface languages offered to your patrons.

Modifying a Translated Component

To modify an existing topic, query, or launcher component:

1. At the main button menu level, access Configuration Mode as explained beginning on page 6-33.
2. Go to the button menu that contains the topic, query, or launcher component to be modified.
3. Right-click the button to be modified. This opens a button-specific menu (Figure 6.28).
4. Click **Modify**. This displays the Component Configuration dialog box containing properties of this component (example shown in Figure 6.36).
5. To modify text, sound, or visual properties, see step 7 on page 6-35. To modify a search query, see steps 8 and 9 beginning on page 6-39. To modify a launcher component link, see step 7 on page 6-43.
6. When finished, click **OK**. This applies the changes, but does not save them.
7. When satisfied with the changes made to the component, save your changes. To do so, right-click any open area of the data pane, then click **Save Changes**. This saves your changes, but does not exit Configuration Mode.
8. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**.

NOTE: If there are any unsaved changes, a warning dialog box appears. You can:

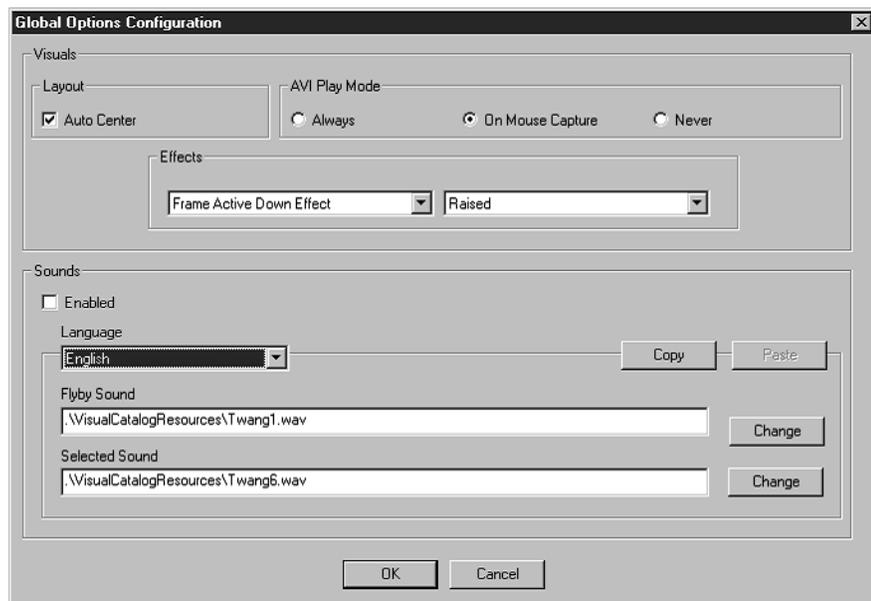
- Click **Yes** to save the changes and exit Configuration Mode.
- Click **No** to cancel any unsaved changes and exit Configuration Mode.
- Click **Cancel** to remain in Configuration Mode without saving changes.

Modifying Translated Global Sound Effects

To modify the global sound effects in an existing parallel language interface:

1. At the main button menu level, access Configuration Mode as explained beginning on page 6-33.
2. Right-click any open area of the data pane. This opens a shortcut menu (Figure 6.27).
3. Click **Configure Global Options**. This displays the Global Options Configuration dialog box (Figure 6.39).

FIGURE 6.39



4. In the **Language** list, select the interface language that requires the sound modification.
5. Modify the sound effects as needed. You cannot modify the visual effects for this language only; if you change the visuals, those changes will apply to every interface language offered to patrons.
 - **Flyby Sound** – Identifies the sound that plays when the mouse points at a button. To select a sound file, either type the path and file name, or click **Change** and navigate to the location of the sound file.
 - **Selected Sound** – Identifies the sound that plays when a button is clicked. To select a sound file, either type the path and file name, or click **Change** and navigate to the location of the sound file.
6. After completing all desired interface modifications, right-click any open area of the data pane, and then click **Exit Configuration Mode**. This displays a warning dialog box. You can:
 - Click **Yes** to save the changes and exit Configuration Mode.
 - Click **No** to cancel any unsaved changes and exit Configuration Mode.



- Click **Cancel** to remain in Configuration Mode without saving changes.

Saving and Exiting Configuration Mode

To save and/or exit Configuration Mode:

1. Right-click any open area of the data pane. This opens a shortcut menu (Figure 6.27).
2. Click one of the following:
 - **Save Changes** – This saves your changes, but does not exit Configuration Mode.
 - **Exit Configuration Mode** – This displays a warning dialog box. You can:
 - Click **Yes** to save the changes and exit Configuration Mode.
 - Click **No** to cancel any unsaved changes and exit Configuration Mode.
 - Click **Cancel** to remain in Configuration Mode without saving changes.

Using Report Tool

This chapter describes:

- How to access and run the reports preloaded into M3
- How to customize the library name on a preloaded report
- How to print a report
- How to download a report to diskette
- How to create a new report
- How to use the grouping function
- How to use the join function

NOTE: The common ReportTool™ functions are described in this M3 Users Guide. The M3 ReportTool module also includes an extensive on-screen Help system. For detailed information not included in this Users Guide, refer to the on-screen ReportTool Help.

ABOUT REPORTTOOL

Notes:

- *In a wide area network, Mandarin recommends running reports at the central site only. If individual sites need to run reports, they should be scheduled to run at different times to avoid slowing down the server.*
- *Deleted records appear in reports until deletions are purged using the M3 Cataloging module.*

In M3, reports are generated using ReportTool, a flexible and powerful Windows report generator developed by Zen Software, Inc. More than 850 library-related reports are preloaded into M3. You can run these preloaded reports in their current form, customize the preloaded reports, or create new reports.

During M3 installation, the user must choose to install preloaded reports in one of two categories:

- **School** – contains more than 850 reports. This includes reports generally used by K-12 schools, public libraries, and universities.
- **Public or Academic** – contains more than 450 reports generally used by public libraries and universities. This does not include reports generally used by K-12 schools.

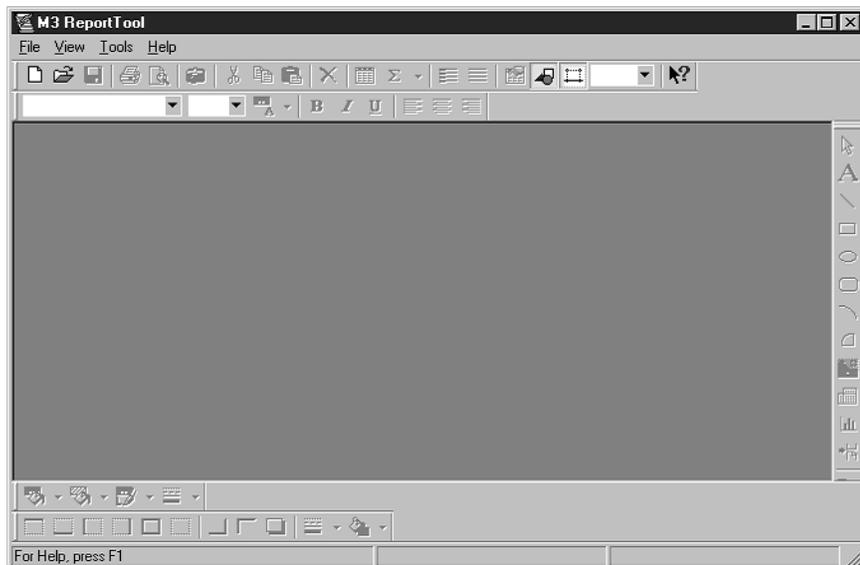
The preloaded reports are listed in Tables B.1 through B.14 in “Appendix B: Pre-loaded Reports” beginning on page B-1. Reports are coded according to type:

S (School) or **P/A** (Public or Academic). Additional reports are created periodically and can be downloaded from the Mandarin Web site at: <http://www.mlasolutions.com>

Under **Customer's Corner**, type your customer number, then click **Login**. On this page, you can also request custom reports by clicking the **Request a custom report** link.

STARTING REPORTTOOL

FIGURE 7.1



On the taskbar, click the **Start** button, select **Programs**, select **Mandarin M3**, and then click **ReportTool**. This displays the M3 ReportTool window (Figure 7.1).

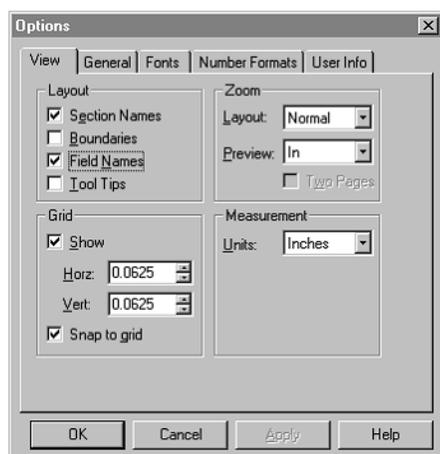
REPORTTOOL SETUP

Before running or creating reports, you should configure several options which will make the report design easier to understand.

To set up ReportTool:

1. On the **Tools** menu, click **Options**. This displays the Options dialog box (Figure 7.2) with the **View** tab displayed.

FIGURE 7.2



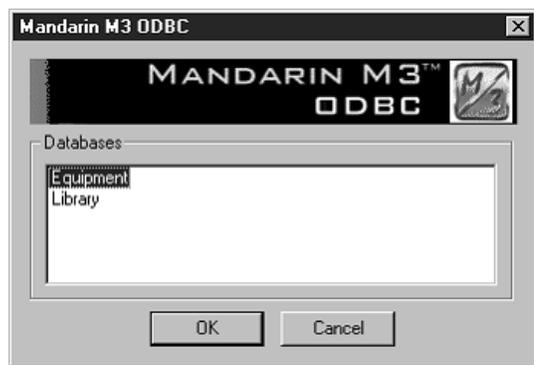
2. In the **Layout** group, select the **Section Names**, **Boundaries**, **Field Names**, and **Tool Tips** check boxes. These options make the features visible.
3. In the **Grid** group, select the **Show** check box. This option places a grid design on your report.
4. Click **OK** to save your changes.

RUNNING PRELOADED REPORTS

To run a preloaded report:

1. On the **File** menu, click **Open**. This displays the Open dialog box containing a list of available reports.
2. Select the report you want to run, then click **Open**. This displays the Mandarin M3 ODBC dialog box (Figure 7.3).

FIGURE 7.3



3. Select the database for which you want to run the report, then click **OK**.

This displays the corresponding report layout screen, which shows where the data fields are positioned on the report page. It does not include your report data at this time.

4. From here you can:

- Compile and print the report. To do so, click **Print** on the **File** menu. In the Print dialog box, adjust the settings as desired, and then click **OK**. After the data is compiled, the report prints without a preview.

OR

- Compile and preview the report on-screen. To do so, click **Print Pre-view** on the **File** menu. After the data is compiled, the report displays. The Print Preview toolbar allows you to zoom in and out, skip to the next or previous page, and display two pages at a time. Click **Print** to print the report, or **Close** to exit Preview mode.

NOTES:

- *Preloaded reports automatically print with the current date.*
- *Preloaded reports do not include a library name unless your library has customized the reports. If you want to add your library name to a pre-loaded report, refer to the next section, “Adding Your Library Name to a Preloaded Report.”*

ADDING YOUR LIBRARY NAME TO A PRELOADED REPORT

You have the option to add your library’s name to the header of a preloaded report. (Otherwise, the report prints without any library name.) To do so:

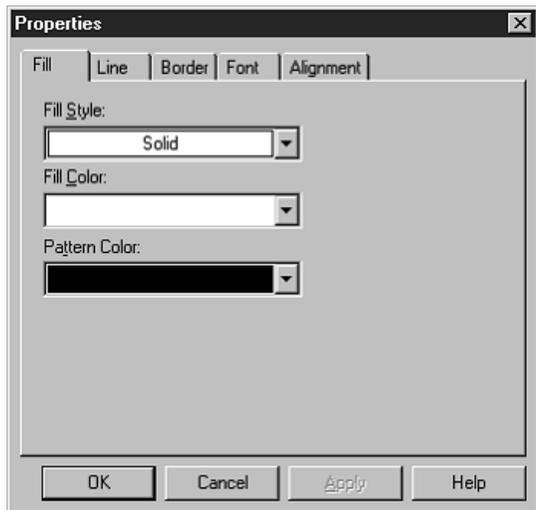
1. On the **File** menu, click **Open**. This displays the Open dialog box.
2. Select the report you want to modify, then click **Open**. This displays the Mandarin M3 ODBC dialog box (Figure 7.3).
3. Select the database for which you want to run the report, then click **OK**. This displays the report layout screen.
4. If the report already contains a text box with an incorrect library name, select the incorrect text and type your library’s name in its place. Then skip to step 7.

OR

If the report layout screen does not have an existing library name box, continue to step 5.

5. On the Drawing toolbar (usually positioned along the right of the window), click the **A** symbol.
6. In the Report Header (shown in Figure 7.5), drag the mouse to create a text box (see Figure 7.6). Type your library’s name in the text box.
7. To format the appearance of your library’s name, right-click in the text box, and then select **Properties** from the menu. This displays the Properties dialog box (Figure 7.4).

FIGURE 7.4



8. Select the font, text alignment, and other properties in the appropriate tabs. When finished, click **OK**.
9. On the **File** menu, click **Save As**. This displays the Save As dialog box. Navigate to the location where you want to save the report.
10. In the **File name** box, type a new name for the report, and then click **Save**. This saves the report.

PREVIEWING A REPORT

To preview a report to check content and layout:

Tip: Use the camera icon on the toolbar as a shortcut to Print Preview; it speeds up the process if you have repeated previews to perform.

1. On the **File** menu, click **Print Preview**. This displays the Mandarin M3 ODBC dialog box (Figure 7.3), which lists the available databases.
2. Select the appropriate database, then click **OK**. This displays the report.
3. To navigate the report, use the following buttons:
 - **Print** – prints a preview copy of the report
 - **Next Page** – displays the next page of the report
 - **Prev Page** – displays the previous page of the report

- **Two Page** – displays the report two pages at a time (if **Two Page** is selected, **One Page** appears on the button)
- **Zoom In** – enlarges the display of the report
- **Zoom Out** – reduces the display of the report
- **Close** – closes the preview and returns to the layout screen

NOTE: Sample data is used in Preview mode. Therefore, a printed preview report should only be used to review field placement and text properties.

PRINTING A REPORT

Note: Before printing, verify ReportTool is not running in Preview mode. To do this, verify that the camera icon on the toolbar is not selected.

To print a report:

1. On the **File** menu, click **Open**. This displays the Open dialog box.
2. Select the report you want to print, then click **Open**. This displays the Mandarin M3 ODBC dialog box (Figure 7.3).
3. Select the database for which you want to run the report, then click **OK**. This displays the report.
4. On the **File** menu, click **Print**. This displays the Print dialog box.
5. Change settings as desired, then click **OK**. This prints the report.

DOWNLOADING A REPORT TO A FILE

To download a report to a file:

1. On the **File** menu, click **Open**. This displays the Open dialog box.
2. Select the report you want to download, then click **Open**. This displays the Mandarin M3 ODBC dialog box (Figure 7.3).
3. Select the database for which you want to run the report, then click **OK**. This displays the report.
4. On the **File** menu, click **Print**. This displays the Print dialog box.
5. Select the **Print to file** check box, then click **OK**. This displays the Print to File dialog box.



6. Navigate to the location where you want to download the report.
7. In the **File name** box, type a name for the report.
8. In the **Save as type** list, select the appropriate file format, then click **Save**. This downloads the report.

Create a new Report - Report Tutorial

In the ReportTool, creating a new report requires a series of procedures. These procedures are summarized in the following section, “Overview,” and then detailed in the sections that follow.

Overview

Step 1: Define the report, determining if a similar report exists that you can modify or if you must create a new report

Step 2: Create a blank report

Step 3: Add a title to the report

Step 4: Add style to text on the report Step 5: Add the run date to the report Step 6: Specify the data source

Step 7: Add and sort fields on the report

Step 1: Defining the Report

Before beginning, make a list of what the report must accomplish and what information must appear on the final printed report. Then, compare your list to the pre-loaded report list to determine if a similar report already exists (see Tables B.1 through B.14 in “Appendix B: Preloaded Reports” beginning on page B-1). It is faster to modify an existing report than to create a new one.

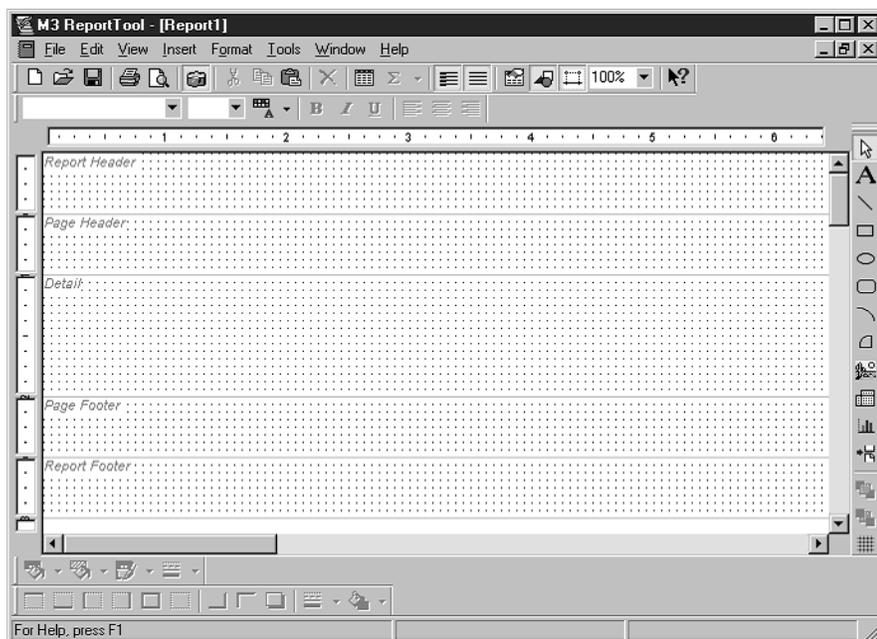
NOTE: When you modify a preloaded report, always save the report under a different name. This will preserve your new report when reports are updated.

Step 2: Creating a Blank Report

To create a new report:

1. Verify that your server (or ZServer module) is running.
2. On the **File** menu, click **New**. This displays the Open dialog box containing a list of available reports.
3. Select **Blank Report**, then click **OK**. The layout for a blank report is displayed in Figure 7.5.

FIGURE 7.5



The report layout is divided into five sections:

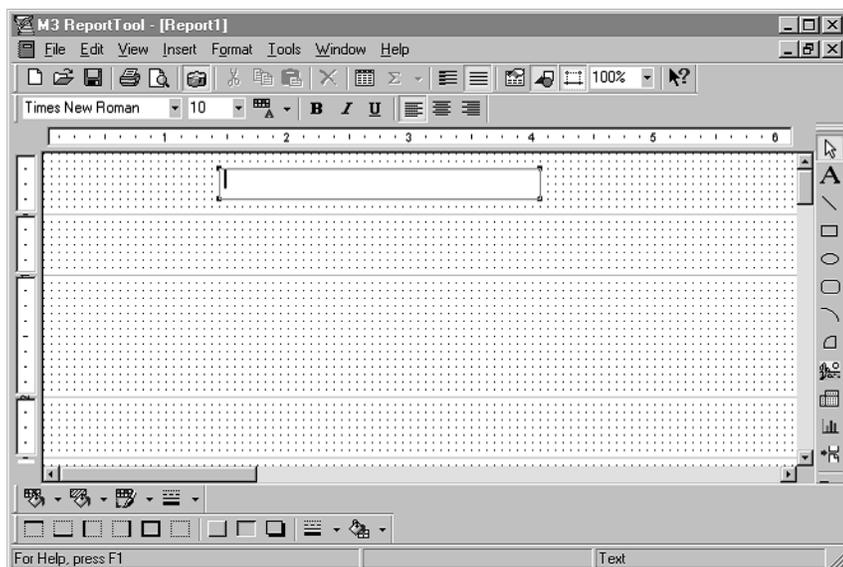
- **Report Header** – Appears at the top of page one of the report. It is not repeated on subsequent report pages.
- **Page Header** – Appears at the top of every page. On page one, it appears below the Report Header.
- **Detail** – Encompasses the body of the report.
- **Page Footer** – Appears at the end of every page. On the last page, it appears above the Report Footer.
- **Report Footer** – Appears at the end of the last page.

Step 3: Adding the Report Title

The report title appears in the Report Header section. To create a title for the report:

1. On the Drawing toolbar, click the A symbol.
2. In the Report Header (shown in Figure 7.5), drag the mouse to create a text box (shown in Figure 7.6).

FIGURE 7.6



3. In the text box, type the title of your report. When finished, click outside the text box to deselect it.

Step 4: Formatting Text

To modify the text properties of the report title, or any text added to the report:

1. Verify the text box is not selected. To do so, click elsewhere on the report.
2. Right-click in the text box you want to format, then select **Properties** from the menu. This displays the Properties dialog box (Figure 7.7).
 - A. To change the font, click the **Font** tab (shown in Figure 7.7). Select the desired font, font style, and size.

FIGURE 7.7



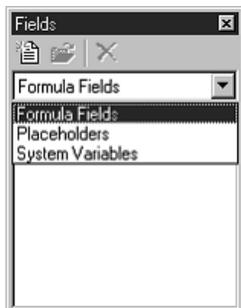
- B. To change the alignment, click the **Alignment** tab. Select left, center, or right alignment, then click **OK**.
- To resize the text box, select the text box, then drag one of the corners.
 - To move the text box, click outside the text box to deselect it. Then click on the text box and drag it to the new location.
 - To center a text box or field on a report, click **Align** on the **Format** menu. This displays the Align dialog box. In the **Horizontal** group, click **Center**, and then click **OK**.
 - On the **File** menu, click **Print Preview** to view your changes. Click **Close** to exit the Print Preview and return to the report.
 - When finished, click **Save** on the **File** menu.

Step 5: Adding the Report Run Date

To display the date the report was run in the Report Header:

- On the **Insert** menu, click **Fields**. This displays the Fields window (Figure 7.8).

FIGURE 7.8



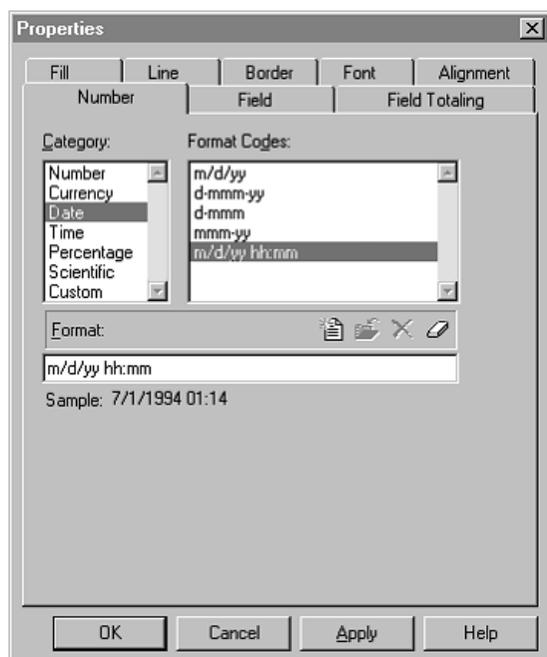
- In the list, select **System Variables**. This displays a list with the following:
 - PRINTDATE** – prints the current date
 - PRINTTIME** – prints the current time
 - PAGE** – prints the current page number
 - TOTALPAGES** – prints the total number of pages
 - REPORTNAME** – prints the report file name
- Drag **PRINTDATE** into the Report Header section, then close the Fields window.

4. Right-click in the new date field, then select **Properties**. This displays the Properties dialog box (Figure 7.4).

A. Click the **Field** tab, then click **Date**.

B. Click the **Number** tab (shown in Figure 7.9). In the **Category** box, select **Date**. In the **Format Codes** box, select a format.

FIGURE 7.9



C. Make any desired text property changes in the **Font** and **Alignment** tabs. (For instructions, see “Step 4: Formatting Text.”) Then click **OK**.

5. To move or resize the new date box, see steps 3 and 4 beginning on page 7-8 for instructions.

6. On the **File** menu, click **Print Preview**.

7. Today's date should be visible on your report. If part of the date is truncated, click **Close** to return to the report layout, and then resize the date box.

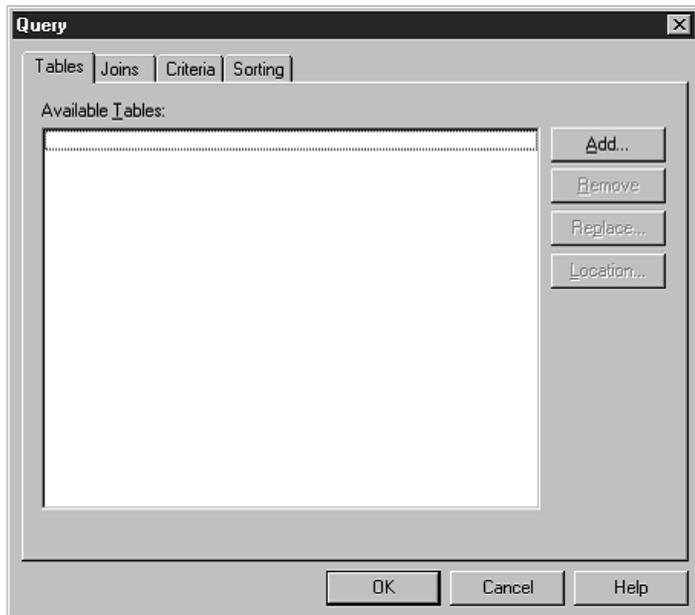
8. When finished, click **Save** on the **File** menu.

Step 6: Specifying the Data Source

To specify the database table from which the report will draw data:

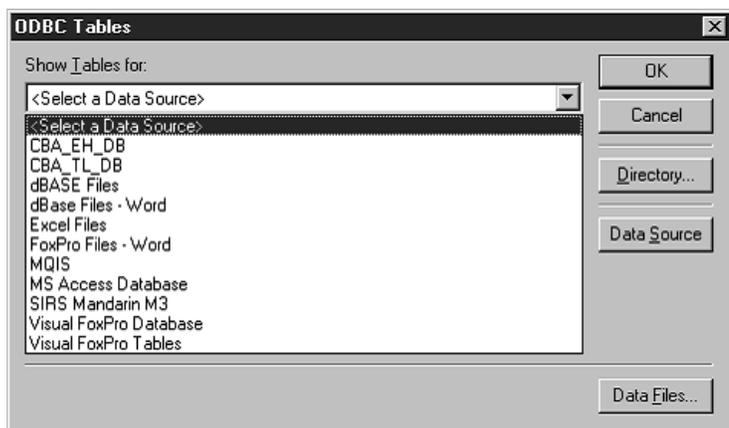
1. On the **Tools** menu, click **Query**. This displays the Query dialog box.

FIGURE 7.10



2. On the **Tables** tab, click **Add**. This displays the ODBC Tables dialog box (Figure 7.11).

FIGURE 7.11



Note: ODBC stands for "Open DataBase Connectivity," a standard by which many commercial database vendors have agreed to abide. ReportTool offers you the choice of using other ODBC-compliant database systems; however, if you choose another system, Mandarin technical support will not be able to help you in case of a problem. Mandarin only guarantees ReportTool will work with the M3 system.

3. In the **Show Tables for** list, select **SIRS Mandarin M3**. If your library offers multiple database types, the Mandarin M3 ODBC dialog box (Figure 7.3) appears. Select the appropriate database type (usually **Library**), then click **OK**. This displays the ODBC Tables dialog box (Figure 7.12) with M3 data-base table choices listed.

FIGURE 7.12



4. Select the database table you want to use. Your default options are:
 - **M3Barcode** – contains the barcodes used by Circulation
 - **M3Bibliographic** – contains all the MARC bibliographic records
 - **M3Group** – contains all the item and patron groups
 - **M3Holding** – contains all the MARC holding records
 - **M3Message** – contains all the blocking messages used by Circulation
 - **M3Patron** – contains the patron records
 - **M3Session** – contains the session records created by Circulation
 - **M3Transaction** – contains the transaction records created and used by Circulation
5. Click **OK**. This closes the ODBC Tables dialog box, and displays the database table name in the **Tables** tab of the Query dialog box.
6. Click **Close** to close the Query dialog box.

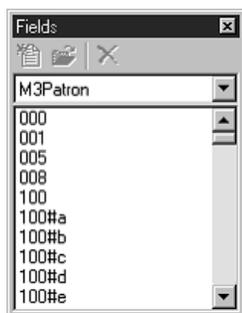
Step 7: Adding and Sorting Fields

Placing Fields onto the Report

To place fields from a database table onto a report:

1. On the **Insert** menu, click **Fields**. This displays the Fields window (Figure 7.13).

FIGURE 7.13



2. The database table you selected in step 4 of “Step 6: Specifying the Data Source” displays. Below it appears a list of field tag numbers and sub-tag codes that represents all the defined fields in a record. In Figure 7.13, an M3 patron record is defined. (For a definition of the fields listed here, see “Obtaining Record Definitions” on page 7-15.)

3. Drag the desired fields from the Fields window into the Detail section of the report you are creating.

NOTE: If you need to enlarge the Detail section, position your cursor over the ruler bar where the bottom margin of the Detail section intersects the ruler bar. When the cursor changes to a double-ended arrow, drag the margin line down to resize.

4. When finished, close the Fields window.

5. To change the text properties and field placement, see “Step 4: Formatting Text” beginning on page 7-8.

6. When finished, click **Save** on the **File** menu.

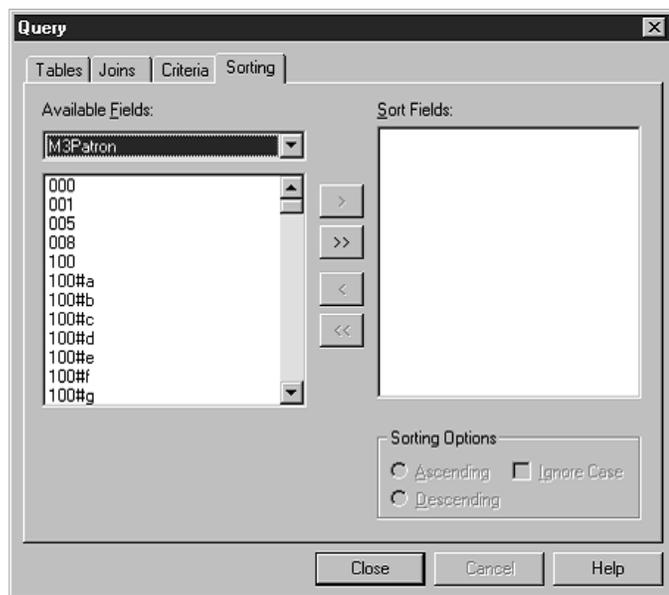
Sorting Field Data

To sort the data in a report by a field:

1. On the **Tools** menu, click **Query**. This displays the Query dialog box (Figure 7.10).

2. Click the **Sorting** tab (shown in Figure 7.14). In the **Available Fields** list, select a database table.

FIGURE 7.14



You can use this dialog box at any time to add, remove, or reorder data sort formulas.

3. Select a field in the left column, then click the > button to move the field to the **Sort Fields** box.
4. Select the field in the **Sort Fields** box. In the **Sorting Options** group, click **Ascending** or **Descending**, and then select the **Ignore Case** check box.
5. Repeat steps 3 and 4 for each field you want to sort. The fields will be sorted in the order they appear in the **Sort Fields** box; you can reorder the fields by dragging the field to the appropriate position in the **Sort Fields** box. When finished, click **OK**.
6. On the **File** menu, click **Print Preview**. Data should now display in the order you selected.
7. When finished, click **Save** on the **File** menu.

Obtaining Record Definitions

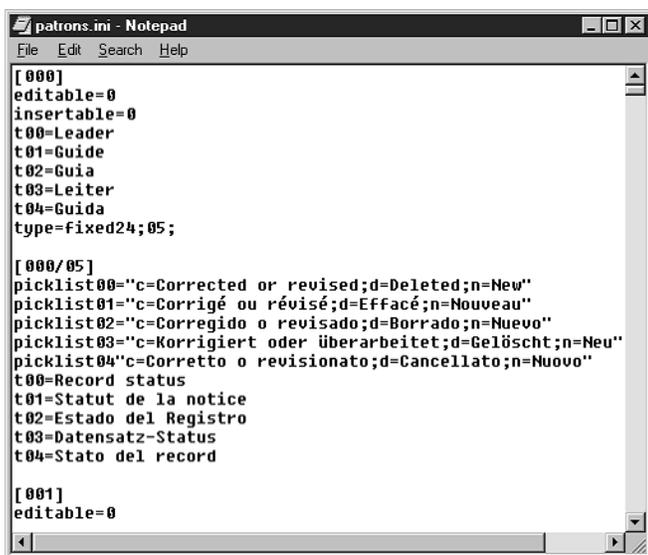
To obtain the definition for any record structure used in M3:

1. Minimize the ReportTool window.
2. Using a simple text editor such as Notepad or WordPad, open the Patrons.ini file (the default path is **C:\Program Files\Mandarin M3\Definition**).

This document and all other .ini files in the Definition folder contain field definitions for all the valid fields in MARC tables for ReportTool. Each field tag is enclosed in brackets; each field definition is preceded by **t00=**. (A sample Patrons.ini file is shown in Figure 7.15.)

NOTE: Within .ini files, t00 contains English terms, t01 contains French, t02 contains Spanish, t03 contains German, and t04 contains Italian.

FIGURE 7.15



```
patrons.ini - Notepad
File Edit Search Help
[000]
editable=0
insertable=0
t00=Leader
t01=Guide
t02=Guia
t03=Leiter
t04=Guida
type=fixed24;05;

[000/05]
picklist00="c=Corrected or revised;d=Deleted;n=New"
picklist01="c=Corrigé ou révisé;d=Effacé;n=Nouveau"
picklist02="c=Corregido o revisado;d=Borrado;n=Nuevo"
picklist03="c=Korrigiert oder überarbeitet;d=Gelöscht;n=Neu"
picklist04="c=Corretto o revisionato;d=Cancellato;n=Nuovo"
t00=Record status
t01=Statut de la notice
t02=Estado del Registro
t03=Datensatz-Status
t04=Stato del record

[001]
editable=0
```

3. On the **File** menu, click **Print**, and then close the document.
4. Maximize the ReportTool window.

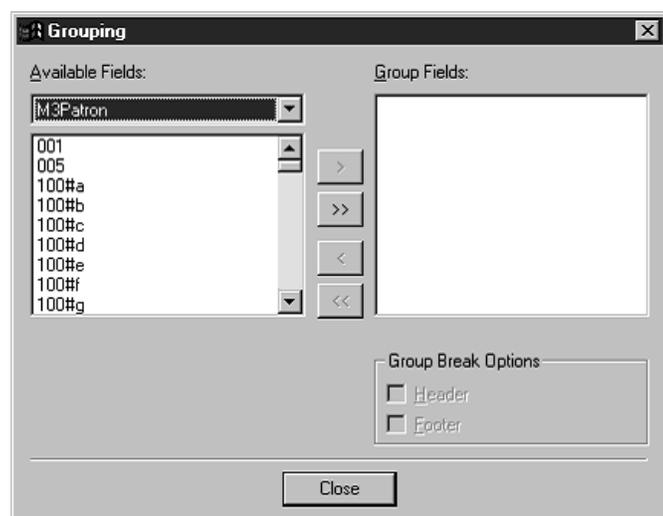
Using the Grouping Function

If you want all records that have the same value for a particular field to be printed together on a report, they need to be grouped. Grouping differs from sorting in that it only prints associated records together on a report; it does not put the records in order. In the following example, we will create a grouping of all patrons in a particular city.

Step 1: Adding a Group

1. On the **Tools** menu, click **Grouping**. This displays the Grouping dialog box (Figure 7.16).

FIGURE 7.16

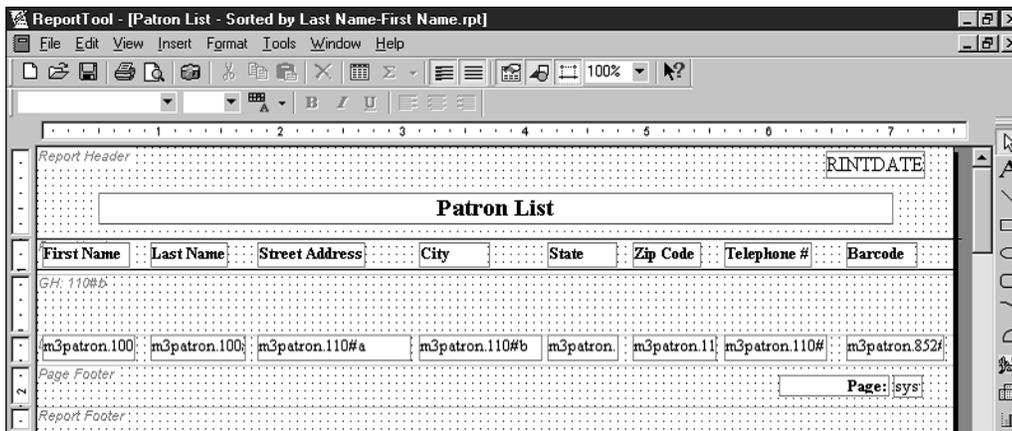


2. Select the field that you want to group in the left column, then click the > button to move the field to the **Group Fields** box. In this example, we will select **110#b** (City). When finished, click **Close**.

Step 2: Adding a Group Header

1. On the **Tools** menu, click **Grouping**. This displays the Grouping dialog box (Figure 7.16). **M3Patron.110#b** now appears in the **Group Fields** box.
2. Click **M3Patron.110#b** in the **Group Fields** box. This enables the **Group Break Options** group. Select the **Header** check box, then click **Close**.
3. The report window now displays the 110#b field in the Group Header (GH) section as shown in Figure 7.17.

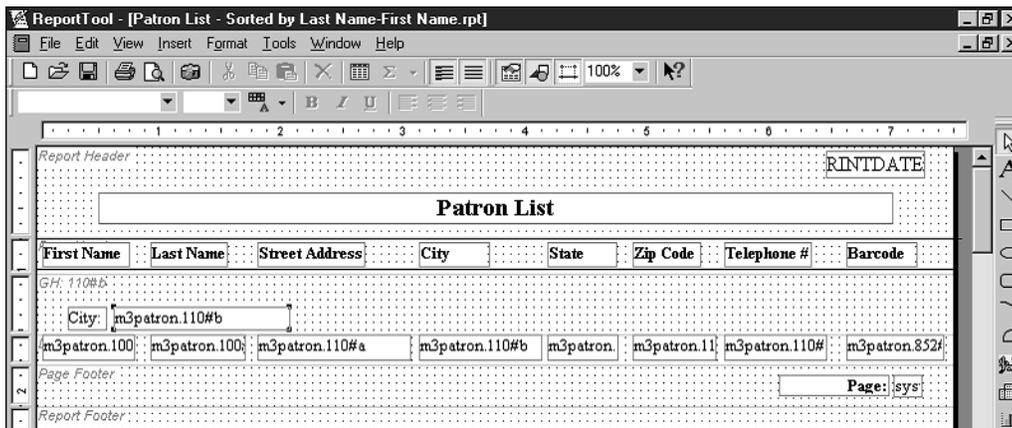
FIGURE 7.17



Step 3: Adding a Field and Field Label

1. On the **Insert** menu, click **Fields**. This displays the Fields window (Figure 7.13).
2. Drag **110#b** into the Group Header (GH: 110#b) section of the report, then close the Fields window. This adds the new field.
3. Click the text box that contains the column header **City** and press CTRL+C. This copies the text box.
4. Click in the Group Header section, then click CTRL+V. This pastes the copied text box and adds the new field label.
5. Click in the new **City** text box and type a colon (:) after the word **City**. Align the new text box so that **City** appears as the field label as shown in Figure 7.18

FIGURE 7.18



6. In order for your report to group and sort properly, you must add the M3Patron.110#b field to your sort criteria. For instructions, see “Step 7: Adding and Sorting Fields” on page 7-13.

Using the Join Function

The “join” function is used to connect different tables in M3. Any report containing information in more than one table requires a join. For example, since the item Title and Author are stored in the M3Bibliographic table and the Call Number is stored in the M3Holding table, a report containing this information requires a join.

A join can only be performed between tables that contain a field with common data. For example, all records in the M3Bibliographic table contain an ISN number (Control Number), which is contained in M3Bibliographic.001. The M3Holding table also contains an ISN number, which is contained in M3Holding.001. However, these ISN numbers are not equal. The M3Holding table also contains a field which stores the ISN number for the corresponding bibliographic record. The bibliographic ISN is stored in the M3Holding.004 field. Therefore, when creating a join between the bibliographic table and the holding table, the join is **M3Bibliographic.001 >>> M3Holding.004**.

Table 7.1 lists the joins most commonly used when creating reports for M3.

TABLE 7.1

Table 1	Table 2	Join/Usage
M3Bibliographic	M3Holding	M3Bibliographic.001 >>> M3Holding.004 Connects the bibliographic table to the holding table and creates a list of items containing call number (holding) and Title/Author (bibliographic). (Both fields in the join contain the bibliographic ISN.)
M3Holding	M3Group	M3Holding.991a >>> M3Group.001 Connects the holding table to the group table and creates a list of holding records that indicate the Item Group name. (Both fields in the join contain the group ISN.)
M3Patron	M3Group	M3Patron.991a >>> M3Group.001 Connects the holding table to the group table and creates a list of patron records that indicate the Patron Group name. (Both fields in the join contain the group ISN.)
M3Transaction	M3Holding	M3Transaction.010#i >>> M3Holding.001 Connects the transaction table to the holding table and creates a list of transactions that contains information from the holding table. (Both fields in the join contain the holding ISN.)
M3Transaction	M3Bibliographic	Transaction.010#n >>> M3Bibliographic.001 Connects the transaction table to the bibliographic table and creates a list of transactions that contains information from the bibliographic table. (Both fields in the join contain the bibliographic ISN.)
M3Transaction	M3Patron	M3Transaction.010#m >>> M3Patron.001 Connects the transaction table to the patron table and creates a list of transactions that contains information from the patron table. (Both fields in the join contain the patron ISN.)

Using Inventory

This chapter describes:

- How to conduct a full inventory
- How to conduct a partial inventory
- How to enter additional barcodes after the barcode records have been uploaded
- How to remove barcodes during the inventory process
- How to print and save inventory results
- How to export a barcode list of inventory results
- How to open a previously saved inventory session or report

ABOUT M3 INVENTORY

Using M3 Inventory, you can conduct a full or partial inventory of your library's holdings. A full inventory involves scanning the entire collection during one time period. A partial inventory involves scanning portions of the collection at any time throughout the year. Both types of inventory are explained in this chapter.

Conducting an inventory with M3 requires only a few basic steps. First, the items to be inventoried need to be scanned. Then the scanning results need to be uploaded into the M3 Inventory module. If conducting a partial inventory, the range limits of the corresponding holdings need to be entered. Lastly, the "Do Inventory" procedure must be run to compare the scanned barcodes to the corresponding holdings database.

When M3 Inventory compares the scanning results to the contents of the holdings database, it groups and categorizes any differences as Newly Found, Missing, Invalid Barcode, Misplaced, Loaned Shelved, No Barcode, Duplicate Barcode, or Out of Range(s) Items. Once the results are compiled, you can print the results lists needed to reconcile your inventory.

STARTING M3 INVENTORY

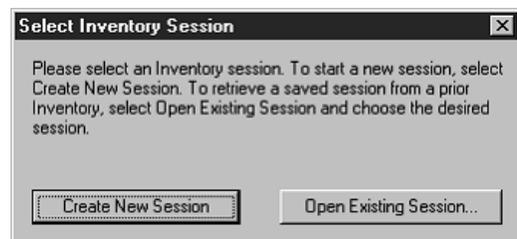
If desired, you can run the M3 Inventory module while other M3 modules are open. However, to ensure accurate inventory results, you should not circulate or catalog items while the collection is being scanned.

To start the M3 Inventory module:

1. On the taskbar, click the **Start** button, select **Programs**, select **Mandarin M3**, and then click **Inventory**. This displays the Inventory Login dialog box.

2. Type your user ID in the **Login Name** box, your password in the **Password** box, and then click **OK**. This displays the Select Inventory Session window (Figure 8.1).

FIGURE 8.1



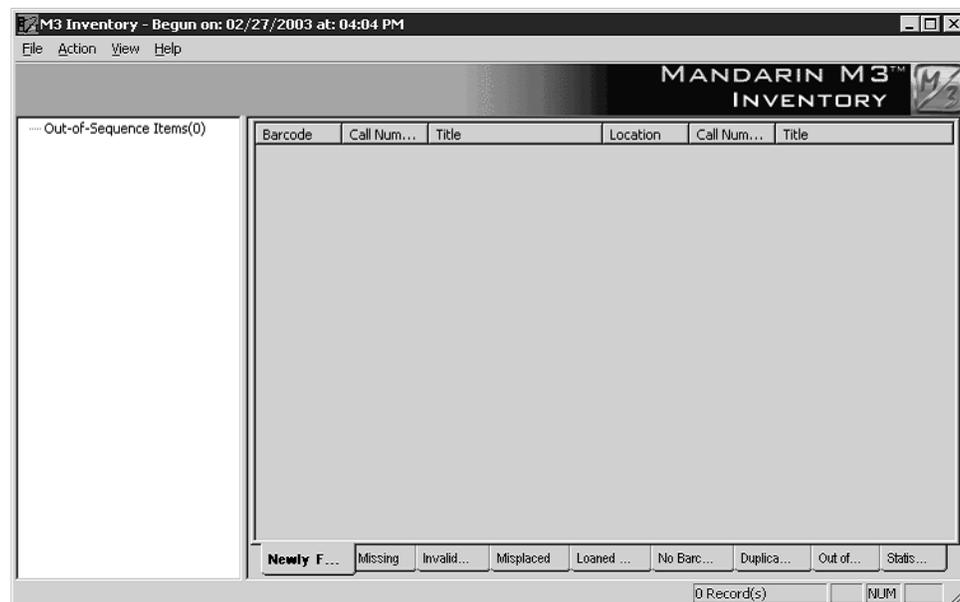
3. Click **Create New Session** or **Open Existing Session**.

- If you click **Create New Session**, the main M3 Inventory window displays (Figure 8.2), ready for you to conduct an inventory.
- If you click **Open Existing Session**, the Open dialog box displays. Navigate to the inventory session file you want to open, then click **OK**. This opens the session in the main M3 Inventory window (Figure 8.2).

INVENTORY WINDOW FEATURES

All M3 Inventory functions can be accessed from the main Inventory window. The Inventory window (Figure 8.2) is divided into three parts: the Inventory menu bar, the Barcode pane (left pane), and the Inventory pane (right pane).

FIGURE 8.2



- **Inventory menu bar** – Contains the File, Action, View, and Help menus:

- **File menu** – Allows you to open and save sessions, add and remove a barcode or a barcode file, upload barcodes from the scanner, open or save an inventory report, export barcodes, print reports, and configure the print setup.
- **Action menu** – Allows you to run the Do Inventory procedure, clear all lists, mark items, run user-defined reports, and access Inventory Options.
- **View menu** – Allows you to change the language of the interface, view a summary of inventory statistics, and turn the status bar on and off.
- **Help menu** – Allows you to access Inventory Help topics and connect to the Mandarin Web page.
- **Barcode pane** – Displays the barcode files you are working with.
- **Inventory pane** – Displays the results of your inventory procedure. It is divided into nine tabs, corresponding to the results of the barcode scanning. These tabs are: **Newly Found, Missing, Invalid Barcode, Misplaced, Loaned Shelved, No Barcode, Duplicate Barcode, Out of Range(s),** and **Statistics**.

NOTE: Media type icons display in the Inventory pane in all tabs (except Statistics) alongside items that have a media type assigned. For information on assigning media types, see “Appendix E: Configuring Media Type Icons” on page E-1. To disable these icons, change the HasIcons entry in the InventoryDisplay.ini file (located in the Inventory folder in your M3 directory) from 1 to 0, then restart the Inventory module.

SELECTING AN INTERFACE LANGUAGE

In M3 Inventory, you can specify the interface language. This affects screen elements such as names of windows, buttons, and text boxes; it does not affect the language of the records in your database.

To select an interface language:

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

Conducting a Full Inventory

To conduct a full inventory:

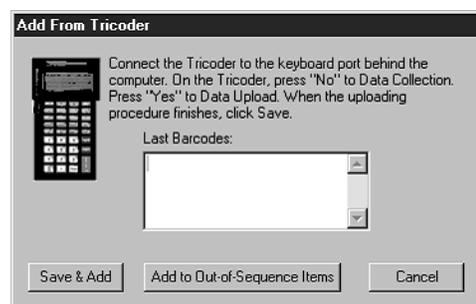
1. Scan the barcode of each item on the shelves, following shelflist order. Use a barcode scanner such as a tricoder.

NOTE: A tricoder can hold an average of 6,000 scanned barcodes at a time. Once that capacity is reached, the information needs to be uploaded into the inventory file. It may take several scanning and uploading sessions to build the inventory data.

2. Upload the scanned barcode records (for the shelved items) from the barcode scanner to M3 Inventory. To do so:

A. On the **File** menu, click **Upload From Reader**. (Or, right-click while pointing to the Barcode pane to access a shortcut menu.) This displays the Add From Tricoder window (Figure 8.3).

FIGURE 8.3



B. Follow the instructions in the window, then click **Save & Add**. This displays the Save As dialog box.

C. Navigate to the location where you want to store the barcode file. If you are going to upload multiple barcode files, you may want to create a new folder for the files.

D. In the **File name** box, type a name for the barcode file you are uploading, and then click **Save**. This saves the file and adds the barcodes to the current inventory. (If you need to upload multiple times to scan the entire collection, be sure to designate different names for each upload file to avoid overwriting data.)

3. Scan the barcode of each item that is out-of-sequence (that is, items not on the shelves, such as items on carts).

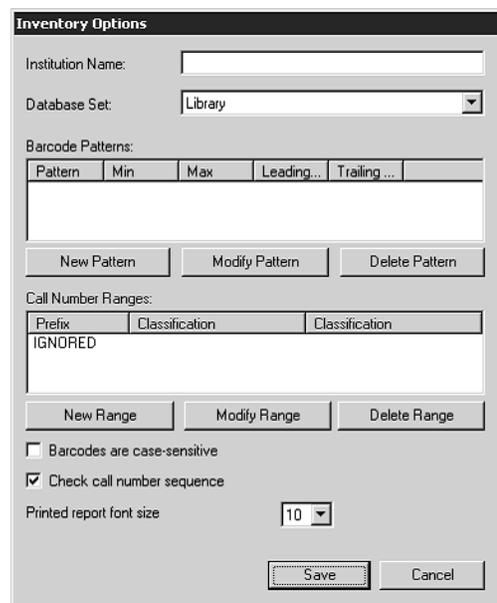
4. Upload the scanned barcode records (for the out-of-sequence items) from the barcode scanner to M3 Inventory. To do so:

A. On the **File** menu, click **Upload From Reader**. (Or, right-click while pointing to the Barcode pane to access a shortcut menu.) This displays the Add From Tricoder window (Figure 8.3).

B. Click **Add to Out-of-Sequence Items**. This adds the items to the out-of- sequence list without creating a file. A misplaced item check is not performed on the out-of-sequence list.

5. On the **Action** menu, click **Inventory Options**. This displays the Inventory Options window (Figure 8.4).

FIGURE 8.4



The screenshot shows the 'Inventory Options' dialog box. It contains the following fields and controls:

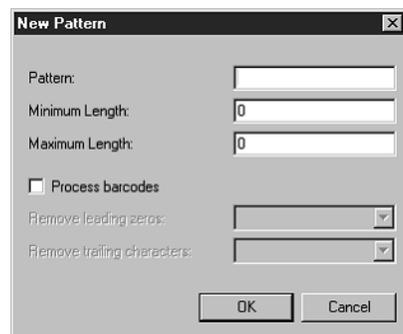
- Institution Name:** A text input field.
- Database Set:** A dropdown menu currently showing 'Library'.
- Barcode Patterns:** A table with columns: Pattern, Min, Max, Leading..., and Trailing... Below the table are three buttons: 'New Pattern', 'Modify Pattern', and 'Delete Pattern'.
- Call Number Ranges:** A table with columns: Prefix, Classification, and Classification. The first row contains the text 'IGNORED'. Below the table are three buttons: 'New Range', 'Modify Range', and 'Delete Range'.
- Barcodes are case-sensitive
- Check call number sequence
- Printed report font size:** A dropdown menu currently showing '10'.
- Save** and **Cancel** buttons at the bottom.

6. In the **Database Set** list, select the database containing the holdings that are now being inventoried.

7. (Optional Step) You can configure the Inventory module to recognize a specific pattern of characters, a certain barcode length, or both. If any scanned barcodes deviate from this character and/ or length specification, the deviant barcodes are highlighted in the barcode listing. To do so:

A. Click **New Pattern**. This displays the New Pattern dialog box (Figure 8.5).

FIGURE 8.5



The screenshot shows the 'New Pattern' dialog box. It contains the following fields and controls:

- Pattern:** A text input field.
- Minimum Length:** A text input field with '0' entered.
- Maximum Length:** A text input field with '0' entered.
- Process barcodes
- Remove leading zeros:** A dropdown menu.
- Remove trailing characters:** A dropdown menu.
- OK** and **Cancel** buttons at the bottom.

- B. To set up a character pattern, type the pattern in the **Pattern** box. For example, if all barcodes involved in this full inventory begin with the same three characters, type those three characters here.
- C. To set up a length pattern:
- In the **Minimum Length** box, type the minimum number of characters in the barcode pattern.
 - In the **Maximum Length** box, type the maximum number of characters in the barcode pattern.
- D. Click **OK** to return to the Inventory Options window, where your pattern entries display in the **Barcode Patterns** box.
- E. Select the **Barcodes are case-sensitive** check box to locate the exact text of the barcode. For example, if you select this check box and search for B200, you only find occurrences of B200. You will not find an occurrence of b200.
- F. Select the **Check call number sequence** check box to check for and report any barcodes that are not in the sequence being searched.
- G. Click **Save**.
8. Create the barcode file. To do so:
- A. On the **File** menu, click **Add Barcode File**. This displays the Open dialog box.
- B. Navigate to the location where you stored the barcode records files. Double-click the file name. (If you uploaded multiple barcode record files, double-click one of the files. Then repeat this step for each barcode record file you uploaded.) This imports the data into the M3 Inventory module and creates a file in M3 Inventory. The file name appears in the Barcode pane in the main Inventory window (Figure 8.6).
- C. The total number of barcodes imported is displayed to the right of the name of the newly created file. Click the plus (+) sign to expand the file and view the list of barcodes entered.

FIGURE 8.6

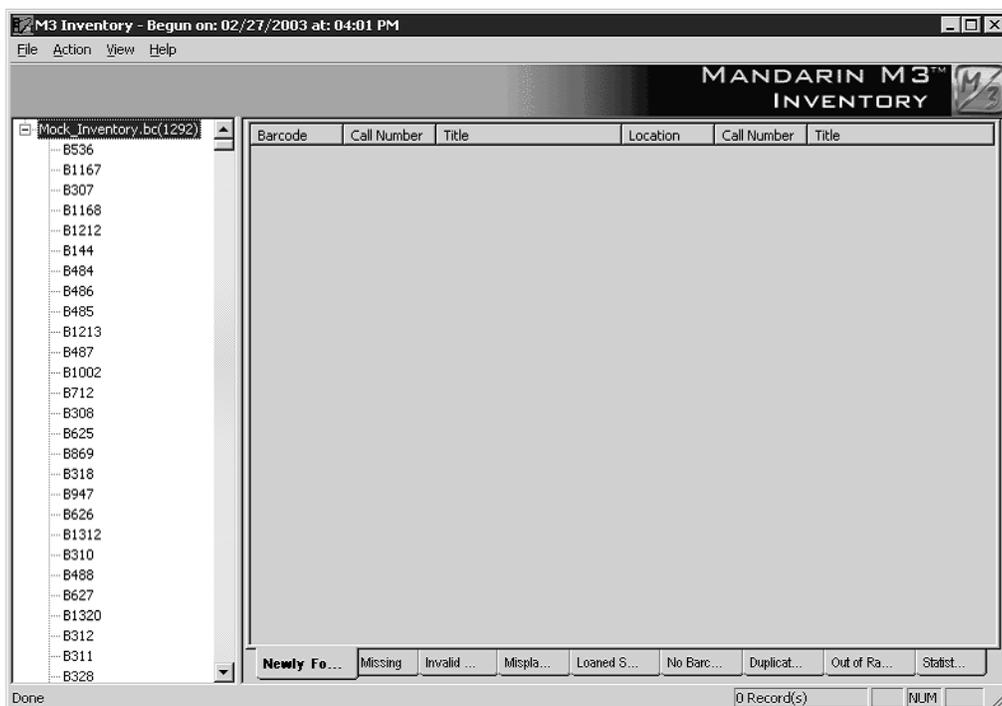


FIGURE 8.7



9. Run the Do Inventory procedure. To do so:

A. On the **Action** menu, click **Do Inventory**. M3 Inventory compares the barcode information to the corresponding holdings data. When finished, a dialog box (Figure 8.7) displays with a summary of the inventory results.

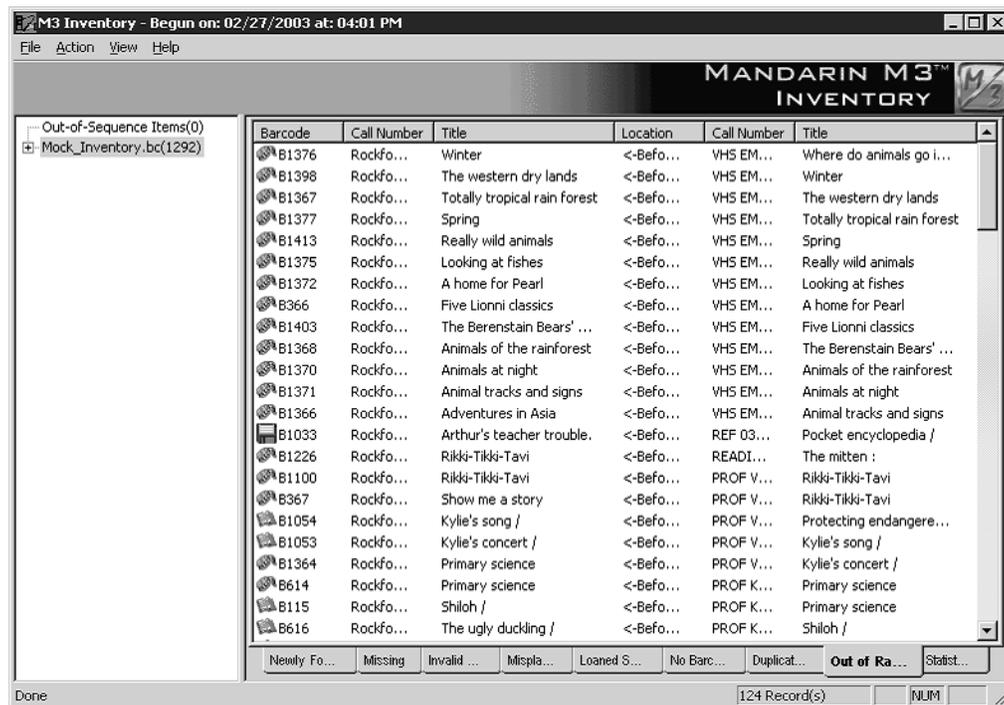
B. Click **OK** to close the dialog box and return to the main Inventory window. M3 Inventory places the appropriate information in each of the nine tabs in the Inventory pane:

- **Newly Found** – Lists items present in this barcode upload, but previously flagged as missing. (NOTE: To change the status of all newly found items to “Normal,” click **Mark Newly Found Items** on the **Action** menu. At the confirmation prompt, click **OK**.)
- **Missing** – Lists all items missing from this barcode upload. If the item has a Location (852#a), the Location appears before the call number.

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

C. Click any tab to view the corresponding information. In Figure 8.8, the **Out of Range(s)** tab is selected. This information can be printed or saved to a file, if desired. (See “Printing and Saving Results” on page 8-14.)

FIGURE 8.8





10. To place a “missing” status in the corresponding holding records of all items listed in the Missing tab:

- A. Click the **Missing** tab. Some items may display in black and some in red. Black signifies the item was listed as missing in a previous inventory. Red signifies the item was listed as missing during this inventory.

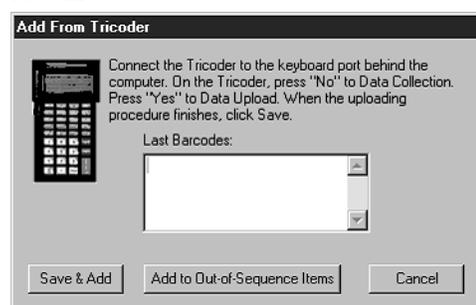
- B. On the **Action** menu, click **Mark Missing Items**. At the confirmation prompt, click **OK**. This turns all red items to black and places a status of “missing” in the corresponding holding records.

Conducting a Partial Inventory

To conduct a partial inventory:

1. Scan the barcode of each item on the shelves to be inventoried at this time, following shelflist order. Use a barcode scanner such as a tricoder.
2. Upload the scanned barcode records (for the shelved items) from the barcode scanner to M3 Inventory. To do so:
 - A. On the **File** menu, click **Upload From Reader**. (Or, right-click while pointing to the Barcode pane to access a shortcut menu.) This displays the Add From Tricoder window (Figure 8.9).

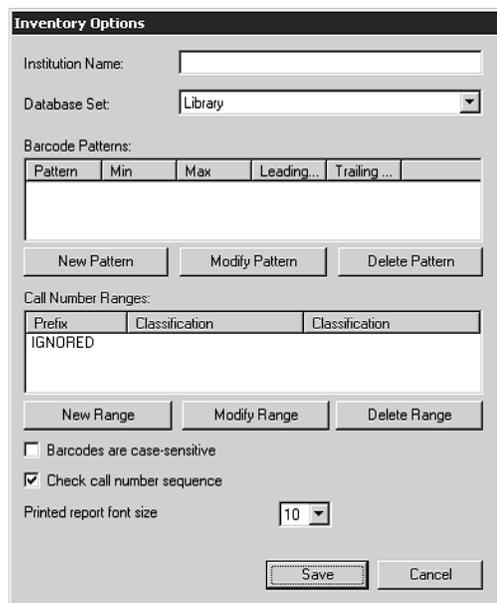
FIGURE 8.9



- B. Follow the instructions in the window, then click **Save & Add**. This displays the Save As dialog box.
 - C. Navigate to the location where you want to store the barcode file. If you are going to upload multiple barcode files, you may want to create a new folder for the files.
 - D. In the **File name** box, type a name for the barcode file you are uploading, and then click **Save**. This saves the file and adds the barcodes to the current inventory. (If you need to upload multiple times, be sure to designate different names for each upload file to avoid overwriting data.)
3. Scan the barcode of each item to be inventoried that is out-of-sequence (that is, items not on the shelves, such as items on carts).
4. Upload the scanned barcode records (for the out-of-sequence items) from the barcode scanner to M3 Inventory. To do so:
 - A. On the **File** menu, click **Upload From Reader**. (Or, right-click while pointing to the Barcode pane to access a shortcut menu.) This displays the Add From Tricoder window (Figure 8.3).
 - B. Click **Add to Out-of-Sequence Items**. This adds the items to the out-of-sequence list without creating a file. A misplaced item check is not performed on the out-of-sequence list.

5. On the **Action** menu, click **Inventory Options**. This displays the Inventory Options window (Figure 8.10).

FIGURE 8.10



The screenshot shows the 'Inventory Options' dialog box. It contains the following fields and controls:

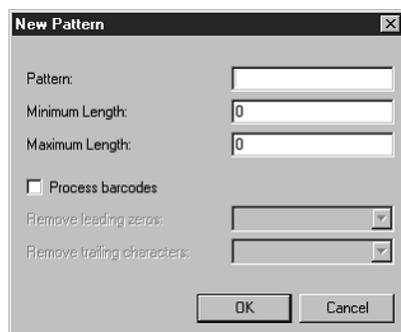
- Institution Name:** A text input field.
- Database Set:** A dropdown menu currently set to 'Library'.
- Barcode Patterns:** A table with columns: Pattern, Min, Max, Leading..., and Trailing... The table is currently empty.
- Buttons:** 'New Pattern', 'Modify Pattern', and 'Delete Pattern' are located below the barcode patterns table.
- Call Number Ranges:** A table with columns: Prefix, Classification, and Classification. The first row contains the text 'IGNORED'.
- Buttons:** 'New Range', 'Modify Range', and 'Delete Range' are located below the call number ranges table.
- Checkboxes:**
 - Barcodes are case-sensitive
 - Check call number sequence
- Printed report font size:** A dropdown menu currently set to '10'.
- Buttons:** 'Save' and 'Cancel' are located at the bottom right.

6. In the **Database Set** list, select the database containing the holdings that are now being inventoried.

7. (Optional Step) You can configure the Inventory module to recognize a specific pattern of characters, a certain barcode length, or both. If any scanned barcodes deviate from this character and/or length specification, the deviant barcodes are highlighted in the barcode listing. To do so:

A. Click **New Pattern**. This displays the New Pattern dialog box (Figure 8.11).

FIGURE 8.11



The screenshot shows the 'New Pattern' dialog box. It contains the following fields and controls:

- Pattern:** A text input field.
- Minimum Length:** A text input field with the value '0'.
- Maximum Length:** A text input field with the value '0'.
- Checkboxes:**
 - Process barcodes
- Remove leading zeros:** A dropdown menu.
- Remove trailing characters:** A dropdown menu.
- Buttons:** 'OK' and 'Cancel' are located at the bottom.

B. To set up a character pattern, type the pattern in the **Pattern** box. For example, if all barcodes involved in this partial inventory begin with the same three characters, type those three characters here.

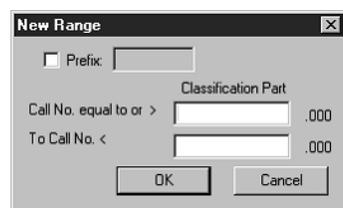
C. To set up a length pattern:

- In the **Minimum Length** box, type the minimum number of characters in the barcode pattern.
- In the **Maximum Length** box, type the maximum number of characters in the barcode pattern.

D. Click **OK** to return to the Inventory Options window, where your pattern entries display in the **Barcode Patterns** box.

8. Click **New Range**. This displays the New Range dialog box (Figure 8.12), where you specify the range of call numbers involved in this partial inventory. The range of holdings you specify here is compared to the barcodes you uploaded from the barcode scanner. If your barcode files cover multiple ranges, you can specify multiple ranges in this dialog box.

FIGURE 8.12



A. In the **Call No. equal to or >** box, type the beginning range. (You are only typing the classification part of the call number, as designated in MARC field 852#h.)

B. In the **To Call No. <** box, type the ending range. The ending range should be the first increment of one after the classification range you want to include. (You are only typing the classification part of the call number, as designated in MARC field 852#h.)

Example: You want to inventory all holdings with an 800 classification part. To do so, the correct entries are 800 in the **Call No. equal to or >** box and 900 in the **To Call No. <** box. This ensures that all 800 holdings up to but not including 900 are included (everything through 899.999). If you had typed 899 in the **To Call No. <** box, any 899.+ numbers would be unintentionally left out.

C. (Optional Step) Within the specified call number range, you can advise the Inventory module to compare barcodes to holdings that have a specific prefix or that have no prefix in MARC field 852#k.

- If you want to compare barcodes to holdings with or without a prefix, do not select the **Prefix** check box.
- If you want to compare barcodes to holdings that have no prefix, select the **Prefix** check box and do not type anything in the **Prefix** box.

- If you want to compare barcodes to holdings with a certain prefix, select the **Prefix** check box and type the desired prefix in the **Prefix** box.

D. Click **OK** to return to the Inventory Options window, where your range entries display in the **Call Number Ranges** box.

9. Click **Save** to save your entries in the Inventory Options window.

10. Create the barcode file. To do so:

A. On the **File** menu, click **Add Barcode File**. This displays the Open dialog box.

Note: If you return a missing item while an inventory is in progress, the item will not be reported as “missing.”

B. Navigate to the location where you stored the barcode records files.

Double-click the file name. (If you uploaded multiple barcode record files, double-click one of the files. Then repeat this step for each barcode record you uploaded.) This imports the data into the M3

Inventory module and creates a file in M3 Inventory. The file name appears in the Barcode pane in the main Inventory window.

C. The total number of barcodes imported is displayed to the right of the name of the newly created file. Click the plus (+) sign to expand the file and see the list of barcodes entered.

11. Run the **Do Inventory** procedure. To do so:

A. On the **Action** menu, click **Do Inventory**.

NOTE: If there is a discrepancy of more than 3,000 barcode entries, a message appears asking if you want to proceed. This happens when:

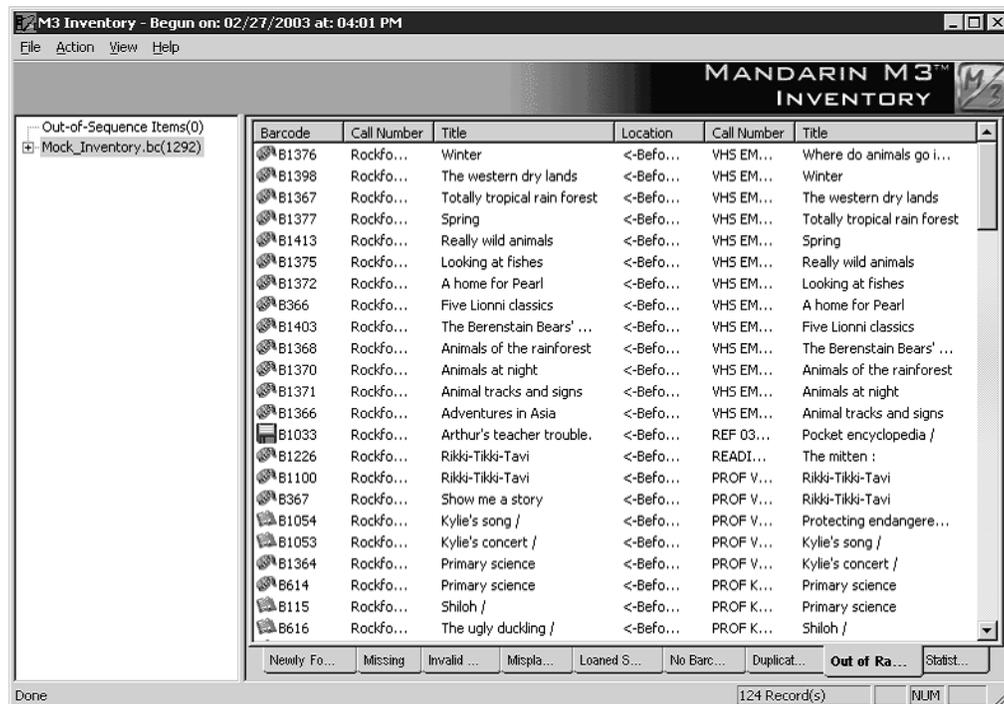
- You are trying to run a partial inventory and did not set the appropriate call number range. Make sure you have set the correct call number range in the Inventory Options window. See step 8 on page 8-11 for instructions.
- Your scanning devices may not have functioned properly or you may have missed a large number of items during the scanning process. To resolve the problem, check the barcode scanner. If it appears to be functioning properly, scan the items again.

To proceed, click **Continue**; otherwise, click **Cancel**. M3 Inventory compares the uploaded barcode data to the specified range of call numbers in the corresponding holdings data.

B. When the inventory comparison is complete, a dialog box (shown in Figure 8.7) displays with a summary of the inventory results. The results include the number of Newly Found, Missing, Invalid Barcode, Misplaced, Loaned Shelved, No Barcode, Duplicate Barcode, and Out of Range(s) Items. Details appear in the corresponding tabs in the main Inventory window. For more information on these tabs, see step 9B beginning on page 8-7.

C. Click any tab to view the corresponding information. In Figure 8.13, the **Out of Range(s)** tab is selected. This information can be printed or saved to a file, if desired. (See “Printing and Saving Results” on page 8-14.)

FIGURE 8.13



12. To place a “missing” status in the corresponding holding records of all items listed in the Missing tab:

- A. Click the **Missing** tab. Some items may display in black and some in red. Black signifies the item was listed as missing in a previous inventory. Red signifies the item was listed as missing during this inventory.
- B. On the **Action** menu, click **Mark Missing Items**. At the confirmation prompt, click **OK**. This turns all red items to black and places a status of “missing” in the corresponding holding records.

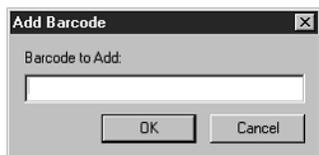
Entering Additional Barcodes

You can add more barcodes to your inventory after the scanned barcode records have been uploaded. If you have already run the **Do Inventory** procedure, you must run it again after adding the extra barcodes to update the results.

To add a barcode:

1. On the **File** menu, click **Add Barcode**. This displays the Add Barcode dialog box (Figure 8.14).

FIGURE 8.14



2. In the **Barcode to Add** box, type the barcode number (or scan the barcode), and then click **OK**. This adds the barcode to the **Out-of-Sequence Items** folder in the Barcodes pane (within the main Inventory window). Repeat for each desired barcode.
3. The total number of barcodes entered this way display to the right of the folder name. To review the list of barcodes entered, click the plus (+) sign to expand the folder.



Removing Barcodes

You can remove a barcode or barcode file at any time during the inventory process. Removing barcodes in this manner does not remove the barcodes from the M3 system or from the scanned barcode file. Instead, it removes the barcodes from the Barcode pane in the main Inventory window and, therefore, from the inventory results. If you remove barcodes after you have run the **Do Inventory** procedure, you must run **Do Inventory** again to update the inventory results.

Removing a Barcode

1. In the Barcode pane of the main Inventory window, select the barcode you want to remove.
2. On the **File** menu, click **Remove Barcode**. This removes the barcode from the inventory procedure.

Removing a Barcode File

1. In the Barcode pane of the main Inventory window, select the file you want to remove.
2. On the **File** menu, click **Remove Barcode File**. This removes the barcode file from the inventory procedure.

Printing and Saving Results

Note: To change the font size on a report, select a size in the Printed report font size box in the Inventory Options window (see Figure 8.4). The default font size is 10 point.

To print inventory results displayed in any of the tabs:

1. Click the tab containing the information to be printed.
2. On the **File** menu, click **Print Setup**. This displays the Print Setup dialog box. Change settings if desired, then click **OK**.
3. On the **File** menu, click **Print [List Type] List**. This displays the Print dialog box. Change settings if desired, then click **OK**.

To save inventory results to a file:

1. On the **File** menu, click **Save Inventory Report**. This displays the Save As dialog box.
2. Navigate to the location where you want to save the inventory report.
3. In the **File name** box, type a name for the file, or accept the default name **M3Inventory Report [current date and time]**.
4. Click **Save**. This saves the inventory report.

To save an inventory session to a file:

On the **File** menu, click **Save Session**. This saves the file as **M3Inventory Session [current date]** to the same location where you initially saved the barcode file.

OR

1. On the **File** menu, click **Save Session As**. This displays the Save As dialog box.
2. Navigate to the location where you want to save the file.
3. In the **File name** box, type a name for the file, or accept the default name **M3Inventory Session [current date]**.
4. Click **Save**. This saves the inventory session.



Exporting Barcodes

You can export the barcodes in any of the inventory tabs (except the No Barcode tab) to a file. The export function only exports the barcodes in the tab you are currently viewing.

To export barcodes:

Tip: Make sure you are viewing the specific inventory tab for the barcode export you want to perform.

1. Click the inventory tab from which you want to export barcodes. This displays the corresponding barcode list.
2. On the **File** menu, click **Export [List Type] List**. This displays the Save As dialog box.
3. Navigate to the location where you want to save the barcodes.
4. In the **File name** box, type a name for the file, or accept the default name **BarcodeFile [current date and time]**.
5. Click **Save**. This exports the barcodes.



Opening a Previous Session or Report

To open a previously saved inventory session or report:

1. On the **File** menu, click **Open Session** or **Open Inventory Report**, depending on the type of file you want to open. This displays the Open dialog box.
2. Navigate to the file you want to open, then click **Open**. This opens the file in the main Inventory window. Proceed with the inventory as desired.



Using M3 Server

This chapter describes:

- The features of the M3 Server Monitor window
- How to add and delete ports
- How to view the log file and change its size
- How to clear the log file

ABOUT M3 SERVER

M3 Server is a connectivity tool that allows the M3 system to search your Mandarin catalog database. It also acts as a usage monitoring tool, allowing administrators to view server information, port statistics, and database usage.

Monitor Window Features

To open the Mandarin M3 Server Monitor window in your Web browser:

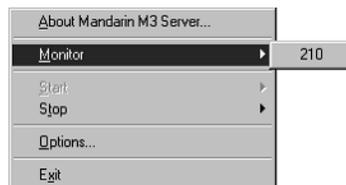
1. On the taskbar, click the **M3 Server** icon (shown in Figure 9.1).

FIGURE 9.1



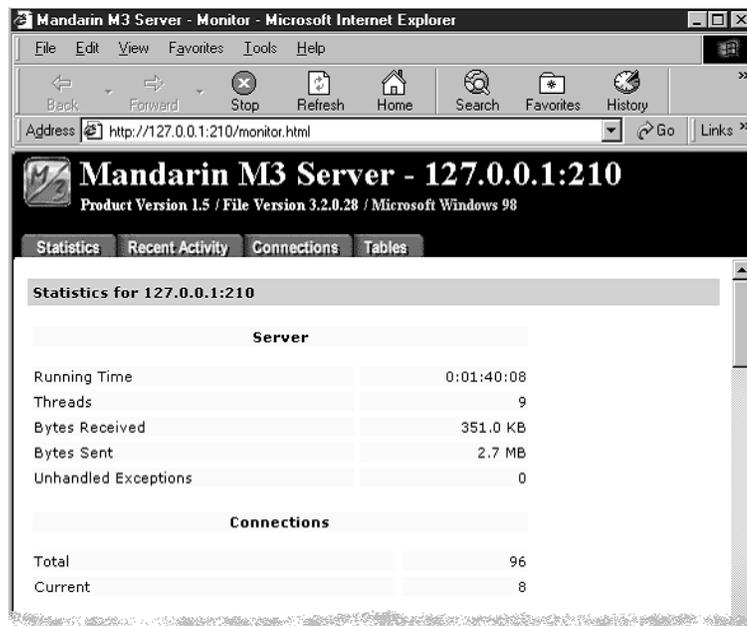
2. This displays the **M3 Server** menu (Figure 9.2). Select **Monitor**, then click the port number you want to display. For this example, 210 will be used.

FIGURE 9.2



3. This displays the Login dialog box. Type your user ID in the **Login Name** box, your password in the **Password** box, and then click **OK**. This displays the Monitor window (Figure 9.3).

FIGURE 9.3



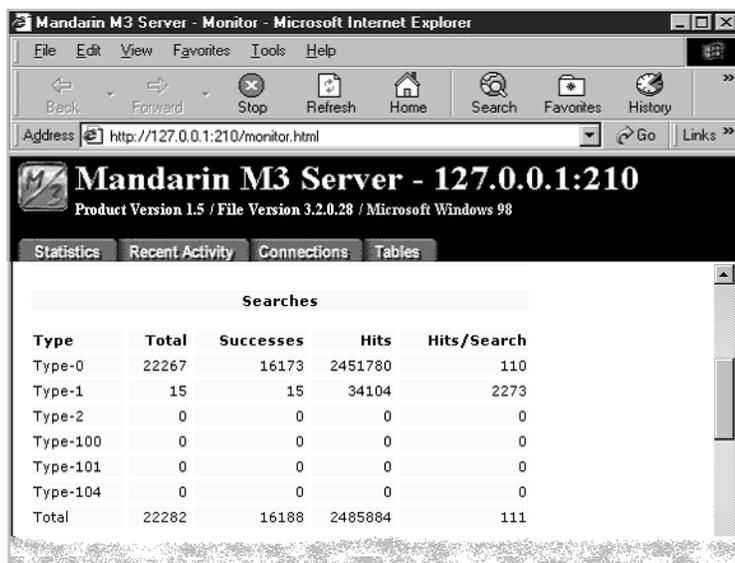
- **M3 Server header** – Displays the IP address and port number being viewed, as well as the M3 Server version number and the current operating system.
- **Selection tabs** – Use the four tabs to move between Statistics, Recent Activity, Connections, and Tables.
- **Resource Information pane** – Displays information related to the selected tab.

Statistics Tab

This tab (Figure 9.3) displays information related to the selected server, such as port details, usage statistics, and recent activity. All information described will not immediately display; use the scroll bar to navigate through the window.

- **Server** (shown in Figure 9.3) – The technical statistics on system performance for the port.
- **Running Time** – The amount of time M3 Server has been listening to the port.
- **Threads** – The number of resources dedicated to client requests.
- **Bytes Received** – The number of bytes of information received by the port.
- **Bytes Sent** – The number of bytes of information the M3 Server has sent to the clients.
- **Unhandled Exceptions** – The number of unanticipated error conditions that have been encountered with the M3 Server. On occasion, the M3 Server may shut down in an attempt to fix itself.
- **Connections** (shown in Figure 9.3) – The statistical data on connections through the port.
- **Total** – The number of connections that occurred on the port.
- **Current** – The number of connections that are currently active.

FIGURE 9.4



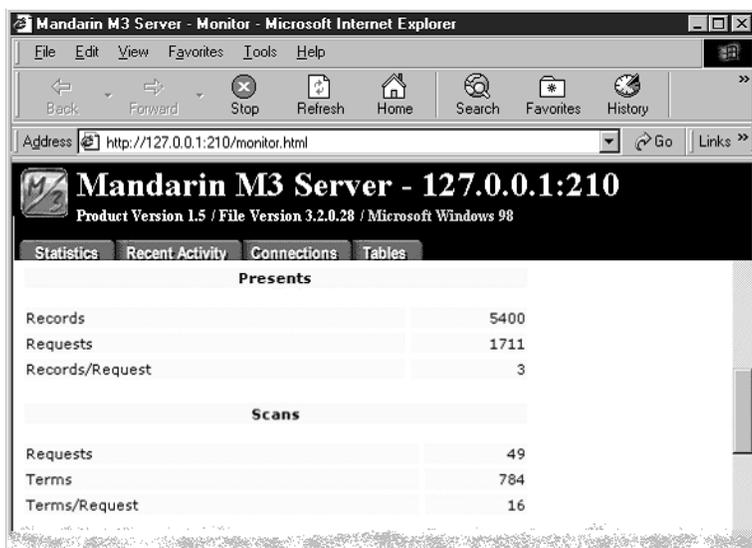
Tip: Use the scroll bar to navigate through the window.

Note: The M3 Server recognizes the client searches as Type-0, Type-1, or Type-101

Z39.50 search types. For information on the additional search types reported, refer to www.niso.org/z3950.html.

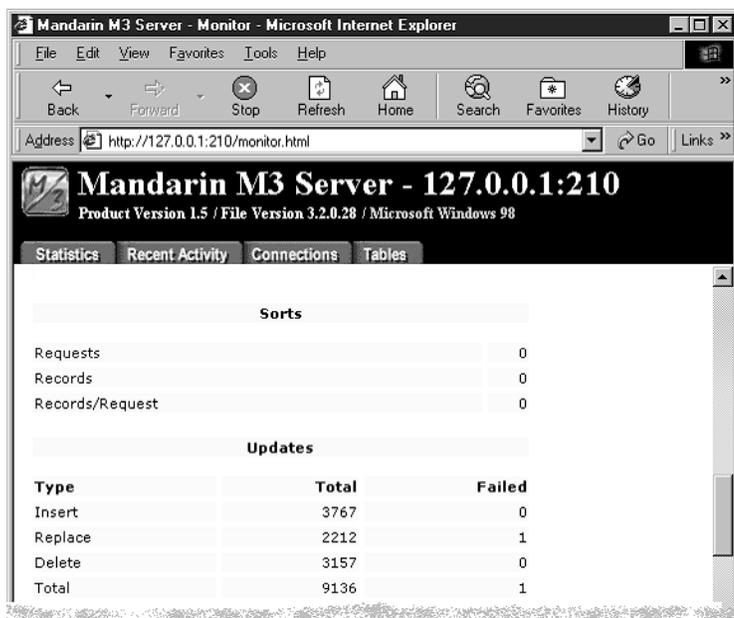
- **Searches** (shown in Figure 9.4) – The number of searches that occurred through the port.
- **Type** – The Z39.50 search type category. The M3 Clients report statistics through Type-0, Type-1, and Type-101 searches.
- **Successes** – The number of successful searches performed through the port.
- **Hits** – The number of successful hits or matches for the search.
- **Hits/Search** – The average number of hits or matches in each search performed through the port.

FIGURE 9.5



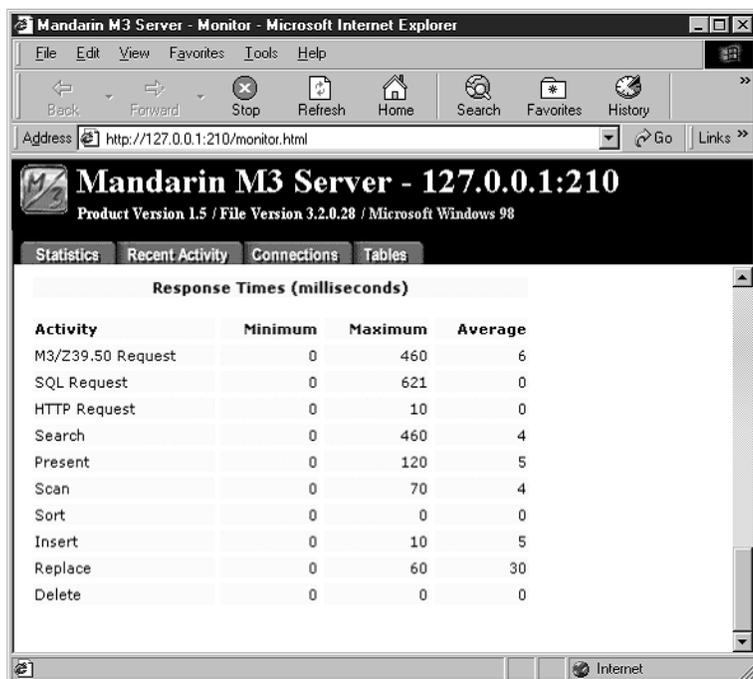
- **Presents** (shown in Figure 9.5) – The number of records the M3 Server provided in response to the client requests.
- **Records** – The number of records presented by the M3 Server.
- **Requests** – The number of requests received for records.
- **Records/Request** – The average number of records per request that occurred through the port.
- **Scans** (shown in Figure 9.5) – The number of whole field index scan requests and processes performed.
- **Requests** – The number of scan requests received.
- **Terms** – The number of entries returned.
- **Terms/Request** – The average number of entries returned per request.

FIGURE 9.6



- **Sorts** (shown in Figure 9.6) – The number of sorts requested and the number of records sorted.
- **Requests** – The number of sorts requested.
- **Records** – The number of records sorted.
- **Records/Request** – The average number of records sorted per request.
- **Updates** (shown in Figure 9.6) – The number of new, modified, and purged records. The total number of requests and failures for each Update Type is listed.
- **Insert** – The number of new records added.
- **Replace** – The number of edited records.
- **Delete** – The number of records that have been removed or purged.
- **Total** – The total number of updates that have occurred.

FIGURE 9.7



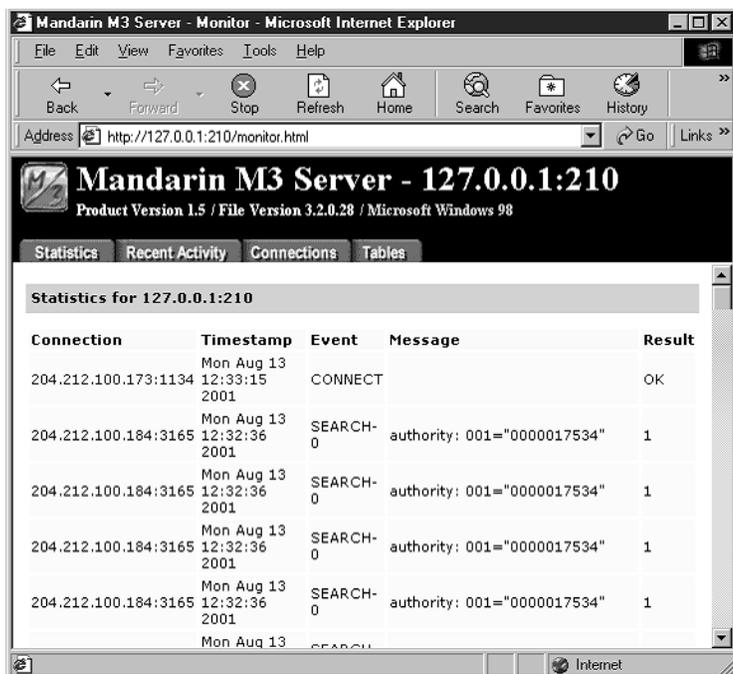
Tip: To refresh the pane, click Refresh on your browser.

- **Response Time (milliseconds)** (shown in Figure 9.7) – The response time for each activity performed by the M3 Server reported in milliseconds.
- **Activity** – The response time for each M3 Server action is monitored and reported in milliseconds.
- **Minimum** – The minimum response time for the action.
- **Maximum** – The maximum response time for the action.
- **Average** – The average response time for the action.

Recent Activity Tab

This tab (Figure 9.8) displays recent activity for the selected port, including the sites that connected, the connection date and time, the event performed, any messages, and the result. The Resource Information pane can display up to 1,024 lines of activity. All activity is written to the log file.

FIGURE 9.8

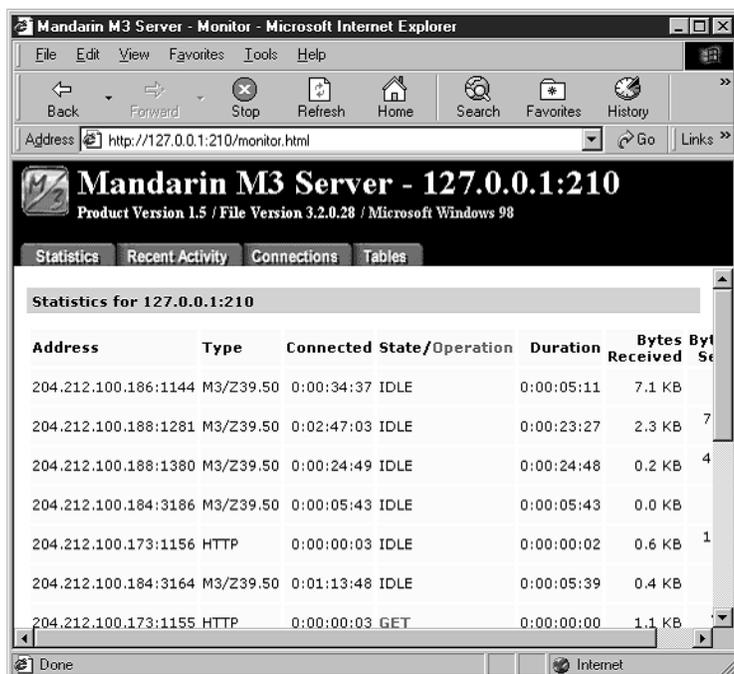


- **Connection** – The TCP/IP address and port number of each client site that has recently connected.
- **Timestamp** – The date and time of each event.
- **Event** – The occurrence types.
- **Connect** – Occurs when a client connects to a port.
- **Search** – Occurs when a client completes a search on a port. **Search** lists the database search, along with the Z39.50 query in the Message column. It also displays the number of matching records or an error number in the Result column.
- **Disconnect** – Occurs when a client disconnects from a port.
- **Message** – Additional information regarding the event.
- **Result** – The result for the event, if any.

Connections Tab

This tab (Figure 9.9) displays the current connections to the server.

FIGURE 9.9



- **Address** – The TCP/IP address and port number of each client site that is currently connected.
- **Type** – The type of connection made.
- **Connected** – The length of time the connection has been open.
- **State** – The status of the connection. States include (but are not limited to) Idle, Processing, Delivery, and Closing.
- **Operation** – The operation currently in process by the M3 Server for this connection. Operations include (but are not limited to) Initialize, Search, Present, Sort, and Scan.
- **Duration** – The length of time the connection has been in the current State or Operation.
- **Bytes Received** – The number of bytes of information received through this connection.
- **Bytes Sent** – The number of bytes of information the M3 Server has sent to this connection.

Tables Tab

This tab (Figure 9.10) displays a list of the tables being used by the M3 system.

FIGURE 9.10

Mandarin M3 Server - Monitor - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History

Address http://127.0.0.1:210/monitor.html Go Links

Mandarin M3 Server - 127.0.0.1:210

Product Version 1.5 / File Version 3.2.0.28 / Microsoft Windows 98

Statistics Recent Activity Connections Tables

Statistics for 127.0.0.1:210

Table
AUTHORITY
BARCODE
BIB-HOLDING
BIBLIOGRAPHIC
CONFIGURATION
EQUIP-HOLDING
EQUIPMENT
FIELDMAPPINGS
FIELDMAPPINGSLIST
GROUP
MESSAGE
PATRON
SESSION

Done Internet

Port Customization

M3 Server listens to a TCP/IP port for connections from client sites. The default port number is 210.

Adding a Port

Multiple port numbers are useful if your library has multiple sites and you need to track usage statistics by site.

To add a port:

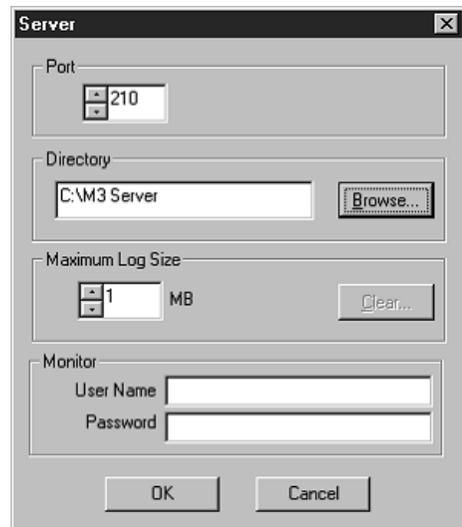
1. On the taskbar, click the **M3 Server** icon (shown in Figure 9.1).
2. On the **M3 Server** menu (Figure 9.2), click **Options**. This displays the Options dialog box (Figure 9.11).

FIGURE 9.11



3. Click **Insert**. This displays the Server dialog box (Figure 9.12).

FIGURE 9.12



4. In the **Port** box, type or select a port number.

NOTE: Port numbers can range from 1 to 65,535. Some port numbers are reserved for other TCP/IP server connections, such as 80 for WWW/HTTP and 21 for FTP.

5. In the **Directory** box, type the path to the server directory, or click **Browse** and navigate to the path. (It should default to the correct name.)
6. In the **Maximum Log Size** box, type or select a log size.
7. In the **User Name** and **Password** boxes, type the login information to be used for accessing this port.
8. When finished, click **OK**.
9. In the Options dialog box, click **Apply** to save your changes. This displays a confirmation dialog box; click **Yes** to add the port.
10. In the Options dialog box, click **OK**.

Deleting a Port

To delete a port:

1. On the taskbar, click the **M3 Server** icon (shown in Figure 9.1).
2. On the **M3 Server** menu (Figure 9.2), click **Options**. This displays the Options dialog box (Figure 9.11).
3. Select the port you want to delete, then click **Delete**.
4. In the Options dialog box, click **Apply** to save your changes. This displays a confirmation dialog box; click **Yes** to delete the port.
5. In the Options dialog box, click **OK**.

Working with the Log File

The log file contains information about the activity of every port; it contains the same information as the Resources Information pane. The default log size is 1 MB.

Viewing the Log File

To open the log file:

1. On the **File** menu, click **Exit** to close the M3 Server.
2. Using a simple text editor such as Notepad or WordPad, open the log.txt file (the default path is **C:\M3 Server**).

Modifying the Log File Size

You can increase or decrease the maximum log file size. If you do not want this file to log activity, set the size to 0 MB.

To modify the log file size:

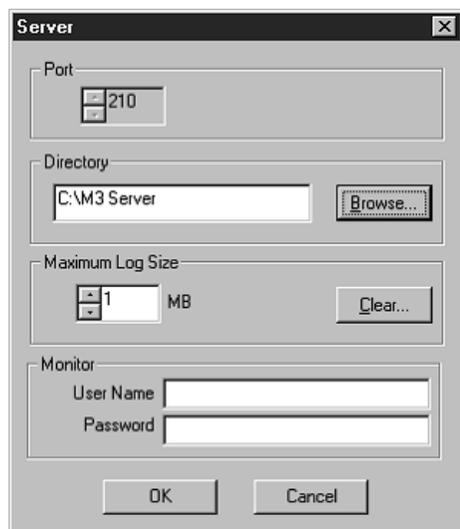
1. On the taskbar, click the **M3 Server** icon (shown in Figure 9.1).
2. On the **M3 Server** menu (Figure 9.2), click **Options**. This displays the Options dialog box (Figure 9.13).

FIGURE 9.13



3. Select the port containing the log file you want to modify, then click **Edit**. This displays the Server dialog box for this port (Figure 9.14).

FIGURE 9.14



4. In the **Maximum Log Size** box, type or select a log size.
5. When finished, click **OK**.
6. In the Options dialog box, click **Apply** to save your changes. This displays a confirmation dialog box. Click **Yes** to modify the log size now, or **No** to modify the log size the next time the server is started.
7. In the Options dialog box, click **OK**.

Clearing the Existing Log

To clear the existing log file:

1. On the taskbar, click the **M3 Server** icon (shown in Figure 9.1).
2. On the **M3 Server** menu (Figure 9.2), click **Options**. This displays the Options dialog box (Figure 9.13).
3. Select the port containing the log file you want to clear, then click **Edit**. This displays the Server dialog box for this port (Figure 9.14).
4. When finished, click **Clear**. This displays a confirmation dialog box; click **Yes** to delete the log file. (A new log file is created the next time the M3 Server is started.)
5. In the Options dialog box, click **OK**.



Appendix

A. Customizing the .ini Files

The M3 OPAC has default settings that work with most configurations. However, you may choose to customize the OPAC .ini files to work with your own system configuration preferences. This appendix describes:

- How to modify the M3Opac.ini file
- How to modify the SortFormulas.ini file
- How to modify the Summaries.ini file
- How to modify the ZNetworked.ini file

Warning:

The following information is only for the use of system administrators. If you do not possess a comprehensive understanding of configuration files, do not attempt to change the .ini files. Improper procedures could affect the OPAC. Before you proceed, it is suggested that you make a complete backup of this file.

MODIFYING THE M3OPAC.INI FILE

The M3Opac.ini file controls several general configuration aspects of the Windows M3 OPAC. To modify the M3Opac.ini file:

1. Using a simple text editor such as Notepad or WordPad, open the M3Opac.ini file (the default path is **C:\Program Files\Mandarin M3**).
2. In the M3Opac.ini file, make the desired customizations.
3. When finished, save the file. The customized configuration becomes active the next time you start the M3 OPAC.

Contents of the M3Opac.ini File

Table A.1 contains some of the common customizable fields. The left column of the table lists the information contained in the M3Opac.ini file. The right column provides an explanation of the left column entries.

NOTE: The values shown in the left column are the default settings.

TABLE A.1

Contents of M3Opac.ini file	Explanation
BULLETIN BOARD settings	
Use_External_Browser=0	Controls whether the Bulletin Board uses an external browser to link to the page to be displayed (0=disabled)
Source=LOCAL	Where LOCAL is the default bulletin board file in the M3 directory. The local default file is "BulletinBoard.html." Instead of "LOCAL," this also can be the full path to any Web

	<ul style="list-style-type: none"> • http:// • https:// • file:///
WWW HOTSPOTS settings	
Use_External_Browser=0	Controls whether the OPAC uses an external browser for any URLs listed in the Search Results window
PRINTING settings	
<Header> <ul style="list-style-type: none"> • 0=Mandarin M3 OPAC • Justification=Center <Footer> <ul style="list-style-type: none"> • 0=Page%CURRENT_PAGE • Justification=Center 	Controls elements and formats of the printed header and footer. You can use any of the following variables: The default variables are: <ul style="list-style-type: none"> • %CURRENT_PAGE - Current page. • Justification - Controls where the information will appear (Center, Left, Right). In addition, you can include any of these variables in the header and footer: <ul style="list-style-type: none"> • %APP_NAME - Current name of the program. • %SECOND - Current time's seconds. • %MINUTE - Current time's minutes. • %STANDARD_HOUR - Current time's hour in standard format (two 12-hour cycles per day). • %AM_PM_INDICATOR - Indicates before noon or after noon for STANDARD_HOUR format. (Text for this is located in the Timestamp.ini file.) • %HOUR - Current time's hour in military format (i.e., one 24-hour cycle per day). • %NUMERIC_DAY - The number of the current day of the month ranging from 1 to 31. • %ALPHA_DAY - The name of the current day of the week. (Text for these names is located in the Timestamp.ini file.) • %NUMERIC_MONTH - Current month listed numerically, from 1 (January) to 12 (December). • %ALPHA_MONTH - The name of the current month. (Text for these names is located in the Timestamp.ini file.) • %YEAR - Current year calculated by the computer and displayed as a four-digit number.

Contents of M3Opac.ini file	Explanation
<Limits> Pages=0	Controls the number of pages a patron can print. If pages=0, there is no limit to the number of pages printed. If pages is not 0, the number of pages printed is equal to that number.
REPORT settings	
<Names>	Maps language keys to language dependent report formats.
<Attribute_Set_Identifier>	Specifies the attribute set identifier of the attribute set with which a report format is to be associated.
<Format_String>	Contains the format strings that dictate the type of and layout of the data on the report. Also specifies whether the report is to be printed on the OPAC.

MODIFYING THE SORTFORMULAS.INI FILE

The SortFormulas.ini file controls the formulas by which record lists are sorted in the M3 OPAC. These formulas apply to sorting records in the Search Results Record List, Bookbag Record List, and the Open Transactions and Closed Transactions lists in the My Account tab. To modify the SortFormulas.ini file:

Note: If you installed M3 v1.1 prior to installing v1.6, your default path is



C:\Program Files
\\SIRS Mandarin\M3.

1. Using a simple text editor such as Notepad or WordPad, open the SortFormulas.ini file (the default path is C:\Program Files\Mandarin M3).
2. In the SortFormulas.ini file, make the desired customizations.
3. When finished, save the file. The customized configuration becomes active the next time you start the M3 OPAC.

Adding New Sort Formulas

If a sort formula you want to use is not listed in the SortFormulas.ini file, you can add a new sort formula. To do so:

1. In the SortFormulas.ini file, locate the heading **[sort_formula]**.
2. Highlight the entire section (down to the next **[sort_formula]** heading) to select it, then press CTRL+C. This copies the text.
3. On the line before the next **[sort_formula]** heading, press CTRL+V. This pastes the copied text.
4. In the new **serial_number=** entry, delete the number that appears after the equal (=) sign and type the number of this new sort formula (for example, if five sort formulas are currently listed, type **6**).
5. In the **0=** entry, delete the existing text and type the name of the new sort formula. In the four lines that follow, type language translations as needed (1=French, 2=Spanish, 3=German, 4=Italian).
6. Under the heading **<default>**, type any options you want to specify for this sort formula. For an explanation of available options, see the instructions under **[sort_formula] <default>** in the SortFormulas.ini file.
7. Under the heading **<key>**, type the identification number of the sort key by which you want to sort. You can select multiple keys, if desired. The available sort keys are listed under the **[sort_key]** heading in the file. To create a new sort key, see the following section, "Adding New Sort Keys."
8. When finished, save the file. The new sort formula becomes active the next time you start the M3 OPAC.

Adding New Sort Keys

If a sort key you want to use is not listed in the SortFormulas.ini file, you can add a new sort key. To do so:

1. In the SortFormulas.ini file, locate the heading **[sort_key]**.
2. Highlight the entire section (down to the next **[sort_key]** heading) to select it, then press CTRL+C. This copies the text.

3. On the line before the next **[sort_key]** heading, press CTRL+V. This pastes the copied text.
4. In the new **serial_number=** entry, delete the number that appears after the = sign and type the number of this new sort key (for example, if five sort keys are currently listed, type **6**).
5. In the **0=** entry, delete the existing text and type the name of the new sort key. In the four lines that follow, type language translations as needed (1=French, 2=Spanish, 3=German, 4=Italian).
6. Under the heading **<options>**, type any options you want to specify for this sort key. For an explanation of available options, see the instructions under **[sort_key] <options>** in the SortFormulas.ini file.
7. When finished, save the file. The new sort key becomes active the next time you start the M3 OPAC.

Automatic Sorting

The OPAC can be configured to automatically sort the Search Results Record List by a default formula. To do so:

1. In the SortFormulas.ini file, locate the formula by which you want to sort (**Call Number**, **Title**, and so on). For this example, we will use **Title**.
2. Under the heading **[sort_formula]**, locate the **[identification]** section with the entry **0=Title**. This is the **Title** sort formula.
3. In this sort formula, locate the **<default>** section. After the entry **missing_keys_last=1**, type **auto=1** on a new line.
4. Save the file, then restart the OPAC. The next time a search is conducted, the Search Results Record List will automatically sort by the specified formula.

MODIFYING THE SUMMARIES.INI FILE

In the M3 OPAC, the Summaries.ini file allows configuration of the Holdings box in the Search Results Record Details window. You can choose the fields that are listed and the order they display on screen. To modify the Summaries.ini file:

1. Using a simple text editor such as Notepad or WordPad, open the Summaries.ini file (**C:\Program Files\Mandarin M3**).
2. In the Summaries.ini file, make the desired customizations.
3. When finished, save the file. The customized configuration becomes active the next time you start the M3 OPAC.

Adding a New Field

If a field you want to display is not listed in the Summaries.ini file, you can add a new field. To do so:

1. In the Summaries.ini file, locate the heading **[summary_column]**.
2. Highlight the entire section (down to the next **[summary_column]** heading) to select it, then press CTRL+C. This copies the text.
3. On the line before the next **[summary_column]** heading, press CTRL+V. This pastes the copied text.
4. In the new **serial_number=** entry, type the number of this new summary column (for example, if 10 summary columns are currently listed, type **11**).
5. In the **0=** entry, type a new name for the column. In the four lines that follow, type language translations as needed (1=French, 2=Spanish, 3=German, 4=Italian).
6. In the **linking_identifier=** entry, type a code to reference the table storing the data (for example, **b**=bibliographic, **h**=holding, or **e**=equipment).
7. In the **<format>** section, in the **0=** entry, type the field and subfield in which the data is stored (for example, **852c**).
8. Locate the heading **[summary_layout]** for the type of linking identifier being modified (holdings, BIB1, or e (equipment)).
9. Highlight a **<column>** section (consisting of three lines) to select it, then press CTRL+C. This copies the text.
10. At the desired location, press CTRL+V. This pastes the copied text to create a new column that will display the data.
11. In the new **id=** entry, type the number you entered in step 4.
12. In the new **width=** entry, type a new column width, if needed.
13. When finished, save the file. The new field displays the next time you start the M3 OPAC.

MODIFYING THE ZNETWORKED.INI FILE

The ZNetworked.ini file controls the path to the database. To modify the ZNetworked.ini file:

1. Using a simple text editor such as Notepad or WordPad, open the ZNetworked.ini file (the default path is **C:\Program Files\Mandarin M3**).
2. In the ZNetworked.ini file, type the new database path.



3. When finished, save the file. The new database path becomes active the next time you start the M3 modules.

B. Preloaded Reports

M3 reports adhere to the following naming convention:

[Report Category]-[Type of Report][Report Criteria] For example: **Item-List(ByAuthorForSelectedLocation)**

Reports are divided into the following categories: Bib & Item Lists, Bill Letters, Booking Reports, Cards & Labels, Equipment Lists & Forms, Fine Letters, Fine Lists, Fine Notices, Overdue Letters, Overdue Lists, Overdue Notices, Patron Lists, Statistical Reports, and Transactions Lists.

Reports are coded according to the folder in which they reside: **School (S)** or **Public or Academic (P/A)**.

BIB & ITEM LISTS

Bibliographic reports (Bib-List) list bibliographic records. Item reports (Item-List) list holding records and include pertinent information from the corresponding bibliographic record. Lists are available for deleted records, but not purged records. Lists in shelflist order are sorted by call number, title, and author.

BILL LETTERS

Bill letters are sent to patrons with items in an overdue status. All bill letters allow the user to specify the number of days that items are overdue (“cut-off date”) as a criteria in creating the letters; items due more than this number of days will be billed. These letters list the overdue item and the replacement cost of the item; payment is requested. Selected bill letters allow a surcharge to be added to the cost. An example of the desired format for standard price-currency is “p9.95usd”.

BOOKING REPORTS

Booking reports list library equipment (such as overhead and slide projectors, VCRs, TVs, and so on) and items (such as reference books or any other library item) that are booked for future use. When running booking reports on equipment (Booked-Equipment), select the equipment database; when running booking reports on items (Booked-Items), select the library database.

CARDS & LABELS

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

EQUIPMENT LISTS & FORMS

Equipment lists and forms include equipment items and verification forms. Items must be in the equipment database and the equipment database must be selected in order for the items to be included in equipment reports.

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 “Selected Range Of Days,” the user can generate lists that correspond to the Fine Letter or Fine Notices that have been generated. Lists in shelflist order are sorted by call number, title, and author.

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 “Selected Range Of Days,” the user can generate lists that correspond to the Overdue Letter or Overdue Notices that have been generated. Lists in shelflist order are sorted by call number, title, and author.

OVERDUE NOTICES

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

PATRON LISTS

Patron lists provide information about patrons and are generated from the library database. The “Public or Academic” reports provide address information, and the “School” reports provide grade, homeroom, and teacher information.

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.

C. M3 Patron Record Definition

Table C.1 provides the standard M3 patron record definition.

TABLE C.1

USMARC Field Tag	Field Name
110#n	Primary Address 2 (P.O. Box)
110#o	Primary Address 3 (RR#, RFD, and so on)
111	Secondary Address (same subfields as 110)
112	Alternate Address (same subfields as 110)
113	Additional Address (same subfields as 110)
120	Contact Information
120#a	Telephone
120#b	Fax
120#c	Electronic Mail
200	Friend or Neighbor Personal Information
200#a	First Name
200#b	Middle Name
200#c	Last Name
210	Friend or Neighbor Address
210#a	Address
210#b	City
210#c	State or Province
210#d	Country
210#e	Postal or Zip Code
220	Friend or Neighbor Contact Information
220#a	Telephone
220#b	Fax
220#c	Electronic Mail

852	System Information
852#a	Location (School or Library)
852#b	Homeroom
852#c	Teacher or Advisor
852#d	Department
852#f	Patron Language
852#g	Grade Level
852#h	Year of Graduation
852#i	ILL Permission
852#j	Internet Access permission
852#k	Rental Permission
852#l	Parent or Guardian Last Name
852#m	Parent or Guardian First Name
852#o	Login Name
852#p	Barcode
852#q	Password
852#z	Note
853	Membership Information
853#a	Date Paid
853#b	Amount
853#c	Status
853#d	Member Since (Sign up date)
853#e	Expiry of Membership
990	Message
990#a	Message ISN
990#b	Message Formula
990#c	Location Assigned
991	Groups Information
991#a	Standard Group
991#b	Reserve Group
993	Statistics
993#a	Loan Count
993#b	Hold Count

993#c	Reserve Count
993#d	Renewal Count
993#e	Recall Count
993#f	ILL Count
993#g	Booking Count
993#i	Fines Count
993#j	Fines Total
993#k	Fines Forgiven Count
993#l	Fines Forgiven Total
993#m	Lost Count
993#n	Lost Total
993#o	Lost Forgiven Count
993#p	Lost Forgiven Total
993#q	Damaged Count
993#r	Damaged Total
993#s	Damaged Forgiven Count
993#t	Damaged Forgiven Total
993#u	Claimed "Never Had" Count
993#v	Claimed "Returned" Count
993#w	Claimed "Paid" Count
993#x	Current Loan Count
993#y	Current Hold Count
993#z	Current Reserve Count
993#1	Current Renewal Count
993#2	Current Fines Count
993#3	Last Subject Borrowed
993#7	Current Due Amount

D. Bibliographic Record Format for Records From Vendors

MARC records can be created in various formats. Book vendors that provide MARC records may store the field and subfield information differently than M3. In this case, records would require manipulation after importing to M3. In order to alleviate unnecessary record manipulation, users should request the MARC record profile described below.

MARC21 MICROLIF PROTOCOL

M3 uses the MARC21 MicroLIF Protocol, formerly known as USMARC MicroLIF Protocol. MicroLIF is an abbreviation for Microcomputer Library Interchange Format, a specific implementation of the MARC21 format incorporating library holding information. This format utilizes the MARC21 852 Location field for local holdings information. Each record must have one 852 field for every copy or volume purchased. The configuration of the 852 field should be as shown in Table D.1.

TABLE D.1
MARC 852 Location Field

Location	a	YPWG
Sublocation or Collection	b	Reference
Classification Part	h	398.2
Item Part	i	AND
Call Number Prefix	k	REF
Call Number Suffix	m	v.3
Copy Number	t	c.2
Barcode	p	YPWG001234
Price*	9	p19.95usd

*852#9 should contain p, followed by the decimal price, followed by the ISO currency code for the currency with which the item was paid.

NOTE: It is not acceptable for the entire call number to be stored in 852#h; it must be split into the appropriate subfields (h, i, k, m).

Libraries that catalog as part of a district or region should prepare their records in the same manner, with the exception of subfields a and b. In this case, 852#a should contain the district or region code and 852#b should contain the individual library or building code. An example of district or regional cataloging of the 852 field is shown in Table D.2.

TABLE D.2
MARC21 852 Location Field for District/Regional Cataloging

--	--	--



Holding Symbol	a	FEH*
Sublocation or Collection	b	SRS**
Classification Number	h	398.2
Cutter (Author Letters)	i	GRI
Call Number Prefix	k	REF
Call Number Suffix	m	v.3
Barcode	p	SRS0012345
Price	9	p19.95usd

*Abbreviation for Franklin-Essex-Hamilton BOCES School Library System.

**Abbreviation for Salmon River Secondary School.

NOTE: The 852 field formats shown above apply to Mandarin 2.80e and M3 users.

E. Configuring Media Type Icons

Tip: If you want icons to display in the OPAC only, they can be disabled in the Inventory module. For more information, see “Inventory pane” on page 8-3.

In order for media type icons to display in the OPAC and Inventory modules, certain codes must be entered into each bibliographic record. Table E.1 lists the appropriate icon for each type of bibliographic record along with the field, position, and codes needed in the record.

If more than one field and position are listed for a record type, enter the fields and positions in the order listed. If more than one code appears for a field and position, choose the one that is appropriate for the record.

TABLE E.1

Record Type	Icon and Image Name	Field and Position	Code and Description
Artifact		Field 000, position 6	r = Three dimensional artifact or naturally occurring object
Book		Field 000, position 6	a = Language material t = Manuscript language material
		Field 000, position 7	a = Monographic component part c = Collection d = Subunit m = Monograph/item
Photo		Field 000, position 6	k = Two dimensional nonprojectable graphic
Music Cassette		Field 000, position 6	j = Musical sound recording
Data CD		Field 007, position 00	c = Computer file
		Field 007, position 01	c = Optical disc
Movie, slide	 film.ico	Field 000, position 6	g = Projected medium
Electronic media	 floppydisk.ico	Field 000, position 6	m = Computer file
Journal	 journal.ico	Field 000, position 6	a = Language material
		Field 000, position 7	b = Serial component part s = Serial

Library kit	 kit.ico	Field 000, position 6	o = Kit p = Mixed material
Map	 map.ico	Field 000, position 6	e = Printed map f = Manuscript map
Book on tape	 microphone.ico	Field 000, position 6	i = Nonmusical sound recording
Music CD	 music.ico	Field 007, position 00	s = Sound recording
		Field 007, position 01	d = Sound disc
Sheet music	 sheetmusic.ico	Field 000, position 6	c = Printed music d = Manuscript music
Video recording	 video.ico	Field 007, position 00	v = Videorecording
Online resource	 www.ico	Field 000, position 6	m = Computer file
		Field 008, position 26	j = Online system or service

F. 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 disable 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=xxxxxxxx

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 marcredit 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.

Glossary

attributes	Fields within MARC records that can be searched. Each attribute must be attached to an
attribute set	Collection of attributes. The purpose of each attribute set is to define end user searches. The attribute set to identify search fields. See <i>also</i> attributes.
Authority Control	Controls the consistency of bibliographic records. This is achieved by managing the heading records, as well as the appropriate references from unauthorized and authorized headings authority record, cross-references.
authority record	Record in MARC format which controls the authorized forms of names, titles, and subjects. Authority Control, cross-references.
barcode	Unique identification code assigned to an item or patron. An item barcode typically appears on the barcode typically appears on the patron's library card.
block	When a message is attached to a patron or item record, it must also be indicated how the message is used in a transaction. To do so, a block type is assigned to each message when it is attached to a record. <ul style="list-style-type: none"> • blocking block – The user must select an option in the message dialog box in order to proceed. • information block – The user can bypass this block by clicking anywhere in the message dialog box. • nudge block – The first time a message with a nudge block appears, the user must click anywhere in the message dialog box in order to proceed. Each subsequent time the message appears, the user can click anywhere in the message dialog box to proceed. • privilege block – The user must type a password to bypass the message dialog box.
blocking block	See block.
Bookbag	Feature in the M3 OPAC and the optional Web Gateway that allows the patron to save items from a search session.
booking	Method of reserving an item, such as a conference room or a piece of equipment, for a future date.
Boolean operator	Operators AND, OR, and NOT, used in a search query to link two or more keywords.
Bulletin Board	Feature in the M3 OPAC that can be configured to link to a Web page or HTML file.
circulation period	Period of time that an item can be loaned to a patron in a patron group or a special reservation. The period is determined by the group the item is assigned to in the Group Editor.
claimed never had	When a patron reports to the circulation desk that the item in question was never checked out.
claimed returned	When a patron reports to the circulation desk that the item in question was previously checked out.
cross-references	In versions of M3 that support Authority Control, these appear as links in the Search Results page. They are managed under Authority Control. There are two types of cross-references: <ul style="list-style-type: none"> • “See” references lead a searcher from an unauthorized heading to an authorized heading. • “See also” references lead a searcher from an authorized heading to another related authorized heading.

delimited record	Bibliographic or patron records in which data fields are separated by a space, tab, punctuation, or other character. These records are converted to USMARC format when imported into your M3 system.
Design Mode	In M3 Circulation, the mode that allows the panes in the main Circulation window to be customized for each transaction mode. <i>See also</i> transaction modes
Enhanced Search	One of two keyword search methods available in the M3 OPAC. This method offers search results in a list format. <i>See also</i> Search.
FTP	File Transfer Protocol. The predetermined format used on the Internet to send files.
fine	Monetary penalty that accrues when an item's circulation period has expired before the item is returned. Damaged items can also generate a fine when the item is returned or claimed as lost.
fixed width record	Bibliographic or patron records in which data fields are limited to a specified number of characters. These records are converted to USMARC format when imported into your M3 system.
forgive	In M3 Circulation, an action to dismiss the fine for an overdue item. A fine can be partially forgiven.
grace period	Amount of time a loaned item can be checked out beyond the specified circulation period before a fine is assessed.
grouping	In ReportTool, a function that allows you to visually separate records that have a specific attribute.
Helping Hand	ReportTool's wizard that can be used to help you create column, row, label, and crosstab reports. This feature is explained in more detail in M3 ReportTool online Help.
history	<i>See</i> search history.
hold	Method used to set aside a library item for a patron. When an item is checked into the library, it is placed in a hold. <i>See also</i> reserve.
holding	Any item, book, videocassette, and so on, currently in the library's inventory. <i>See also</i> item.
holding record	In M3, a MARC record containing information for a specific item in the library's inventory.
ILL	Interlibrary loan. The optional Web Gateway module includes an ILL request form.
Index Browse	Feature in the M3 OPAC and the optional Web Gateway that allows a patron to review an index of records. A patron can browse a field index (such as subject, title, or author) to select a search term.
information block	<i>See</i> block.
in-house circulation	Return function designed to "return" items that were removed from their shelf locations and used at the library though not checked out.
interface language	Language in which messages and names of windows, dialog boxes, buttons, text boxes, and other objects are displayed. The interface language does not affect the language of the data in the database being used.
IP address	Numeric Internet Protocol address assigned by the Network Information Center (NIC) that identifies a computer on a network that uses TCP/IP. The IP address is a 32-bit identifier made up of four groups of numbers, such as 123.432.154.13.
item	In M3, a library holding such as a book, videocassette, or CD-ROM that has a MARC bibliographic record. Items can be added to and/or removed from an item group via the Group Editor module. A patron can check out one item group at a time, but can be included in any number of special reserve groups. <i>See also</i> group.

item group	Made up of one or more holding records, an item group is used to control the circulation of the item. A library can create an unlimited number of item groups. Typical item groups are General Patron and Special Reserve. A record can be assigned to only one item group at a time.
join	In ReportTool, a function used to establish a relationship between two tables. A join is needed when you want to retrieve information in more than one table. Each of the tables to be joined must contain a field with the same name.
keyword	Single term used in a search query.
launcher component	Component found in the Visual Catalog Search of the M3 OPAC and the optional Web Gateway. It is used to launch an application or Web page to be launched by the button. See also Visual Catalog Search.
layout screen	Design area of a report; includes section breaks that allow for placement of objects and fields.
Library Transactions Mode	Mode in M3 Circulation in which you can view and print circulation statistics for specific transactions.
loaned item	Item that has been checked out by a patron through the library's circulation system.
MARC	Machine Readable Cataloging. A MARC record includes a description of the item, the main entry, and the classification or call number. (MARC records often contain much additional information.)
message bank	In M3 Circulation, a collection of patron and item messages available for attachment to patron records.
nudge block	See block.
OPAC	Online Public Access Catalog. An online bibliography of a library collection that is available to library patrons.
patron	Person or organization that is categorized by a single patron barcode for a library's circulation system. Patrons can be assigned to one or more patron groups from patron and special reserve groups via the Group Editor. A patron can be assigned to one or more patron groups in any number of special reserve groups. See also patron group, special reserve group.
patron group	Made up of one or more patron records, a patron group is used to specify the circulation parameters for a group of patrons. A library can establish several patron groups such as General Patron, Library Volunteer, and Special Reserve. A library can create an unlimited number of patron groups. A patron can only be assigned to one patron group at a time.
phrase search quotes	In searching, the use of quotation marks (“ ”) to enclose keywords in order to only find instances where the keywords appear together. For example, the keywords “ Greek islands ” find only occurrences of the two words together, and not “ Greek ” and “ islands ”.
placeholder	Identifies the position on a report template where database fields subsequently will be placed. By using placeholders in a template, you can define the position of data fields printed on the report. Placeholders can be created only in a template. However, a report based on a template will not print if a placeholder is not defined. Placeholders can be used as markers for database, sort, and group fields, as well as in form design. For more detail in the M3 ReportTool online Help.
port	Interface on a computer to which a device is connected. In TCP/IP networks, a port is the number assigned to a device. Port numbers identify the type of data being transferred by the port. For example, port 210 is used for M3.
privilege block	See block.
purge records	This command removes all records marked for deletion from the M3 system. Purged records are permanently deleted.

query component	Component found in the Visual Catalog Search of the M3 OPAC and the optional Web Gateway search query linked to the button. When a query button is clicked, the search query is sent to the Visual Catalog Search.
registry service	Provides the system administrator with an inside view into the workings of the server. It allows access and perform system maintenance. It is not related to the Windows registry.
report footer	Summary information at the end of a report, such as grand totals and charts.
report header	Information at the beginning of a report, such as the report title and charts.
reserve	Method used to set aside a library item for a patron. This method is used when the item is checked out and becomes available, this status changes to hold. <i>See also</i> hold.
Reset	Feature in the M3 OPAC that clears the search history for the current search session. The search history resets automatically after a predetermined idle time. <i>See also</i> search history.
search history	Feature in the M3 OPAC that allows the patron to return to an earlier Enhanced Search in the M3 OPAC.
search query	Grouping of keywords and Boolean operators submitted to search a database.
See, See also	<i>See</i> cross-references.
Shelf Browse	Feature in the M3 OPAC and the optional Web Gateway that allows a patron to view records adjacent to a selected record. This is similar to looking at items to the left or right of a selected item on a shelf.
SMTP server	Simple Mail Transfer Protocol. A protocol for sending e-mail messages between servers. Gateway to an e-mail server.
special reserve group	Typically, a temporary group of patrons and items established to accommodate unusual circumstances. For example, a library can create a four-week special reserve group to restrict certain science books to in-library use by students. A library can create an unlimited number of special reserve groups, and patrons and items can be assigned to special reserve groups. Special reserve group permissions override item group permissions.
Standard Search	One of two keyword search methods available in the M3 OPAC. This basic method is meant to be used in conjunction with <i>also</i> Enhanced Search.
system variable	Data available for use in a report based on the current date, time, or page number.
table check return	<i>See</i> in-house circulation.
TCP/IP	Transmission Control Protocol/Internet Protocol. The standard format for transmitting data over a network.
template	Provides layout and format information to be used when creating bibliographic, holding, and accession records. See also <i>ReportTool</i> online Help.
temporary items	When creating a new holding record, the record can be designated as temporary. This means that the item is returned, and the barcode can be reused. Some librarians use this method to manage periodicals. Temporary items can be designated as temporary by using the <i>Temporary</i> text field. Field created with <i>ReportTool</i> and made of up alpha or numeric characters.



topic component	Component found in the Visual Catalog Search of the M3 OPAC and the optional Web Gateway sub-menu of additional buttons. The sub-menus consist of query buttons that launch data from different software applications. See also Visual Catalog Search.
transaction modes	Types of transactions that can be conducted in M3 Circulation. The transaction modes are defined by their Status. See also Library Transactions Mode.
truncation	In searching, the use of an asterisk (*) character to designate one or more unspecified characters. For example, the keyword farm* finds all terms beginning with farm: farmer, farming, farm . The keyword *forest* finds all terms that include forest: deforestation, reforestation , and so on.
use attributes	See attribute set.
Visual Catalog Search	Easy point-and-click graphical search method in the M3 OPAC and the optional Web Gateway behind a graphical interface where topic buttons are connected to query buttons, which are also graphical buttons can also be configured to launch software applications. See also topic component.
Web gateway	Interface that allows a library to place its OPAC on the World Wide Web. Patrons use Web Gateway to access the catalog database.
wildcard	In searching, the use of a question mark character (?) to designate one or more unspecified characters. The keyword wom?n finds woman, women , and so on.



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