



Mandarin M5 Tips & Tutorial™

How to use Mandarin M5
2017

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Table of Contents

Introduction3
How to create collections.....4
Conducting an Inventory5
Contacts & Credits 14



Introduction

Thank you for your interest in the Mandarin M5 Library Automation System. We have prepared this set of instructions to help you better understand and use M5.

You can use this guide to familiarize yourself with specific M5 activities. This guide is not intended to replace our Users Guide as it only briefly touches on many of M5's capabilities.

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

How to create collections





Conducting an Inventory

OVERVIEW

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

With the Inventory module, you can:

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

Conducting an inventory with M5 requires a few basic steps:

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

STARTING INVENTORY

Launch Mandarin M5

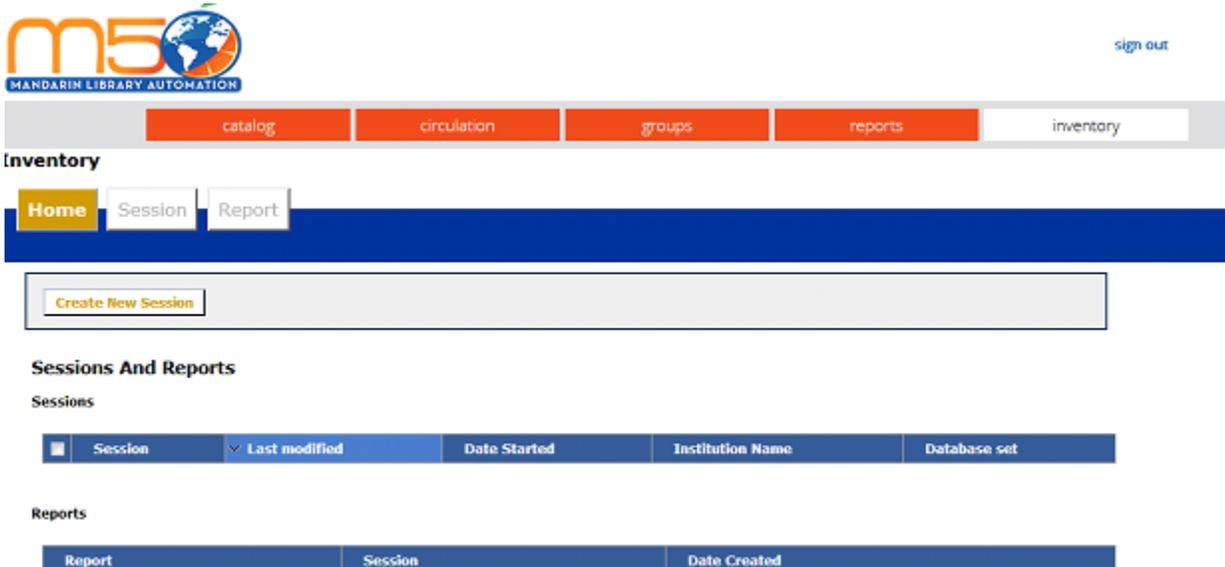
Sign in as a Librarian

Select the **inventory tab**



The screenshot shows the 'My Library' dashboard. At the top, there is a navigation bar with 'sign out', 'my account', 'my lists', 'reset', and a home icon. Below this is a secondary navigation bar with 'catalog', 'circulation', 'groups', 'reports', and 'inventory'. A search bar is present with 'select library' and 'subject' dropdowns, a search input field, and a search icon. Below the search bar are 'reading program' and 'record fetch' buttons. Further down are 'enhanced search', 'visual search', 'search results', 'bulletin board', 'web search', 'schedule', and 'news' buttons. The main content area features three columns: 'visual search' with icons for chemistry, space travel, molecular science, and government; 'recommended reading'; and 'gallery'.

Click on **Create New Session**



The screenshot shows the 'Inventory' page. At the top, there is a navigation bar with 'catalog', 'circulation', 'groups', 'reports', and 'inventory'. Below this is a secondary navigation bar with 'Home', 'Session', and 'Report' buttons. A 'Create New Session' button is prominently displayed. Below this are sections for 'Sessions And Reports', 'Sessions', and 'Reports'. The 'Sessions' section contains a table with columns: Session, Last modified, Date Started, Institution Name, and Database set. The 'Reports' section contains a table with columns: Report, Session, and Date Created.

In this example, we will use the Database Set, Furniture.

Fill in, **Name:** of the session.

Fill in, **Date Started:**

Fill in, **Institution Name:**

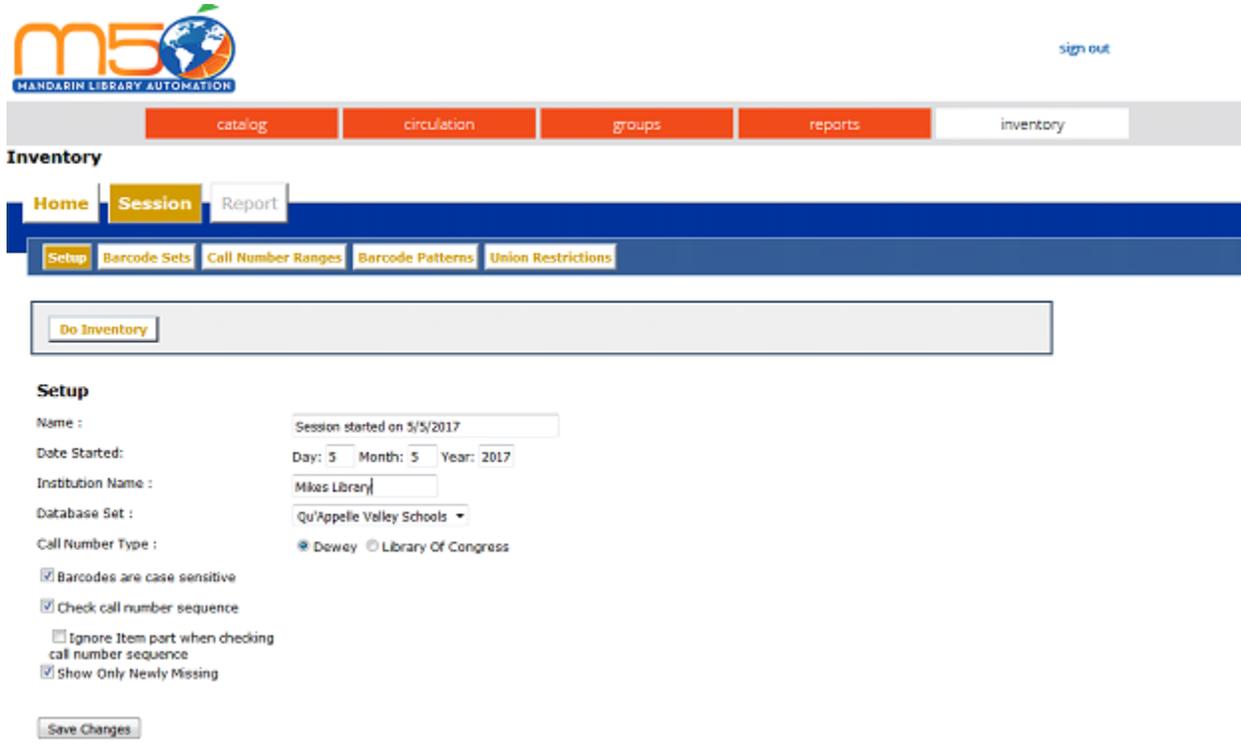
Change, **Database Set** to **Furniture**

Fill in, **Call Number Type**, by clicking on the **Dewey** radio button.

Uncheck, **Barcodes are case sensitive**

Uncheck, **Check call number sequence**

Click on, **Save Changes.**



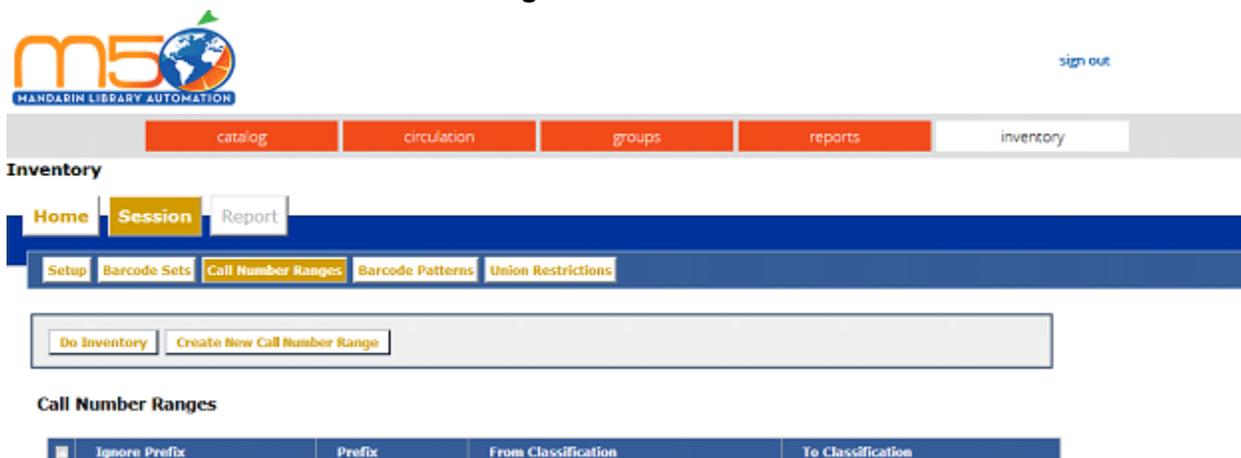
The screenshot shows the M5 Inventory Setup page. At the top, there is a navigation bar with tabs for 'catalog', 'circulation', 'groups', 'reports', and 'inventory'. Below this is a sub-navigation bar with 'Home', 'Session', and 'Report' tabs. Under 'Session', there are sub-tabs for 'Setup', 'Barcode Sets', 'Call Number Ranges', 'Barcode Patterns', and 'Union Restrictions'. A 'Do Inventory' button is visible. The 'Setup' section contains the following fields and options:

- Name: Session started on 5/5/2017
- Date Started: Day: 5, Month: 5, Year: 2017
- Institution Name: Mikes Library
- Database Set: Qu'Appelle Valley Schools
- Call Number Type: Dewey Library Of Congress
- Barcodes are case sensitive
- Check call number sequence
- Ignore Item part when checking call number sequence
- Show Only Newly Missing

A 'Save Changes' button is located at the bottom of the setup section.

Click on **Call Number Ranges.**

Click on **Create New Call Number Range**



The screenshot shows the M5 Call Number Ranges page. It features the same navigation structure as the previous page. The 'Call Number Ranges' sub-tab is active. Below the sub-tabs, there are 'Do Inventory' and 'Create New Call Number Range' buttons. The 'Call Number Ranges' section has a table with the following columns:

<input type="checkbox"/>	Ignore Prefix	Prefix	From Classification	To Classification
--------------------------	---------------	--------	---------------------	-------------------

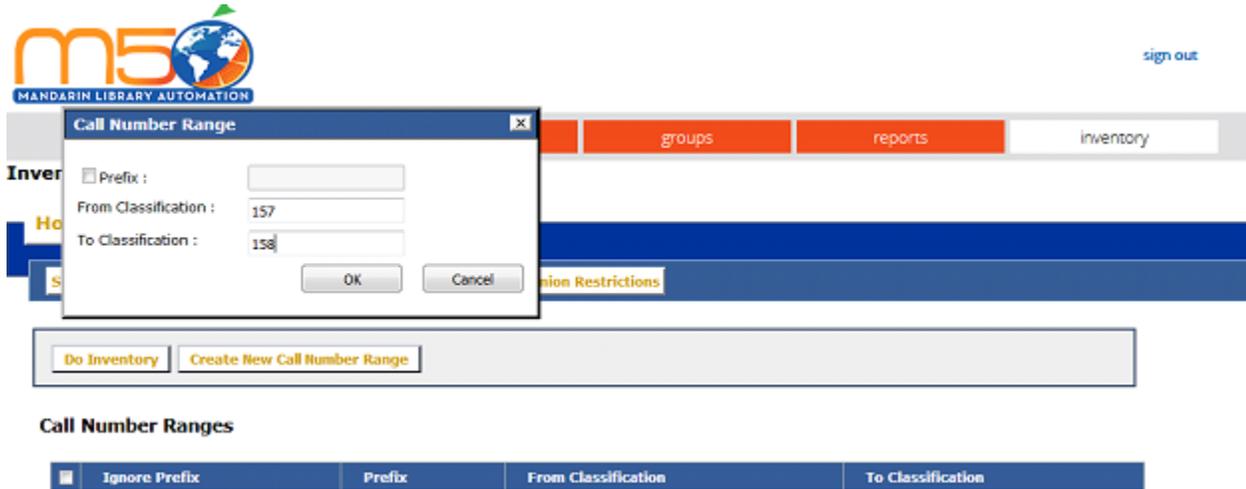
In the Example below, we want to limit our search to "157". Type in,

From Classification: **157**

To Classification: **158** (This is a "Less than" number)

Click, **OK.**

Inventory will only do Room 157.



Call Number Range

Prefix :

From Classification : 157

To Classification : 158

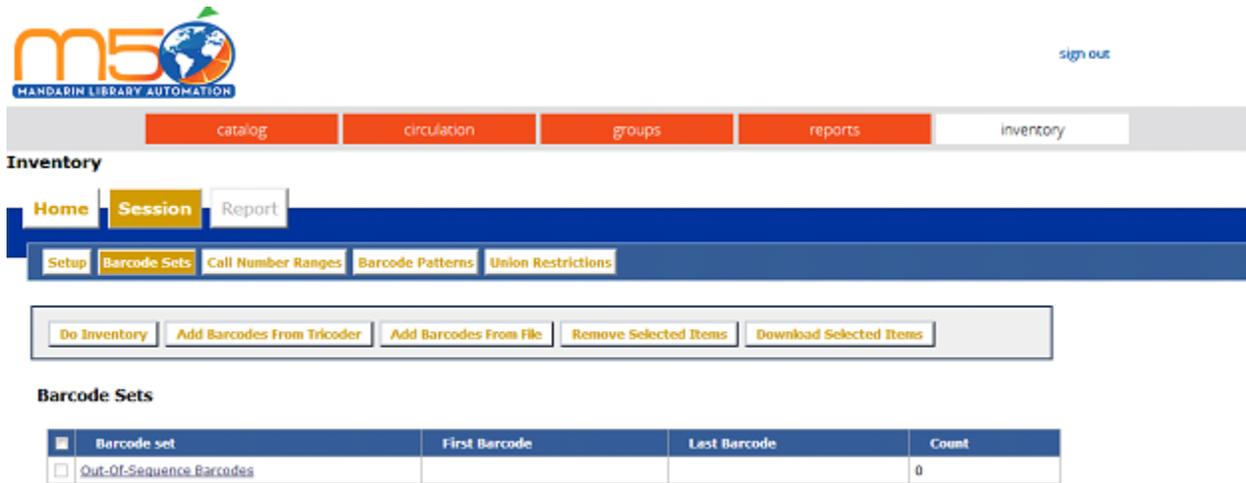
OK Cancel

Do Inventory Create New Call Number Range

Call Number Ranges

<input type="checkbox"/>	Ignore Prefix	Prefix	From Classification	To Classification
--------------------------	---------------	--------	---------------------	-------------------

Click on **Barcode Sets**
 Click on **Add Barcodes From File**.



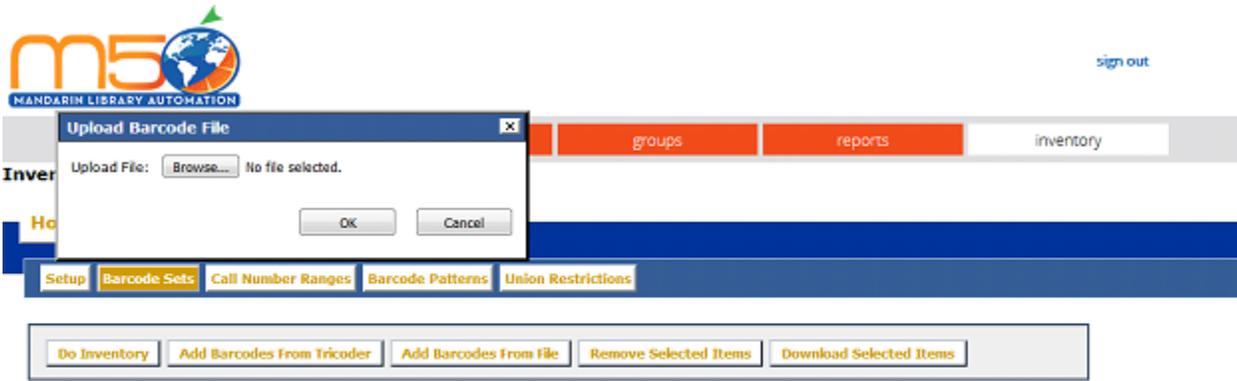
Barcode Sets

Do Inventory Add Barcodes From Tricoder Add Barcodes From File Remove Selected Items Download Selected Items

<input type="checkbox"/>	Barcode set	First Barcode	Last Barcode	Count
<input type="checkbox"/>	Out-Of-Sequence Barcodes			0

Note: The barcode file can come from a portable scanner (like the Worthington Tricoder) you will upload into a notepad file or you can create a manually created notepad file by entering the barcodes manually.

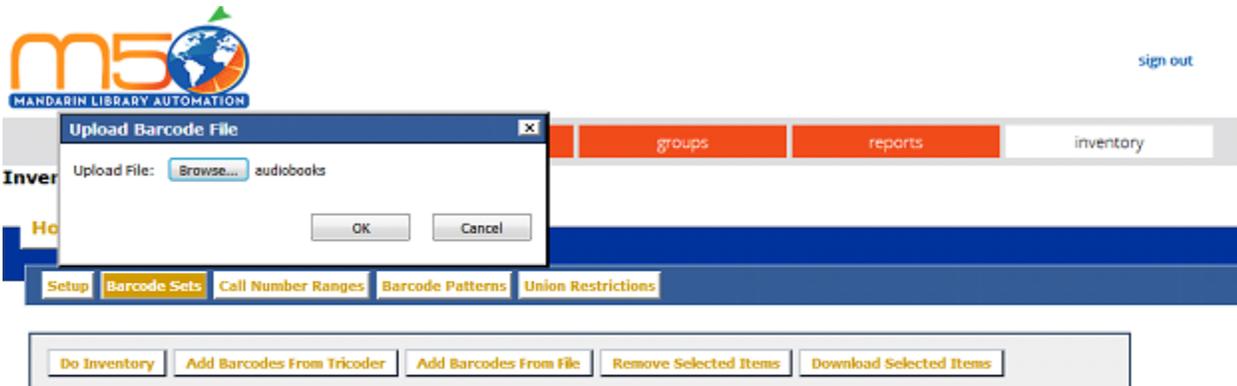
Click "Browse" and Path your way to the barcode file. Click on **Open**.



Barcode Sets

<input type="checkbox"/>	Barcode set	First Barcode	Last Barcode	Count
<input type="checkbox"/>	Out-Of-Sequence Barcodes			0

Click on **OK**.



Barcode Sets

<input type="checkbox"/>	Barcode set	First Barcode	Last Barcode	Count
<input type="checkbox"/>	Out-Of-Sequence Barcodes			0

The barcodes will be uploaded. Click on **OK**.



[sign out](#)

groups reports **inventory**

This is the imported barcode set. To confirm the import, please click OK. To discard it, click Cancel.

Add to Out-Of-Sequence Barcodes

Name :

Add Barcode :

Remove Selected Items

<input type="checkbox"/>	Barcode
<input type="checkbox"/>	82728
<input type="checkbox"/>	29383
<input type="checkbox"/>	82726
<input type="checkbox"/>	92827

Home Selected Items Download Selected Items

Last Barcode	Count
	0

Click on, **Do Inventory**
 When "Do Inventory" finishes, there will summary



[sign out](#)

catalog circulation groups reports **inventory**

Inventory

Home Session **Report**

Newly Found Missing **Invalid Barcodes** Misplaced Loaned Shelved No Barcode Duplicate Barcode Out Of Range **Statistics**

Statistics

Session : Session started on 5/5/2017
 Institution Name : Mikes Library
 Date Created : 5/5/2017 10:20:27 AM

Call Number Ranges :

Number of scanned barcodes : 4
 Number of bibliographic records : 3
 Average number of holdings per bibliographic record : 1
 Number of holdings in database : 3
 Number of holdings in selected range(s) : 3
 Percentage of database inventoried : 100%
 Number of items previously marked as missing : 0
 Percentage of previously missing items : 0%
 Number of items with prices associated : 0
 Cost of previously missing items : 0
 Number of newly missing items : 3
 Percentage of newly missing items : 100%
 Cost of newly missing items : 0
 Number of newly found items : 0
 Number of missing items : 3
 Number of invalid barcodes : 4
 Number of misplaced items : 0
 Number of loaned, shelved items : 0
 Number of holding records without a barcode : 0
 Number of duplicate barcodes : 0
 Number of out of range items : 0
 Number of items on loan : 0



Conducting an Inventory

If you click the “home” button you will see the screen below and in the reports section Click on, the Report you want to open, below it is “**Report Created...**”

sign out

catalog circulation groups reports inventory

Inventory

Home Session Report

Create New Session Remove Selected Items

Sessions And Reports

Sessions

Session	Last modified	Date Started	Institution Name	Database set
Session started on 5/5/2017	5/5/2017 10:19:20 AM	5/5/2017 12:00:00 AM	Mikes Library	Qu'Appelle Valley Schools

Reports

Report	Session	Date Created
Report Created on 5/5/2017 10:28:09 AM	Session started on 5/5/2017	5/5/2017 10:28:09 AM

Note: The report will show you an inventory list for the specific room.

When you open the Report, you will first see “**Statistics.**”



Conducting an Inventory



Contacts & Credits

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