Mandarin M5™

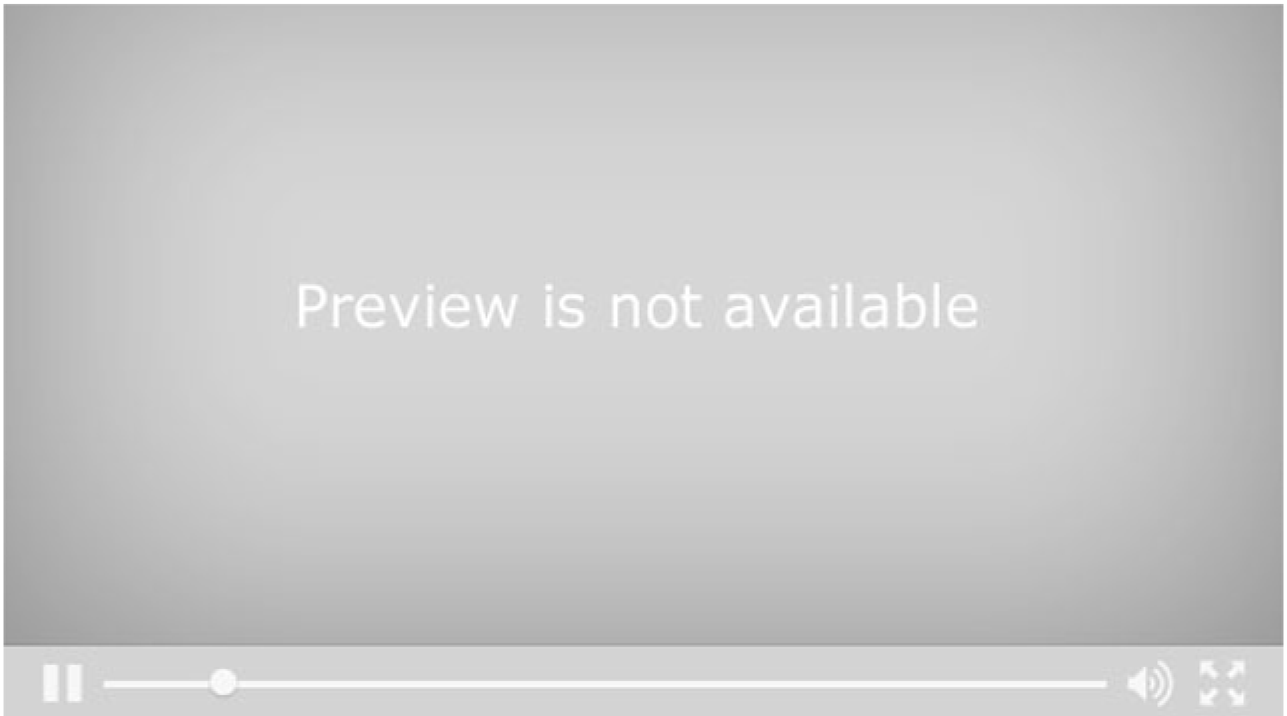
Users guide ver 5.7
2020

Last Update: 01/29/2020

Table of Contents

Mandarin M5 Overview

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



It brings to the accessibility of the web the flexibility and maturity of Mandarin's long history of providing quality, affordable integrated library systems.

Built *with* librarians, *for* librarians.

Introduction

Mandarin M5 allows access to library resources through any computer with an Internet connection. The simple interface is easy to learn, and the appearance and features can be tailored for each library.

Optional modules and services offered by Mandarin allow libraries to customize their systems to meet their individual needs.

M5 also supports Unicode, which allows librarians and users to catalog and search their collections in any language.

For single sites or large library systems, M5 can help lower costs and save time with one-point installation, maintenance and updates.

The M5 Interface

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

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

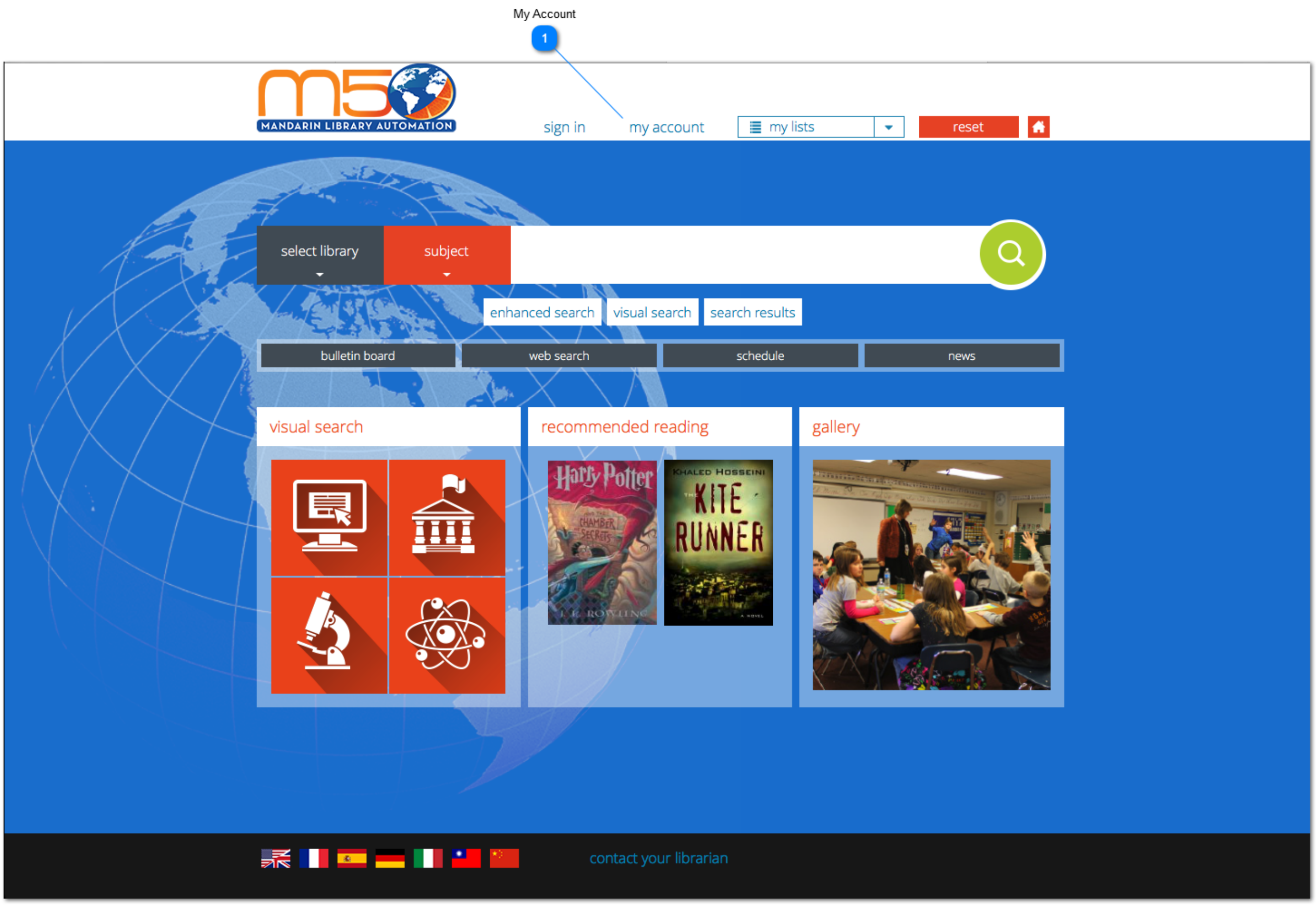
The Mandarin M5 interface has two modes: Patron Mode and Librarian Mode.

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

Patron Mode **Librarian Mode**

Patron Mode

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



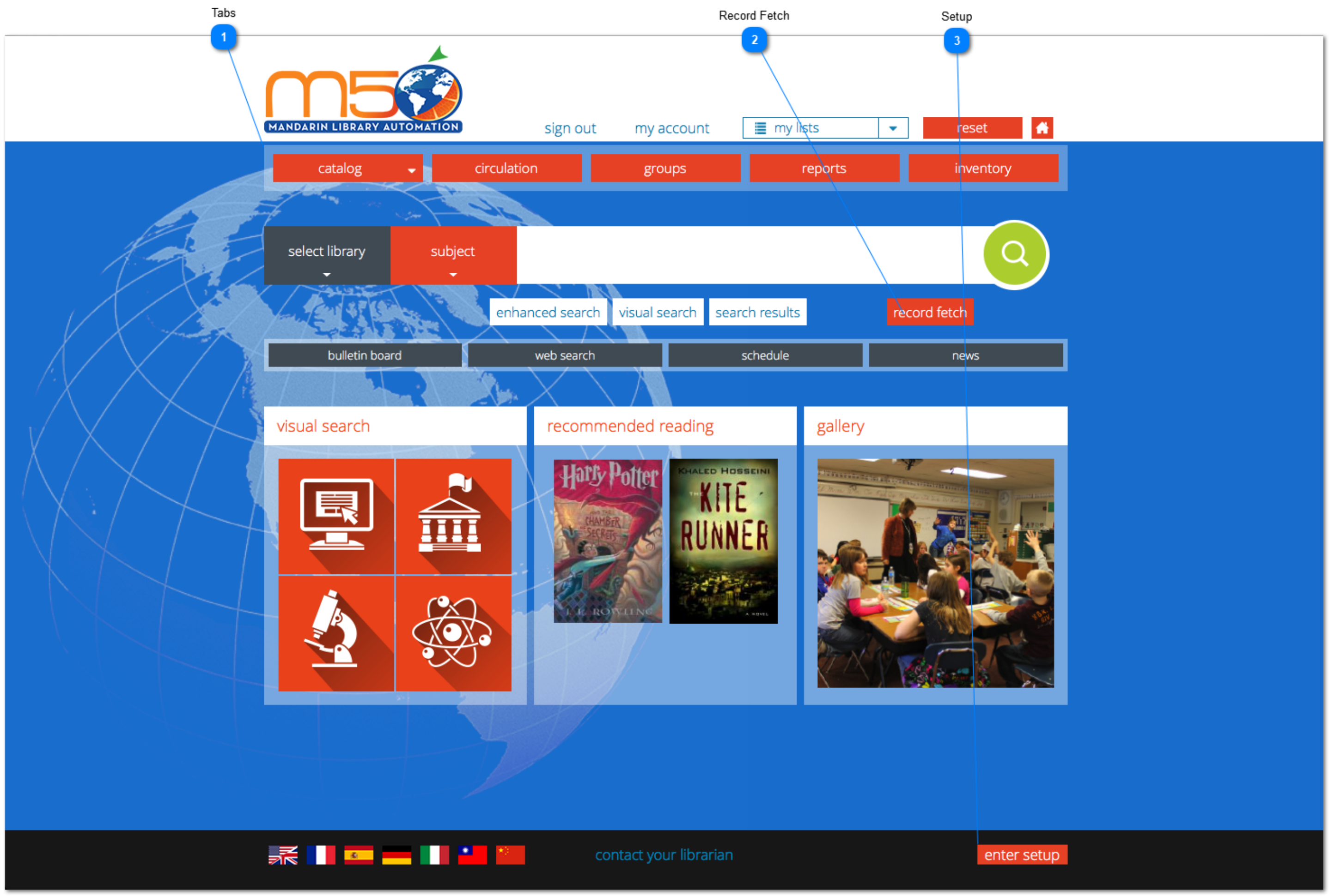
1 My Account

my account

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

Librarian Mode

When someone signs in to Mandarin M5 with librarian or administrator rights, M5 displays the tabs to all library functions that person has permission to access. It also display the Record Fetch button and the Setup button.

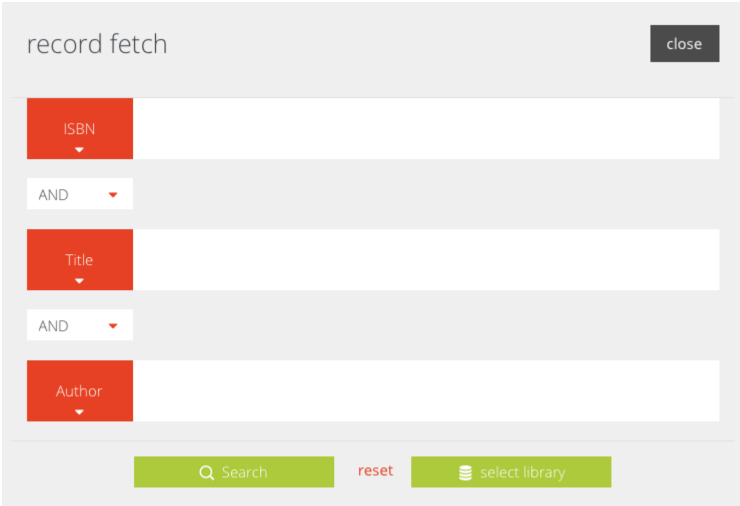


1 Tabs

To all library functions

2 Record Fetch

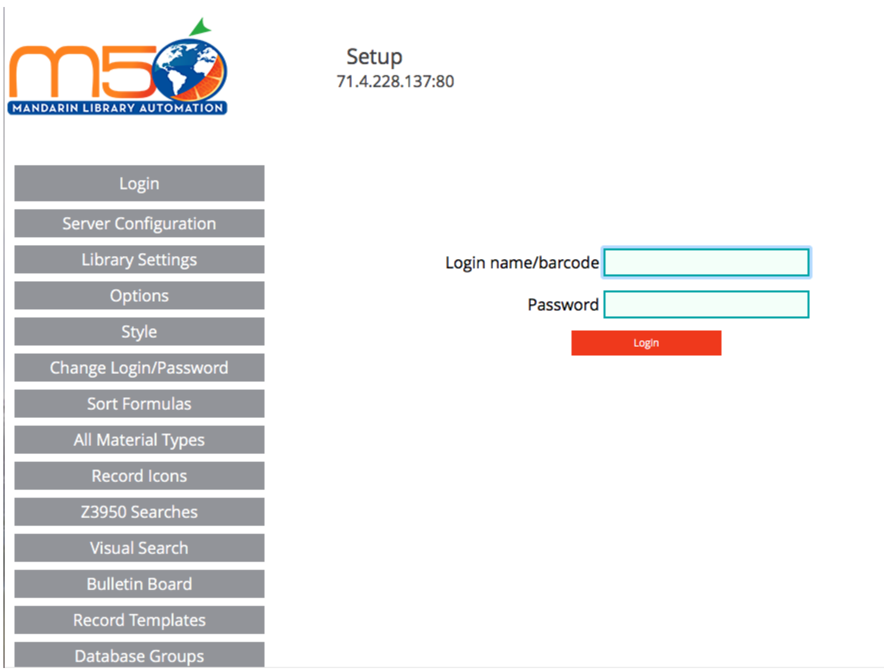
This will display the Record Fetch dialog box



3 Setup

enter setup

This button display the setup screen



Catalog (OPAC) Customizations

The following customizations can be made to suit the needs of your specific library.

- Background: There are currently five background options to choose from: World (default), Blue, Mandarin, Purple or Titanium.

- Logo/Title/Subtitle: You may upload an image file (jpg or png) to visually represent your library throughout the M5 application. A title and/or subtitle may also be included to include the name of your library, tagline and/or brief library information like operating hours.

- Reading Programs/Levels: Records can be searched and filtered by the following Reading Programs: Lexile, Fountas & Pinnell, Accelerated Reader, and Scholastic Reading Counts. A slider below the standard search bar enables patrons to pre-filter their search by confining results to a certain range – this slider can be turned on or off for each reading program, or altogether. Similarly, the post-query filters enable patrons to narrow their search by specific Reading Programs and/or ranges. These can also be turned off for each reading program, or altogether.

- Kids Catalog: The Kids Catalog has been designed specifically for younger patrons. A link to the Kids Catalog can be added or removed from the top-right corner of the general Catalog homepage.

- Bulletin Board: The Bulletin Board refers to the four grey buttons that are displayed below the standard search bar. These icons can be renamed and used to link to any external resource or removed entirely.

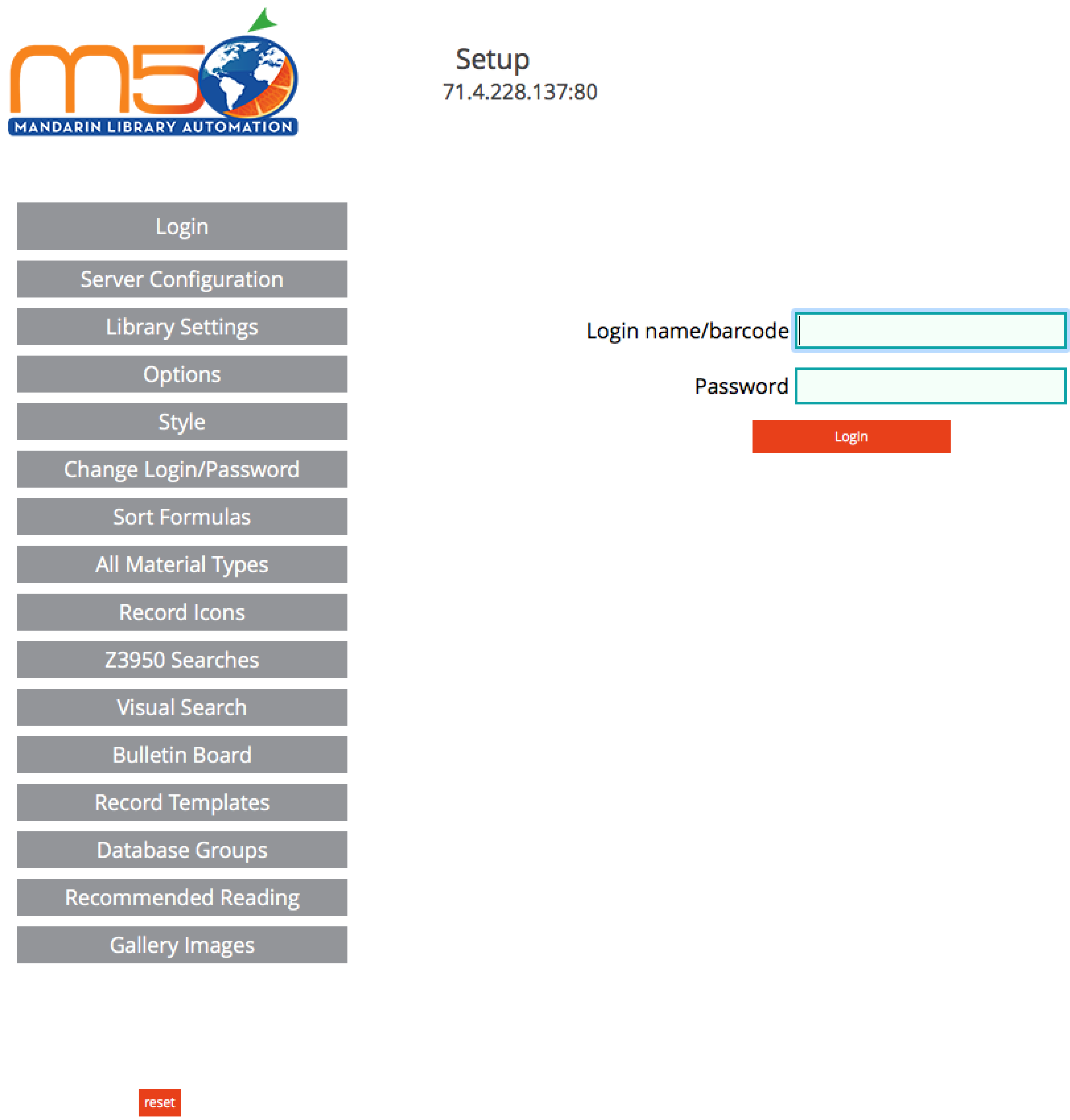
- Visual Search: Visual Search is a graphical interface that allows patrons to narrow a search from a topic to sub-topics, ultimately prompting a search. This search can link to an external webpage (like a third-party database) or generate search results from within the catalog itself. Please note, visual icons and search results are customizable. The Visual Search widget can also be renamed or removed from the page entirely.

- Recommended Reading: The Recommended Reading widget enables admin users to highlight items from the catalog directly on the homepage. Items can be added by ISBN, which automatically populates title, author and call number information, as well as the associated cover image (if available). The Recommended Reading widget can also be renamed or removed from the page entirely.

- Gallery: The Gallery widget can be used to display images, and can be renamed or removed from the page entirely.

Configuration

Setup Page / Installation



Setting up your M5 setup

Your M5 setup page is where you can do much of the customization that makes your M5 installation work best for your library.

To get to your setup page, log into M5 as an administrator. You will see a button for Enter Setup on the lower right corner. Clicking this brings you to a login page for Setup. Log in with your login and password. The default is ***admin / boca raton.*** This is a separate login and password from your M5 logins.

After logging in, you'll be at the **Library Settings** section of Setup. Select the **Server Configuration section** to see the IP address and port number of your database, plus any special keys that indicate a location within a union catalog, if appropriate.

When you leave Setup

If you have made any changes in Setup, you need to open a new session of M5 to be able to see the changes.

Click on the Setup button at the top of the left menu. This brings you to a page that shows the installations created for your library. There might be several installations, or you might just see the Default.

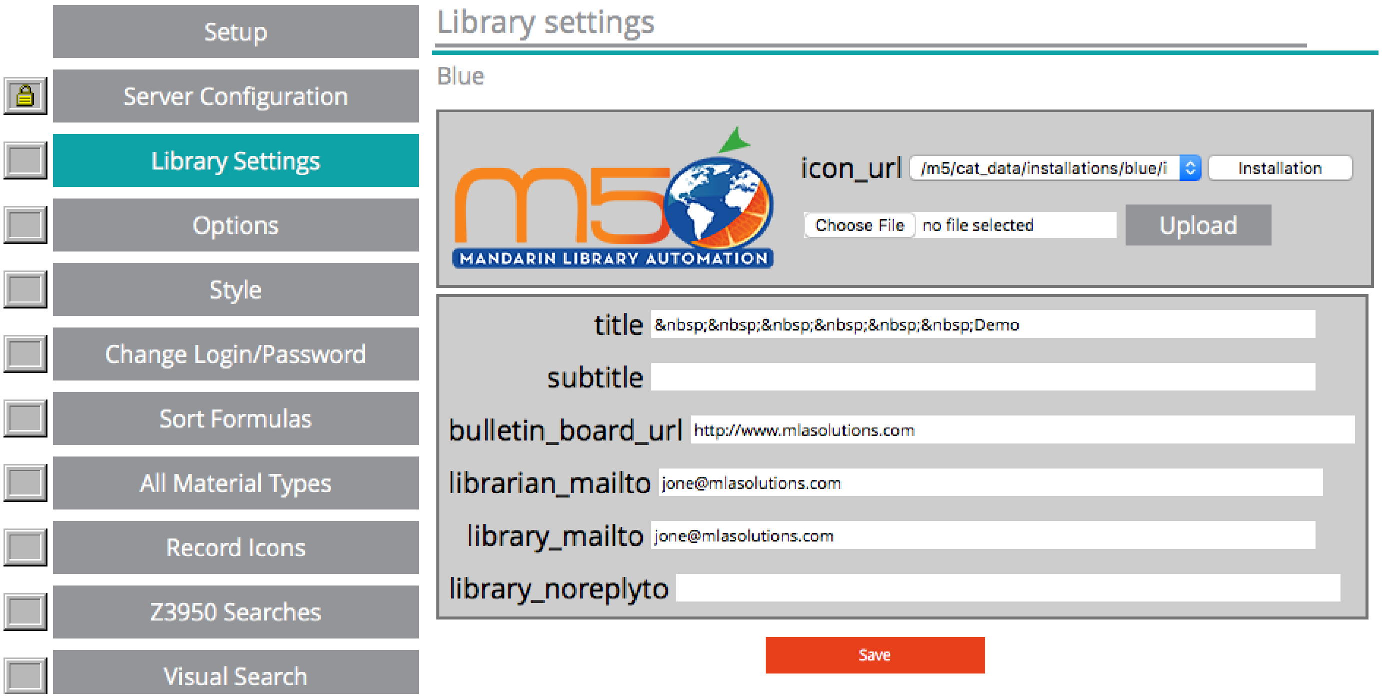
You can create other installations, which can different ways of accessing the program and your data. One example for using separate installations would be if you have a children's section and an adult section in your library. You might want the pictures and the links on the OPAC for the children's section to be different from the OPAC for the adult section. Or you might find that it is useful to have different installations for searching your collection and links from within the library and from outside the library or from home.

Notice that there is a link that shows you what that actual URL is. You can use that to copy the actual URL to a note or an email, or for creating the link from the school or community website.

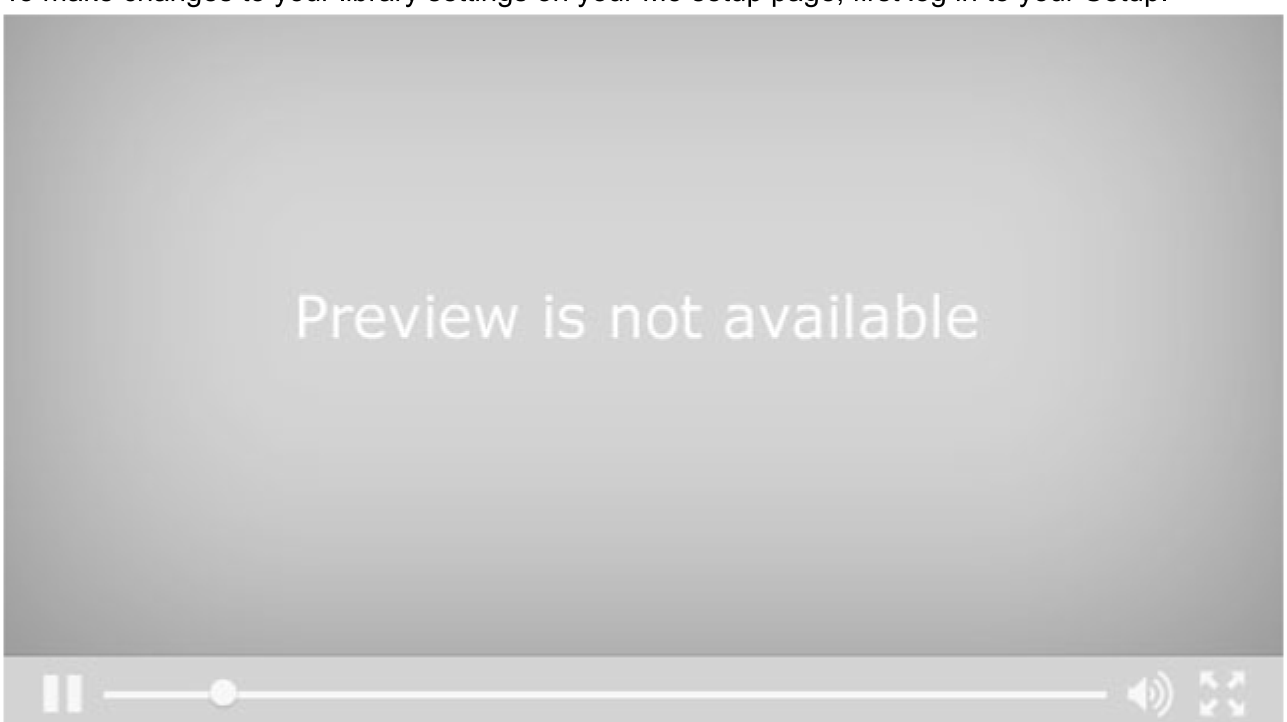
To be able see and modify the settings for any installation from this page, you must click on the Edit button in line with the installation name. Clicking on it brings you to the server configuration page and makes the rest of the buttons live.

Clicking on the name of the installation opens a new session in a new window at that URL.

Library Settings

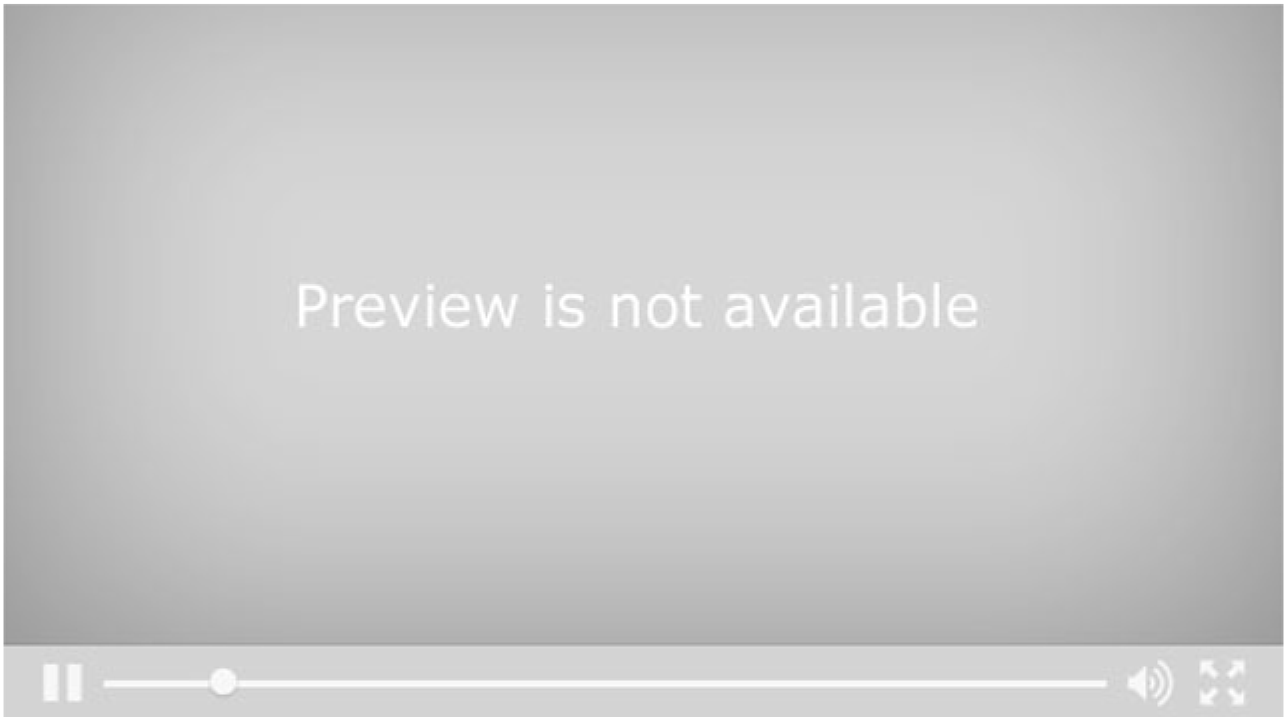


To make changes to your library settings on your M5 setup page, first log in to your Setup.



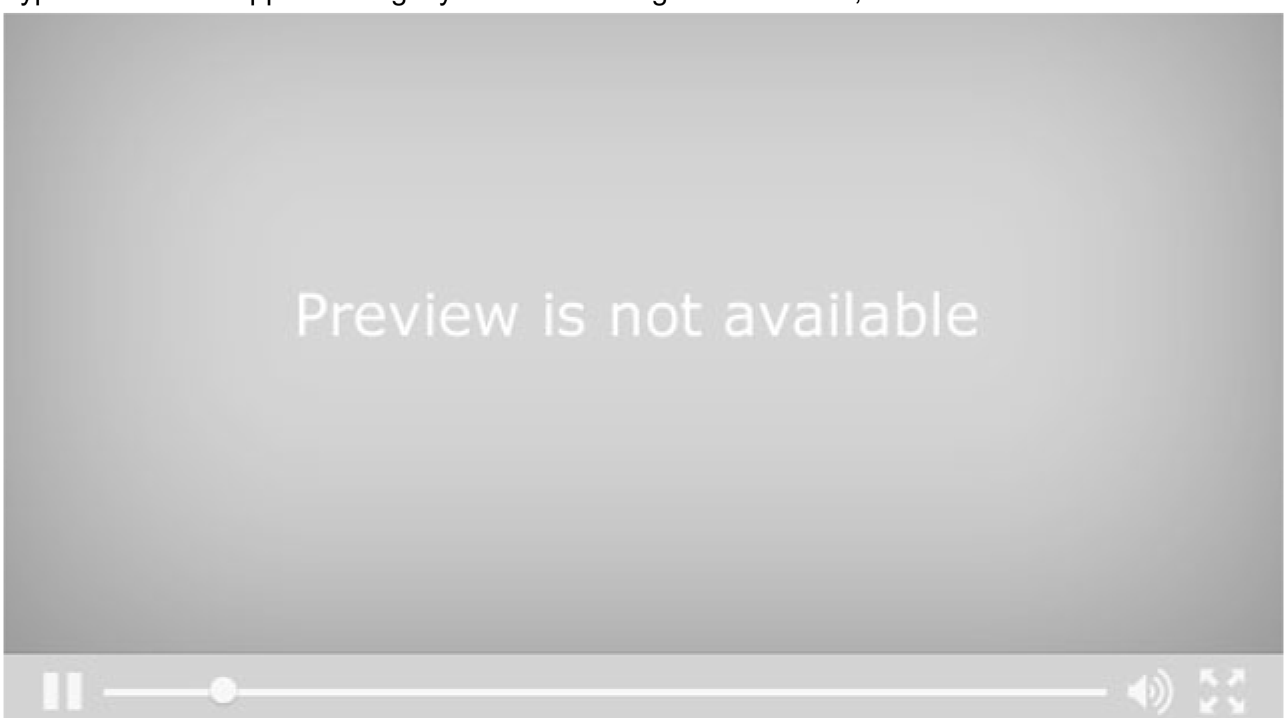
Click on the button for Library Settings. This is where you can change the logo and the information in the heading for your OPAC.

To change the logo, navigate to the image you would like to use by clicking Browse. Find the image and click Open. Click Upload to bring the image into the correct place in your installation.



Type the title you want to display in the M5 header, such as your library name.

Type a subtitle to appear in slightly smaller lettering under the title, if desired.

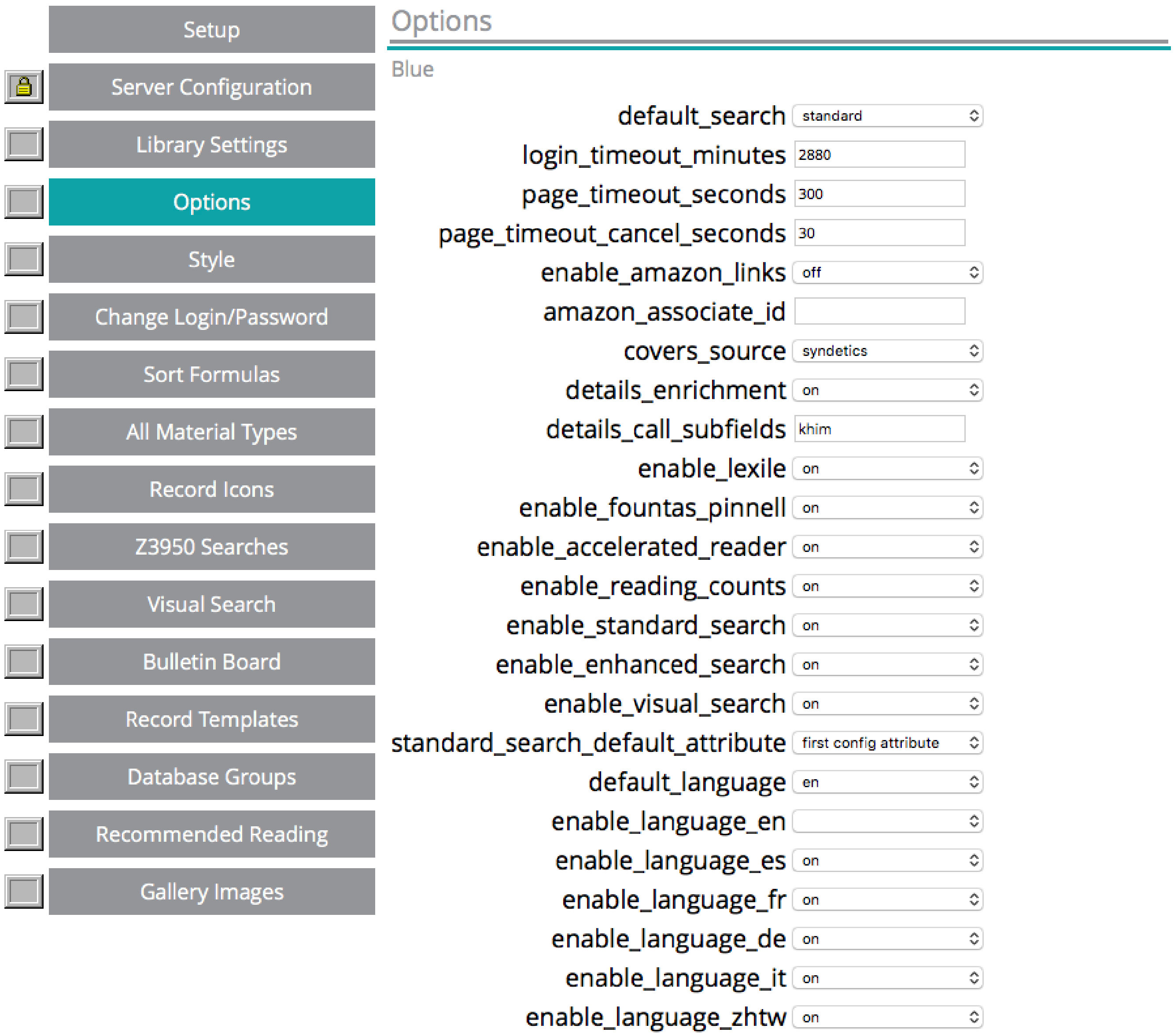


For librarian mailto, type the email address that will receive email when a patron sends a message through the "contact your librarian" link. If this option is left blank, the link will not be available.

For the library mailto, type the email address that will appear in the from field in notification emails sent by the library through Circulation functions.

For the library no reply-to, type the email address that will show as the sending address on emails sent through the catalog.

Click Save to save and apply any changes you have made in the Library Settings section of Setup.



To make changes to your Options on your M5 setup page, first log in to your Setup.

Click on the button for Options. Here you will find a list of settings having to do with functionality, languages, and displays that can be configured by you. The default settings can be used without changes, but you may find ways you want to customize the program for your library.

• **default_search**: This drop down menu lets you choose which type of search will be the default.
• **login_timeout_minutes**
• **max_holdings_display:** Choose the maximum number of holding records that will display for an individual item in Details mode.
• **page_timeout_seconds:** Select the number of seconds M5 can remain idle before it automatically resets.
• **page_timeout_cancel_seconds:** Select the number of seconds that a timeout warning will display, allowing the patron to extend the session before M5 automatically resets.
• **results_per_page**: Choose the number of items to display per page in a list of results.
• **change_results_per_page:**

• **enable_amazon_links**: Amazon links allow the patron to connect to Amazon.com to view editorial and customer reviews, related items, copies available for purchase, and more. Click ON to enable these links.
• **amazon_associate_id:** Having an Amazon Associate ID allows you to earn commission on items purchased by patrons who connect to the Amazon Website via your Amazon links. If you enabled Amazon links and have an ID, type it here.
• **covers_source**: If you want to display cover images, leave the setting at **local (legacy)** to use images in your local picture table, or **syndetics** if you have a subscription to Syndetic Solutions, or **local** to see pictures and basic information from Google Books.
• **details_enrichment:** If this setting is on, on the Details page you see basic information from Google Books, or, if you have a subscription to Syndetic Solutions, Syndetics will display detailed content data about your items.
• **details_call_subfields**: Choose which subfields of the call number will appear in the Details holding display.
• **enable_standard_search:**
• **enable_enhanced_search:**
• **enable_visual_search:** Click off to disable any of the search types.
• **standard_search_default_attribute:** Choose the index that will be selected by default on the Standard Search page. Click Anywhere, or click First Configurable Attribute to use the first attribute in the search configuration as set in Configuration Editor.
• **default_language**: Select the language you want to display by default when M5 is launched.

enable_language_en
enable_language_es
enable_language_fr
enable_language_de
enable_language_it
enable_language_zhtw
enable_language_zhcn:

Click off to disable any of the other languages.

• **enable_bookbag**: The book bag allows patrons to save search results. Click off to disable the book bag feature.
• **enable_save_bookbag**: This option allows patrons to save the list of items in their book bag to a storage medium such as a disk or flash drive.
• **enable_email_bookbag:** This option allows patrons to email the list of items in their book bag.
• **enable_persistent_bookbag:** This option saves all items placed in the book bag if a patron signs on anytime during his or her session. If the patron never signs on, all items in the book bag are deleted when M5 resets. Click off to disable persistent book bag. For more information, see the video about using the book bag feature.
• **enable_account:** This option allows patrons to view information about their account, such as current and past transactions. Click off to disable the My Account feature.

The next few settings apply to the patron account features. Click off to disable any of these features: account information; current transactions; historical transactions; and change sign in and/or password.

The next few settings enable links for additional patron account features: renewing items, reserving items or canceling reserves, requesting items by interlibrary loan. Click **on** to show the links; click **off** to disable and hide the links; click **access** to only show and enable the links when the patron is logged in with the appropriate permissions. This option allows you to indicate an email address that will receive a blind carbon copy of each Interlibrary loan request, if desired.

• **enable_search_progress:** When search progress is enabled, during the search process a window shows blue and yellow balls moving to indicate that the search is happening.

The next group of options has to do with the formats and sort order for different types of records. For each record type, select the format that will display by default on the Results page.

For each record type, select the format that will display by default on the Details page.

For each record type, select the sorted order that search results and book bag pages will display by default.

• **enable_show_preferences** allows for the display of the Mandarin databases and libraries on the search page as well as under Libraries in the left menu. Select true to display the databases and libraries only under the Libraries link.
• **enable_stop_words** allows the program not to include small, common words such as articles, some prepositions, and so forth, in the search process.
• **enable_spell_check** allows the program to check search terms entered against the built-in dictionary to catch possibly misspelled words.

Click Save to apply and save these settings to your Library Options in Setup.

All of these settings may not be available in your setup. If there are settings here that you would like to change from the default but do not show in your setup, please contact Mandarin technical support.

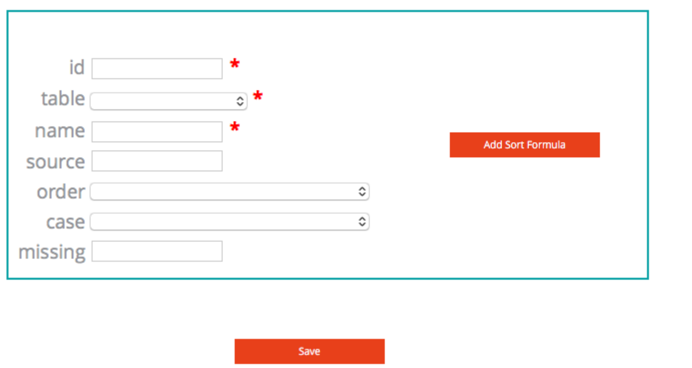
Sort Formulas

Indicate the sort formulas you want to be available in the Results and Bookbag pages. Eight default formulas (with their language translations) are provided.

Adding a Sort Formula

1. Scroll down to the bottom of the page. In the ID box, type the ID for the new formula, and then click Add. This adds a new entry to the page.
2. Type the language translations in the Name boxes, if desired.
3. In the Source box, type the field and subfield data for the sort formula.
4. In the Order box, select Ascending or Descending.
5. In the Case box, select Sensitive or Insensitive.
6. In the Missing Value box, type the value to use when there is no data in the record that corresponds to the key.
7. When finished, click the Add button to the right of the entry, and then click Save at the bottom of the page.

***Tip**: To add a secondary sort to an existing formula, follow steps 3 through 7 in the empty gray box below the desired formula.*

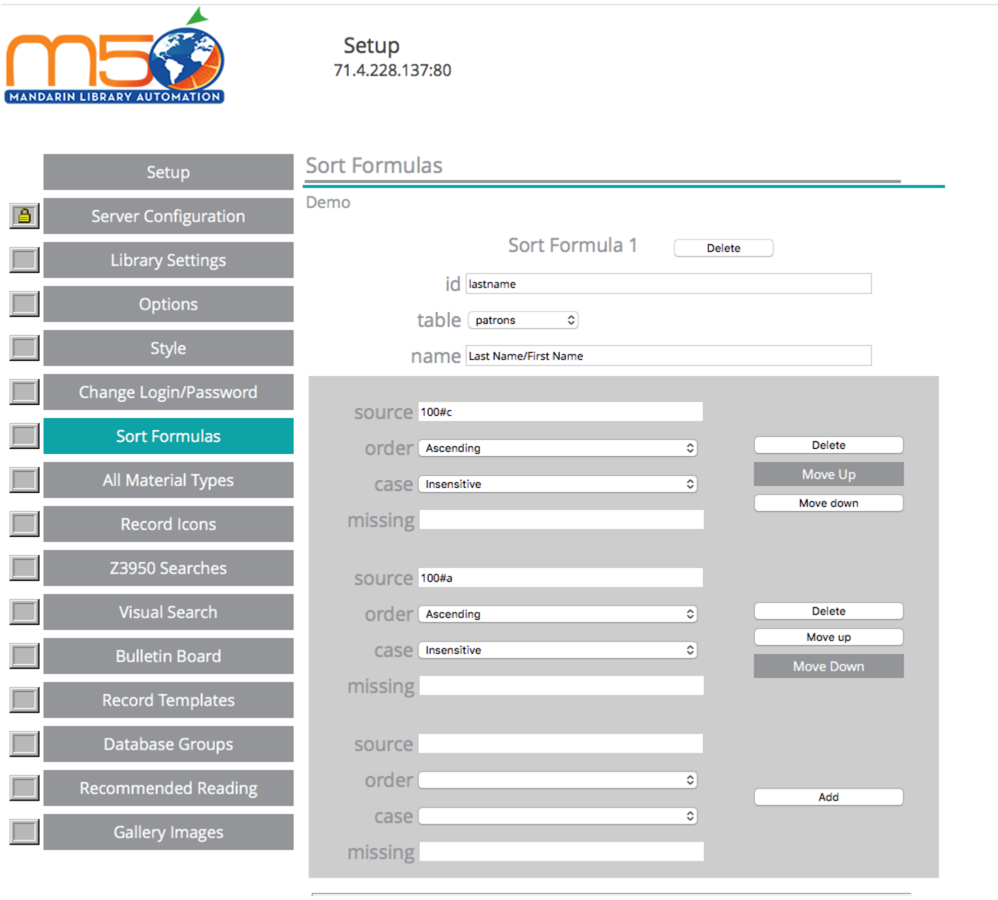


Modifying, Moving, or Deleting a Sort Formula

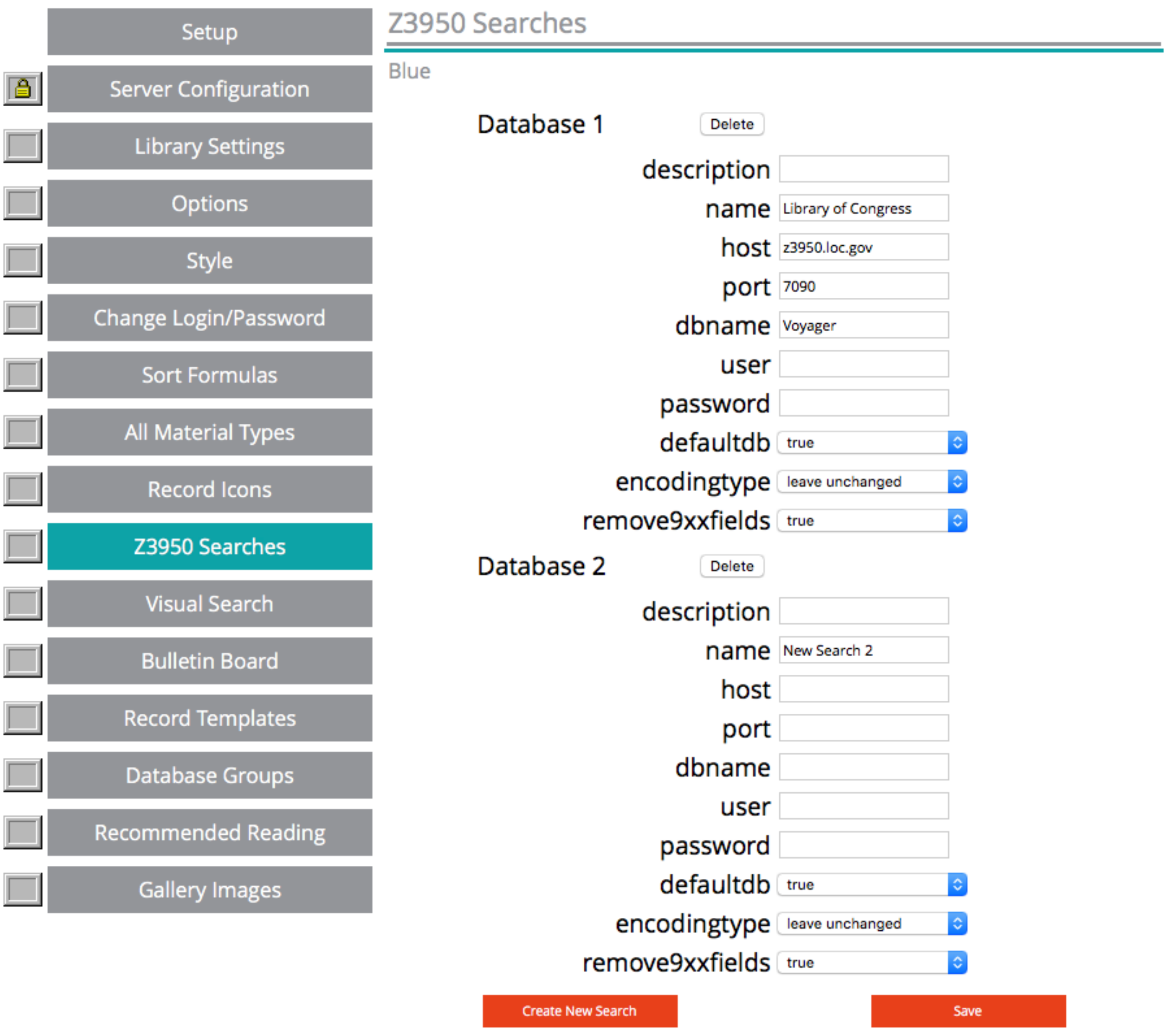
• To modify an entry for a sort formula, enter the new information as desired. Then click Save at the bottom of the page.
• To move a sort formula (therefore changing its priority), click the corresponding Move Up or Move Down button until the formula is in the desired position on the page (with the top being the first key). Then click Save at the bottom of the page.
• To delete a sort formula, click the corresponding Delete button. Then click Save at the bottom of the page.

When finished with the Sort Formulas section, clicking Save at the bottom of the page returns you to the Configuration page.

***Note**: If an item matches more than one media type, the matching icon that is closest to the top of the page will display for the item.*


Setup
71.4.228.137:80
Setup
Server Configuration
Library Settings
Options
Style
Change Login/Password
Sort Formulas
All Material Types
Record Icons
Z3950 Searches
Visual Search
Bulletin Board
Record Templates
Database Groups
Recommended Reading
Gallery Images
Sort Formulas
Demo
Sort Formula 1
Delete
id lastname
table patrons
name Last Name/First Name
source 100#c
order Ascending
case Insensitive
missing
Delete
Move Up
Move down
source 100#a
order Ascending
case Insensitive
missing
Delete
Move up
Move Down
source
order
case
missing
Add

Z3950 Searches



When Record Fetch is selected in M5 Cataloging or the WebOPAC, the Libraries link shows the library databases that have been set up as Z39.50 sources. These databases can be added and modified through your setup page.

To make changes to the Z39.50 sources on your M5 setup page, first log in to your Setup. At this page, click on the **Edit** button in the line for the installation whose settings you want to edit.

Click on the button for **Z3950 Searches**. [This is where you can add and modify Z-search library databases to be used by the Record Fetch in M5 and the WebOPAC.]

Z39.50, of course, refers to the standard protocol for searching and retrieving information from remote computer databases. In M5 and the Mandarin WebOPAC, this protocol is built in to allow librarians to find catalog records in other libraries and download or import them.

The program comes with the **Library of Congress** set as the default database. The information that is needed to add another library is what is entered in the host, port and database name fields. There are several different sources that collect this information from libraries, or you may need to contact a library directly to find out this information. Not all libraries, of course, allow Z39.50 access to their catalogs.

To add a new library to your sources, click on **Create New Search.**
In **description** enter any short note describing the source, if it is not obvious from the name.
In **name** enter the name of the library or database as you want it to display in M5 Record Fetch.
In **host** enter the url or IP address of the catalog.
In **port** enter the port number for the catalog.
In **dbname** enter the name of the database as it is identified at the institution.
If the institution requires login and password to access their Z39.50 service, enter that information here. The British Library, for example, requires authentication but will provide a librarian with a login and password upon request.

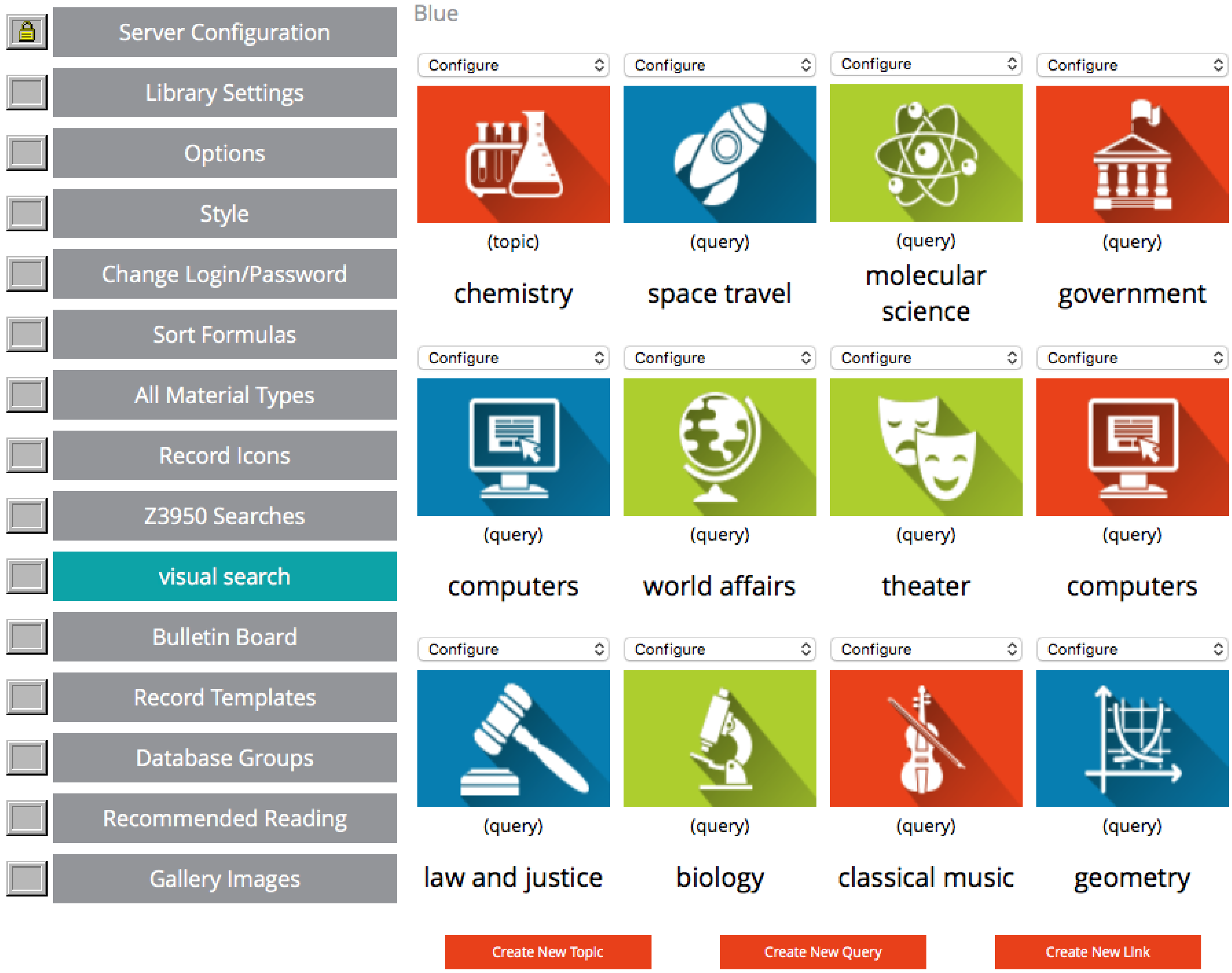
This option allows you to choose whether the database is always selected in Record Fetch. If you want to choose which databases are selected each time you use Record Fetch, choose false here.

This option allows you to choose whether to convert imported or downloaded records to MARC8 character set, or to UTF8 character set, or to leave the records unchanged.

This option allows you to choose to have all MARC fields in the 900 range, which are usually local to a specific library, removed from records you download or import through Record Fetch.

Click **Save**. Your new database will appear in Record Fetch the next time you launch M5 or the WebOPAC. See the video on using Record Fetch for more information on this feature.

Visual Search



Visual Search is a graphical interface that allows patrons to narrow a search from a topic to sub-topics, ultimately reaching search results. You can also create components that directly launch a search query or open a Web page.

Visual Search comes with several levels of default search components. You can customize your Visual Search screen by modifying the default components or by creating new components. There is no limit to the number of components you can add to Visual Search.

To customize your Visual Search, log into your M5. On the Visual Search page you will see a link for Configure Visual Search.

Clicking on this link brings you to the login page for Setup. Once you have logged in, you are taken right to the Visual Search setup page. This page is also accessible from the main Setup page, after you have clicked on the edit button for the installation you want to configure. The Visual Search button is in this list of features to configure.

On the Visual Search Configuration page, the components are identified with labels in parentheses indicating whether each component is a topic, a query, or a link.

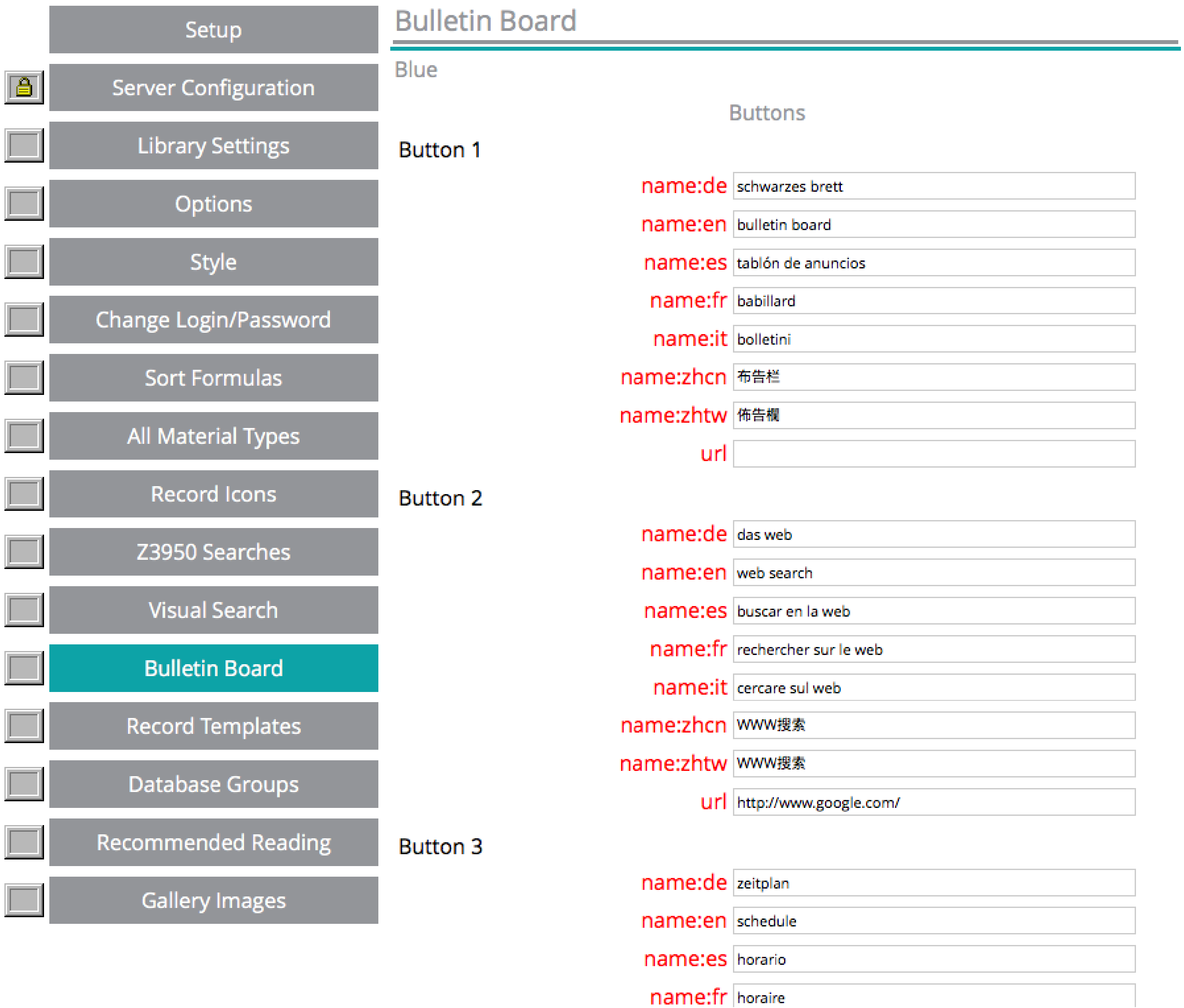
Components can be modified or deleted totally by choosing modify or delete in the drop down menu. The components can also be rearranged by using the move left and move right choices in the drop down menu.

To create new components, select the type of component you want to create at the bottom of the page.

Create a topic component if you want to launch sub-topics. Click on **Create New Topic**. For the new topic, click on the drop down menu and choose **Modify**. You will see the Topic Component Configuration dialog box. To add a new image at this window, click **Browse**, navigate to where you have a saved image, click **Open**, and then click **Upload**. If the image you want is included with M5, click on **Application** and scroll down to see and choose from the included images, or click on **Installation** and see and choose from images already uploaded. In the **Caption box,** type the caption that will appear under the component. In the **Description box,** type the description that will appear when the cursor points to the component. Click **Save**.

You can choose a language for the caption and description of this component. You can create multiple captions and descriptions and images for each component, to go along with the languages of the rest of the interface. In other words, if you know you have patrons who want or need the interface in a certain language, such as Spanish, then have a Spanish caption and description for each Visual Search component as well as an English one.

Bulletin Board



Mandarin M5 has four or five components making up what we call the Bulletin Board. These are the pictures and links across the top, which you can customize to show scenes from your library and or other graphics with links to other webpages at your institution, or to outside resources such as databases.

To customize your Bulletin Board components, you need to go to your Setup page. To get there, you can log into your OPAC and click on the **Enter Setup button.**

This will bring you to the login page for setup. **Login.**

and you come to a page like this. Click on the **edit button** for the installation you want to customize. Then go to the **Bulletin Board button** on the left.

Here you can see the pictures or graphics. They are numbered from the left. To modify number one, the leftmost one, for example, click on **Browse** and find the picture you have saved. Then click **Upload** to bring it into your installation.

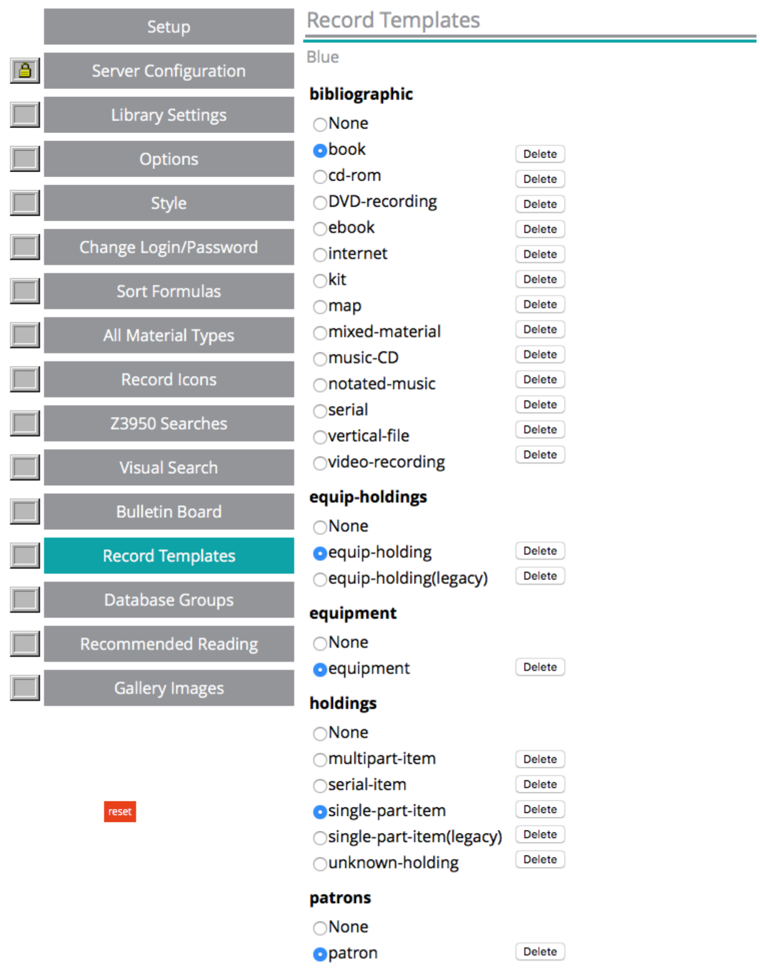
The corresponding link is up here, numbered the same way. Enter the link for the web page this picture should open.

Modify each component with the desired picture and corresponding link.

When you are finished, click **Save**.

It is a good idea to then click on the word **Setup** to go back to the installation list. Click on the **name of the installation** to open a fresh page, so that you can check and make sure the pictures and links look and work the way you want.

Record Templates



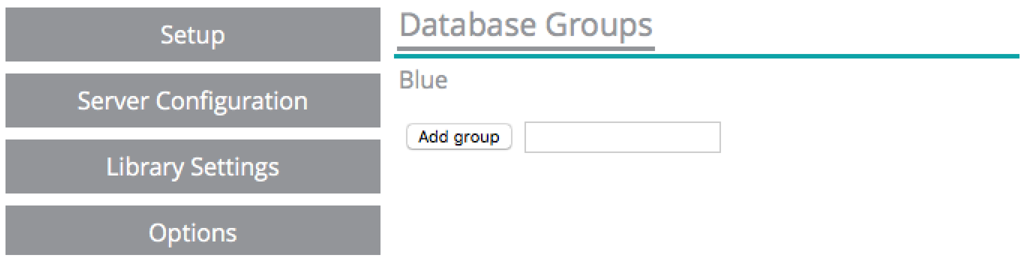
In order to use this feature, to be able to create or modify templates, you need to go to your Setup page. There you'll see an option at the dock on the left called Record Templates.

When you have logged in, select this option, you'll see all the templates that are currently available for your installation. The default selection for each type of record is None. If you leave the default there, you will have the standard templates that come with the program, and you will not have the option to make new templates. If you want to be able to modify and create templates, select one of the templates listed. If the book template is the one you use the most for creating bibliographic records, choose that. For each type of record choose the one that you will use the most.

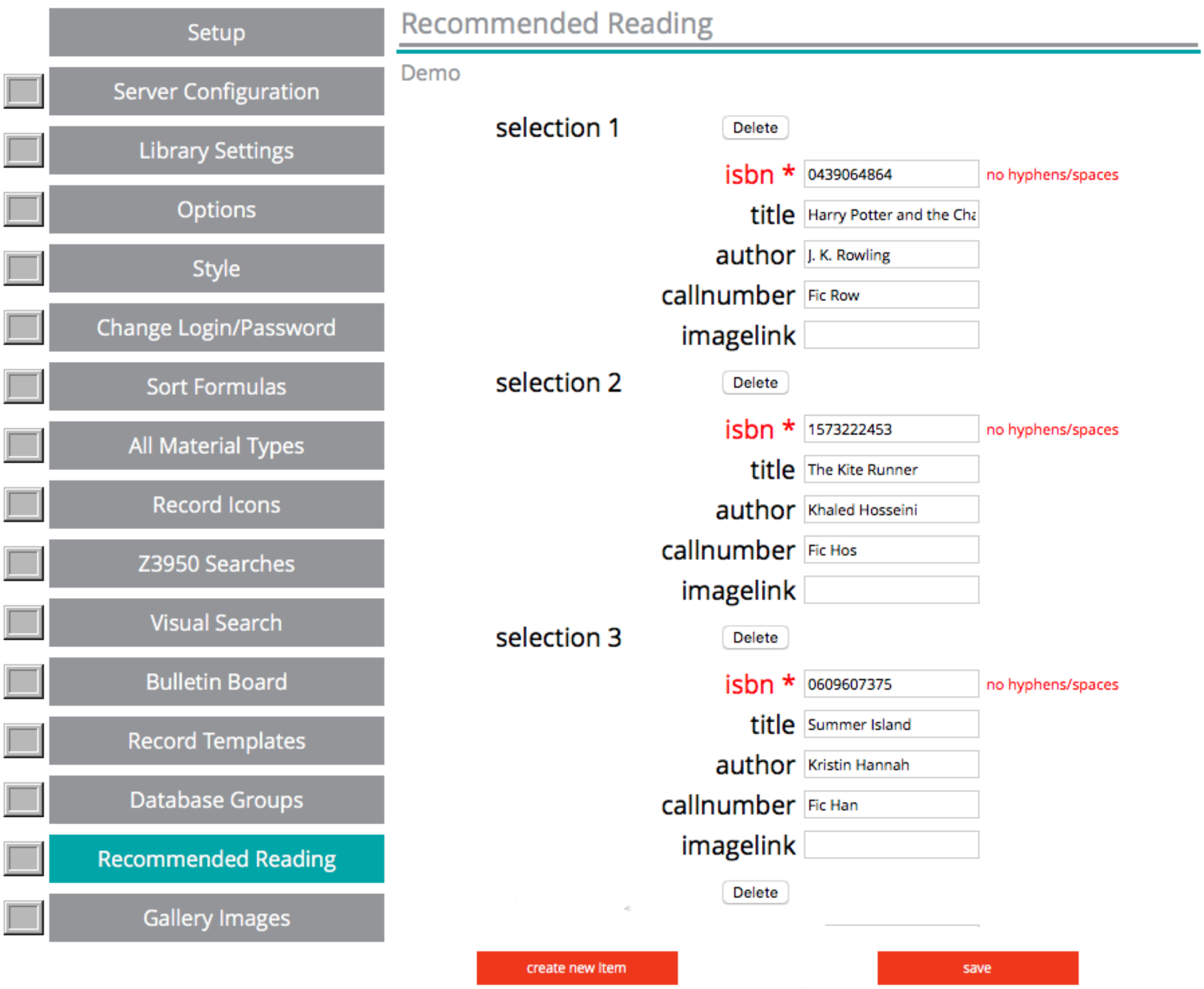
When you next log into M5 as a librarian and want to add that type of record, you will see your choice as the default, and you'll see the Save as template button at the top of the Basic Editor. Now make the changes that you need to make. At the very least you will probably want to put in your location information, for example, so that you don't need to type it every time. Add or change any other information that you want in your records. In this holdings template for example, I'm going to put p and usd in the price subfield so I remember that the cost goes in that format. If you need to add or delete any fields or subfields, you can do that in the Advanced Editor. Then click **back** to the Basic Editor and click **Save** as Template. You can replace one of the default templates, or you can give your template a unique name.

When you look at your Setup page again, you'll see your new template in the list for this type of record. You can set it as the default, or you can delete it here, if it's not what you want.

Database Groups



Recommended Reading



Recommended Reading enables admin users to highlight specific items from the collection on the OPAC homepage.

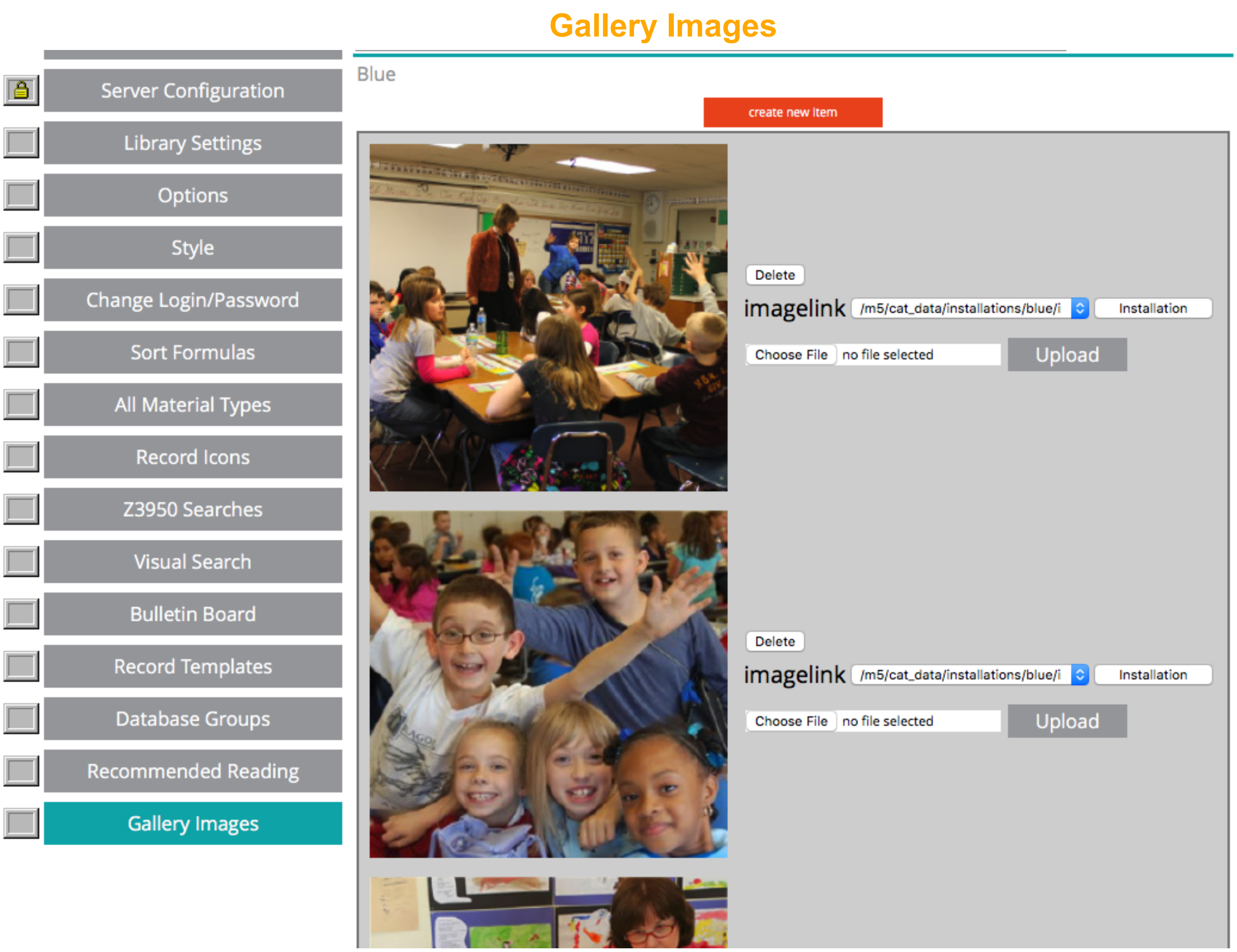
The Recommended Reading widget displays cover images of selected items, and clicks through directly to item details for those items. The first two items will be displayed in the widget preview. To view additional items, click the widget button, and navigate using the arrows on either side.

To add items to the Recommended Reading widget, log into Setup using your admin credentials and select “Recommended Reading” from the left-hand menu.

To add a new item, click **create new item** and copy-paste the ISBN for the item you would like to add (no hyphens or spaces). Clicking the isbn* field will prompt an Overlay; that automatically fills the **title, author**, and **call number** info. If you would prefer NOT to display that data, simply delete those fields manually.

A cover image will only be displayed if it is available locally or through a third-party add-on service like Syndetics. If a local cover image is available, the URL will automatically load into the imagelink field.

Click **save** and refresh the OPAC homepage to ensure the items have been added correctly.


Gallery Images
Server Configuration
Library Settings
Options
Style
Change Login/Password
Sort Formulas
All Material Types
Record Icons
Z3950 Searches
Visual Search
Bulletin Board
Record Templates
Database Groups
Recommended Reading
Gallery Images
Blue
create new item
Delete
imagelink
/m5/cat_data/installations/blue/i
Installation
Choose File
no file selected
Upload
Delete
imagelink
/m5/cat_data/installations/blue/i
Installation
Choose File
no file selected
Upload

Using the Group Editor

Attention: You must either set up a hierarchy of patron groups based on permissions, or you must disable the hierarchy.

About the Group Editor

The Group Editor is used to create and modify the groups that Mandarin M5 requires to function. Each group has a customized set of parameters and permissions.

There are three types of groups in Mandarin M5: Patron, Item, and Special Reserve.

• **Patron groups** – Each patron record in the Mandarin M5 system must be assigned to a patron group to establish circulation permission for the patron, as well as to set the level of access to Patron and Librarian Mode. 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. The patron group information is stored in the 991#a of the patron record.

• **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. The item group information is stored in the 991#a of the holding record.

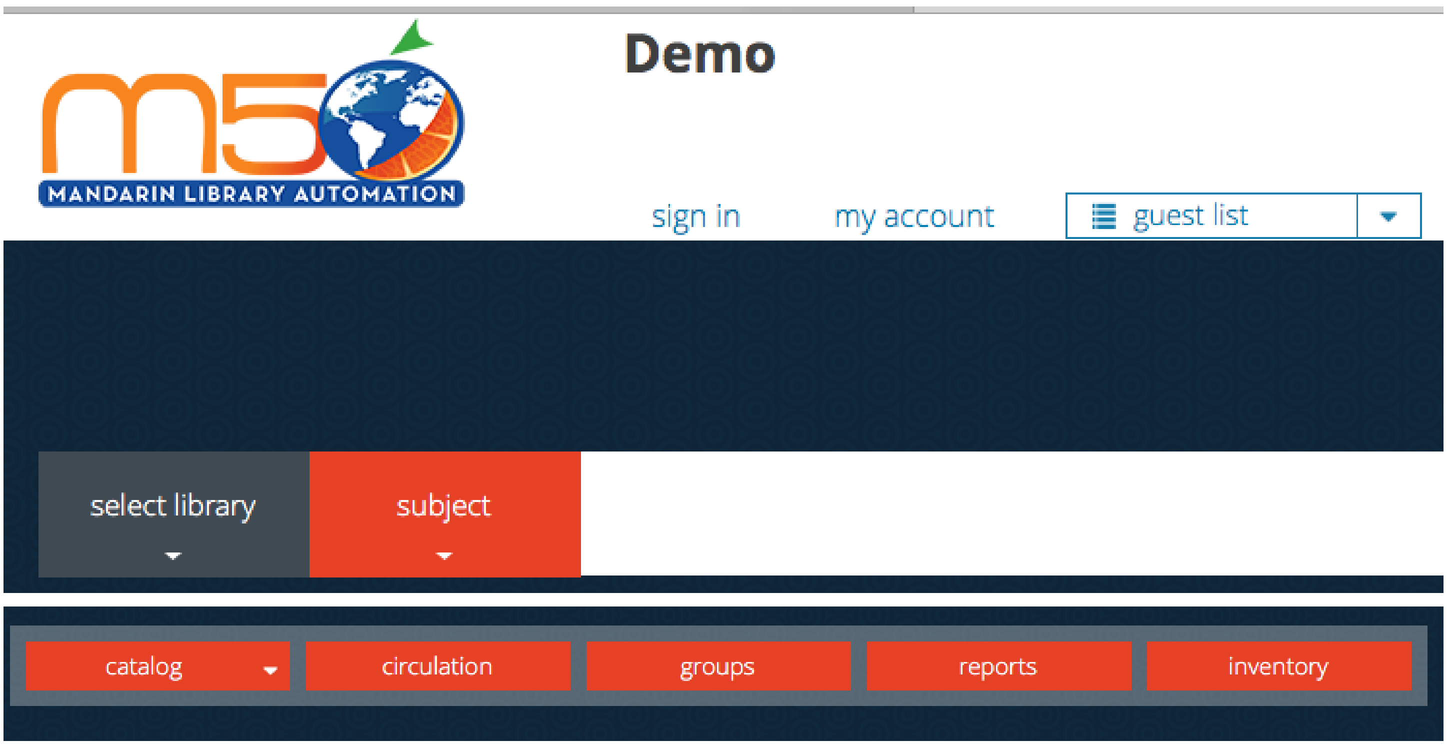
• **Special Reserve groups** – When a library needs to accommodate unusual circulation restrictions for a defined patron set, a special reserve group can be created. For instance, you might create a four-week special reserve group to restrict certain science books to in-library use by students involved 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, and patrons and items can be assigned to multiple special reserve groups. Special reserve group permissions override item group permissions. Special reserve group information is stored in the 991#b of the patron and holding record. Subfield b is a repeatable subfield.

Sign In to Groups

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

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

NOTE: If you need to sign out, click the Sign Out link on the right.



Creating the 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, which is located on the **General** page for each patron, item, and special reserve group. This entry determines which groups display on the **Group Access** pages. Permissions to modify patron and item access are then established on the Group Access pages.

***NOTE:** 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.*

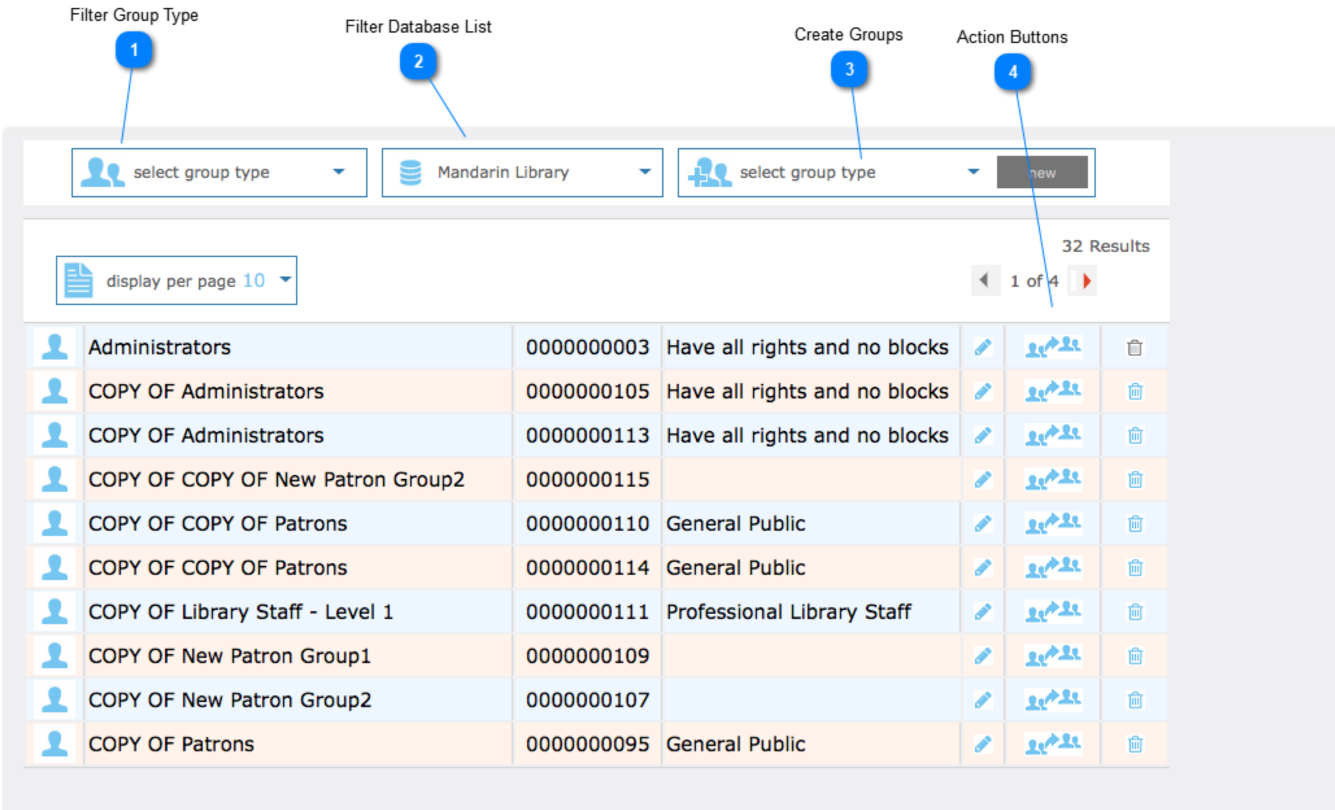
Mandarin M5 includes four default patron groups: Administrators, Librarians, Library Assistants, and Patrons. The hierarchy has been created for these groups. Mandarin recommends that these groups be used; they cannot be deleted. You can modify these groups or create additional groups, if desired. These 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 “Librarians” group has created a “Faculty” group, which will have the same permissions as the group “Library Assistants.”

1. On the main Group Editor page, locate the Faculty group and click the Edit link to the right. This opens the **General** page for the Faculty group. In the **Created by Patron Group** box, select **Librarians**. (No patron groups that were also created by the Librarians group will have access to the Faculty group unless indicated on the Group Access page.)
2. On the menu, click **Group Access**. 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**.

Group Editor Features



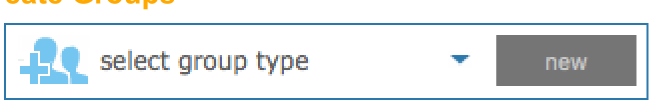
1 Filter Group Type

Contains the list of display options for this page. 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 an option in the Display list.

2 Filter Database List

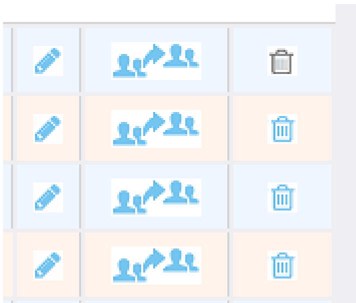
Contains the list of Catalog databases available in Mandarin M5. Your Mandarin M5 system can access multiple Catalog databases. If multiple databases are available, select the desired database in the Database Set list.

3 Create Groups



Select this button to add a new group within a group type The icon identifies the group type: a head signifies a patron group, a book signifies an item group, and eyeglasses signify a special reserve group. From this page, you can create, edit, duplicate, and delete groups.

4 Action Buttons



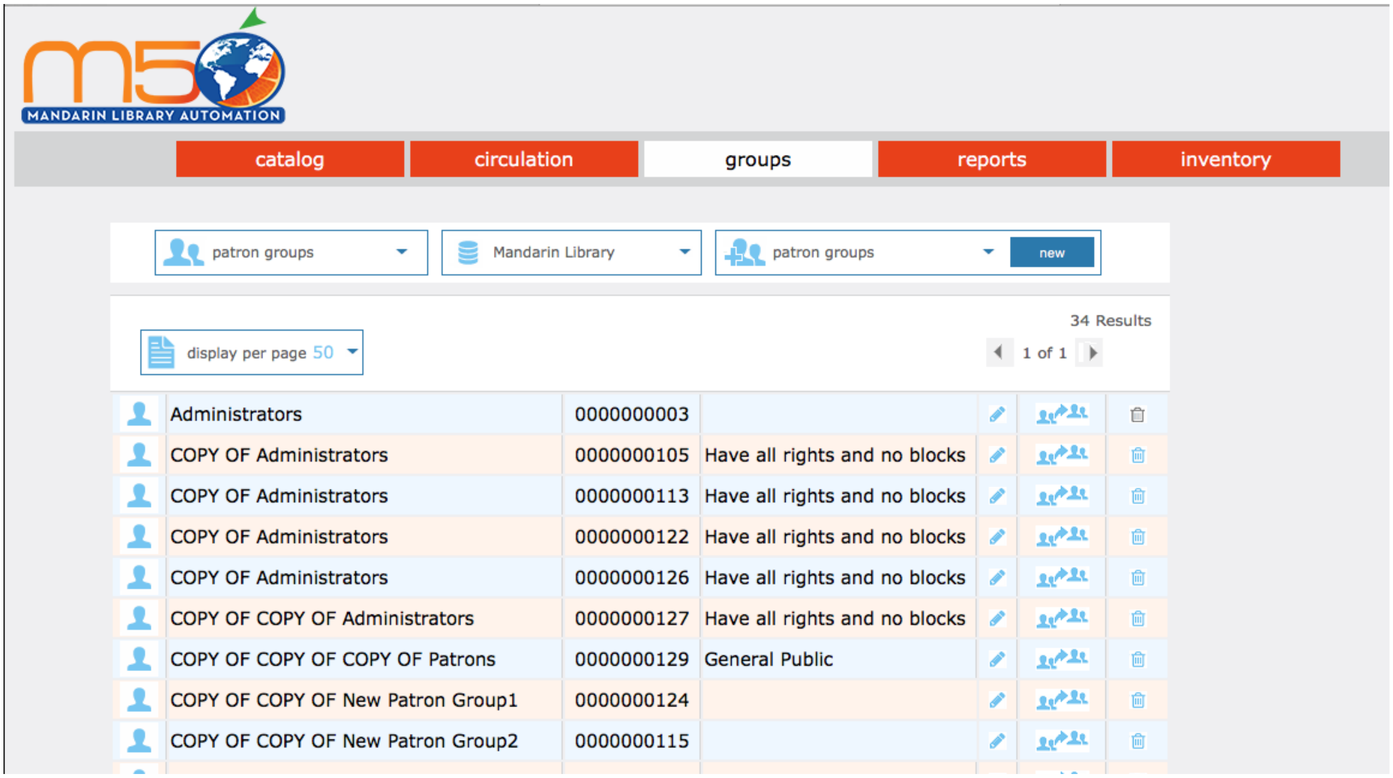
Use these buttons to Edit, Duplicate or Delete a group. When a group is duplicated all the privilege are available to the new group.

Working with Patron Groups

Note: *Patron groups must be in the program before you can enter or import patron records into the Catalog. Some groups are installed with the program.*

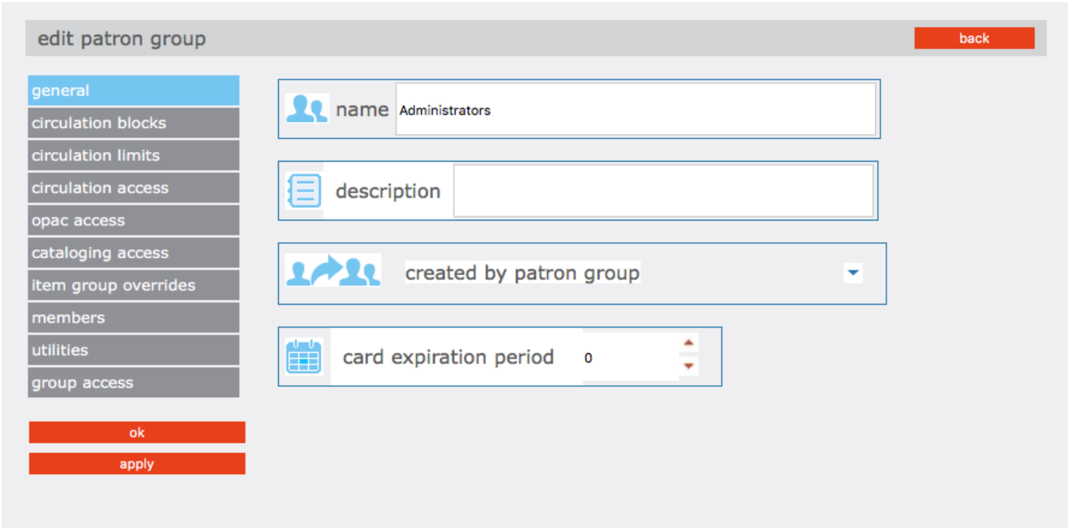
Creating a New Patron Group

1. Select a Catalog database in the **Database List**.
2. In the **New** list, select **Patron Group**, then click the **New** button on the right. This creates a "**New Patron Group1**" entry.



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

3. Click the **Edit** link to the right of the new group. This opens the **Edit** page for the new group. Proceed with the following sections to enter information for this group.



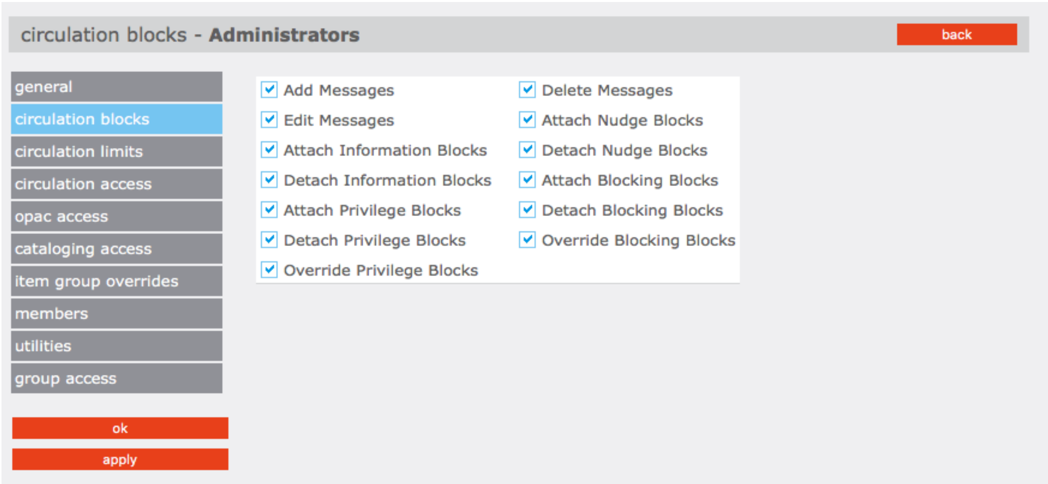
Edit. On this page, enter identification information for the group.

1. In the **Name** box, type a distinguishing name for the patron group.
2. In the **Description** box, type any information needed to describe this group. This will display on the main Group Editor page.
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 on this page, then click Circ Blocks in the side menu and proceed to the next section.

Note*: When a new patron record is added to the system, the record is assigned to a patron group. In many libraries, the unique barcode for that patron 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.*

Circ Blocks. On this page, 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.

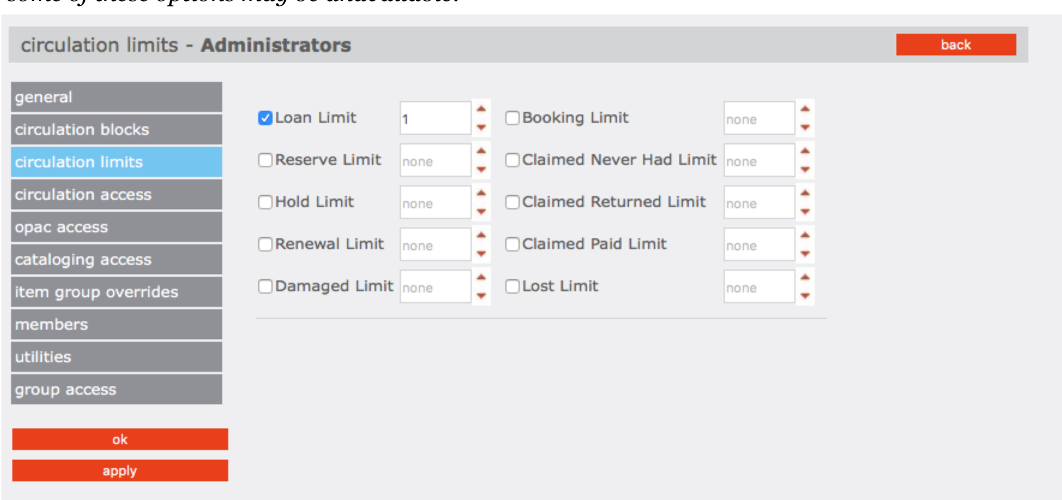
1. Select the functions needed by members of this patron group:
    - **Add, Edit**, and **Delete Messages** allows group members to add, edit, and delete patron and item messages.
    - **Attach** and **Detach Information Blocks** allows group members to attach and detach messages assigned the information 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 on this page, then click **Circ Limits** in the side menu and proceed to the next section.



Circ Limits. On this page, customize the circulation quantity limits for the patron group. Specify the maximum number of items for each type of transaction listed.

1. Select a circulation limit, i.e. number of items, for each limit type. To do so:
    - Select the check box next to the desired limit type.
    - In the list next to the limit type, select or enter a limit amount. Enter 0 if none of this type is allowed.
    - Repeat for each limit you want to set. If a limit is not selected, no limit is assigned, i.e. the number of items is unlimited.
2. Click **Apply** to save your entries on this page, then click **Circ Access** in the side menu and proceed to the next section.

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



Circ Access. On this page, specify whether this patron group is allowed to access any circulation functions.

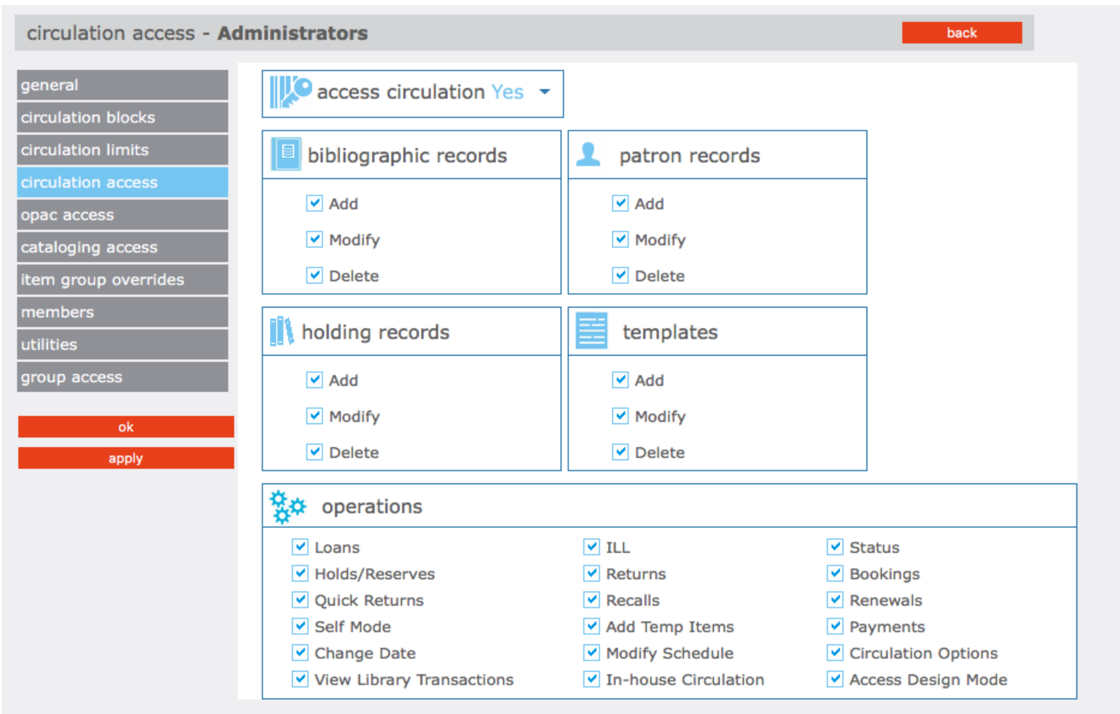
1. In the **Access Circulation list**, select **Yes** or **No**. If you select **Yes**, you can enable any available function listed on the page by selecting the function. Functions are organized into five groups:
    - **Bibliographic Records** – pertains to bibliographic record maintenance
    - **Patron Records** – pertains to patron record maintenance
    - **Holding Records** – pertains to holdings record maintenance
    - **Templates** – pertains to template record maintenance

• **Operations** – lists various types of circulation transactions

If you select **No**, all functions listed on this page are disabled.

2. Click **Apply** to save your entries on this page, then click **OPAC** Access in the side menu and proceed to the next section.

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

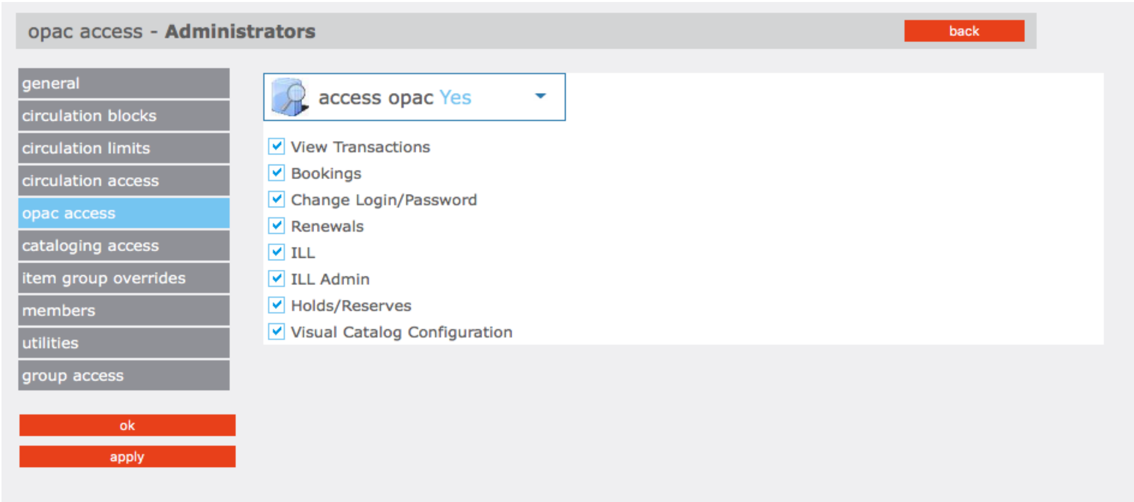


OPAC Access. On this page, specify whether this patron group is allowed to access any OPAC functions. The OPAC is the search feature found in the Catalog tab.

1. In the **Access OPAC** list, select **Yes** or **No**. If you select **Yes**, you can enable any available function listed on the page by selecting the function. Options are:
   - **View Transactions** – allows patrons to view their transactions in the My Account tab
   - **Renewals** – allows patrons to renew items
   - **Holds/Reserves** – allows patrons to place a hold/reserve on items
   - **Bookings** – allows patrons to book items
   - **ILL** – allows patrons to request interlibrary loans
   - **Visual Catalog Configuration** – allows library staff to configure the Visual Catalog display

If you select **No**, all functions listed on this page are disabled.

2. Click **Apply** to save your entries on this page, then click **Cataloging Access** in the side menu and proceed to the next section.



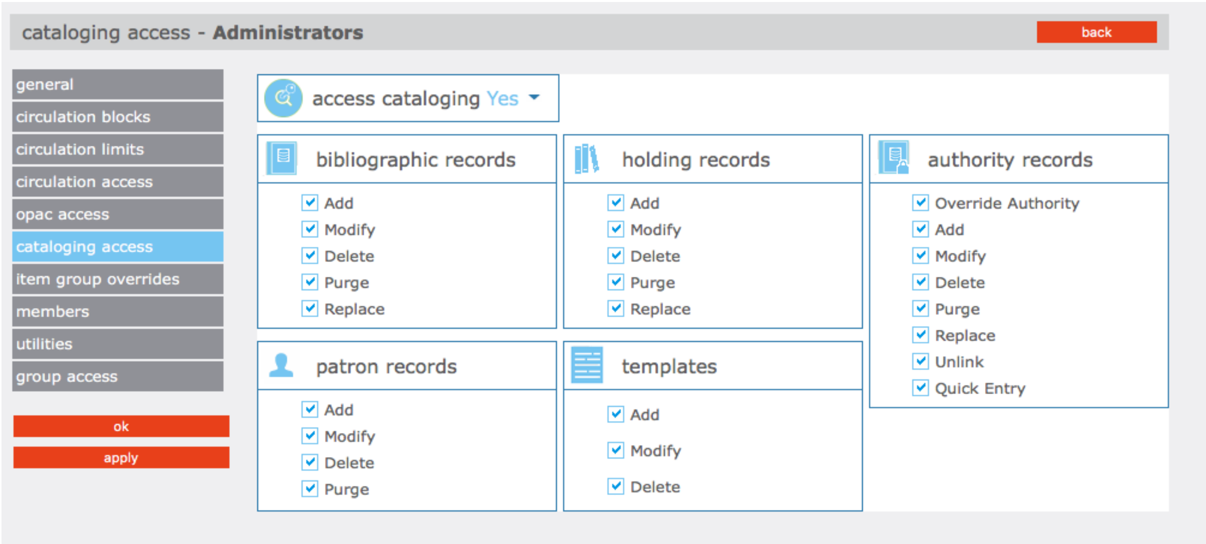
Cataloging Access. On this page, specify whether this patron group is allowed to access any Catalog functions.

1. In the **Access Cataloging list**, select **Yes** or **No**. If you select **Yes**, you can enable any available function listed on the page 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
    - **Authority Records** – pertains to authority record maintenance
    - **Templates** – pertains to template maintenance

    If you select **No**, all functions listed on this page are disabled.
2. Click **Apply** to save your entries on this page, then click Item **Group Overrides** in the side menu and proceed to the next section.

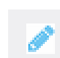
Note: *Depending on your permissions, some of these options may be unavailable.*

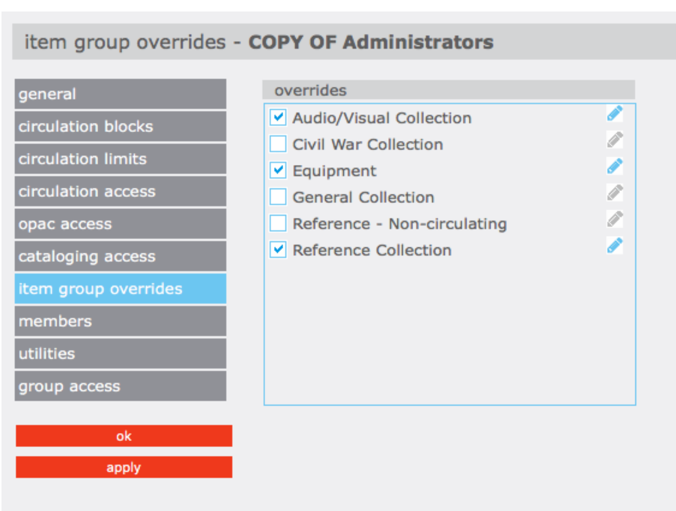
Note: *The Override Authority option and the options under Authority Records are available only if you are using a version of M5 that supports Authority Control.*

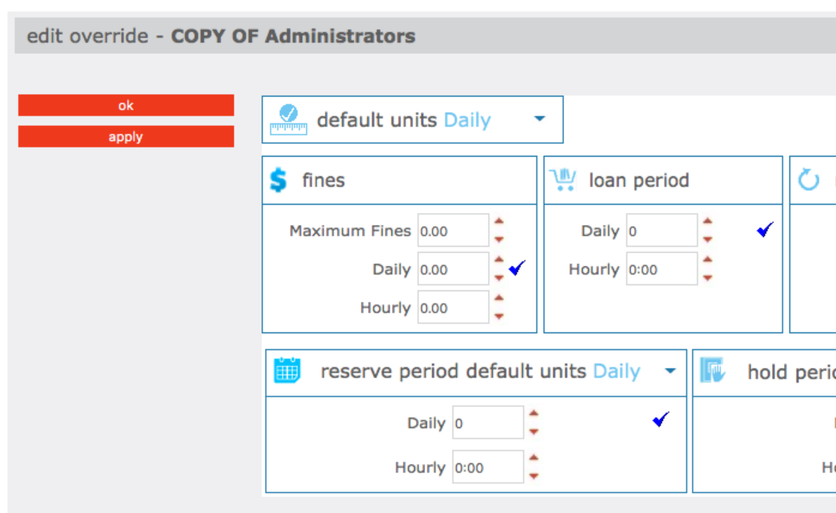


Item Group Overrides. On this page, grant this patron group rights to override specific circulation limits connected to item groups. For example, if the item group “Audio/visual Collection” limits the number of loan renewals to one, you can establish a different limit for this particular patron group.

1. In the **Overrides box**, click the item group name.

2. While the item group name is selected, click **.** A new page opens that displays the circulation limits for the selected item group.
3. In the **Default Units** list, select **Daily** or **Hourly** as the default time unit for **Loan Period, Renewal Period, Grace Period**, and **Fines.**
4. In **Loan Period, Renewal Period, Grace Period**, and **Fines**, enter the time limit for each period type. Also, enter the following:
    Under **Renewal Period,** enter the maximum number of renewals allowed.
    Under **Fines**, enter the maximum fine amount.
5. Click **OK.** This returns you to the Item Group Overrides page.
6. Click **Apply** to save your entries on this page, then click Members in the side menu and proceed to the next section.



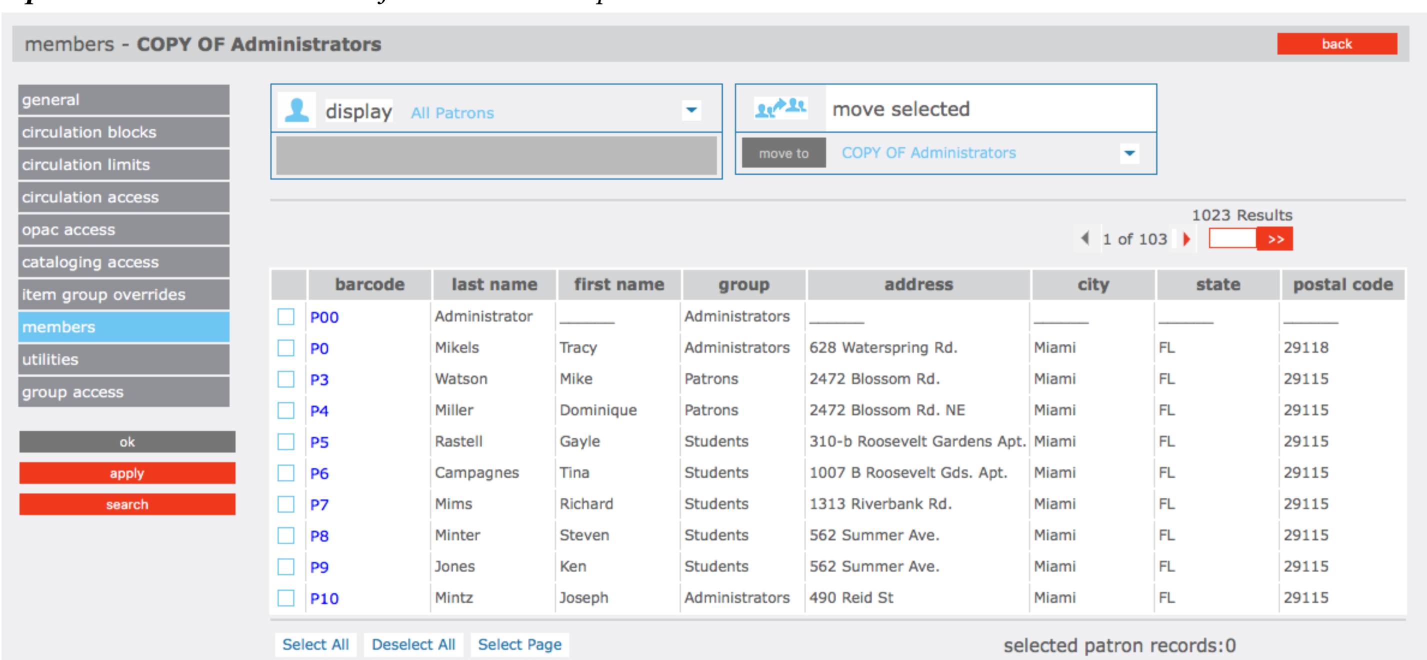


Members. On this page, add and remove patron group members. Skip this page if you have not yet entered any patron records for this group. You can add members to this group later using the Edit function.

1. In the **Display list,** select **All Patrons**. This displays a list of all patrons, not just patrons currently assigned to this group.
2. Select the check box next to each patron you want to add to the patron group. To locate specific patrons:
   - In the side menu, click **Search**. This displays the Search page.
   - 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. Under **Move selected records**, the new group name displays. To move the selected patrons to this group, click the >> button on the left. This displays the new group with its assigned patrons.
4. Click **Apply** to save your entries on this page, then click Utilities in the side menu and proceed to the next section.

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.*

Tip*: Click Select All at the bottom of the list to select all patrons listed.*

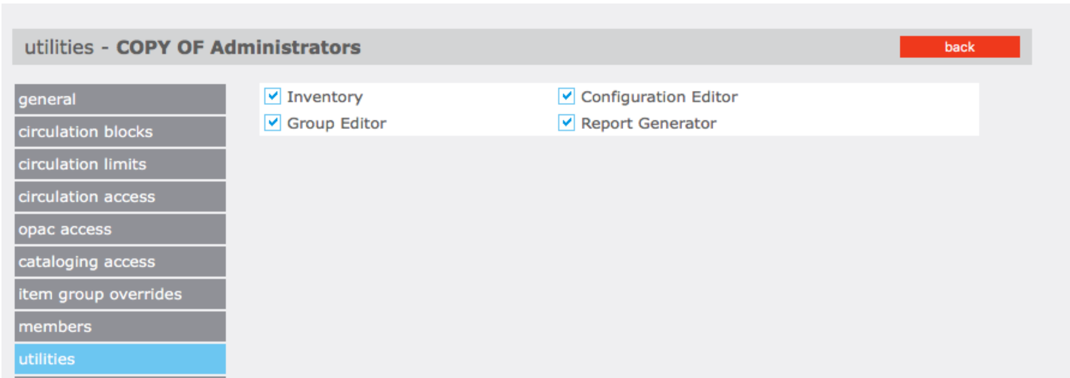


Utilities. On this page, specify whether this patron group is allowed to access any of the functions listed.

1. To allow access to a utility, select the corresponding check box. Options are:
   - **Inventory** – allows members of this patron group to view and conduct inventory functions through M5 Inventory
   - **Group Editor** – allows members of this patron group to view and conduct functions in the Group Editor
   - **Configuration Editor** – allows members of this patron group to perform configuration functions in M3 Configuration Editor
   - **Report Generator** – allows members of this patron group to view and create reports through Reports

2. Click Apply to save your entries on this page, then click Group Access in the side menu and proceed to the next section.

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



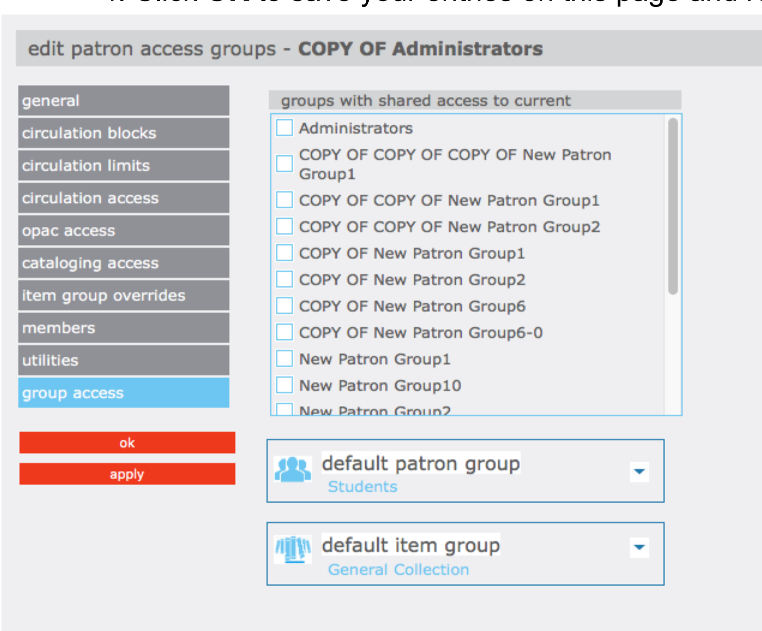
Group Access. On this page, specify which patron groups you want to have access to this group.

1. To change the group access, click the **patron group** 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.

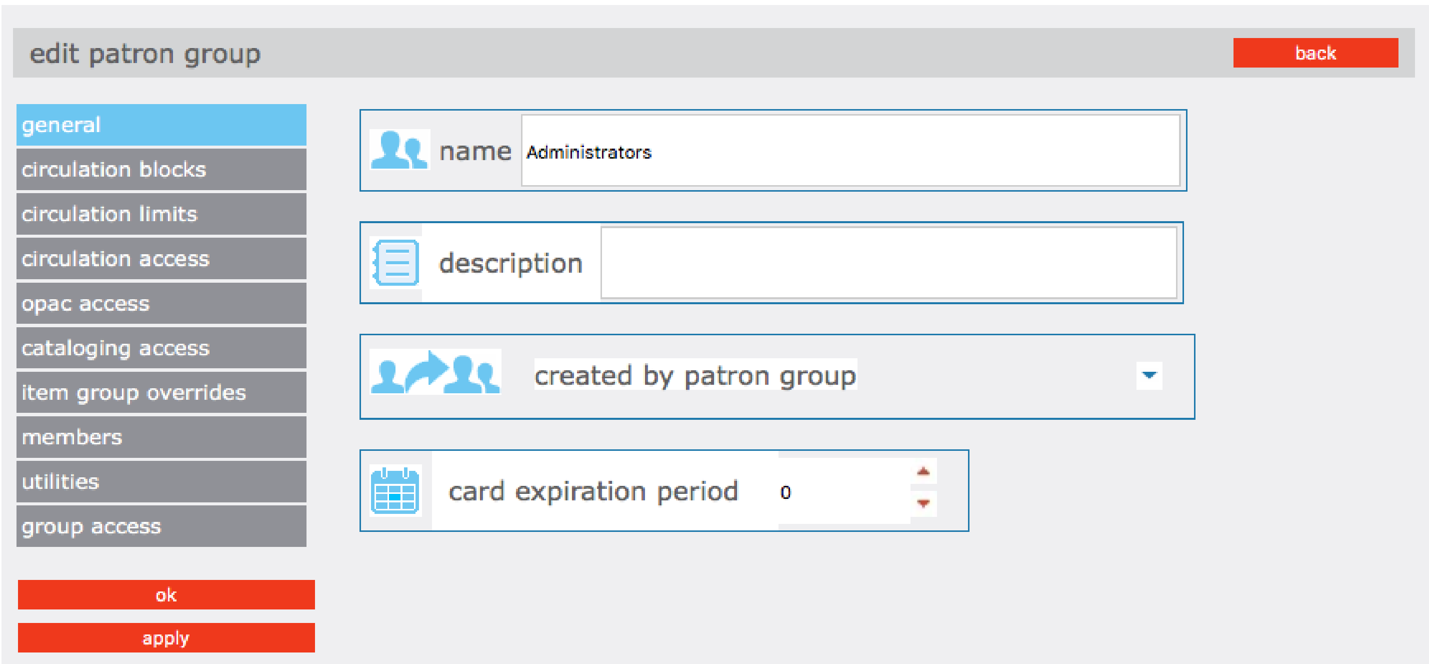
4. Click **OK** to save your entries on this page and return to the Group Editor home page.



Modifying Patron Group Permission

To modify the permissions assigned to a patron group:

1. On the Group Editor home page, click the link for the group you want to modify. This displays the **General page** for the group.
2. Modify the settings as needed. For instructions, refer to the procedure in Creating a New Patron Group
3. When finished, click **OK** to save your changes.



Deleting a Patron Group

To delete a patron group from the M5 system:

1. On the Group Editor home page, click the **link** for the group you want to delete.
2. If the group has no members, a confirmation prompt appears. Click **Yes** to proceed with the deletion.

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

Warning: *This deletion cannot be undone.*

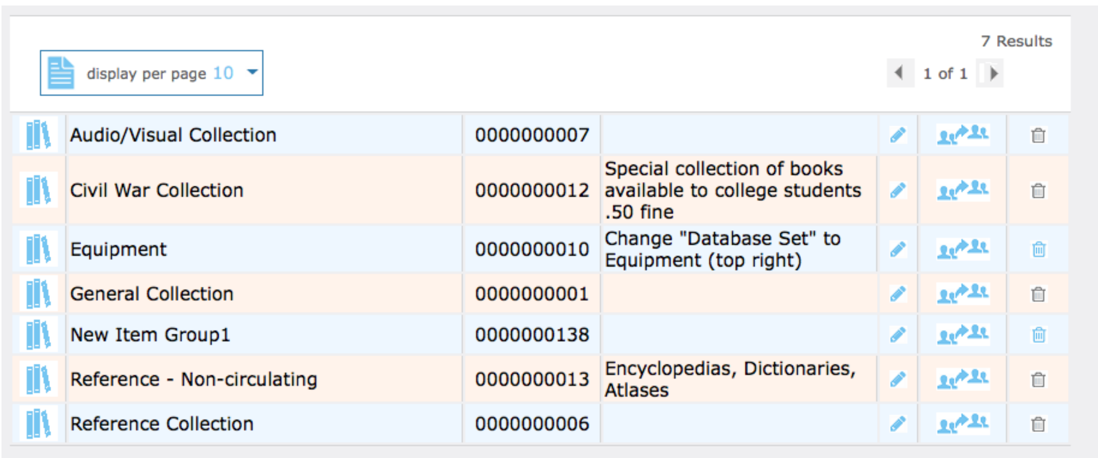
Working with Item Groups

***Note**: Item groups must be in the program before you can enter or import patron records into the Catalog. Some groups are installed with the program.*

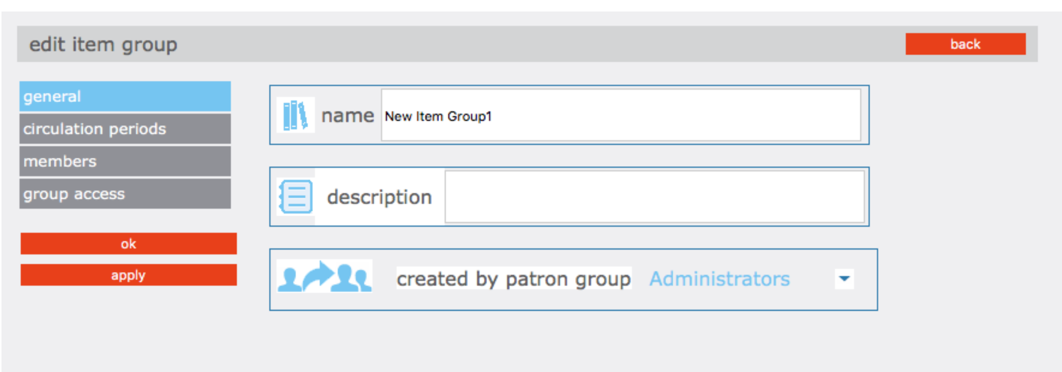
Creating a New Item Group

1. Select a Catalog database in the Database Set list.
2. In the **New** list, select **Item Group**, then click the **New** button on the right. This creates a “New Item Group1” entry.

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

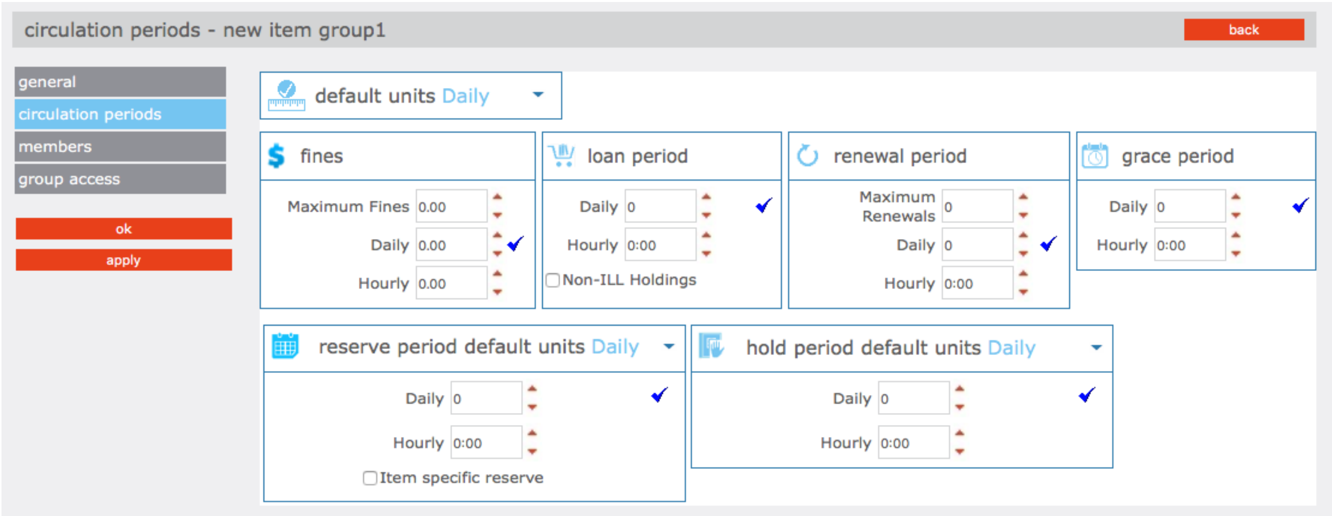


3. Click the  link to the right of the new group. This opens the General page for the new group. Proceed with the following sections to enter information for this group.



General. On this page, enter identification information for the group.

1. In the **Name** box, type the item group’s name.
2. In the **Description** box, type any information needed to describe this group. This will display on the main Group Editor page.
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 on this page, then click Circ Periods in the side menu and proceed to the next section.

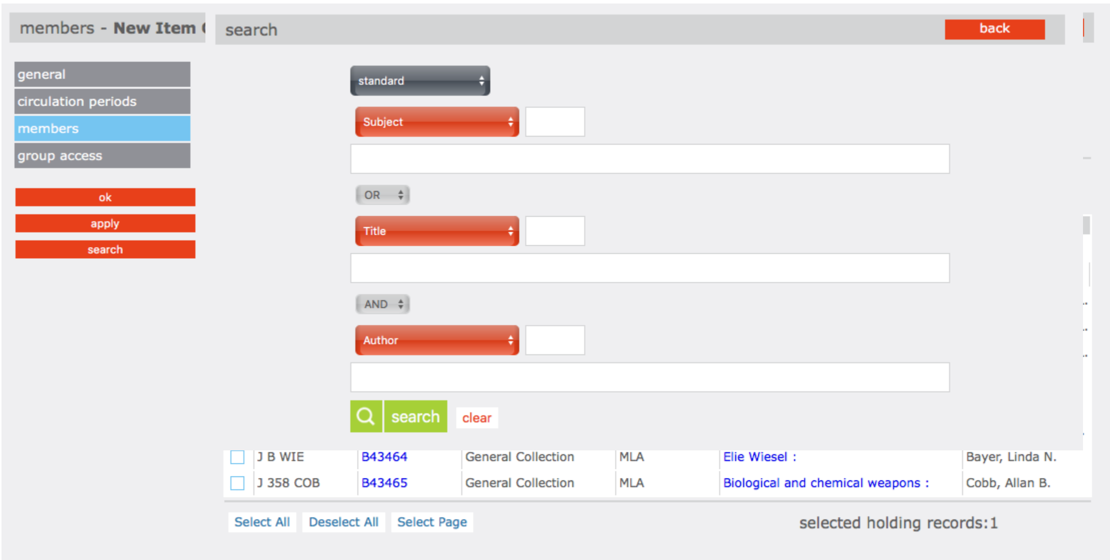


Circ Periods. On this page, establish circulation time frames and fine amounts for this item group.

1. To enter different limits for this item group:
    - In the **Default Units** list, select **Daily** or **Hourly** as the default time unit for **Loan Period, Renewal Period, Grace Period**, and **Fines.**
    - In **Loan Period, Renewal Period, Grace Period**, and **Fines**, enter the time limit for each period type. Also, enter the following:
        - Under **Renewal Period,** enter the maximum number of renewals allowed.
        - Under **Fines**, enter the maximum fine amount.
    - In **Reserve** and **Hold Period Default Units**, enter the time for each of this features
        - **Reserve Period Default Units** are the number of days or hours that the reserve is valid. This number should be a large one, e.g. 200 days, to accommodate long lists of reserves for popular materials. When the reserve period ends, the reserve is cancelled.
        - **Hold Period Default Units** are the number of days or hours that the item is held in the library, waiting for the patron to pick it up. When the hold period ends, if the item has not been retrieved and loaned, the item moves to the hold of the next patron on the reserve list, or it returns to normal status and should be re-shelved.
        - A checkmark in the box for **Item Specific Reserve** indicates that reserves are placed on specific holding records rather than on titles. This is useful for items such as periodicals, where the specific issue is usually required, rather than any issue of that title.

    - Click **OK**. This returns you to the Item Group Overrides page.
2. Click **Apply** to save your entries on this page, then click Members in the side menu and proceed to the next section.

Note: *The Maximum Fine amount is used by the program as the replacement cost if an item is damaged or lost and there is no price in the 852#9 of the holding record. Every library should enter an amount in this box, even if the library does not charge overdue fines.*



Members. On this page, add and remove item group members. Items assigned to this group adhere to the circulation parameters established in Circ Periods.

1. In the **Display list,** select All Items. This displays a list of all items, not just items currently assigned to this group.
2. Select the check box next to each item you want to add to the item group. To locate specific items:
    - On the side menu, click **Search.** This displays the Search page.
    - 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. Under **Move selected records,** the new group name displays. To move the selected items to this group, click the **>>** button on the left. This displays the new group with its assigned items.
4. Click **Apply** to save your entries on this page, then click Group Access in the side menu and proceed to the next section.

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.*

Group Access. On this page, specify which patron groups you want to have access to this group.

1. The Groups Without Access box displays the patron groups that do not have access to make changes 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 **OK** to save your entries on this page and return to the Group Editor home page.

Modifying Item Group Permissions

To modify the permissions assigned to an item group:

1. On the Group Editor home page, click the link for the group you want to modify. This displays the General page for the group.
2. Modify the settings as needed. For instructions, refer to the procedure in Creating a New Item Group.
3. When finished, click **OK** to save your changes.

Deleting an Item Group

To delete an item group from the M5 system:

1. On the Group Editor home page, click the  link for the group you want to delete.
2. If the group has no members, a confirmation prompt appears. Click Yes to proceed with the deletion.

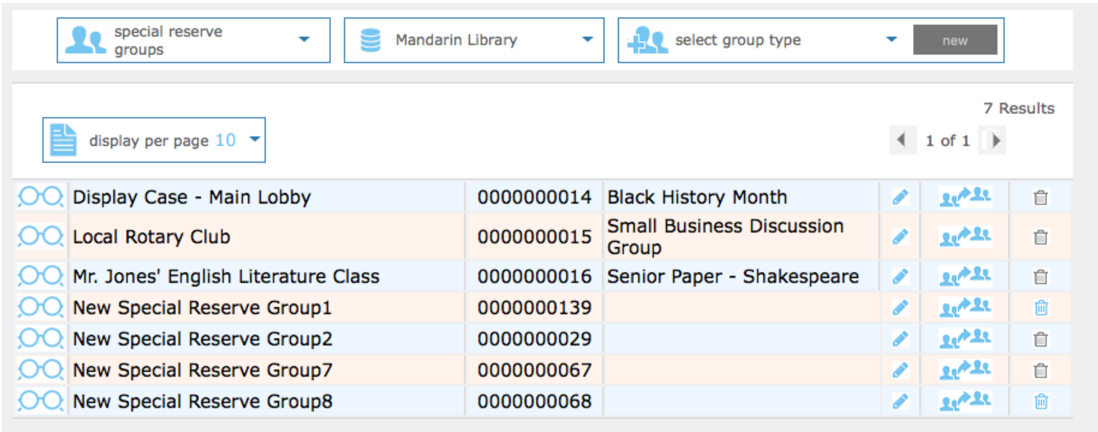
Note: *If members are assigned to the group, the message "You cannot delete a group that has members" appears.*

Warning: *This deletion cannot be undone.*

Working with Special Reserve Groups

Creating a New Special Reserve Group

1. Select a Catalog database in the **Database Set** list.
2. In the **New list**, select **Special Reserve Group**, then click the button on the right. This creates a “New Special Reserve Group1” entry.



3. Click the  link to the right of the new group. This opens the General page for the new group. Proceed with the following sections to enter information for this group.

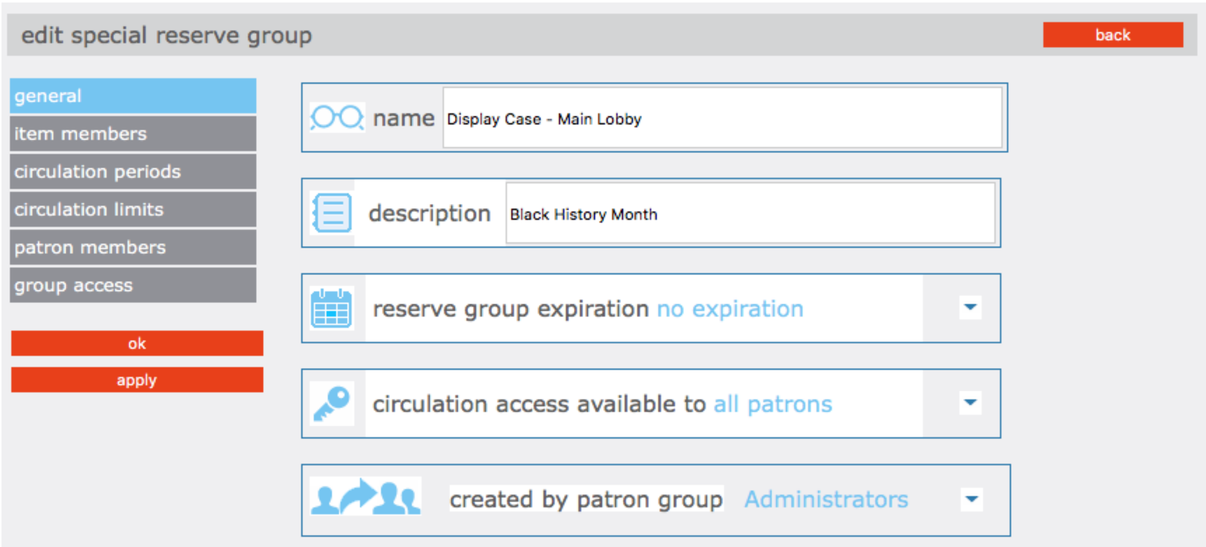
General. On this page, enter identification information for the group as well as information that impacts circulation behavior.

1. In the **Name** box, type the special reserve group’s name.
2. In the **Description** box, type any information needed to describe this group. This will display on the main Group Editor page.
3. Under **Reserve Group Expiration**:
    - If the group has no planned expiration date, click **No Expiration.**
    - 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. Click the calendar’s left (<) and right (>) arrows to select a month, then click the desired date. The date appears in the **Expires box.**

***Note**: On the Expires date the settings for the items and/or patrons of this Special Reserve Group revert to the settings of the standard group (991#a) for each item and/or patron. The Special Reserve Group settings can be made active again by changing the Expires date to the future.*

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. Under **Circulation Access Available to**:
    - Click **All Patrons** if you want all patrons to have access to items included in this special reserve group.
    - 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 on this page, then click Item Members in the side menu and proceed to the next section.



Item Members. On this page, add and remove item group members. Items assigned to this group adhere to the circulation parameters you establish in the next section, Circ Periods.

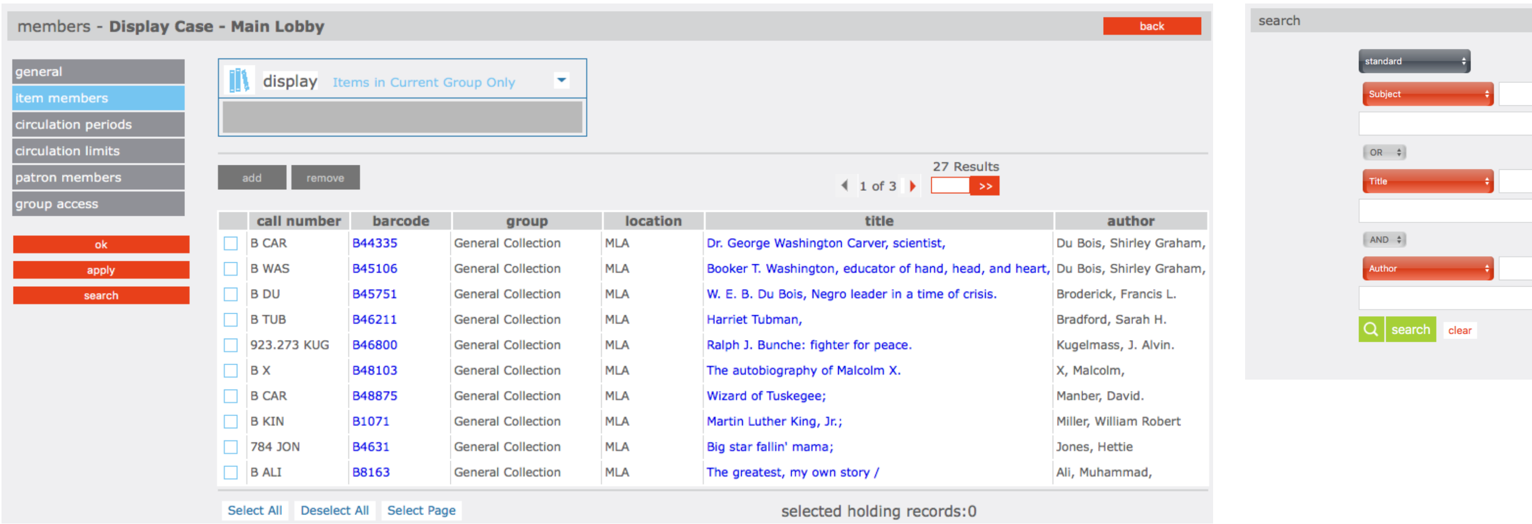
1. In the **Display** list, select **All Items**. This displays a list of all items, not just items currently assigned to this group.

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.*
Scanning items is usually the easiest method to get items into a Special Group.

2. Select the check box next to each item you want to add to the special reserve group. To locate specific items:
   • On the side menu, click Search. This displays the Search page.
   • 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.

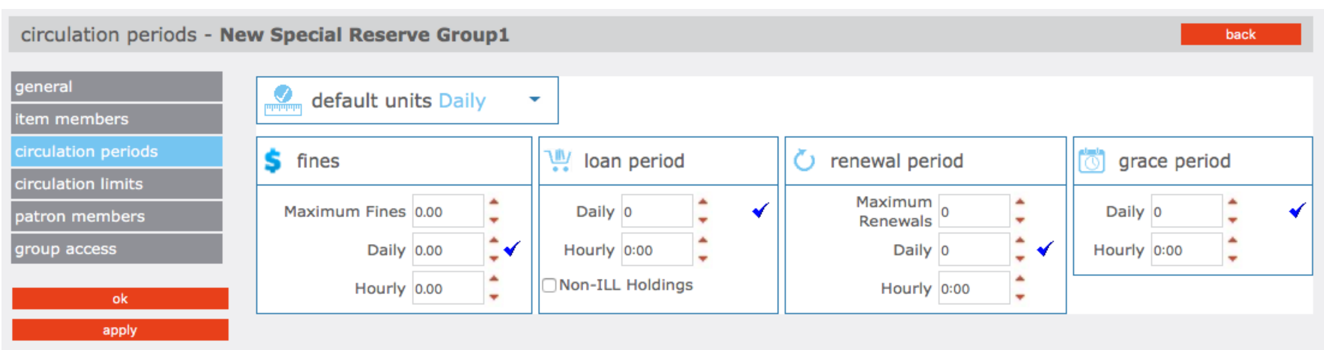
3. When all desired items are selected, click Add. This displays the new group with its assigned items.
4. Click Apply to save your entries on this page, then click Circ Periods in the side menu and proceed to the next section.

Tip: *Click Select All at the bottom of the list to select all items listed.*



Circ Periods. On this page, establish circulation time frames and fine amounts for this special reserve group.

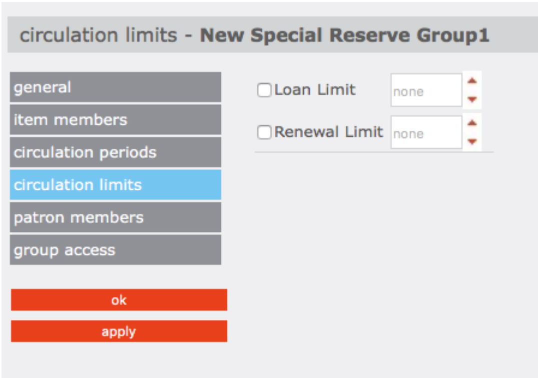
1. Enter circulation time frames and fine amounts for this special reserve group. See steps 3 and 4. in [Item Group Overrides]() at **Creating a New Patron Group.**
2. Click **Apply** to save your entries on this page, then click **Circ Limits** in the side menu and proceed to the next section.



Circ Limits. On this page, customize the circulation quantity limits for the special reserve group. Specify the maximum number of items for each type of transaction listed.

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

2. Click **Apply** to save your entries on this page, then click **Patron Members** in the side menu and proceed to the next section.



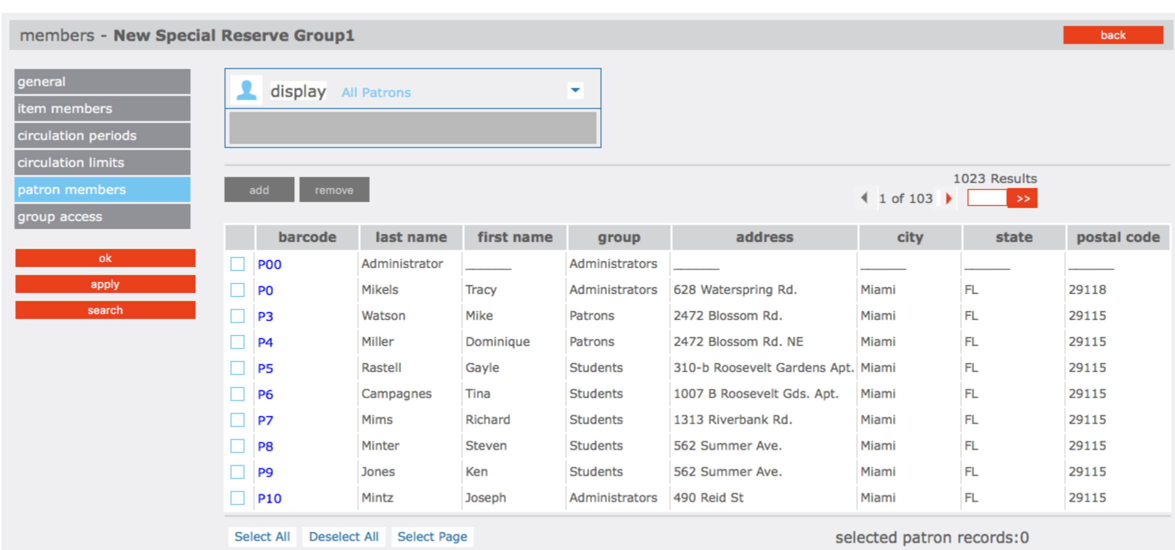
Patron Members. On this page, add and remove patron members.

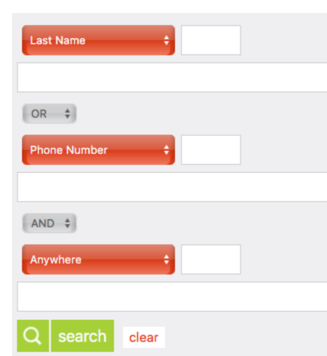
1. In the **Display list**, select All Patrons. This displays a list of all patrons, not just patrons currently assigned to this group.
2. Select each patron you want to add to the **special reserve group**. To locate specific patrons:
    - On the side menu, click **Search.** This displays the Search page.
    - 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. When all desired patrons are selected, click **Add.** This displays the new group with its assigned patrons.
4. Click **Apply** to save your entries on this page, then click Group Access in the side menu and proceed to the next section.

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.*

Tip: *Click Select All at the bottom of the list to select all patrons listed.*

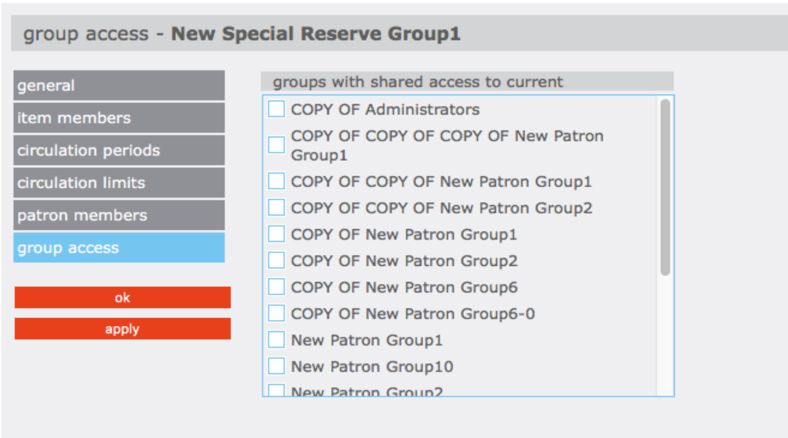




Group Access. On this page, specify which patron groups you want to have access to this group.

1. To make change the group access, select the check box. Repeat this for all groups that you want to have access to this special reserve group.

2. Click **OK** to save your entries on this page and return to the Group Editor home page.



Modifying Special Reserve Groups

To modify the permissions assigned to a special reserve group:

1. On the Group Editor home page, click the link for the group you want to modify. This displays the General page for the group.
2. Modify the settings as needed. For instructions, refer to the procedure in Creating a New Special Reserve Group.
3. When finished, click **OK** to save your changes.

Deleting a Special Reserve Group

To delete a special reserve group from the M5 system:

1. On the Group Editor home page, click the link for the group you want to delete.

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

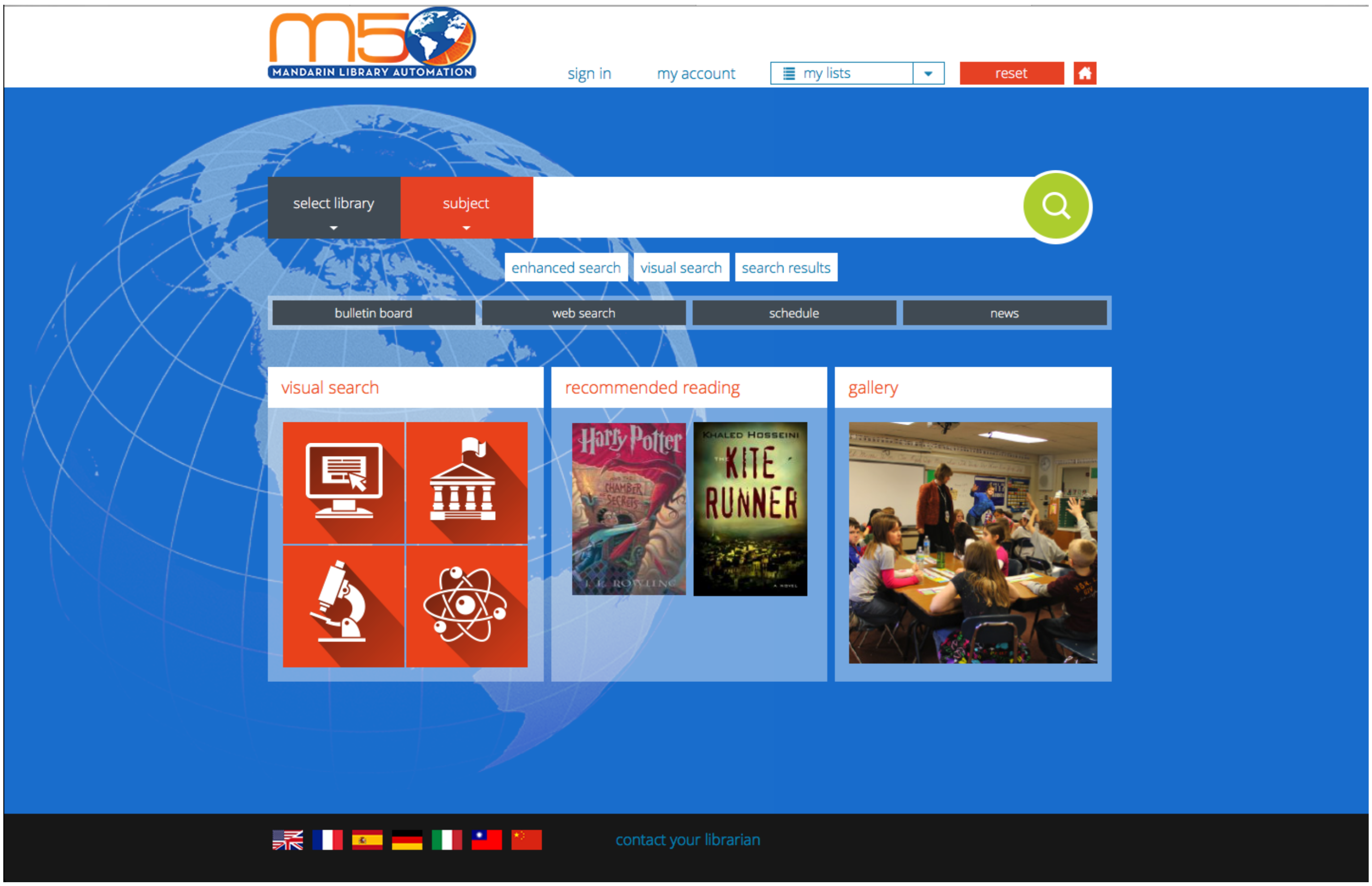
***Note**: You cannot delete a special reserve group if members are assigned to the group.*

***Warning**: This deletion cannot be undone.*

Using the OPAC

This chapter describes:

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

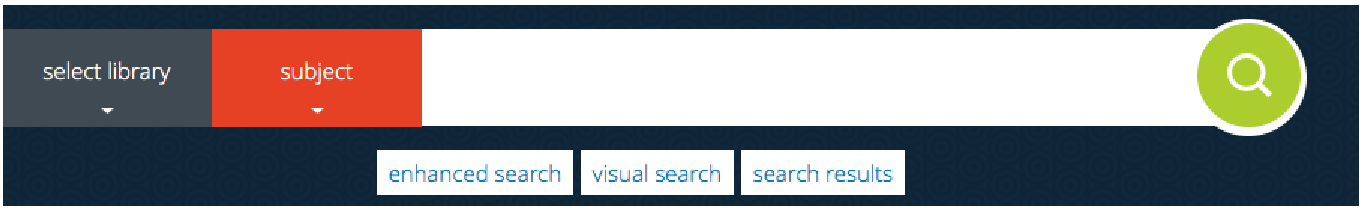


***Note**: Some features described in this chapter may have been disabled by your system administrator, or you may not have permission to access them.*

OPAC Overview

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

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



The OPAC offers three different search methods:

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

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

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

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

• **Visual Search** – Please refer to the Visual Search section in Setup for more information.

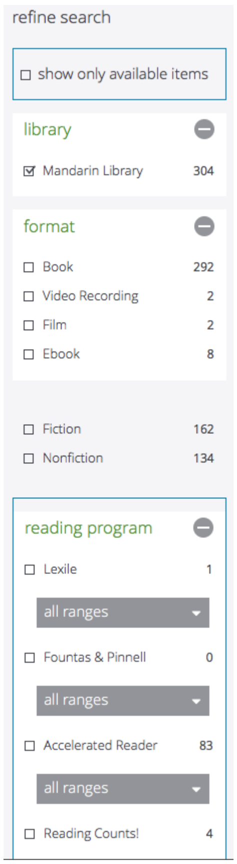
• **Recommended Reading** – Admin users can select items to display on the OPAC homepage so that patrons can click the image to access item details directly. Please refer to the Recommended Reading section in Setup for more information.

• **Gallery** – Admin users can upload images to highlight on the homepage. Please refer to the Gallery section in Setup for more information.

The following features enhance the search session:

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

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



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

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

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

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

• The **Reset feature** returns the user to the default search page and refreshes the session. If the user is NOT signed in, this means that search history and any unsaved lists will be deleted. If the user was signed in, he or she will be automatically signed out.

• The Home Button returns the user to the default search page. Unlike the Reset feature, the home button will NOT sign the user out nor refresh the session.

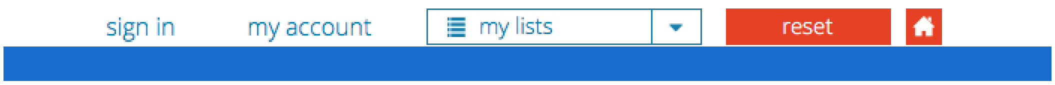
• The **Bulletin Board** is the four grey buttons below the standard search bar that can be used to link to Web pages or files that the library wants patrons to view. These buttons can be edited or turned off in Setup.

• The **Comments/Ratings** feature allows patrons to rate items on a scale of one to five, and/or submit reviews or other comments about specific items. Reviews must be approved by an admin before they will be displayed publicly.

Signing in to the OPAC

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

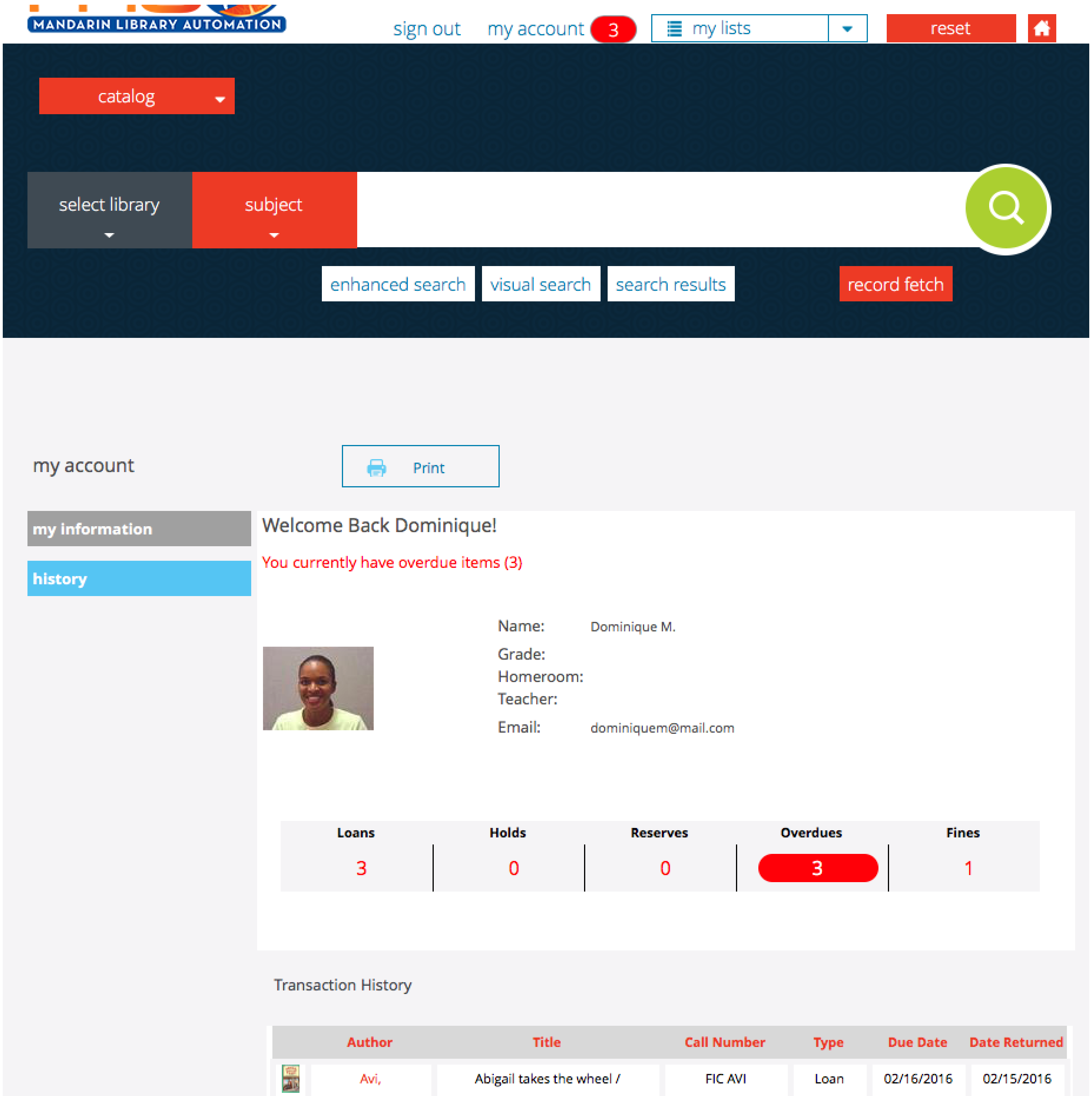
In order to perform tasks that require the OPAC to identify you (such as accessing your saved Bookbag, using **My Account,** or reserving items), you must
sign in. To do so:



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

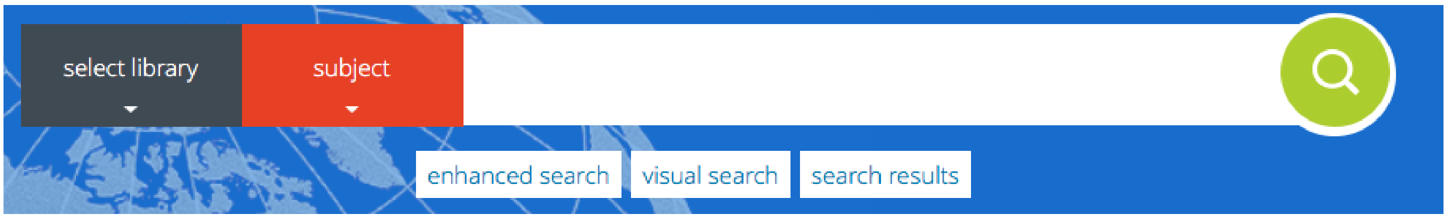
Note: *When finished with your session, click Sign Out or Reset to ensure your privacy.*

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

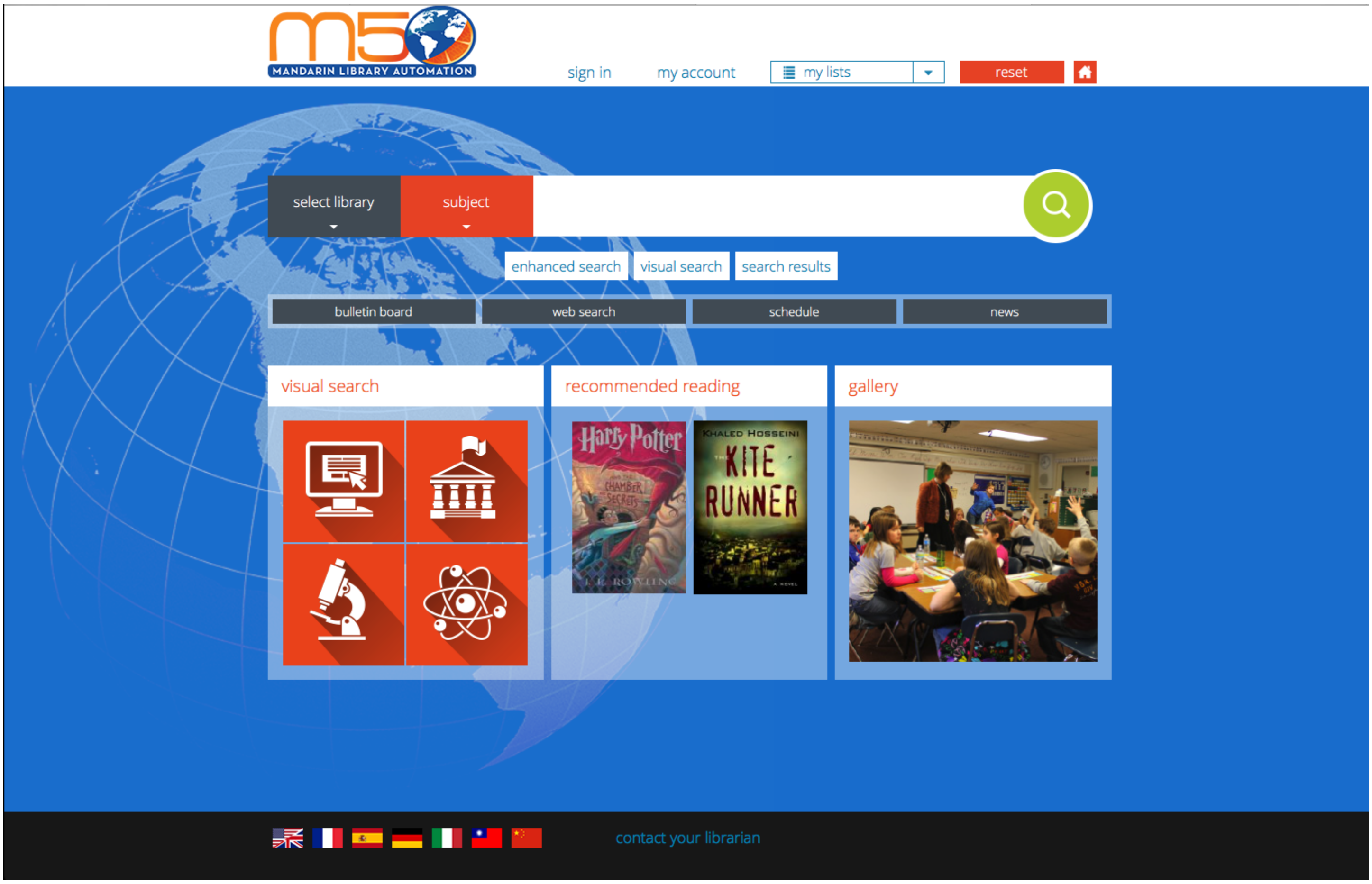

MANDARIN LIBRARY AUTOMATION
sign out
my account 3
my lists
reset
catalog
select library
subject
enhanced search
visual search
search results
record fetch
my account
Print
my information
history
Welcome Back Dominique!
You currently have overdue items (3)
Name: Dominique M.
Grade:
Homeroom:
Teacher:
Email: dominiquem@mail.com
Loans 3
Holds 0
Reserves 0
Overdues 3
Fines 1
Transaction History
Author Title Call Number Type Due Date Date Returned
Avi, Abigail takes the wheel / FIC AVI Loan 02/16/2016 02/15/2016

Searching the OPAC

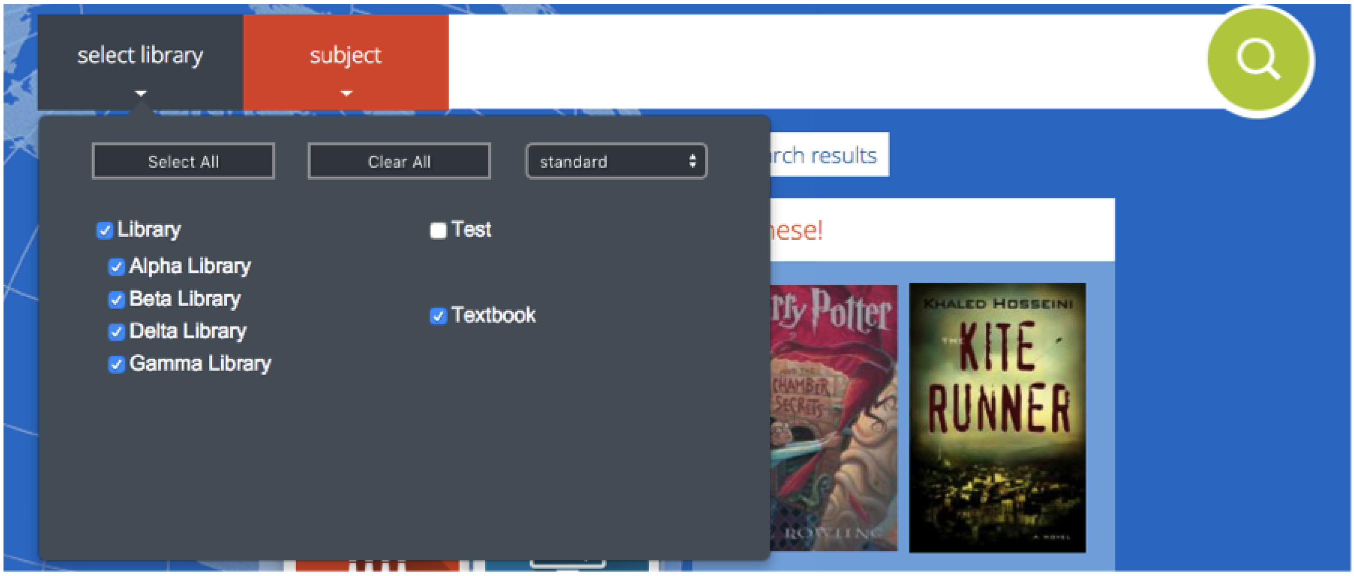
The OPAC offers three different search methods: Standard, Enhanced, and Visual. These are described in the following sections.



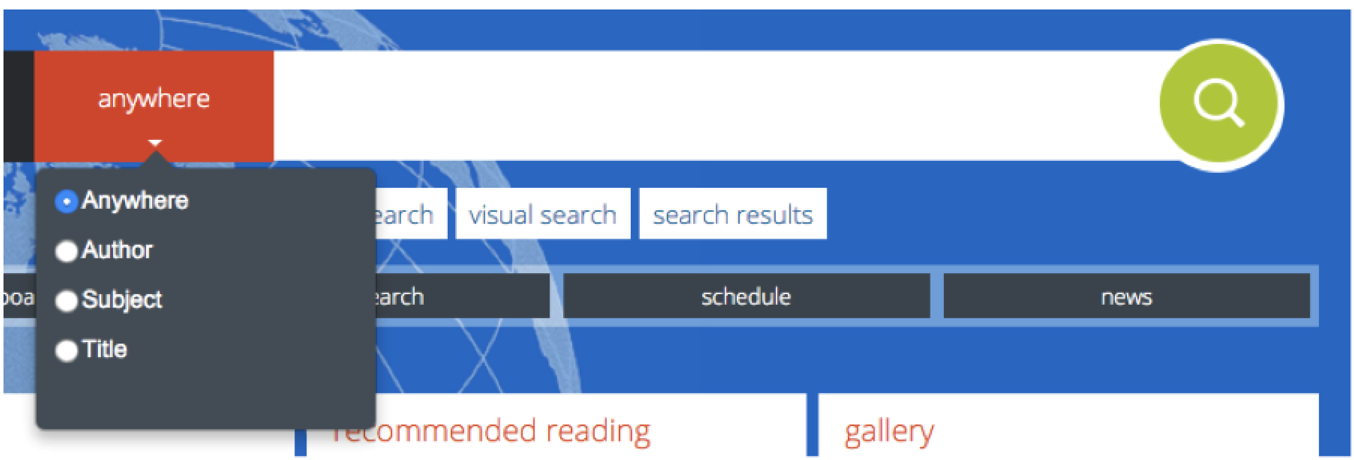
Standard Search

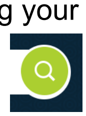


1. Before entering a search term, check the “Select Library” and search by dropdowns.
   - "Select Library” will display all collections that have been configured for that catalog installation. Subsequent searches will search any/all selected libraries. “Standard” collections – which include bibliographic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

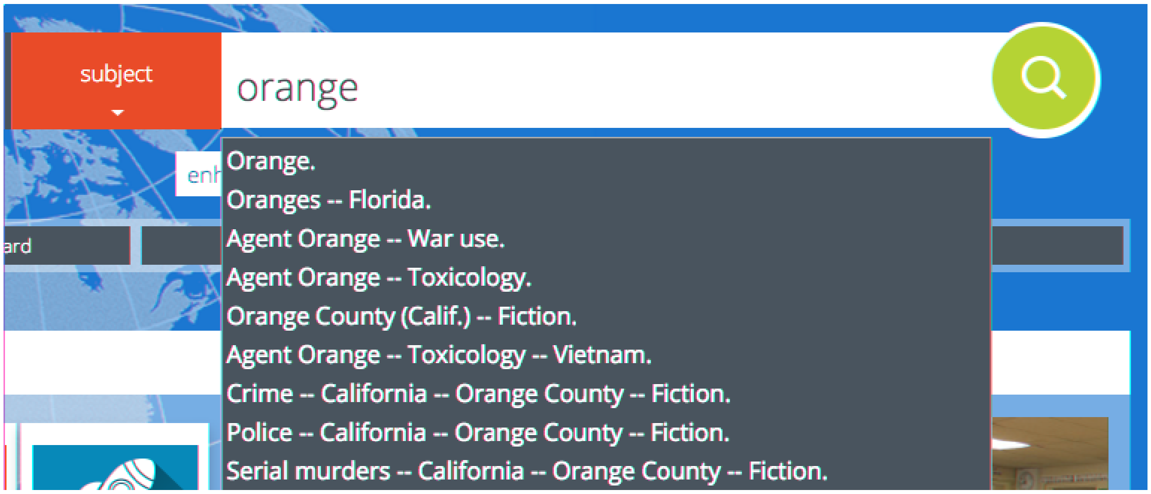


• The “Search By” dropdown will display the selected search attribute: Anywhere, Author, Subject, or Title. The default search attribute may be configured in Setup > Options > “default_search”.



2. Click the search bar and begin typing your desired search term. Once the search term has been entered, press “Enter” or click the search button 

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



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

- The results list will include post-query filters (if available) that enable patrons to refine their search to: show only available items, toggle between libraries/collections, or filter by format, fiction vs nonfiction, reading level or publication dates.

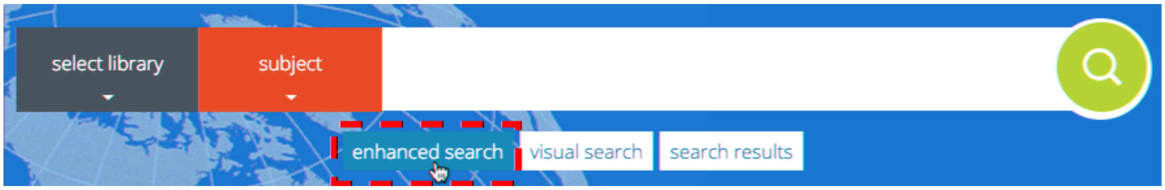
- If a search returns "No Results", please check the spelling of the search term, and try again.

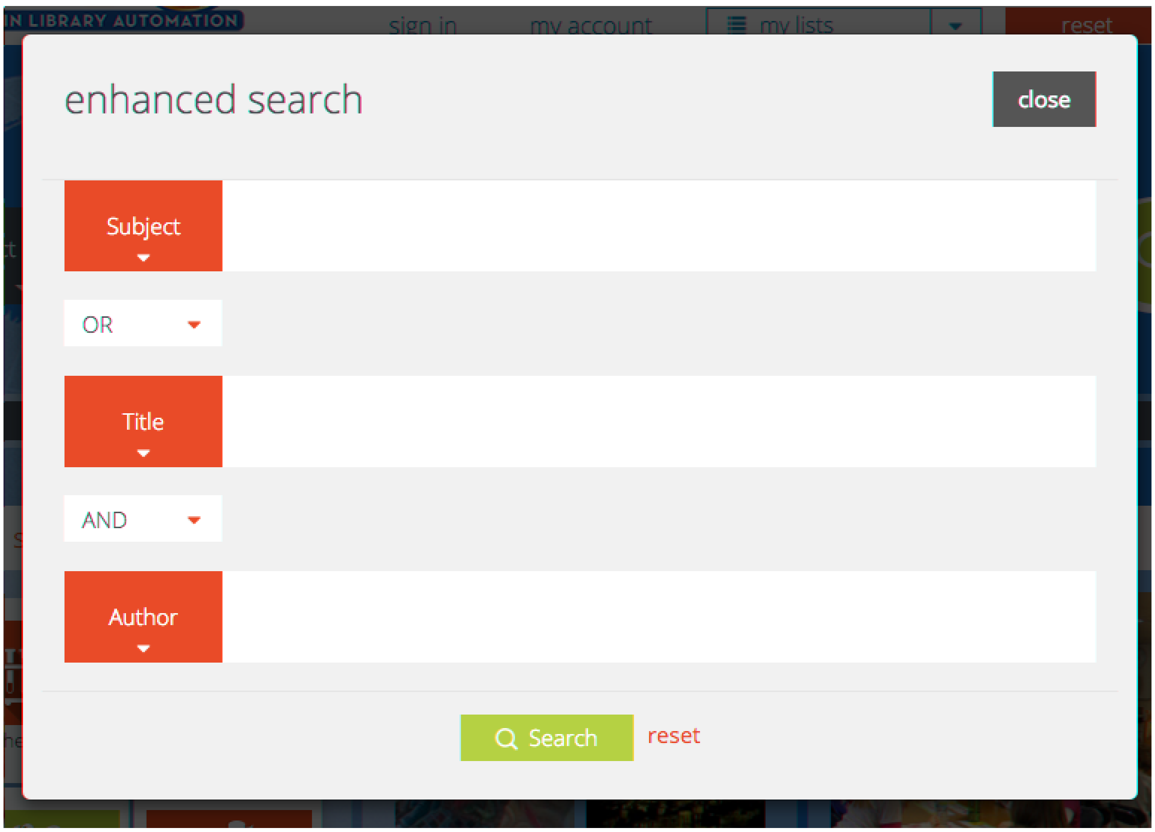
- A new search can be initiated at any time by entering a new term(s) into the standard search bar, or activating one of the other search modes (visual or enhanced search)

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

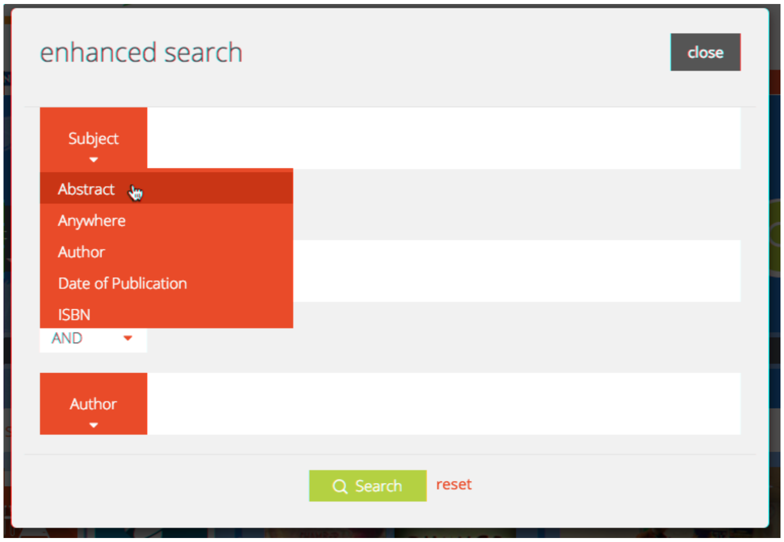
Enhanced Search

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

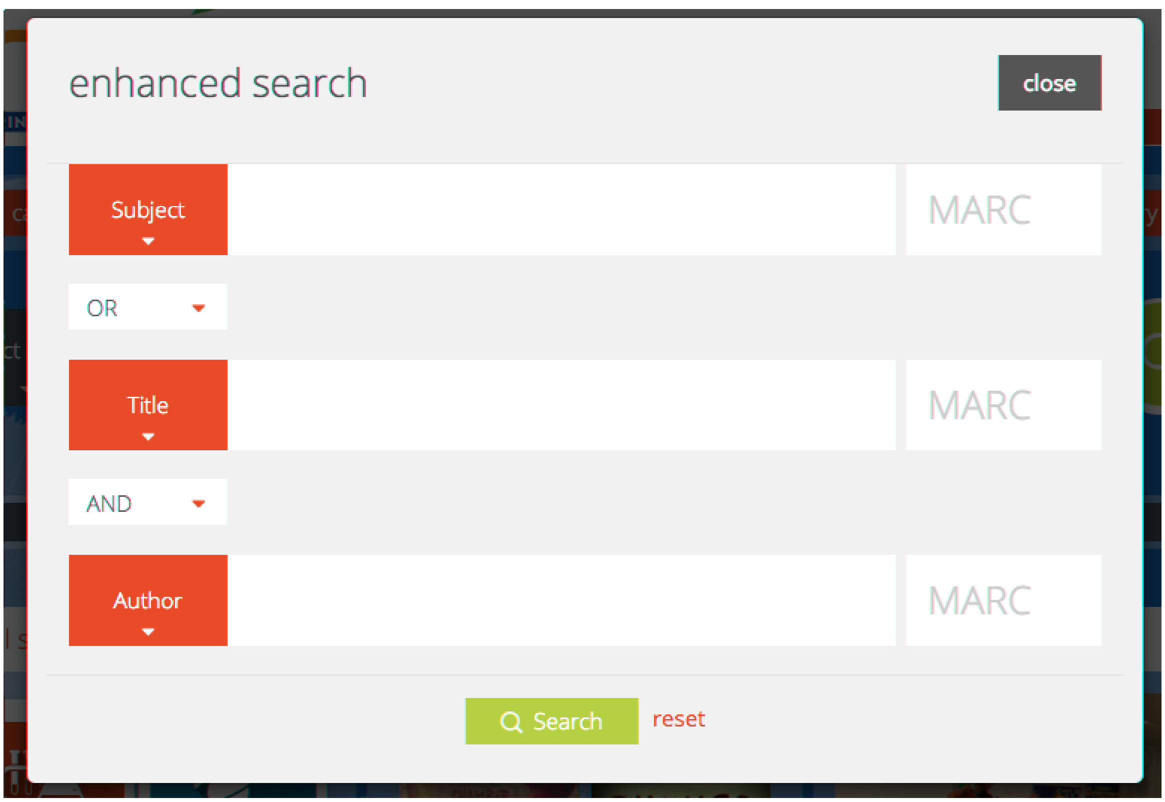


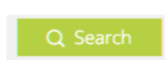


2. Type your search query into one or more of the three keyword boxes, use the dropdown menus to choose search attributes and Boolean operators.



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



3. Press Enter or click **the search button** 

. The **results page** will display the list of search results. See The Results Page for more information.

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

Search Tips

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

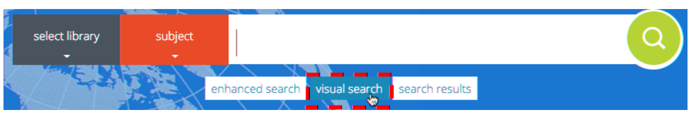
Visual Search

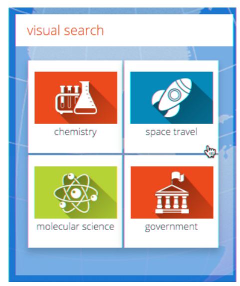
The Visual Search method provides patrons with an easy point-and-click graphical search method. From a patron's perspective, a search consists of clicking a topic component and then clicking a related sub-topic component; this generates a list of search results. In actuality, it is a keyword search method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

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

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

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





2. Click a topic. This either opens a sub-menu page or launches an external Web page.
3. If a sub-menu page appears, continue clicking the desired topics (narrowing the search) until you reach the last menu level (a breadcrumb trail will also appear to allow you to click back to previous levels). Clicking the last level will launch a search query and display the search results on the Results page. (If you click a link component, it will launch a Web page instead of a search query.)

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

The result of selecting them is what makes them different.

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

The Result Page

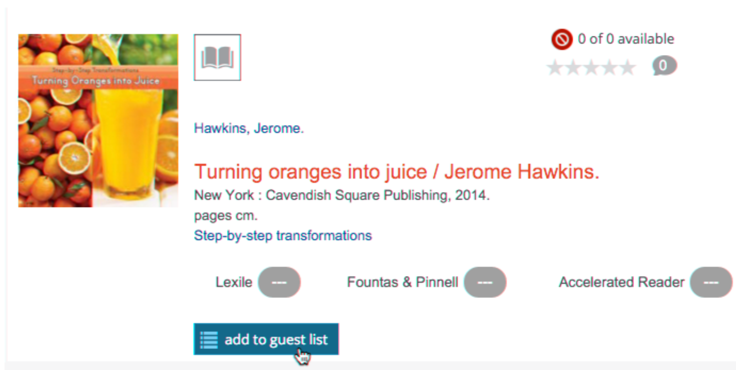
\# **Post-Query Filters**

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

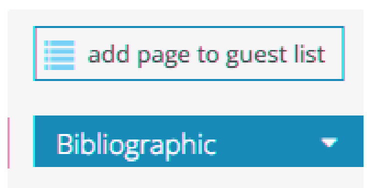
\# **Add Item(s) to List(s)** – please refer to "Using Lists" to learn more about how to manage lists

Non-logged-in Users

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

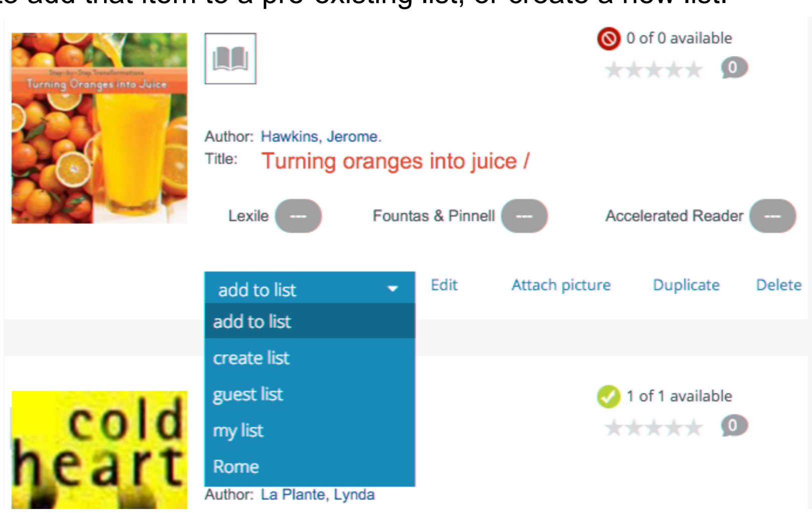


• In the top-left area of the results page, there is also an option to "add page to guest list", this adds all items shown on that page to the Guest List

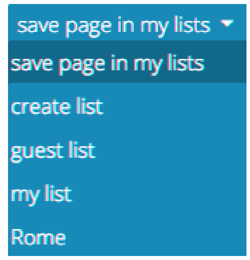


Logged-in Users

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



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

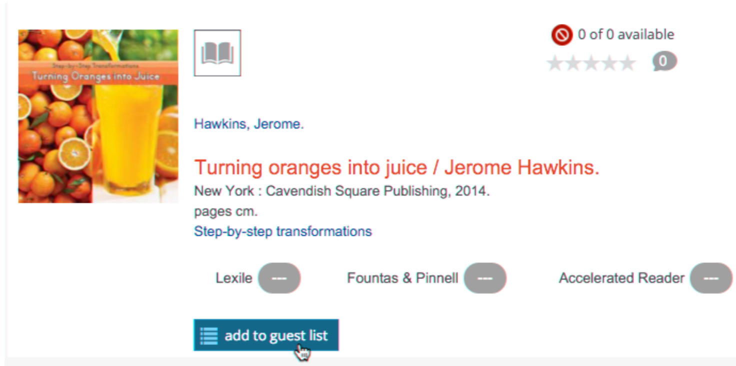


The Detail Page

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

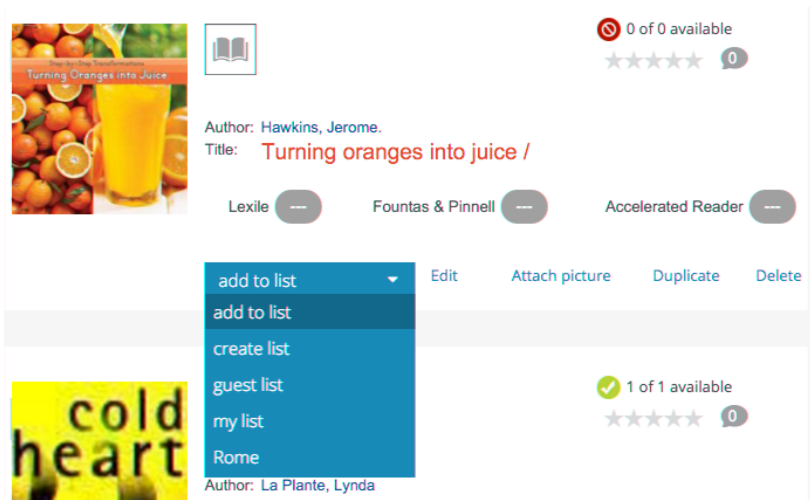
Non-logged-in Users

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

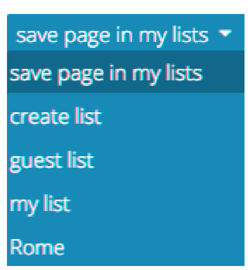


Logged-in Users

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



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



Using Lists

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

Non-logged-in Users

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

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

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

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

Logged-in Users

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

• From My Lists, users may view or edit each list individually, including the option to: remove selected items, remove all items, as well as share, download, print or email each list.

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

Using My Account

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

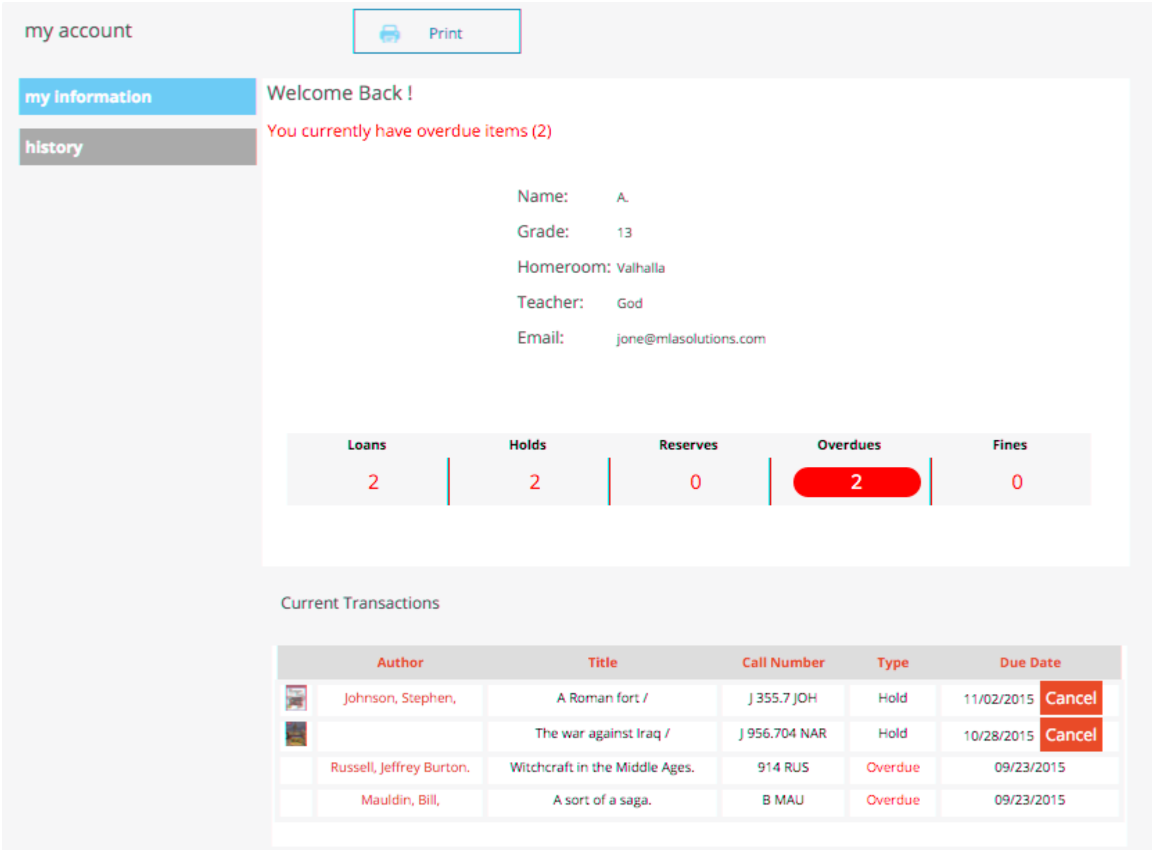
Viewing Your Account Information

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

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

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

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



Renewing Items

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

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

Canceling a Reserve, Hold, or Booking Request

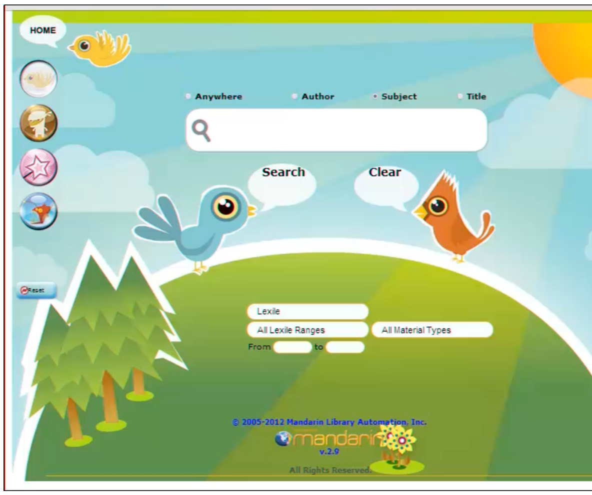
1. On the My Account page, click the “my information” tab and scroll down to view “current transactions”.
2. Click the Cancel button that corresponds to the item you want to cancel.
3. On the confirmation page, click OK.

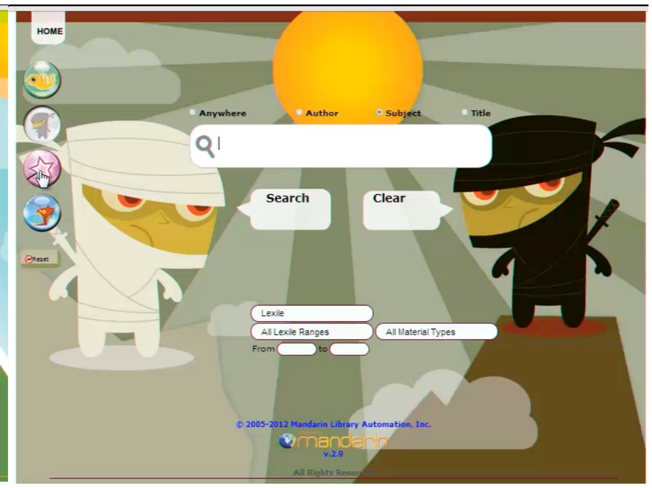
Kids OPAC

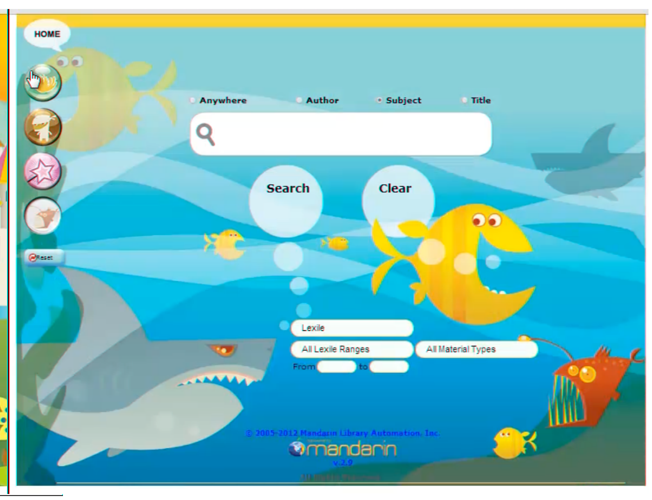
Kids OPAC makes it fun for young readers to search a library's collection! Children can choose from four themes by toggling among them.

Overview

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



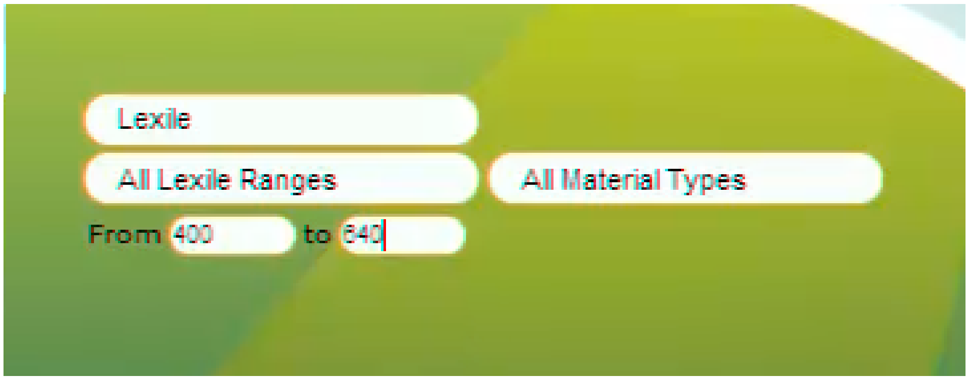




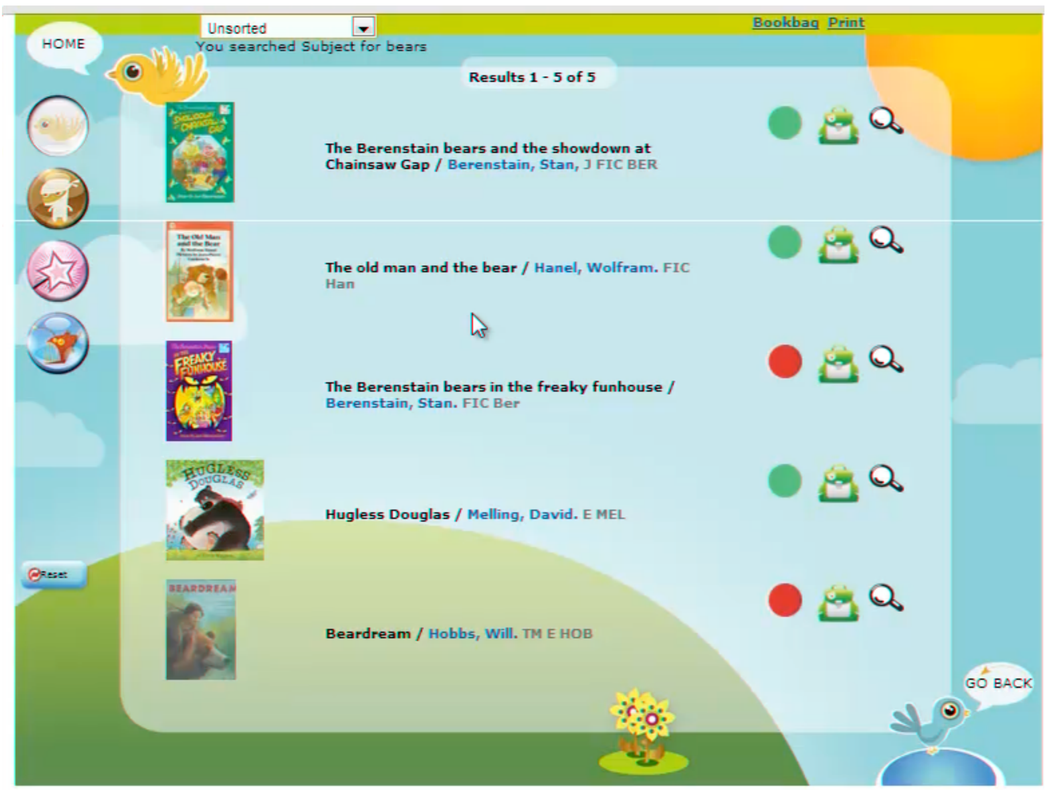
How to use it

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

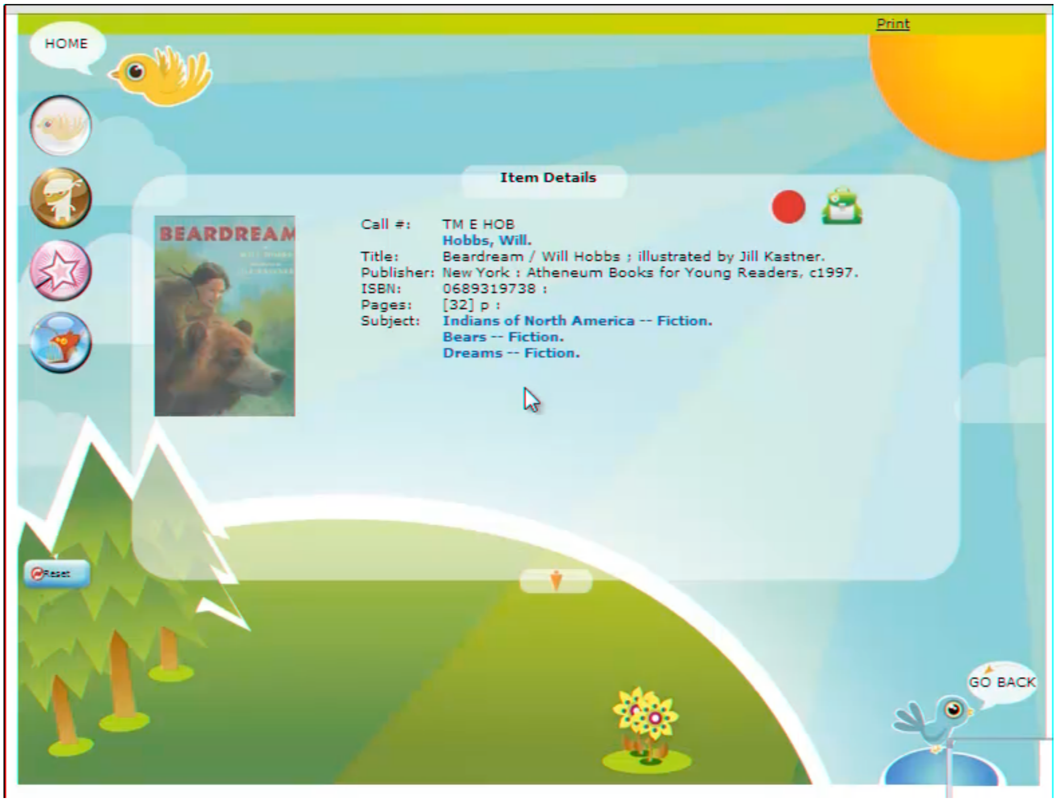
As in the regular OPAC, students can search by Lexile, Fuontas & Pinnell or Accelerated Reader to find materials at their individual reading level.



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



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

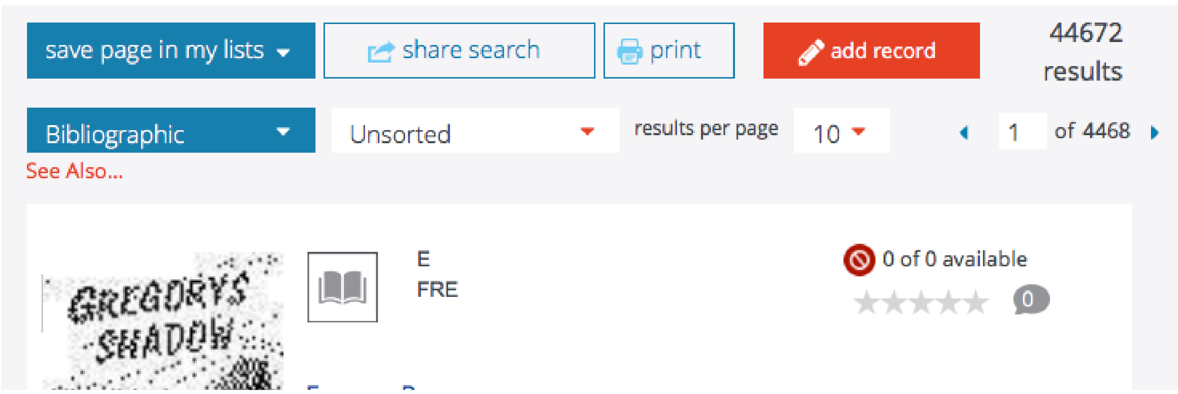


Again, this is connected to your usual OPAC, and clicking on Home brings you back to the standard OPAC home page.

Using the Catalog

Cataloging allows you to add, edit, duplicate, and delete item and patron records. To access Cataloging, you must sign in to M5 with the proper permissions. After you've signed in, M5 displays the tabs for all library functions that you have permission to access.

The bibliographic and patron record editors are accessed from the **Results** page, and the holding record editor is accessed from the Details page.



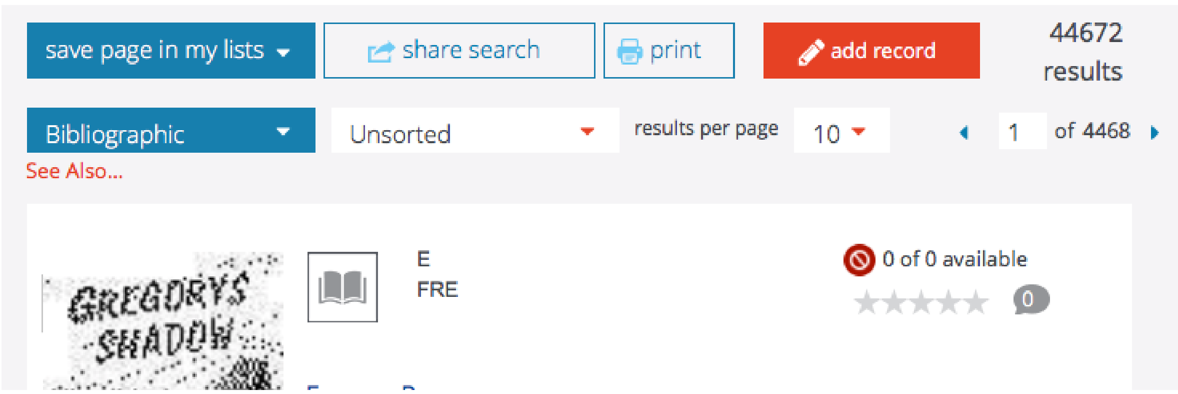
NOTE: *When you have created or edited a record and are ready to save it, keep in mind that any fields left empty in the record will be deleted when you save the record. If you do not want empty fields to be deleted, change the Strip Empty Fields entry in the Global.ini.REG file (the default path is C:\M3 Server\Registry\Common) to OVERRIDE=on. This setting will take effect the next time you start the record editor. Authority Control users should not change this setting.*

Bib Records (Add, Duplicate, Edit, Add from Z39.50)

Note*: Bibliographic records can also be added and edited within Circulation.*

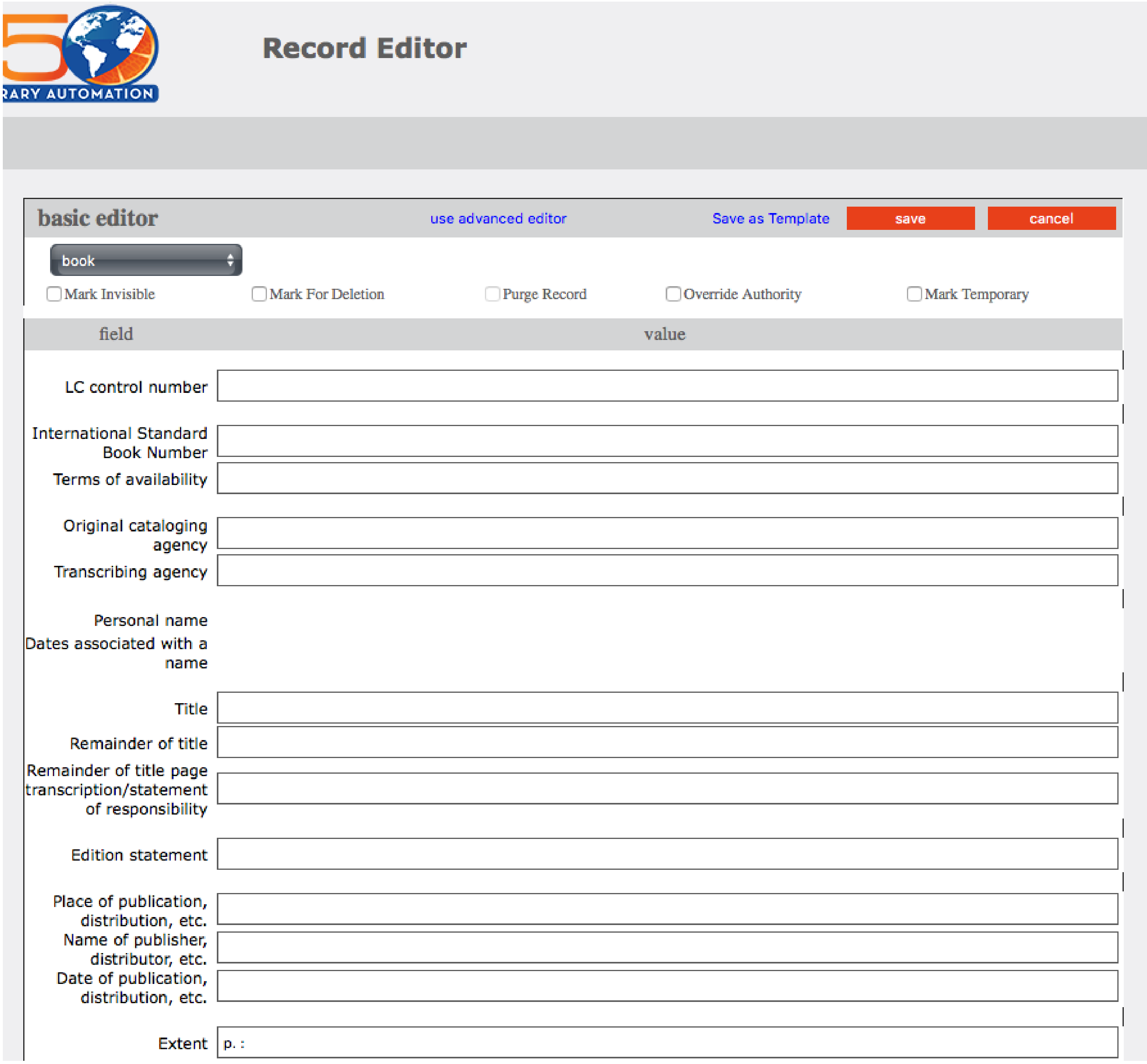
Adding a Bibliographic Record to the Catalog

On the Results page, click the **Add Record** link at the top of the page. This displays the basic record editor, which allows you to quickly enter a record. If more options are required, skip to Using the Advanced Editor.



Using the Basic Editor

1. Select the media type in the list at the top (for example, Book). This displays the appropriate fields for this media type.
2. Type data in the desired fields.
3. To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then Save.
4. If you have Authority Control installed, certain authority-controlled fields are editable only when the **Override Authority** check box is selected. If you do not want these fields to be editable, clear the check box.
5. When finished, click **Save**.



Note: *The Override Authority check box appears only if Authority Control is installed on your system.*

Using the Advanced Editor

1. To display more field and subfield choices, click **Use Advanced Editor**. This displays the advanced record editor
2. On this page, you can edit the record.
    - To insert a new field, type the field number in the keyword box at the top, then click **Insert Field.** This displays another page with subfield choices; its contents will vary depending on the

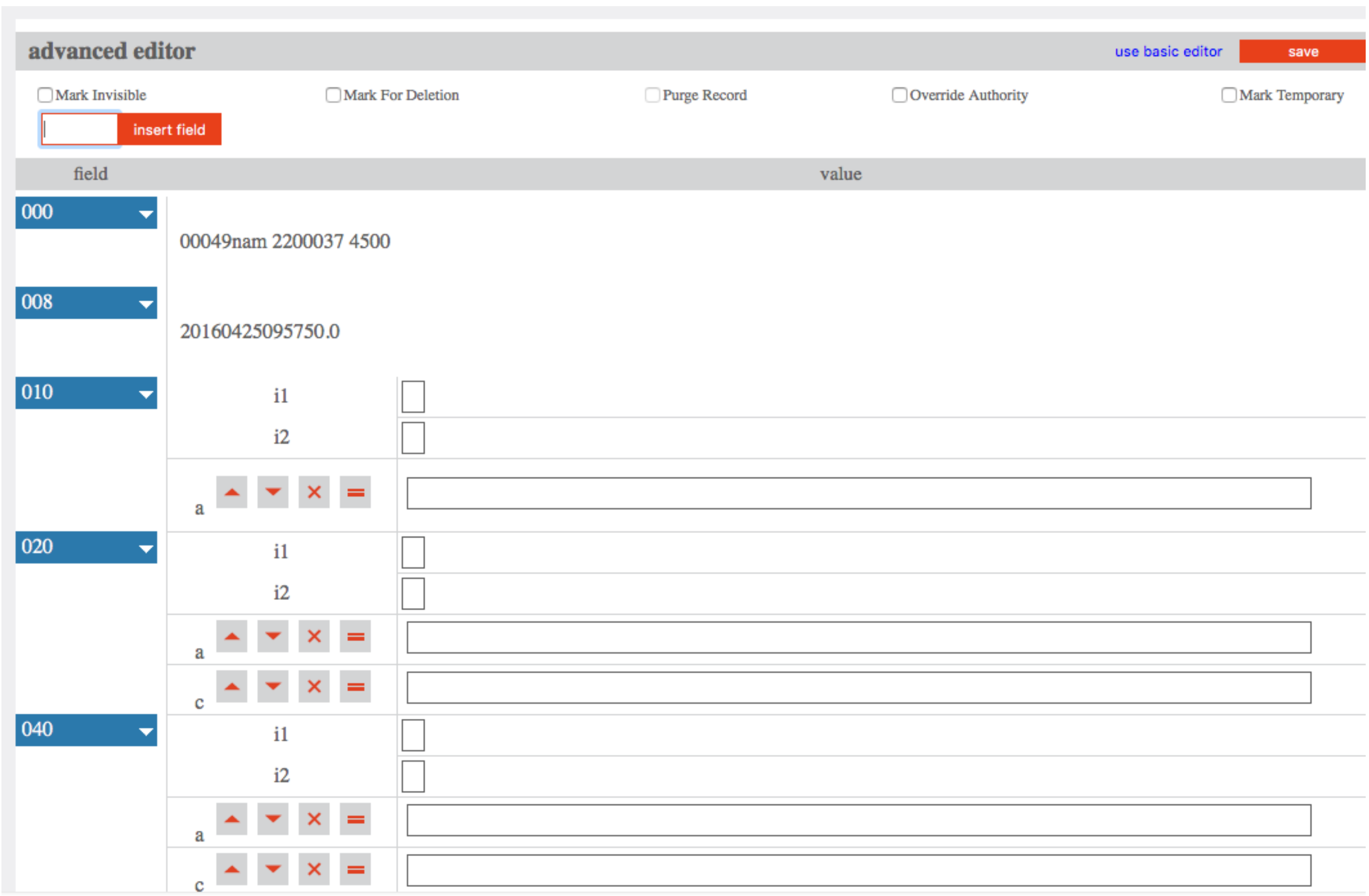
field. Select the check box next to the desired subfield, or type the subfield in the keyword box, then click **OK**.

• You can hold your mouse over the number in the Field column until a menu displays, then click an option in the menu. In control fields, your options are **Edit** or **Delete**; in data fields, your options are **Insert Subfield, Delete, Move Up, Move Down**, and **Rename**.

• To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.

• If you have Authority Control installed, certain authority-controlled fields are editable only when the **Override Authority** check box is selected. If you do not want these fields to be editable, clear the check box.

3. When finished, click Save.



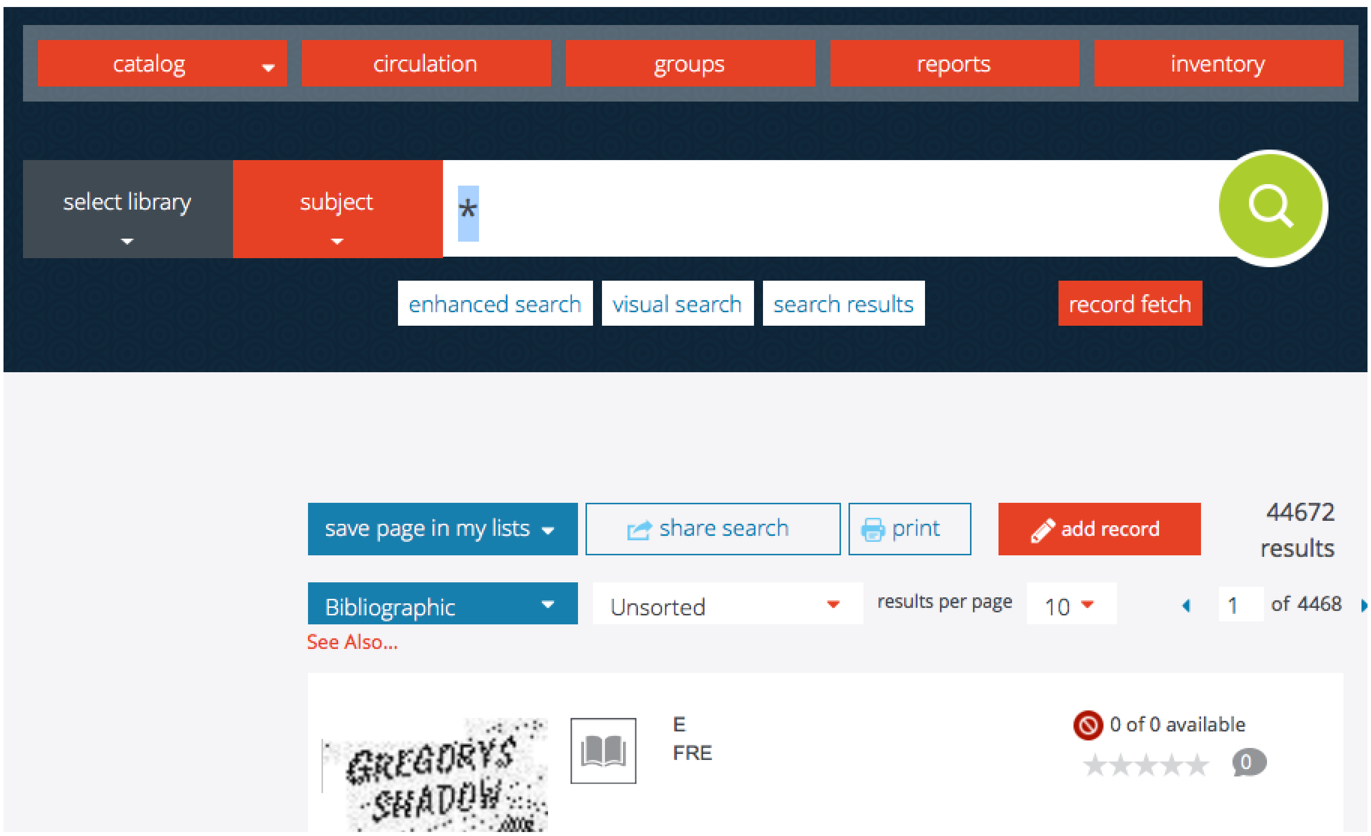
Tip: *To type multiple fields or subfields in a keyword box, separate the entries with a comma and no spaces (for example, to insert fields 200, 300, and 500, type 200,300,500).*

Note: *The Override Authority check box appears* *only if Authority Control is installed on your system.*

Adding Records to the Catalog from Z39.50 Sites (Record Fetch)

In Record Fetch you can add records from the Z39.50 sites configured by your system administrator. After searching for the desired records, add them to your bookbag and then add them to the catalog.

1. Select **Record Fetch** underneath in the search bar.
2. Under **Select Libraries,** select each site you want to search, then click back on **Record Fetch** to return to the Search page.
3. Enter your search query and click **Search**. This displays the Results page with the list of search results.
4. Select the **Save page in my list** or **Save record in my list.**This adds these records to your list/
5. Click **My Lists** link in the top of the page to access your lists. To add these records to the catalog, click the **Add Records** link at the top of the list.
6. A confirmation appears; click **OK**.



To import multiple records from Z39.50 sites by using ISBNs or ISSNs, see Using ISBN/ISSN Fetch.

Note: *For information on configuring Z39.50 sites, see "Configuration" chapter.*

Tip: *You can clear the check box next to any record you do not want to add to the catalog; it will be removed from your bookbag.*

Creating a Bibliographic Record by Duplication

1. Search for the bibliographic record you want to duplicate. Enter the desired search criteria, then click **Search**. This displays the Results page with your search results.
2. On the Results page, click the **Duplicate** link under the bib record. This displays the basic record editor with a duplicate record. (To display more field and subfield choices, click **Use Advanced Editor**. This displays the advanced record editor. See Using the Advanced Editor.)
3. Edit the data as needed.
4. To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.

Editing a Bibliographic Record

1. Search for the bibliographic record you want to edit. Enter the desired search criteria, then click **Search**. This displays the Results page with your search results.
2. Click the **Edit** link under the bib record. This displays the advanced record editor with record data.
3. Edit the data as desired.

Tip: To create a more specific search, enter MARC field and subfield codes (e.g. 852#k) in the small empty boxes next to the dropdown menus of the search form. Then enter the search criteria in the box below as usual. Information in the small box overrides and ignores the dropdown menu.

4. To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**

NOTES:

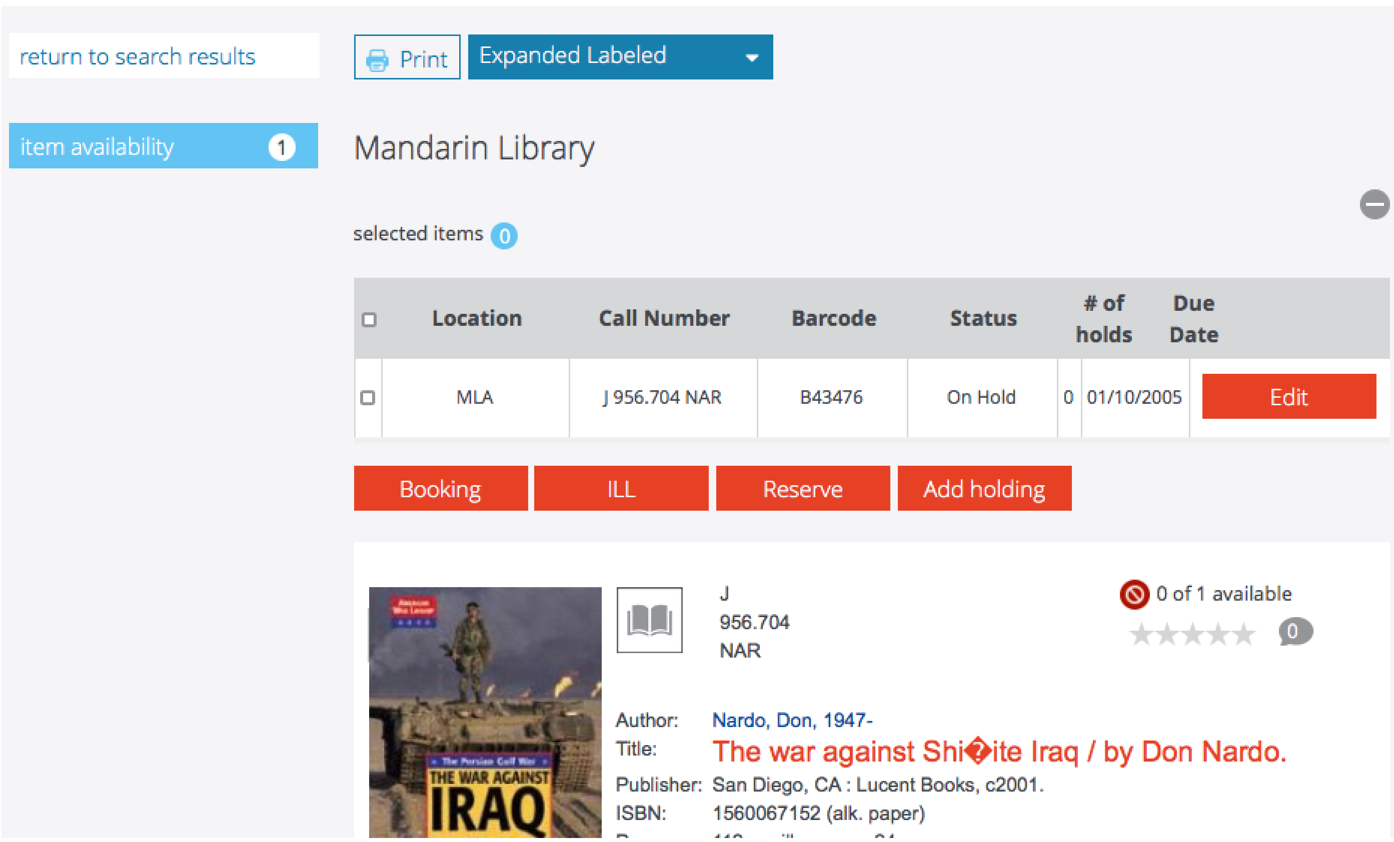
- To undelete a record, click **Edit** on the Results page. In the record editor, clear the **Mark for Deletion** check box, then click **Save**.
- Records can be deleted and/or purged in batches in Advanced Cataloging. See Using Find and Replace.

Holding Records (Add, Edit)

***Note**: Holding records can also be added and edited within Circulation.*

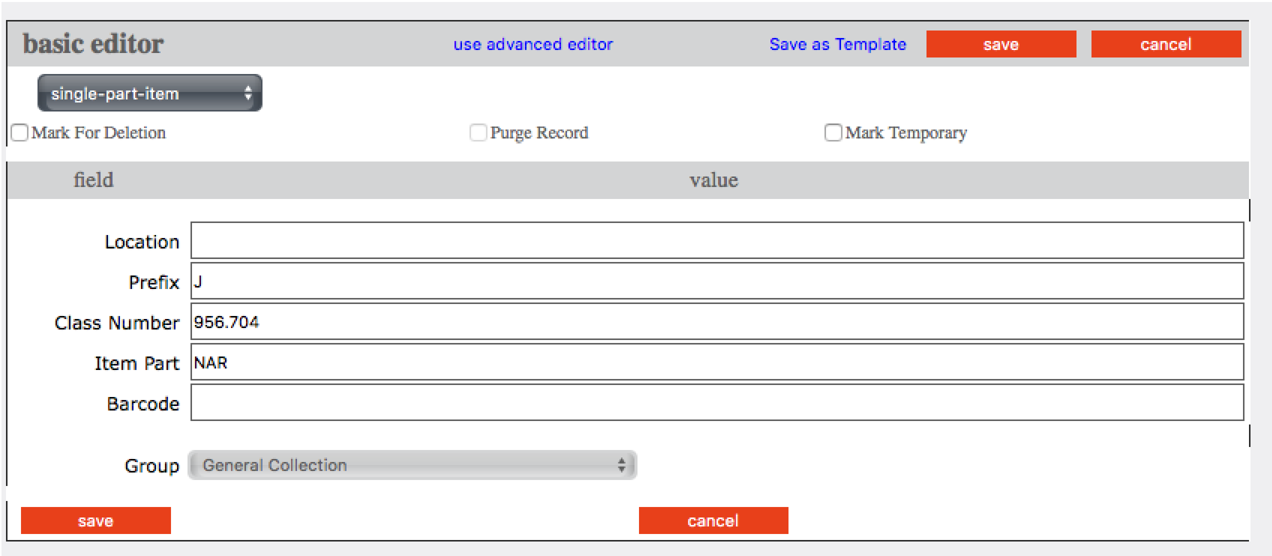
Adding a Holding Record to the Catalog

1. Search for the bib record to which you want to add a holding. Enter the desired search criteria, then click the **Search Icon**. This displays the Results page with your search results.
2. On the Results page, click the **Title** in the bib record. This displays the Details page.
3. Click the **Add Holding** link at the top of the page. This displays the basic record editor, which allows you to quickly enter a record. If more options are required, skip to [Using the Advanced Editor](#).



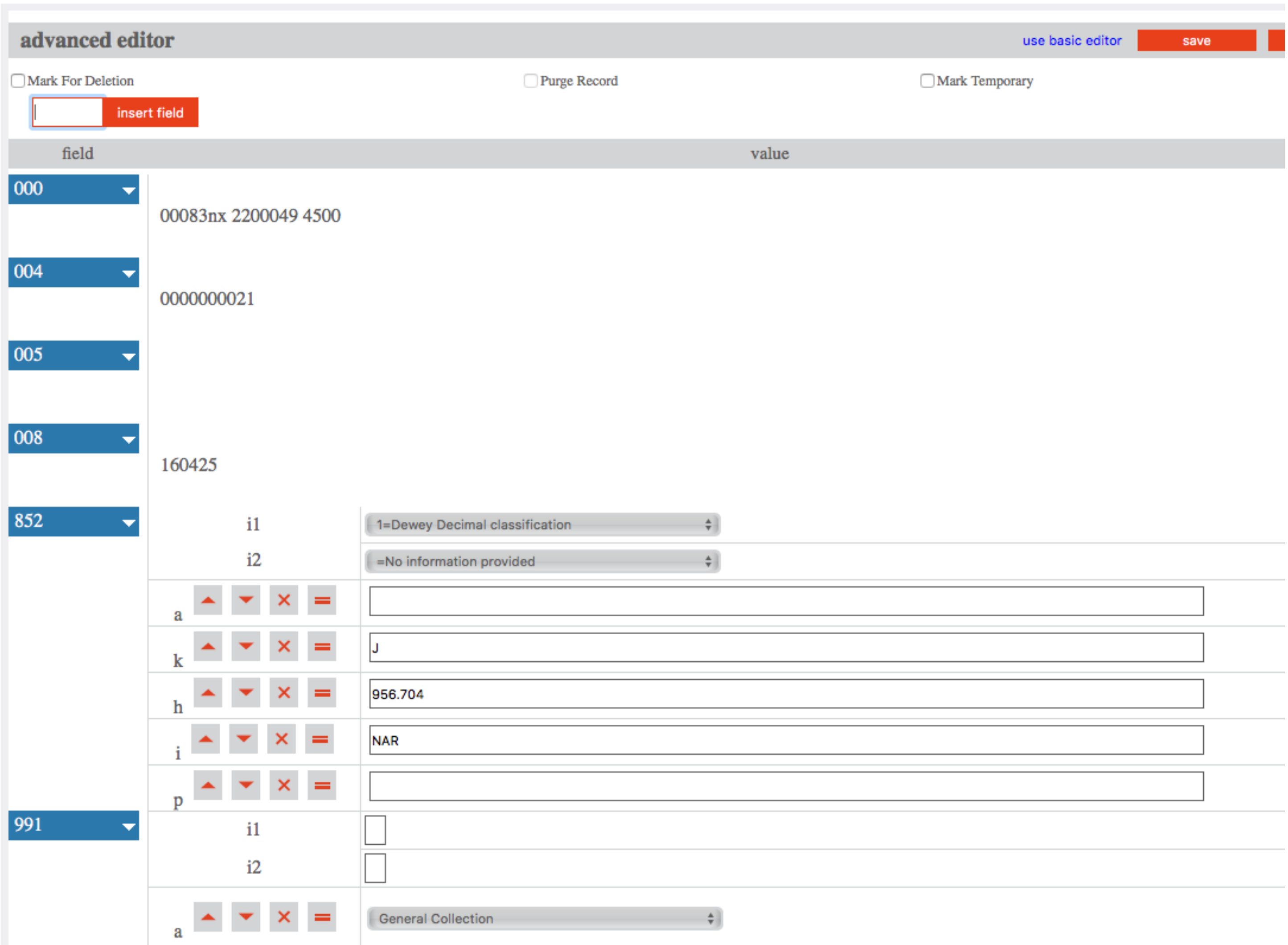
Using the Basic Editor

1. Select the item type in the list at the top (for example, **Single-Part Item**). This display the appropriate fields for this item type. This displays the appropriate fields for this item type.
2. Type data in the desired fields.
3. To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.



Using the Advanced Editor

1. To display more field and subfield choices, click **Use Advanced Editor**. This displays the advanced record editor.
2. On this page, you can edit the record.
    - To insert a new field, type the field number in the keyword box at the top, then click **Insert Field**. This displays another page with subfield choices; its contents will vary depending on the field. Select the check box next to the desired subfield, or type the subfield in the keyword box, then click **OK**.
    - You can hold your mouse over the number in the **Field** column until a menu displays, then click an option in the menu. In control fields, your options are **Edit or Delete**; in data fields, your options are **Insert Subfield, Delete, Move Up, Move Down, and Rename.**
    - To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.



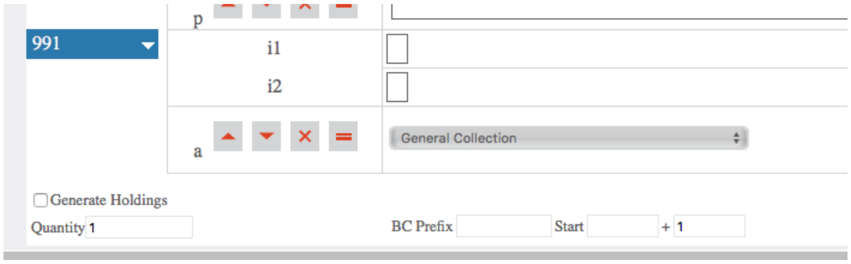
Tip: *To type multiple fields or subfields in a keyword box, separate the entries with a comma and no spaces (for example, to insert fields 200, 300, and 500, type 200,300,500).*

Editing a Holding Record

1. Search for the bib record for the holding you want to edit. Enter the desired search criteria, then click **Search**. This displays the Results page with your search results.
2. On the Results page, click the **Details** link in the bib record. This displays the Details page.
3. Under **Copies/Availability**, locate the desired holding and click its **Edit** link. This displays the advanced record editor with record data.
4. Edit the data as desired.
5. To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.

Adding Multiple Holding Records

To generate multiple holding records for one bibliographic record, in the case of multiple copies or multiple volumes, for example, click on the **Generate Holdings** checkbox at the bottom of the record in the Advanced Editor.



- In the Quantity box, indicate the number of additional holding records to create.
- In the **BC Prefix** box, enter the barcode prefix, if there is one.
- In the **Start** box enter the first barcode number to be used (minus any prefix).
- In the + box enter the increment between barcodes to be created.
- Click **Save**.

NOTES:

- To undelete a record, click **Edit** on the Results page. In the record editor, clear the **Mark for Deletion** check box, then click **Save**.
- Records can be deleted and/or purged in batches in Advanced Cataloging. See [Using Find and Replace].

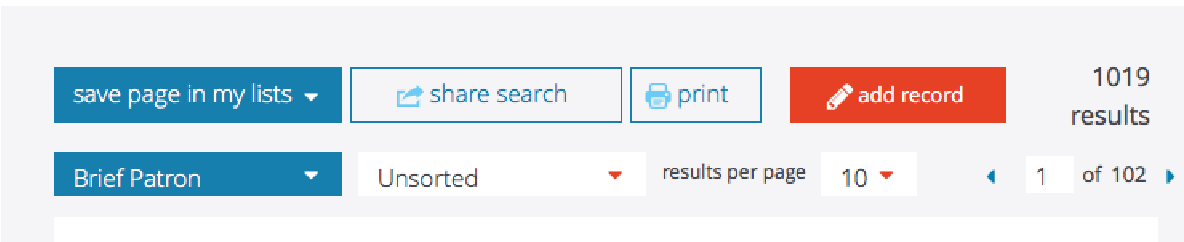
Patron Records (Add, Duplicate, Edit, Delete)

***Note**: Patron records can also be added and edited within Circulation.*

To deal with patron records in the Catalog, first change the active database to the patron database.
• Click on **Libraries** in the left menu.
• Change the dropdown menu from **standard** to **patrons**.
• Click back on one of the Search pages (Standard, Enhanced, or Visual).

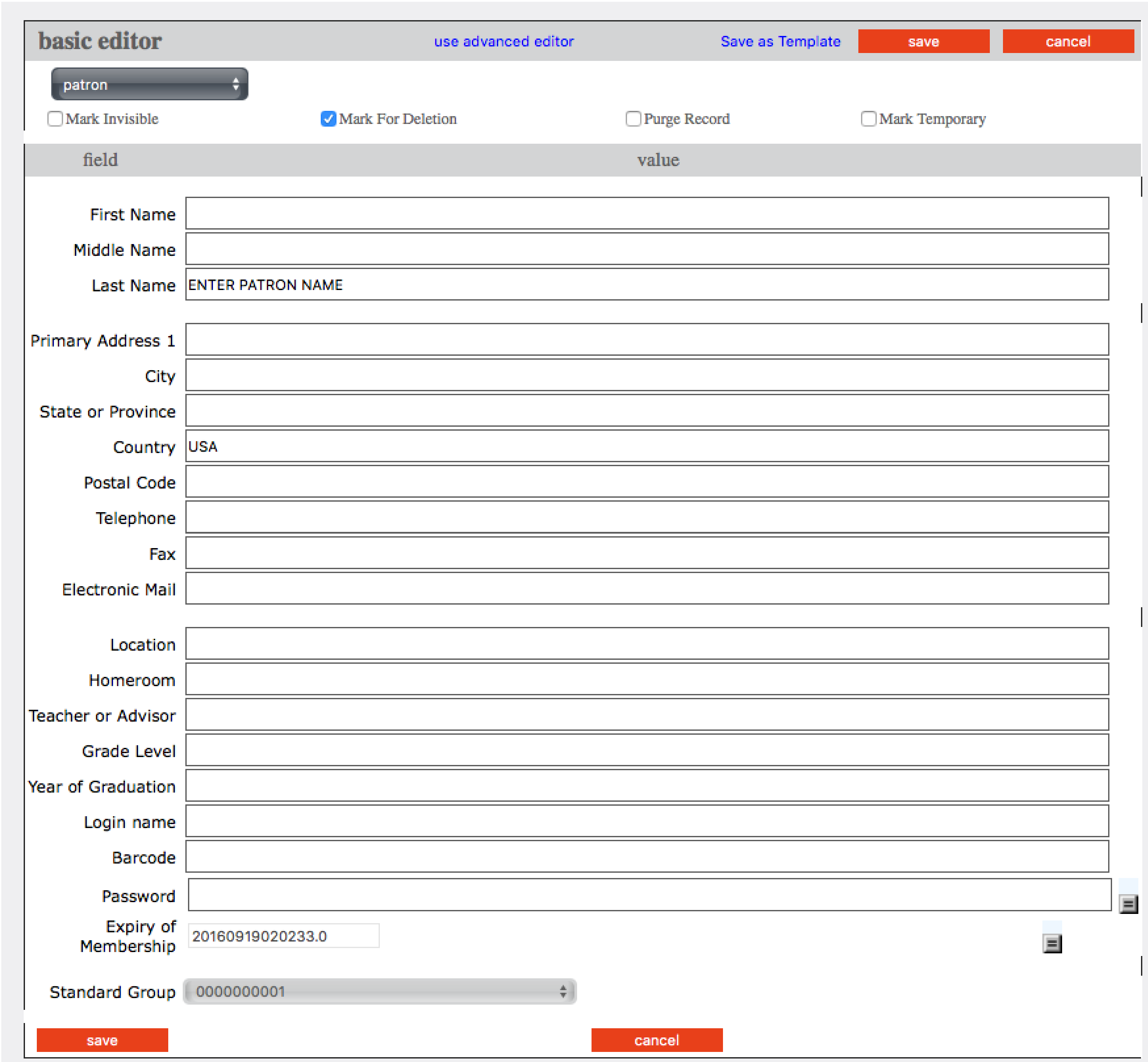
Adding a Patron Record to the Catalog

On the Results page, click the **Add Record** link at the top of the page. This displays the basic record editor, which allows you to quickly enter a record. If more options are required, skip to Using the Advanced Editor.



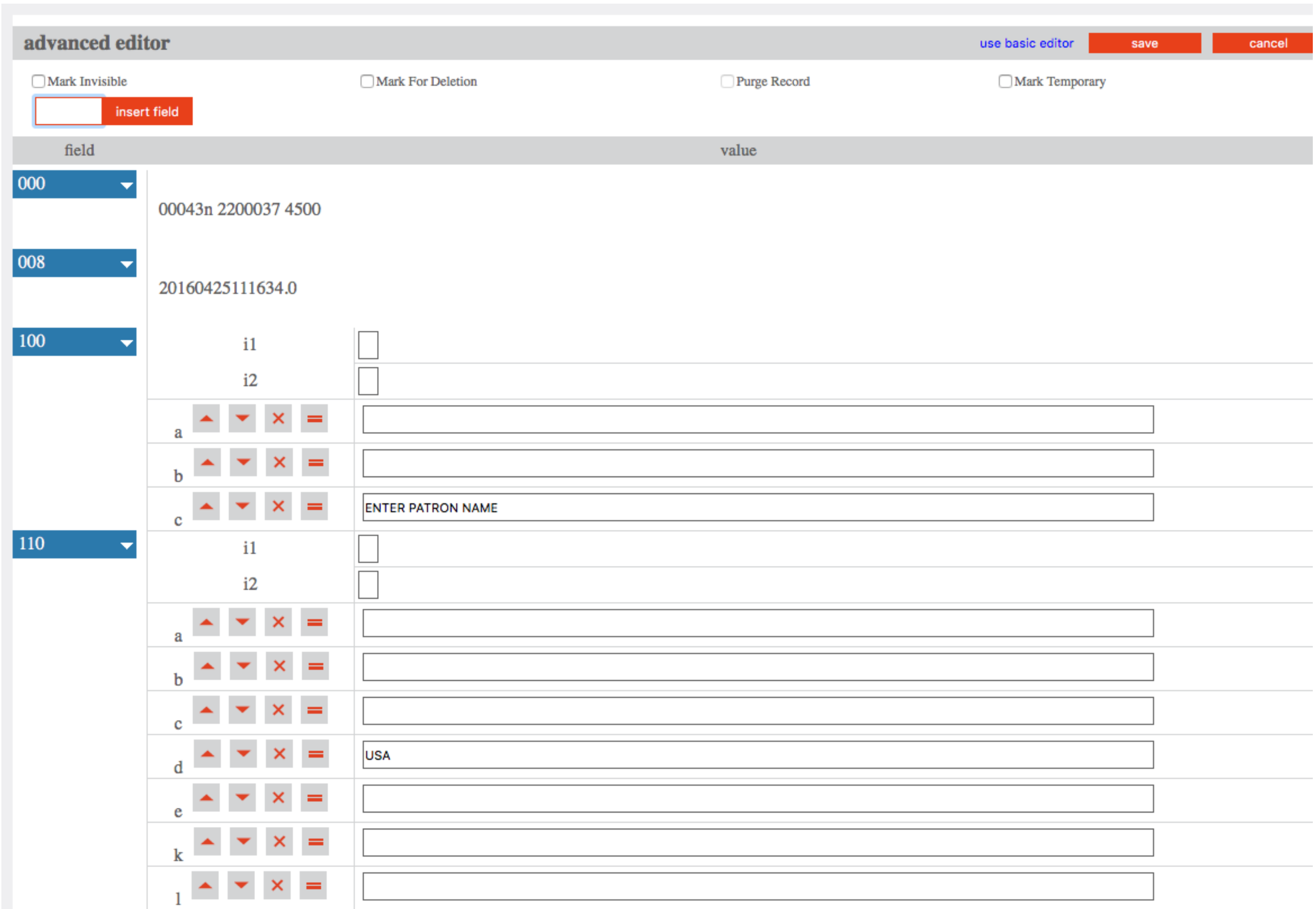
Using the Basic Editor

1. Type data in the desired fields.
2. To mark this record for deletion, select the **Mark for Deletion** check box.
   The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.
3. When finished, click Save.



Using the Advanced Editor

1. To display more field and subfield choices, click **Use Advanced Editor**. This displays the advanced record editor.
2. On this page, you can edit the record.



• To insert a new field, type the field number in the keyword box at the top, then click **Insert Field**. This displays another page with subfield choices; its contents will vary depending on the field. Select the check box next to the desired subfield, or type the subfield in the keyword box, then click **OK**.
• You can hold your mouse over the number in the **Field** column until a menu displays, then click an option in the menu. In control fields, your options are **Edit** or **Delete**; in data fields, your options are **Insert Subfield, Delete, Move Up, Move Down, and Rename.**
• To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save.**

3. When finished, click Save.

Tip: *To type multiple fields or subfields in a keyword box, separate the entries with a comma and no spaces (for example, to insert fields 200, 300, and 500, type 200,300,500).*

Creating a Patron Record by Duplication

1. Search for the patron record you want to duplicate. Enter the desired search criteria, then click **Search**. This displays the Results page with your search results.
2. On the Results page, click the **Duplicate** link in the patron record. This displays the basic record editor with a duplicate record. (To display more field and subfield choices, click **Use Advanced Editor**. This displays the advanced record editor. See Using the Advanced Editor.)
3. Edit the data as needed.
4. To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.
5. When finished, click **Save**.

Editing a Patron Record

1. Search for the patron record you want to edit. Enter the desired search criteria, then click **Search**. This displays the Results page with your search results.
2. Click the **Edit Record** link in the patron record. This displays the basic record editor with record data. (To display more field and subfield choices, click **Use Advanced Editor**. This displays the advanced record editor. See Using the Advanced Editor.)
3. Edit the data as desired.
4. To mark this record for deletion, select the **Mark for Deletion** check box. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.
5. When finished, click **Save**.

Deleting a Record

1. Search for the record you want to delete.
2. On the Results page, click **Delete**. This marks the record for deletion. The record will not be totally removed from the database until you select the **Purge Record** check box and then **Save**.

NOTES:

- To undelete a record, click **Edit** on the Results page. In the record editor, clear the **Mark for Deletion** check box, then click **Save**.
- Records can be deleted and/or purged in batches in Advanced Cataloging. See Using Find and Replace.

Custom Record Templates

Mandarin M5 allows the librarian to create and modify cataloging templates. For bibliographic records this will be especially helpful for any librarians who do original cataloging. Being able to modify the holdings templates will be useful in every library.

Here's how it works

First, in order to use this feature, to be able to create or modify templates, you need to go to your Setup page. There you'll see an option at the dock on the left called Record Templates.

When you have logged in, clicked on the **Edit** button for your installation, and selected this option, you'll see all the templates that are currently available for your installation. The default selection for each type of record is None. If you leave the default there, you will have the standard templates that come with the program, and you will not have the option to make new templates. If you want to be able to modify and create templates, select one of the templates listed. If the book template is the one you use the most for creating bibliographic records, choose that. For each type of record choose the one that you will use the most.

When you next log into M5 as a librarian and want to add that type of record, you will see your choice as the default, and you'll see the Save as template button at the top of the Basic Editor. Now make the changes that you need to make. At the very least you will probably want to put in your location information, for example, so that you don't need to type it every time. Add or change any other information that you want in your records. In the holdings template for example, add a p and usd in the price subfield to remember that the cost goes in that format. If you need to add or delete any fields or subfields, you can do that in the Advanced Editor. Then click **back** to the Basic Editor and click **Save** as Template. You can replace one of the default templates, or you can give your template a unique name.

When you look at your Setup page again, you'll see your new template in the list for this type of record. You can set it as the default, or you can delete it here, if it's not what you want.

Advanced Cataloging Tools

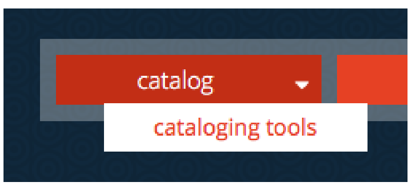
Importing Records

Before importing records, be sure the item or patron group you plan to import the records into has already been created in the Group Editor.

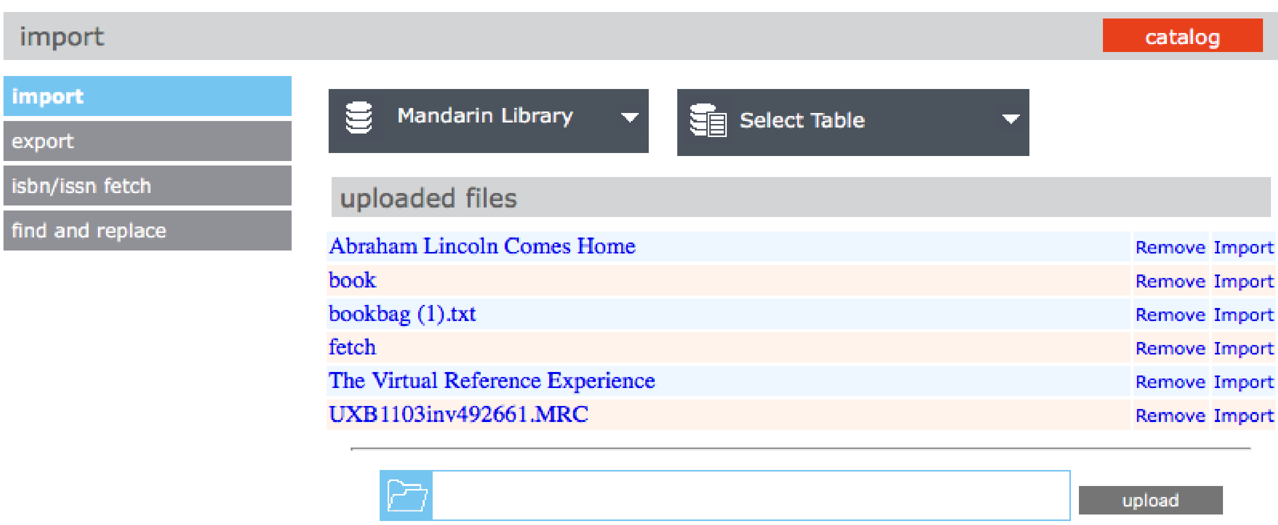
M5 allows you to import bibliographic, holding, and patron records formatted in three different data types:
• MARC – Records in MARC format.
• Delimited – Records in which each field ends with, or is “delimited” by, a particular character such as a comma or tab.
• Fixed width – Records in which each 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 M5 is designed to operate exclusively with MARC records to provide optimum performance.

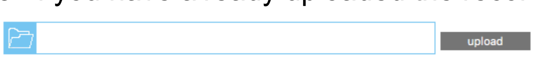
1. Click the **Cataloging tools** link in the Catalog tab.



This displays the Import page. (If the Import page does not display, click the **Import** tab.)



2. In the **Select Table** list, select the type of records you are importing, bibliographic, patron or holding.
3. If you have already uploaded the records, skip to step 5. Otherwise, click **Choose File** box



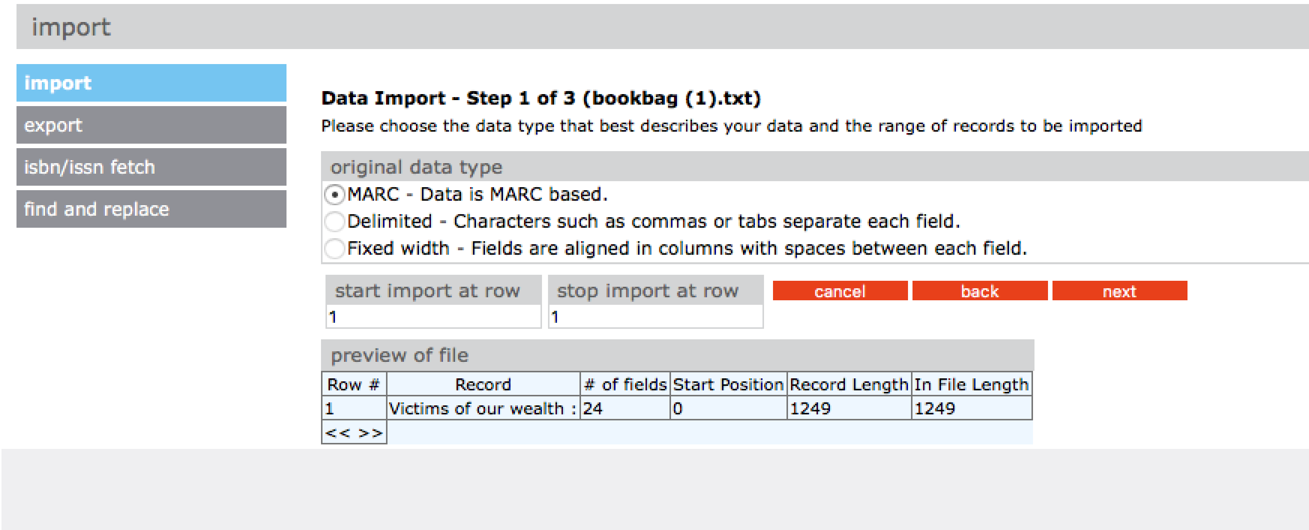
and navigate to the record file, then click **Open**. The path to the file appears in the box.
4. Click **Upload**. The barcode file appears in the **Uploaded Files** list.
5. Click the **Import** link to the right of the barcode file. This displays the Data Import - Step 1
A. Under **Original Data Type** select **MARC, Delimited** or **Fixed**.
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 barcode file are displayed. If you only want to

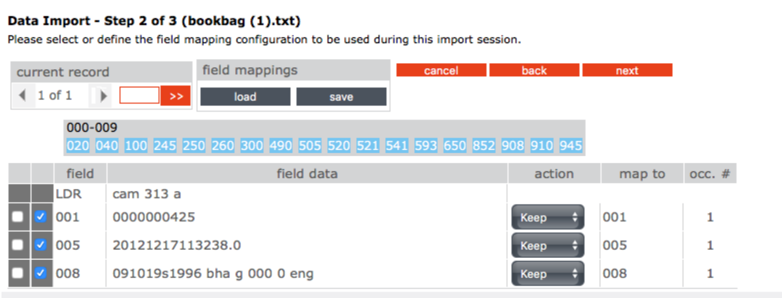
import a portion of the records in the file, type the row numbers corresponding to the range you want to import.
C. When finished, click **Next**.

Continue on how to import **MARC Records**, **Delimited Records** or **Fixed Width Records** according to the **Original Data Type selected.**

MARC Records

7. On the Data Import - Step 2, indicate the field mapping configuration to be used during the import session.





The gray box lists all fields, with the fields in the current record displayed in blue. You can click a field to view it. To view another record, click the navigation arrows under **current record.**

You can either accept the default configuration or modify it, or select a previously saved field map. If you accept the default, click **Next** and skip to step 8.

To use a previously saved field map, click **Load** in the **Field Mappings** box. A window will open with a list of the previously saved field maps. Click **Load** next to the name of the desired map. At this point you can modify the field map again or click **Next** and skip to Data Import - step 3.

To modify the 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 selecting the **Field Collapse** check box. This collapses all the occurrences of the repeating field into one line, creating a single occurrence and enabling you to simultaneously remap all occurrences of this field to the same field. (If you do not use this feature, you must revise the mapping for each occurrence individually.) To use this option, select the **Field Collapse check box** by the first occurrence of the repeating field.

B. In the second check box column, all fields and subfields are selected by default. Clear the check box next to the fields and subfields you do not want to import.

C. In the Action column, select **Keep** or **Replace** for each field and subfield you plan to import.

- 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. A keyword box will display in the **Field Data** column; type the information you want to appear in this field.

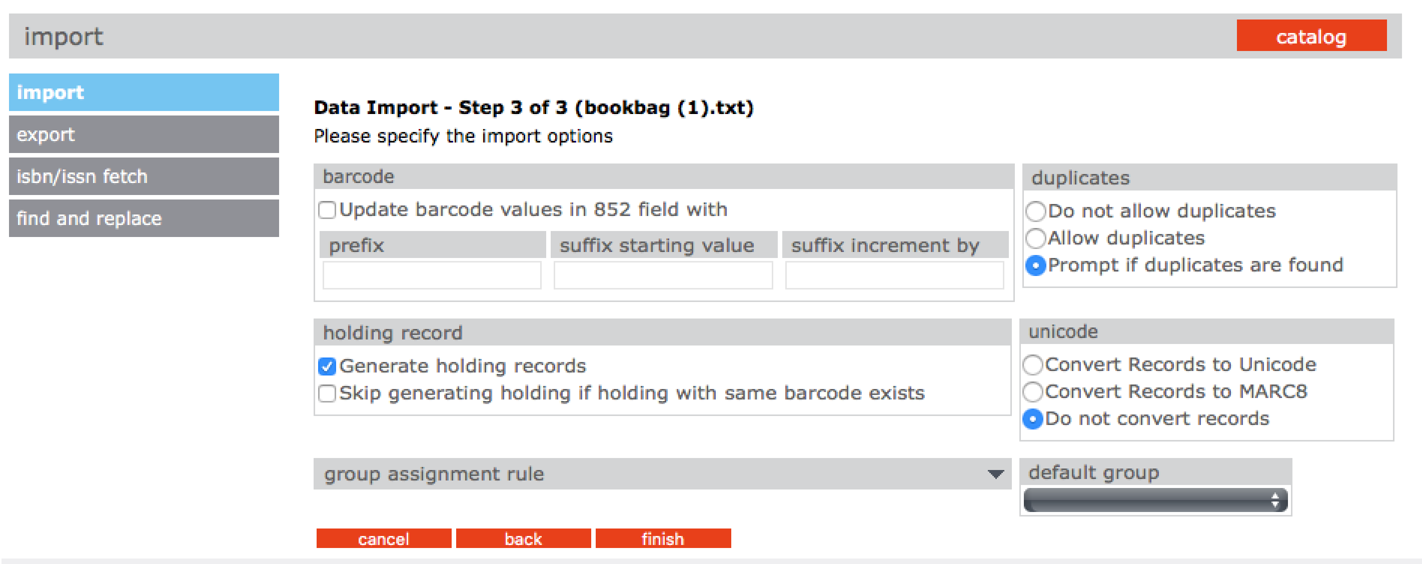
D. The **Map To column** indicates the destination MARC field or subfield for each field you plan to import. By default, this column displays the same field tag number and subfield code listed in the **Field** column.

Tip: *To map most but not all occurrences of a repeating field to the same destination field, you can still use the optional Field Collapse procedure explained in step A, with one modification. After selecting the Field Collapse check box and revising the Map To destination, clear the Field Collapse 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 D for those few listings that do not match the global change you entered while the fields were united.*

To change the Map To value, type a new field and subfield in the text box, or click the arrow to the right and select a field and subfield in the window.

E. Click **Next**.

8. On the Data Import - Step 3, specify the import options.



Tip: *You must have 852 fields 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.*

A. You can create new barcodes for the records being imported, whether barcodes exist in the original records or not. To do so, select the **Update barcode** values in 852 field with check box under Barcode. Then:

- **Prefix** – To assign a constant prefix to the barcode, 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 By** – If you assign a suffix, type the number of increments you want the records to increase by (for example, **1** increment).

B. If you are importing bibliographic records, the **Duplicates** options are 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 for the records to be considered duplicates; 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, click Prompt if duplicates are found option. This lets you compare the record you are importing to the existing record, and then decide whether to import the duplicate record.

C. If you are importing bibliographic records, the **Holding Records** option is available. If you do not want to generate holding records**,** clear the **Generate holding records** check box. Otherwise, leave it selected.

D. In the **Unicode** box, you can choose to convert records to Unicode, convert records to MARC8, or not convert records.

E. In the **Default group** list, select the group you want the imported data assigned to by default.

F. If you want to assign a rule to this data, click the **Expand View** button next to **Group Assignment Rule**.

- Select the check box to the left of the first box to activate it. To the right of the box, click the arrow button.
- Enter the rule you want assigned. (Example: Type **852k** under Field, select **Equals,** and then type **REF** under **Text.)**
- Click **Add**. Add other rules if desired. When finished, click **Close**.
- In the list to the right of the arrow, select the group to assign records to when they meet the rule criteria. (Example: Select **Reference Collection** to complete the example in step 2.)

9. When finished, click **Finish**. While the import processes, a progress bar displays.

If a duplicate record is found and you selected **Prompt if duplicates** are found in step 8B, the Bibliographic Compare window displays

Using the four buttons, you have the following choices:

- **Save Existing** – Saves the existing record and does not import the duplicate 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. 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. All corresponding holding records are also imported and linked to the duplicate 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 bibliographic record and its holding records remain the same.

***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.*

10. When the import procedure is complete, the import summary displays. Click **OK** to return to the Import page, or click Print to print the summary.

Import Completed.

Bibliographic Record Import Summary

Import Started:04/25/16 01:30:55
Import Ended:04/25/16 01:30:57

Total records in import file:1
A total of 1 records (from 1 to 1) selected for import.
Records successfully imported:1
Records not imported:0

Holding Record Creation Summary

Holding records successfully created:2

Barcode Creation Summary

Barcode records successfully created:2

Query to retrieve all imported records:KEYWORD=[[005 "20160425133055.0"]]

Exceptions

** None **

ok Print

***Note:** Any duplicate barcodes are changed to a barcode of "SIRS" followed by the intended barcode and ISN of the holding.*

Delimited Records

7. On the Data Import - Step 2, set the delimiters for your data. Your changes display in the preview pane.
    - In the **Field Delimiter** list, choose how the fields in the file will be separated: comma, semicolon, tab, or space.
    - In the **Text Qualifier** list, choose the character you want to mark the beginning and end of data in a field, or choose no character. For example, if a field contains **lastname, firstname,** the data might be enclosed within quotes, as in "lastname, firstname".
    - Click **Next.**

8. On the Data Import - Step 3, indicate the field mapping configuration to be used during the import session.
    A. In the check box column, no fields are selected by default. Select the check box next to each field you want to import.
    B. In the **Action** column, select Keep or Replace for each field and subfield you plan to import.
        - 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. A keyword box will display in the Field Data column; type the information you want to appear in this field.

    C. In the **Map To** column, enter the destination MARC field and subfield for each field you plan to import. Type a new field and subfield in the text box, or click the arrow to the right and select a field and subfield in the window.
    D. Click **Next.**

If you will be importing the same type of data in the same format multiple times, you can save the field map after you create it. Click on the **Save** button in the **Field Mappings** box and enter a name for the map.

To use a previously saved field map, click **Load** in the **Field Mappings** box. A window will open with a list of the previously saved field maps. Click **Load** next to the name of the desired map. At this point you can modify the field map again or click **Next** and skip to Data Import -- step 3.

9. On the Data Import - Step 4, specify the import options.

Tip: *You must have 852 fields 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.*

A. You can create new barcodes for the records being imported, whether barcodes exist in the original records or not. To do so, select the **Update barcode values in 852 field** with check box under **Barcode.** Then:
- **Prefix** – To assign a constant prefix to the barcode, 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 By** – If you assign a suffix, type the number of increments you want the records to increase by (for example, **1** increment).

B. If you are importing bibliographic records, the **Duplicates** options are 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 for the records to be considered duplicates; 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, click **Prompt if duplicates are found** option. This lets you compare the record you are importing to the existing record, and then decide whether to import the duplicate record.

C. If you are importing bibliographic records, the **Holding Records** option is available. If you do not want to generate holding records, clear the **Generate holding records** check box. Otherwise, leave it selected.

D. In the **Unicode** box, you can choose to convert records to Unicode, convert records to MARC8, or not convert records.

E. In the **Default** group list, select the group you want the imported data assigned to by default.

F. If you want to assign a rule to this data, click the **Expand View** button next to **Group Assignment Rule.**

• Select the check box to the left of the first box to activate it. To the right of the box, click the arrow button.

• Enter the rule you want assigned. (Example: Type 852k under **Field,** select **Equals**, and then type **REF** under **Text**.)

• Click Add. Add other rules if desired. When finished, click Close.

• In the list to the right of the arrow, select the group to assign records to when they meet the rule criteria. (Example: Select **Reference Collection** to complete the example in step 2.)

10. When finished, click **Finish.** While the import processes, a progress bar displays. If a duplicate record is found and you selected **Prompt if duplicates are found** in step 9B, the Bibliographic Compare window displays.

Using the four buttons, you have the following choices:

• **Save Existing** – Saves the existing record and does not import the duplicate 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. 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. All corresponding holding records are also imported and linked to the duplicate 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 bibliographic record and its holding records remain the same.

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.*

11. When the import procedure is complete, the import summary displays. Click **OK** to return to the Import page, or click **Print** to print the summary.

Fixed Width Records

7. On the Data Import - Step 2, set the column widths.

   A. Under **# of Columns**, type the number of columns you want, then click Update. The number of columns that display in the table update accordingly.
   B. Under **Column Width**, type the number of character spaces you want for each column, then click **Update**. The field data below the table updates accordingly.
   C. When finished, click **Next**.

8. On the Data Import - Step 3 page, indicate the field mapping configuration to be used during the import session.

   A. In the check box column, no fields are selected by default. Select the check box next to each field you want to import.
   B. In the **Action** column, select **Keep** or **Replace** for each field and subfield you plan to import.
      • 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. A keyword box will display in the Field Data column; type the information you want to appear in this field.
   C. In the **Map To** column, enter the destination MARC field and subfield for each field you plan to import. Type a new field and subfield in the text box, or click the arrow to the right and select a field and subfield in the window.
   D. Click **Next**.

If you will be importing the same type of data in the same format multiple times, you can save the field map after you create it. Click on the **Save** button in the **Field Mappings** box and enter a name for the map.

To use a previously saved field map, click **Load** in the **Field Mappings** box. A window will open with a list of the previously saved field maps. Click **Load** next to the name of the desired map. At this point you can modify the field map again or click **Next** and skip to Data Import -- step 3.

9. On the Data Import - Step 4 page, specify the import options.

***Tip**: You must have 852 fields 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.*

   A. You can create new barcodes for the records being imported, whether barcodes exist in the original records or not. To do so, select the **Update barcode values in 852 field** with check box under **Barcode**. Then:
      • **Prefix** – To assign a constant prefix to the barcode, 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 By** – If you assign a suffix, type the number of increments you want the records to increase by (for example, **1** increment).

B. If you are importing bibliographic records, the **Duplicates** options are 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 for the records to be considered duplicates; 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, click Prompt if duplicates are found option. This lets you compare the record you are importing to the existing record, and then decide whether to import the duplicate record.

C. If you are importing bibliographic records, the **Holding Records** option is available. If you do not want to generate holding records, clear the **Generate holding records** check box. Otherwise, leave it selected.

D. In the **Unicode** box, you can choose to convert records to Unicode, convert records to MARC8, or not convert records.

E. In the **Default group** list, select the group you want the imported data assigned to by default.

F. If you want to assign a rule to this data, click the **Expand View** button next to **Group Assignment Rule.**

• Select the check box to the left of the first box to activate it. To the right of the box, click the arrow button.

• Enter the rule you want assigned. (Example: Type **852k** under **Field**, select **Equals**, and then type **REF** under **Text**.)

• Click **Add**. Add other rules if desired. When finished, click **Close**.

• In the list to the right of the arrow, select the group to assign records to when they meet the rule criteria. (Example: Select **Reference Collection** to complete the example in step 2.)

10. When finished, click Finish. While the import processes, a progress bar displays. If a duplicate record is found and you selected **Prompt if duplicates** are found in step 9B, the Bibliographic Compare window displays.

Using the four buttons, you have the following choices:

• **Save Existing** – Saves the existing record and does not import the duplicate 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. 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. All corresponding holding records are also imported and linked to the duplicate 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 bibliographic record and its holding records remain the same.

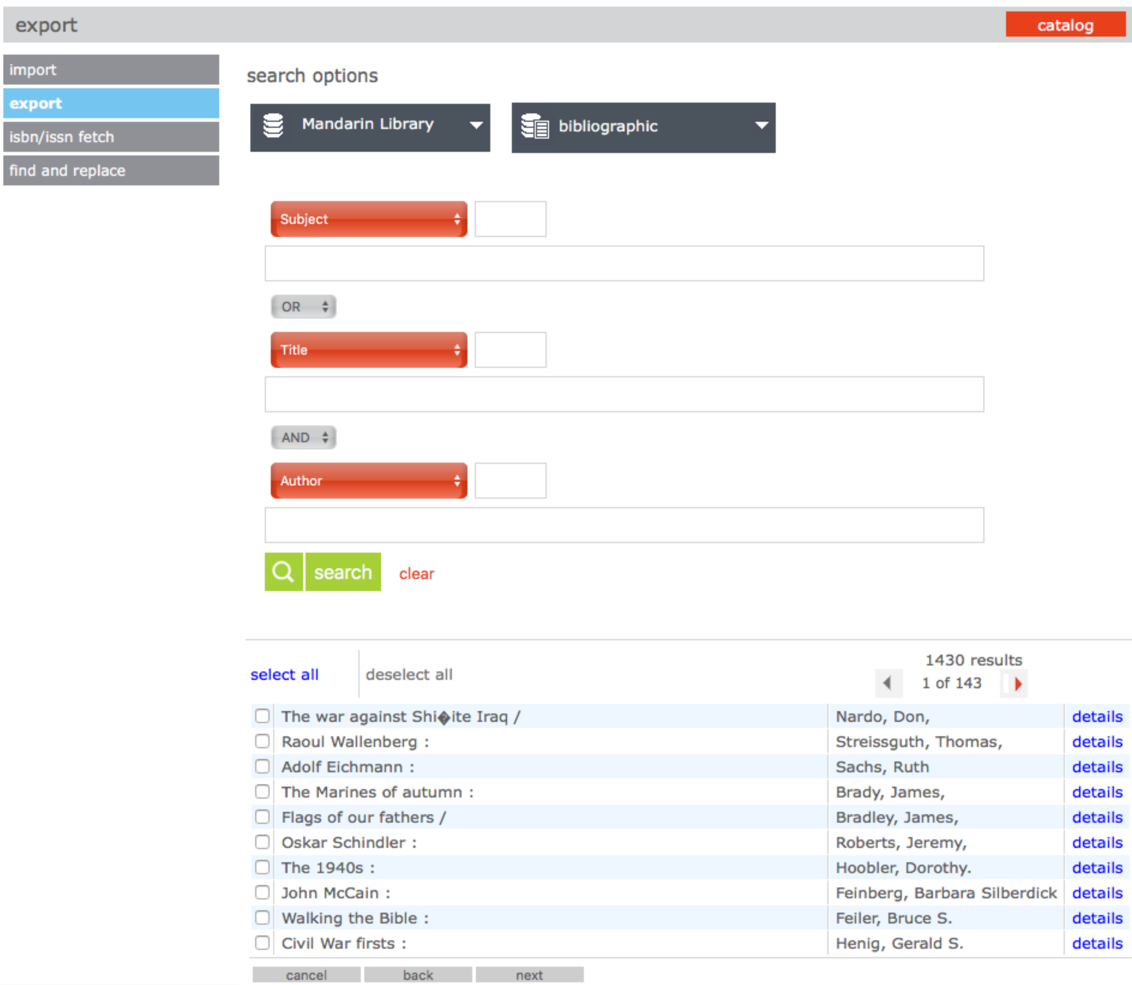
***Tip**: Select the **Don't show this window again** check box before clicking a button to* *apply the action to the displayed record and all records being imported in this session.*

11. When the import procedure is complete, the import summary displays. Click **OK** to return to the Import page, or click **Print** to print the summary.

Exporting Records

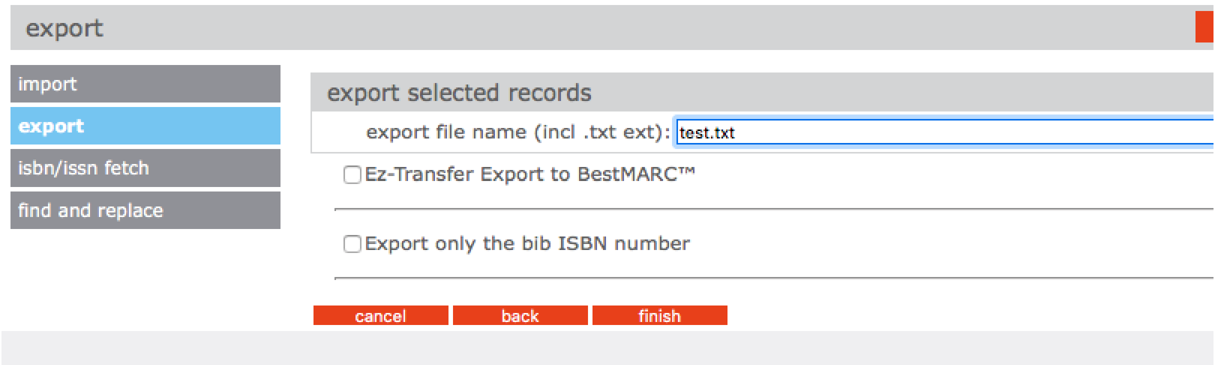
M5 allows you to export bibliographic records formatted in MARC format.

1. Click the **Cataloging Tools** link in the catalog tab, click the **Export** tab.
2. In the search form enter the required information to search for the records to export

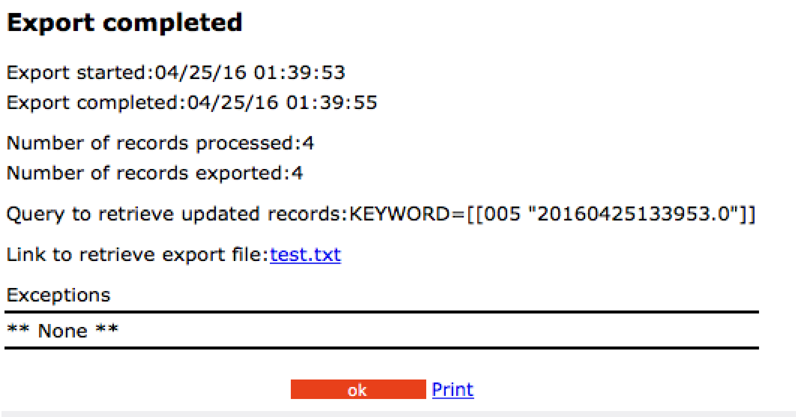


3. The selected records will be displayed on the right side. Click the checkboxes to select individual records, or click **Select All,** then **Next.**
4. Enter the export file name and click **Finish.**

***Note**: Always add the **.txt** extension to the file name*



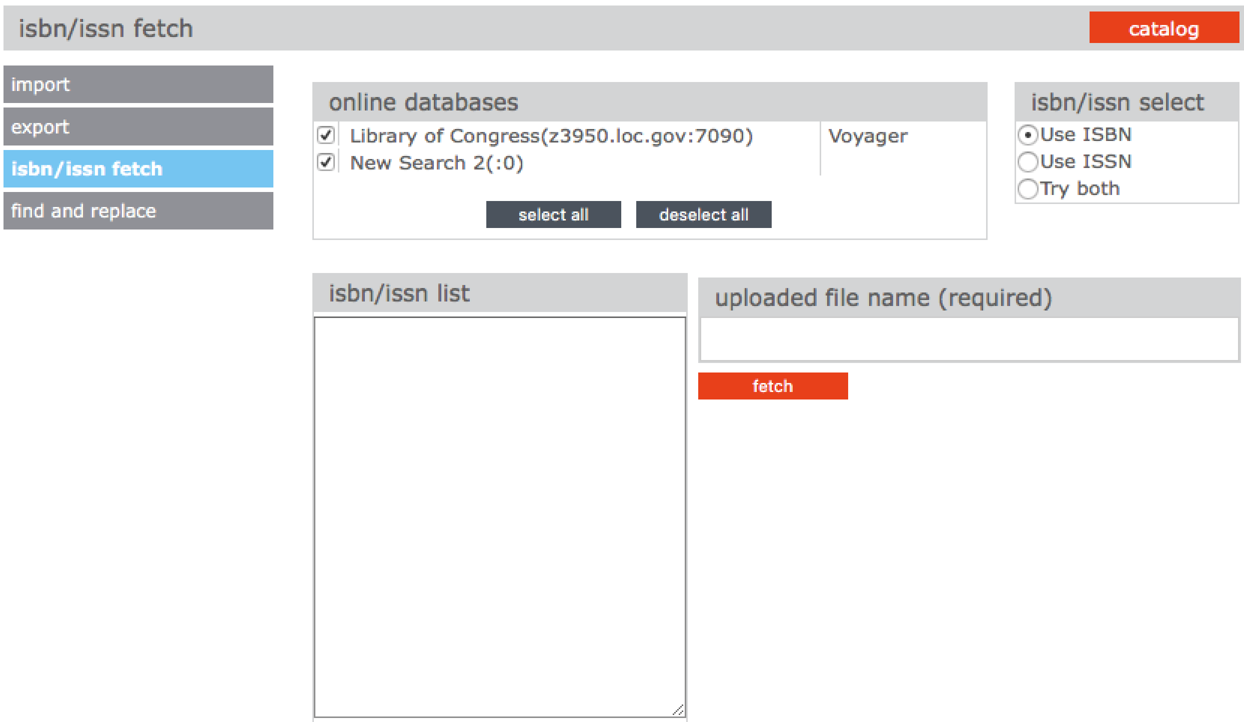
5. Once the export has been finished, the Export summary is displayed. Click the link to download the export file and click the Print link to print the export statistic information.



Using ISBN/ISSN Fetch

***Note**: For information on configuring Z39.50 sites,*
see [Z3950 Searches](#) under “Configuration”.

This feature allows you to import items from Z39.50 sites by using **ISBNs** or **ISSNs**.
1. Click the **Cataloging Tools** link in the catalog tab. This displays the Import page.

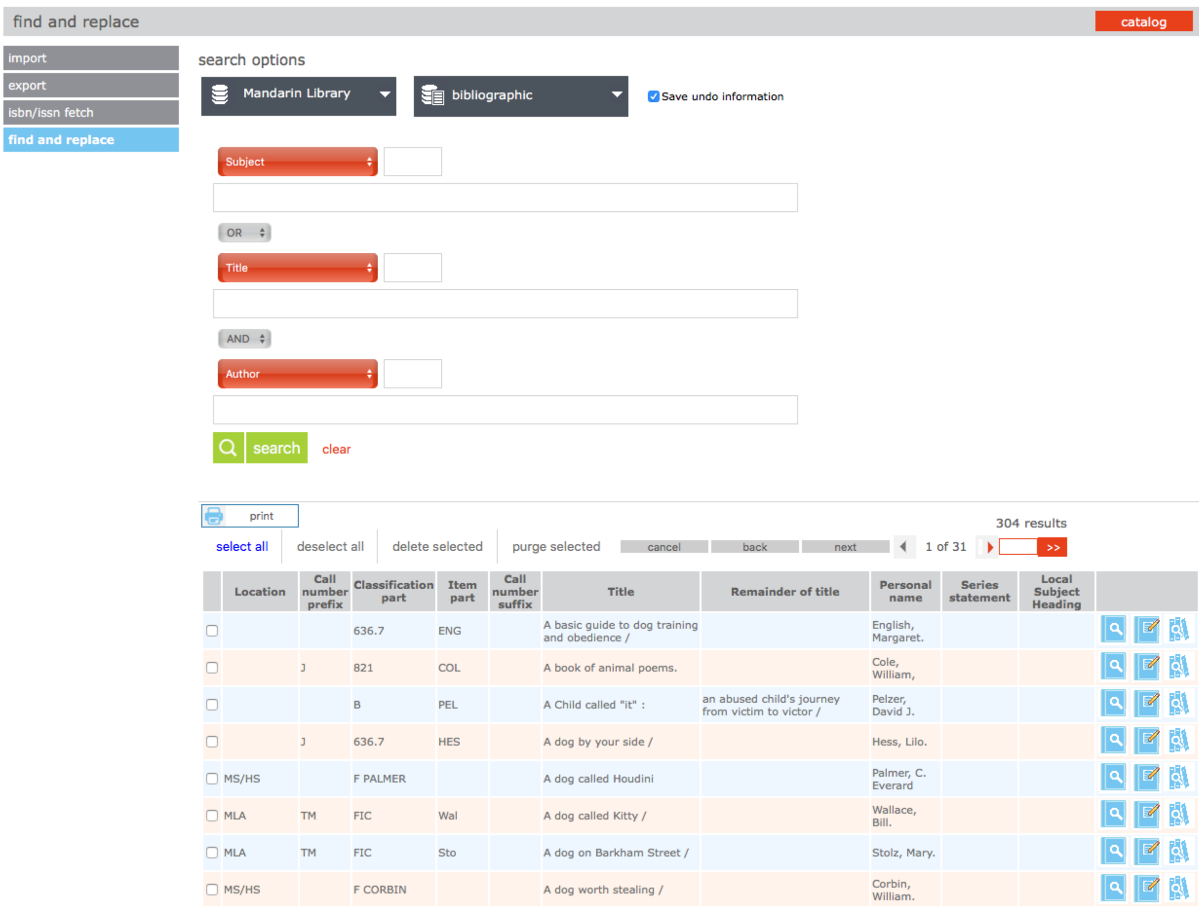


2. Click the **ISBN/ISSN** Fetch tab.
3. In the Online Databases box, select the Z39.50 site(s) you want to search.
4. In the **ISBN/ISSN** Select box, choose whether you want to search by ISBN, ISSN, or both.
5. In the **ISBN/ISSN** List box, enter the ISBNs and/or ISSNs you want to obtain by typing or scanning them into the box.
6. In the **Uploaded File** Name box, type the name you want to assign to the file of ISBNs/ISSNs that are obtained.
7. Click **Fetch**. While the fetch processes, a progress bar displays.
8. Click the **Import** tab. If the import was successful, your file of records will appear in the Uploaded Files list.
9. To import these records, click the Import link next to the file name. This displays the Data Import - Step 1. Follow the instructions in [Importing Records](#).

Using Find and Replace

M5 allows you to do global or partial changes to the database records.

1. Click the **Cataloging Tools** in the catalog tab, click the **Find and Replace** tab.
2. At the top, choose the **Database** and the **Table** (bibliographic, patron, or bib-holding), and check to **Save undo information.**
3. In the search form on the left side enter the required information to search for records to be changed.

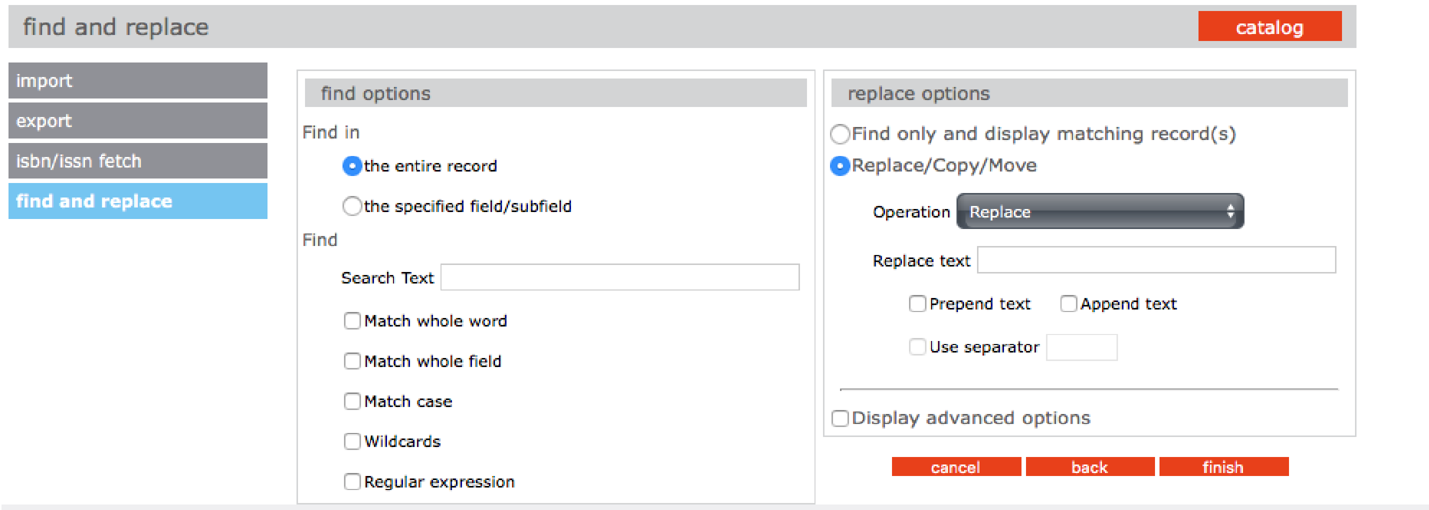


Tip: To create a more specific search, enter MARC field and subfield codes (e.g. 852#k) in the small empty boxes next to the dropdown menus of the search form. Then enter the search criteria in the box below as usual. Information in the small box overrides and ignores the dropdown menu.

4. On the bottom you will see the search results as a list of titles and authors. Navigate through the pages of the list with the arrows at the top. To see more information about an individual record, click the Details link on that line.
5. Select individual records by clicking in the checkbox for each, or click on the **Select All** link at the bottom. At this point you can delete and/or purge selected records by clicking on the appropriate links at the bottom of the pane. For other changes, click **Next**.

6. In the **Find Options** box, select either the entire record or a specified field/subfield within each record to locate the information to be changed. In the **Search Text** box enter the information to be changed, and click **Set**. Make any other choices to specifically identify the information to be changed.

7. In the **Replace Options** box, select the function to perform.

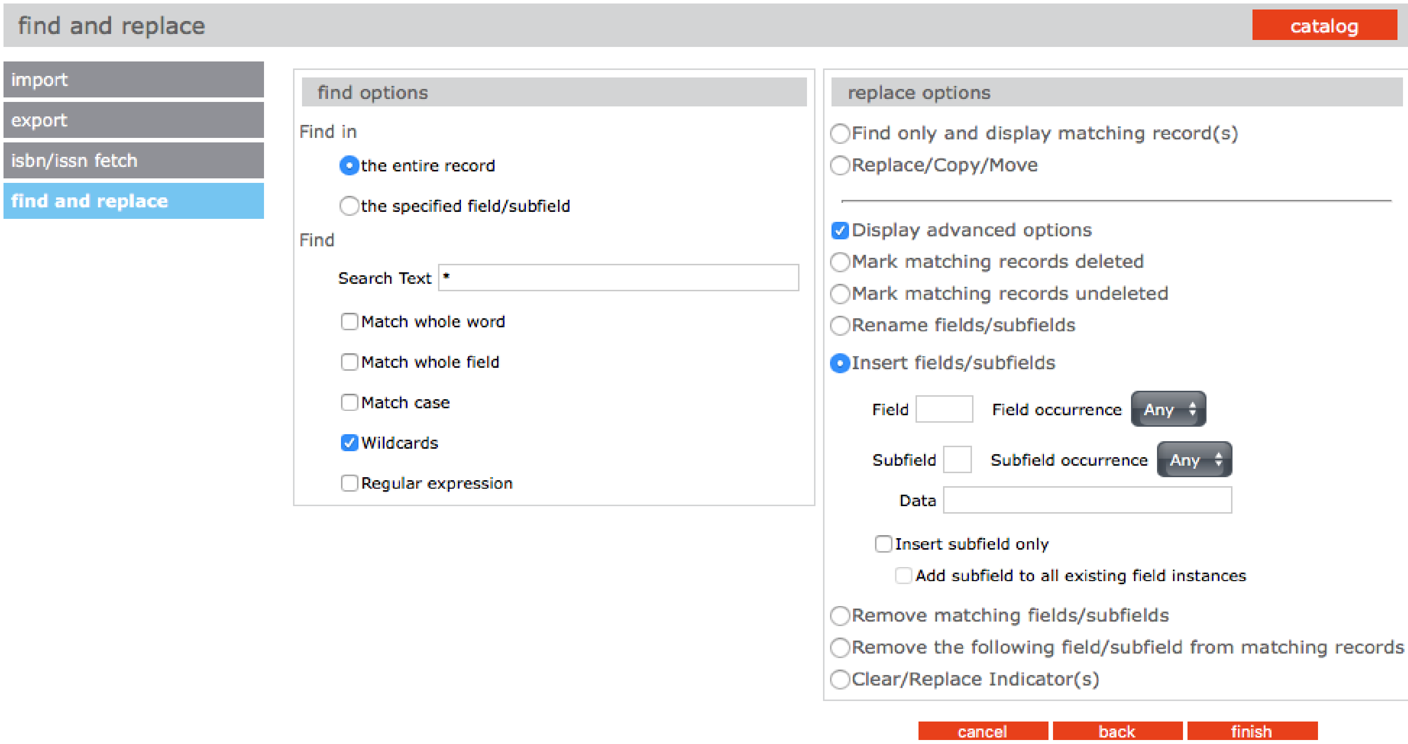


8. Click **Finish**. While the operation processes, a progress bar displays.
9. When the replace procedure is complete, the operation summary displays. Click **OK** to return to the **Search Options** page, or click **Print** to print the summary.

10. On the **Search Options** page you can choose to reverse the procedure if the results were not what you wanted. Choose the appropriate operation from the dropdown menu at the bottom of the page and then click **Undo**.
11. Click the **Catalog** button to return to the main Cataloging screen.

Add or rename field/subfield using find/replace

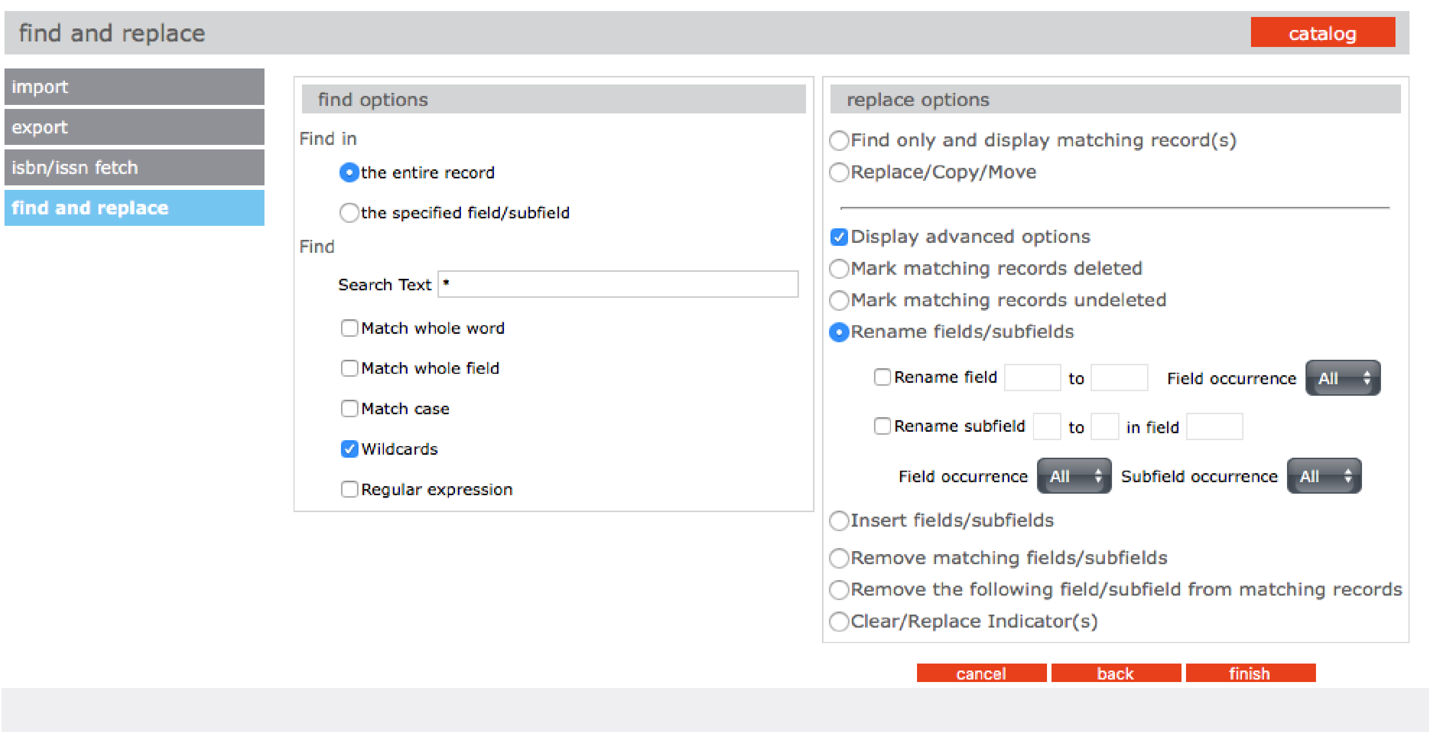
1. It is possible to add a field/subfield using Find/Replace.
   Select Display Advanced options
   Select Insert fields/subfields



2. Fields and subfields can also be renamed.

Select Display Advanced options

Select Rename fields/subfields



Using Circulation

This chapter describes:

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

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

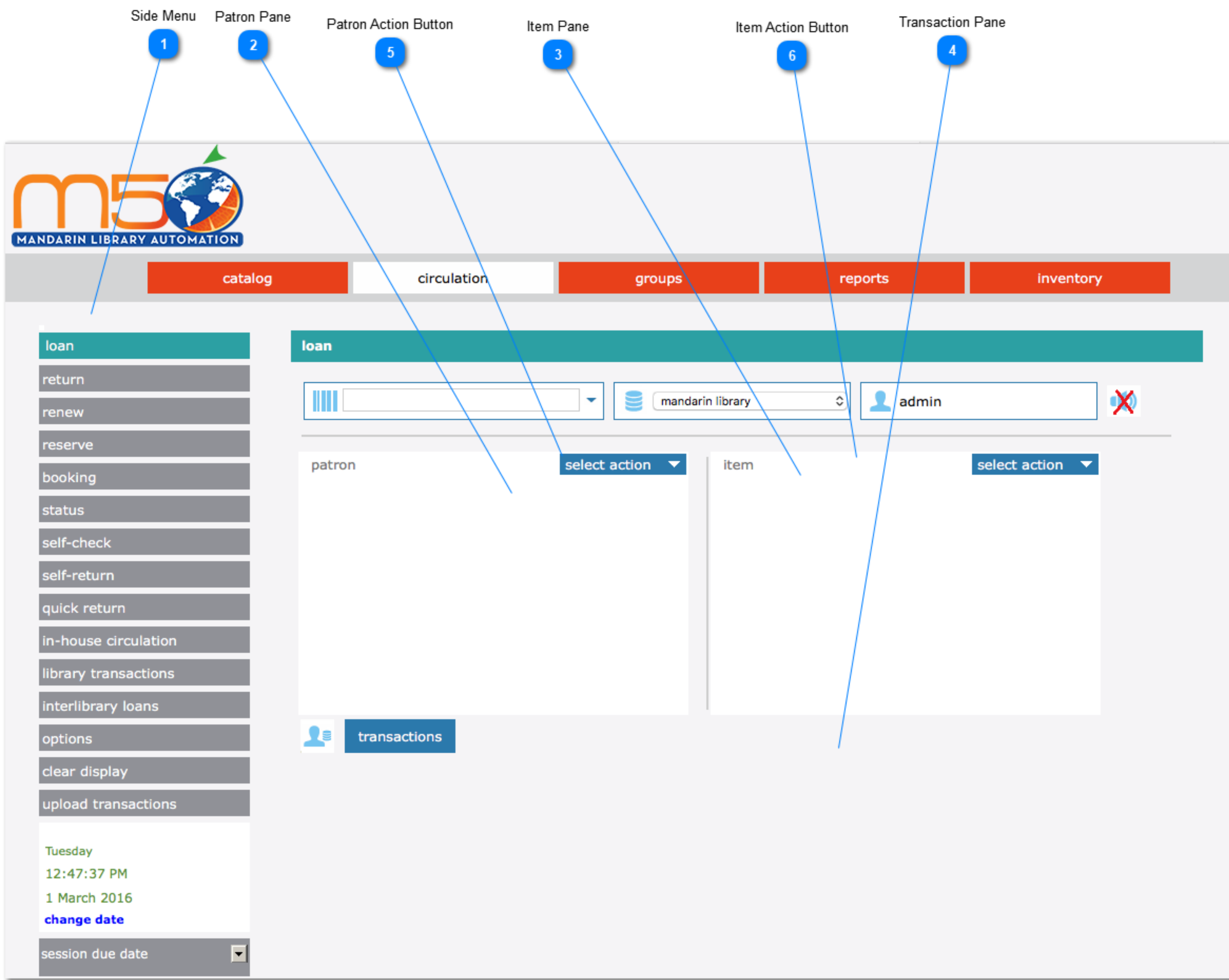
Signing In to Circulation

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

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

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

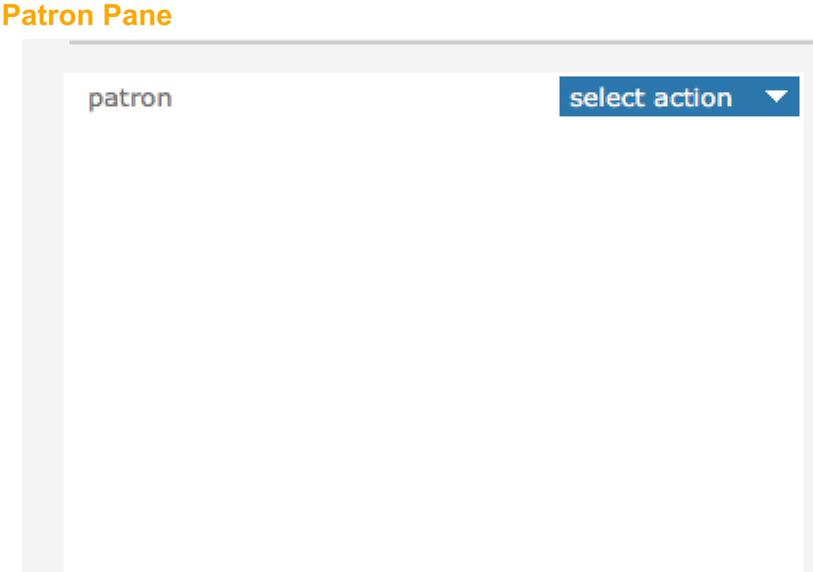
Circulation Features



1 Side Menu

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

2 Patron Pane

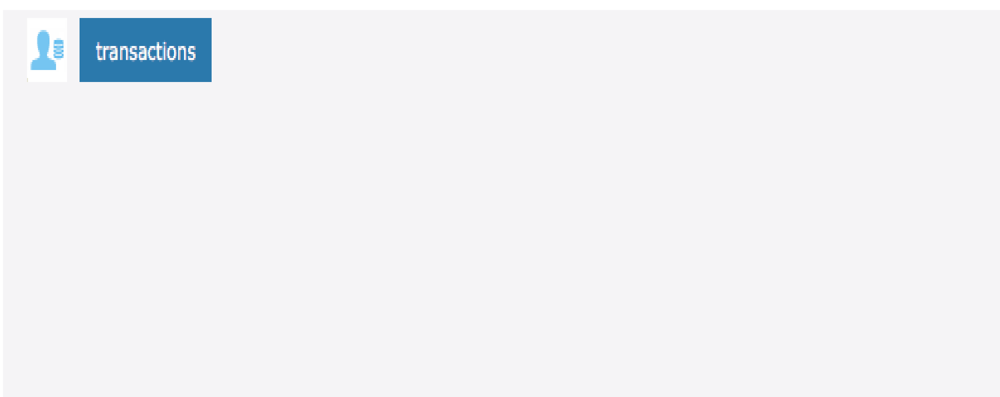


Patron pane – Displays information about the selected patron. The type of information displayed in this pane is customizable, but typically contains data such as the patron name, ID number, address, phone number, and current transaction information.

3 Item Pane

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

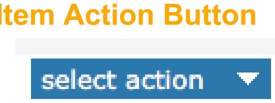
4 Transaction Pane



5 Patron Action Button

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

6 Item Action Button



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

Setting Up the Schedule

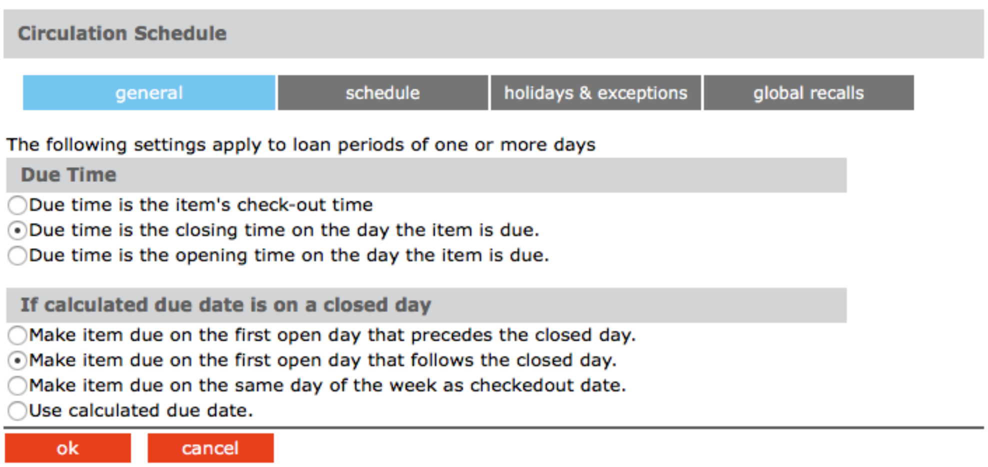
Before using Circulation, you should set up your library's system schedule. You can set up multiple schedules to accommodate different times of the year. For example, your summer schedule may differ from the rest of the year.

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

General Tab

In this tab, establish general loan period rules.

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



Schedule Tab

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

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

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

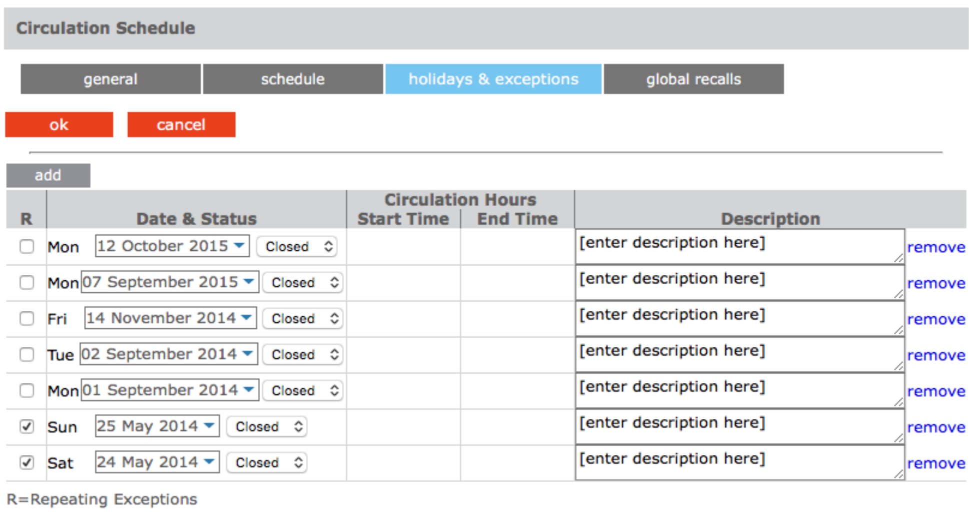
4. When finished, click the **Holidays & Exceptions** tab.

Holidays & Exceptions Tab

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

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

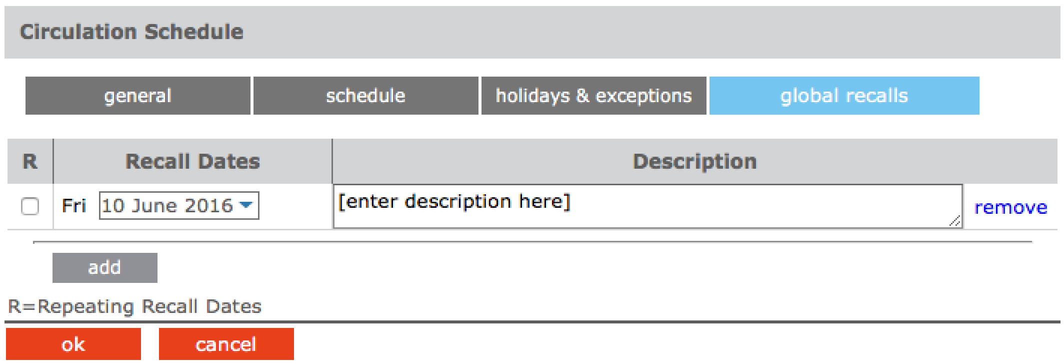
2. Enter information for the exception date as follows:
   A. Select the **R** check box if this exception date should repeat every year. This would be appropriate for holidays that always occur on the same date each year, such as New Year's Day.
   B. In the date box under **Date & Status**, enter the exception date by clicking the date arrow and selecting the desired date in the calendar.
   C. In the box beside the date box, select **Open** or **Closed** to indicate whether the library is open or closed on the date entered in step B.
   D. If you selected **Open** in step C, enter the **Start Time** and **End Time** for this exception day by clicking a time arrow and selecting the time. If you clicked **Closed** in step C, no times can be entered.
   E. In the **Description** box, type any information necessary to clarify this exception date.
3. To enter more dates, click **Add** and repeat step 2.
4. When finished, click the **Global Recalls** tab.



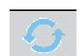
Global Recalls Tab

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

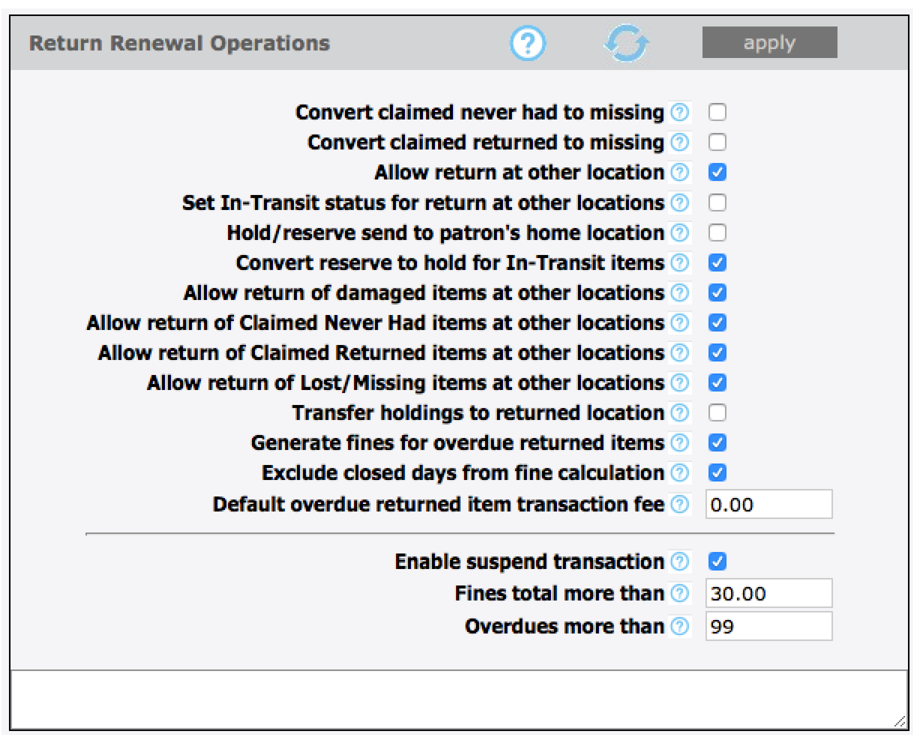
1. Click **Add**. This enters a new line.
2. Enter information for the closing date as follows:
   A. Select the **R** check box if this closing date should repeat every year.
   B. Under **Recall Dates**, enter the closing date by clicking the date arrow and selecting the desired date in the calendar.
   C. In the **Description** box, type any text necessary to clarify this closing date.
3. To enter more dates, click **Add** and repeat step 2.
4. When finished, click **OK**.
5. If you want to add another circulation period (such as a "summer hours" schedule), repeat the procedures for the Schedule, Holidays & Exceptions, and **Global Recalls** tabs.



Circulation Options

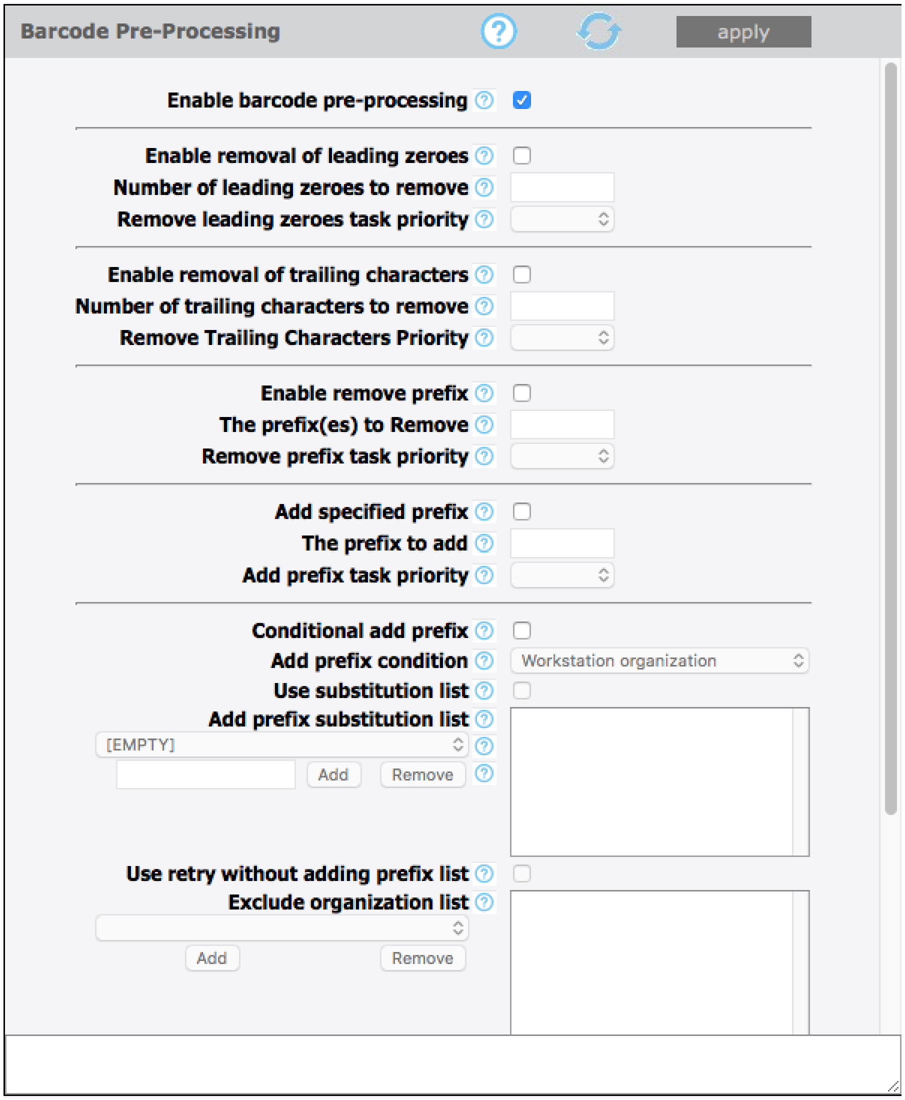
Several configuration settings are available to customize Circulation. Defaults options are good enough for most users. To change the Circulation settings click the **Expand** button  located on top of each group.

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



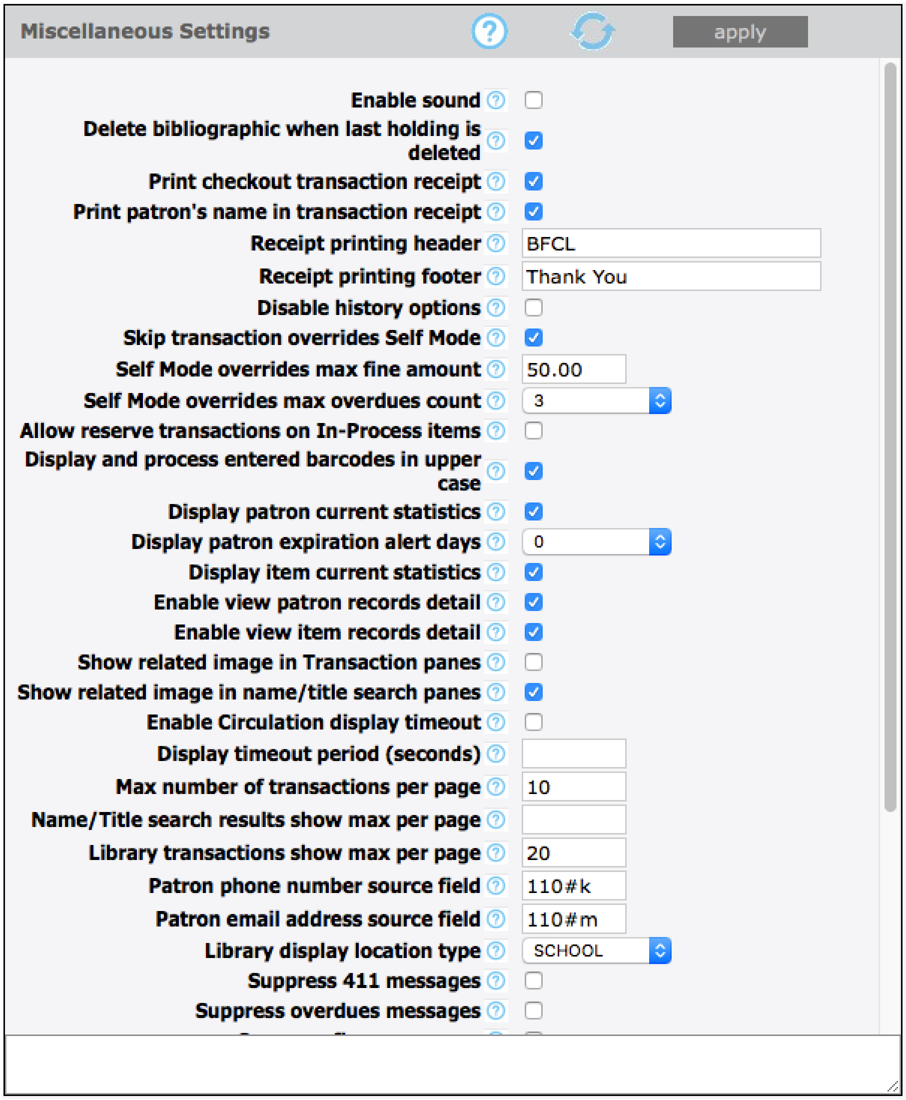
Return Renewal Operations	**Configure the settings relating to return and/or renewal operations, such as allowing return at other location, in-transit processing, etc.**
Convert claimed never had to missing	Select this option to convert the status to MISSING for Items patrons claimed Never Had.
Convert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

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



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

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



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

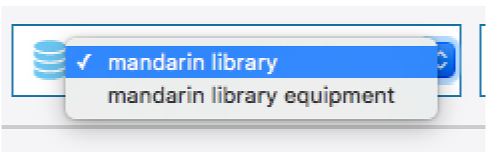
Display patron current statistics	Display the patron current statistics (number of items currently on loan, on hold, on reserve, fines, etc.
Display patron expiration alert days	The number of days before the patron expiration to display notification alert.
Display item current statistics	Display the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

Conducting Transactions

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

Selecting a Circulation Database

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

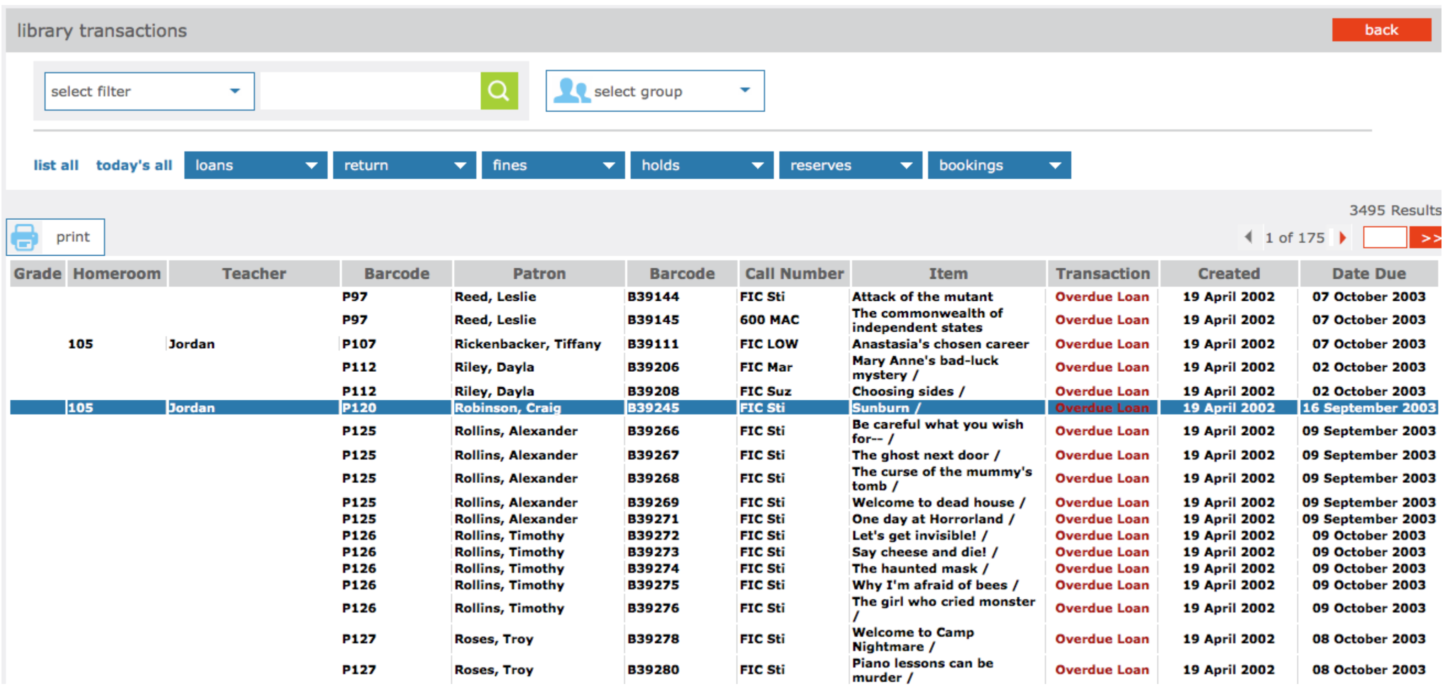


Using the Transaction Menu

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

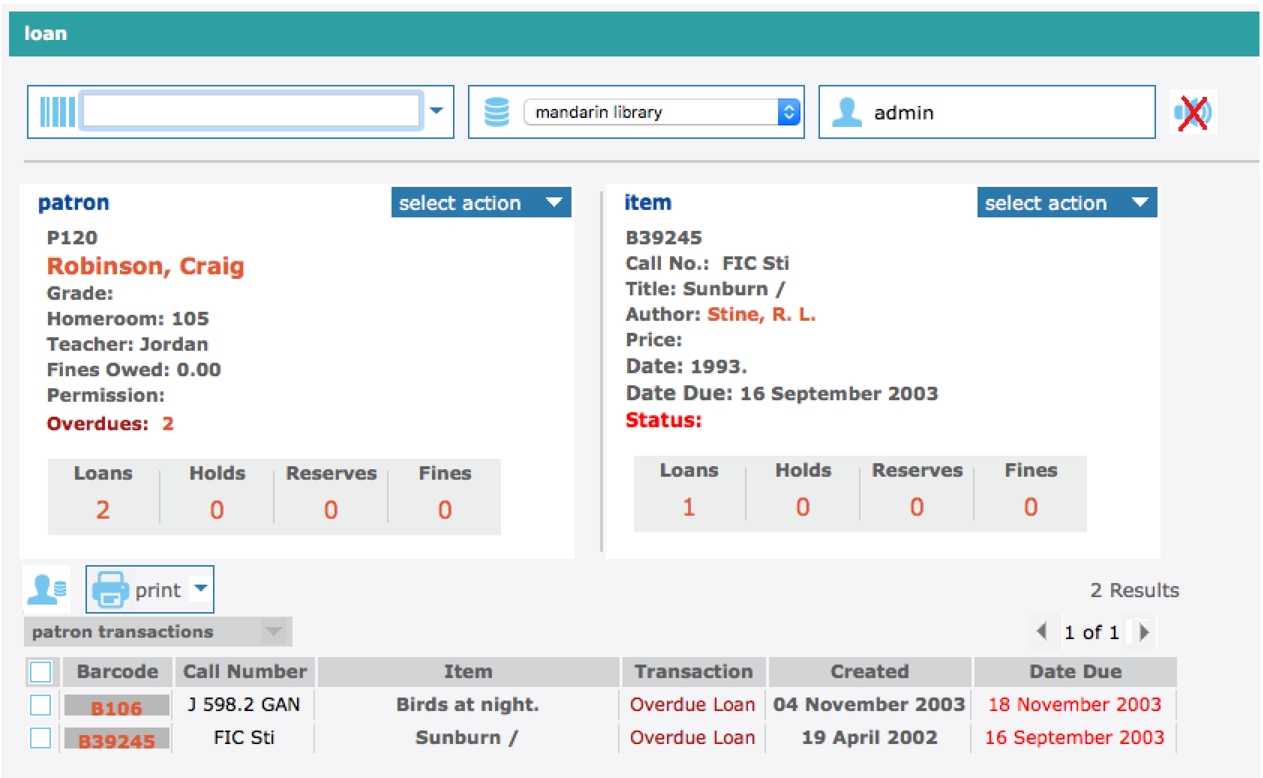
To access the Transactions menu:
1. Display the item(s) you want to process. To search for recent transactions, click **Library Transactions** in the left side options menu

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

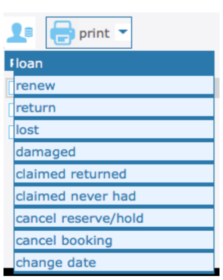


Grade	Homeroom	Teacher	Barcode	Patron	Barcode	Call Number	Item	Transaction	Created	Date Due
			P97	Reed, Leslie	B39144	FIC Sti	Attack of the mutant	Overdue Loan	19 April 2002	07 October 2003
			P97	Reed, Leslie	B39145	600 MAC	The commonwealth of independent states	Overdue Loan	19 April 2002	07 October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

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



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

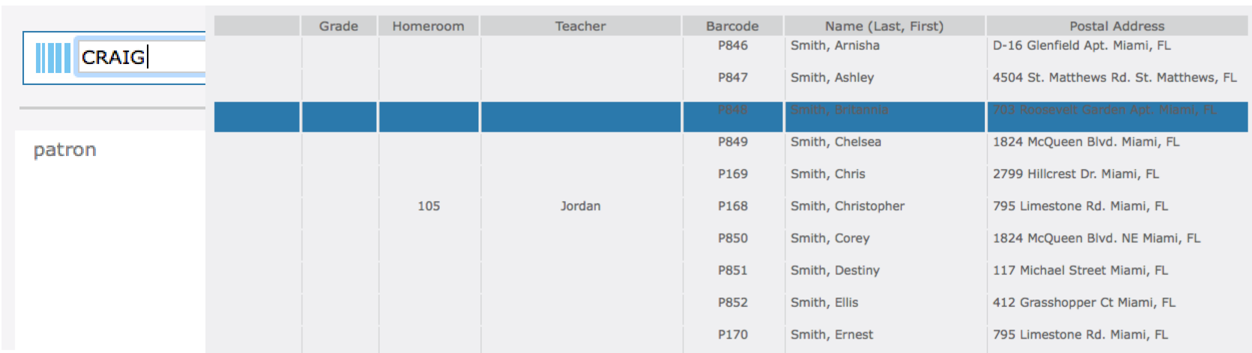


4. Click the transaction type you want to perform.

Searching for Item or Patron

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

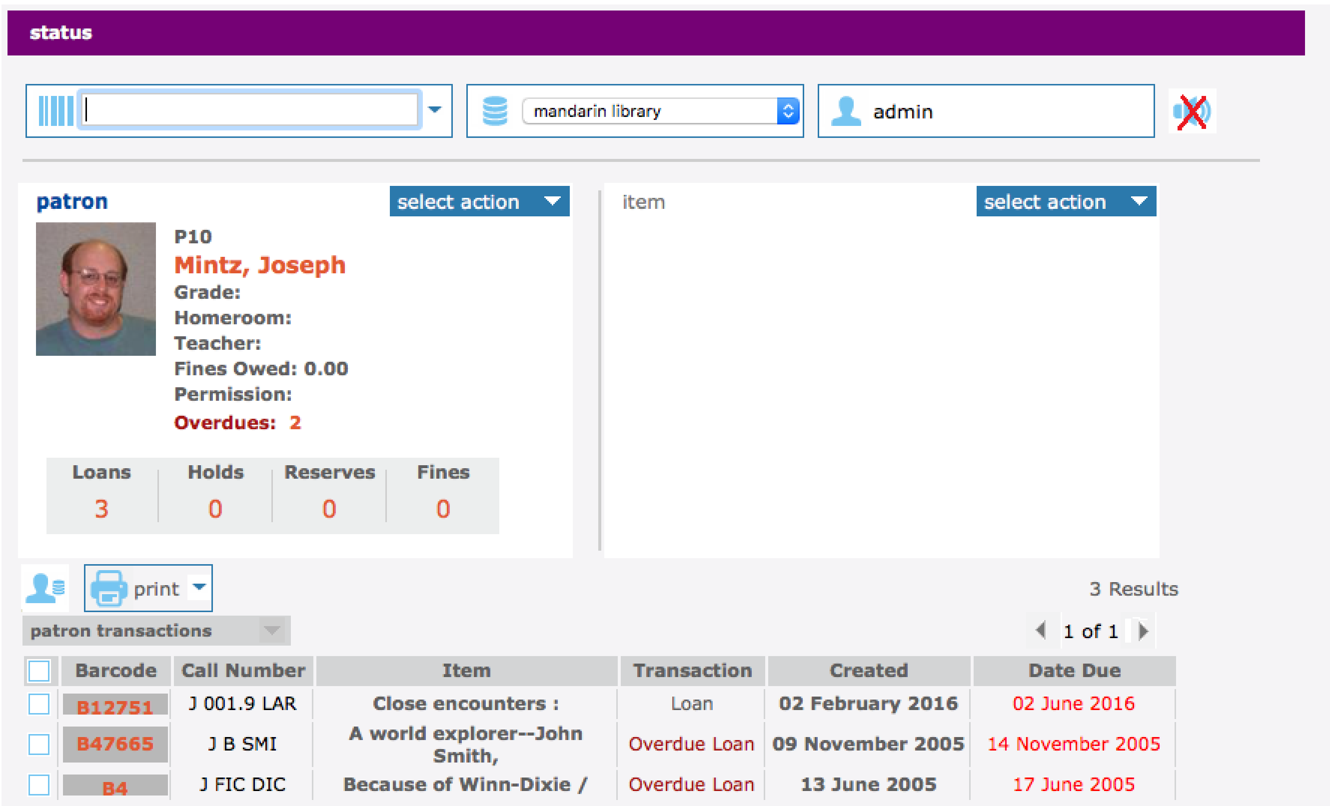
1. In the Barcode box, type a patron or item name, then press ENTER. This displays the Search Results page.



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

Viewing Patron and Items

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



To view the Patron and Item Toolbar see Circulation Features

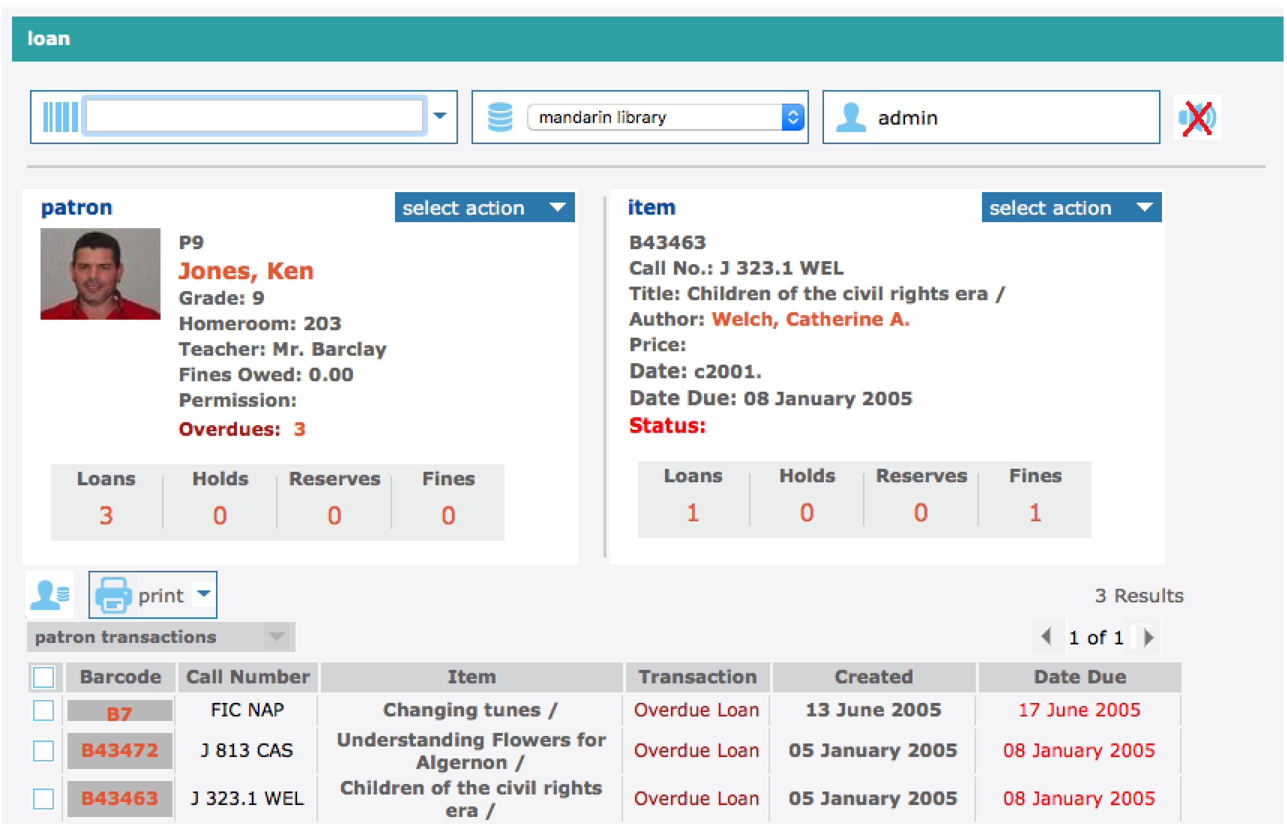
Loaning Items

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

NOTES:

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

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



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

Receipt printing header

demo
03 Jan 2014 03:26 pm

LIBRARY RECEIPT
CHECKOUT

P9
NAME: Jones, Ken

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

Returning Items

***Notes*:**
• If an item is returned that belongs to a special reserve group, a warning message displays.

• When a reserved item is returned, a message displays indicating the name and barcode of the patron who reserved it.

Circulation provides five methods to return items.

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

Side Menu Method

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

Quick Return

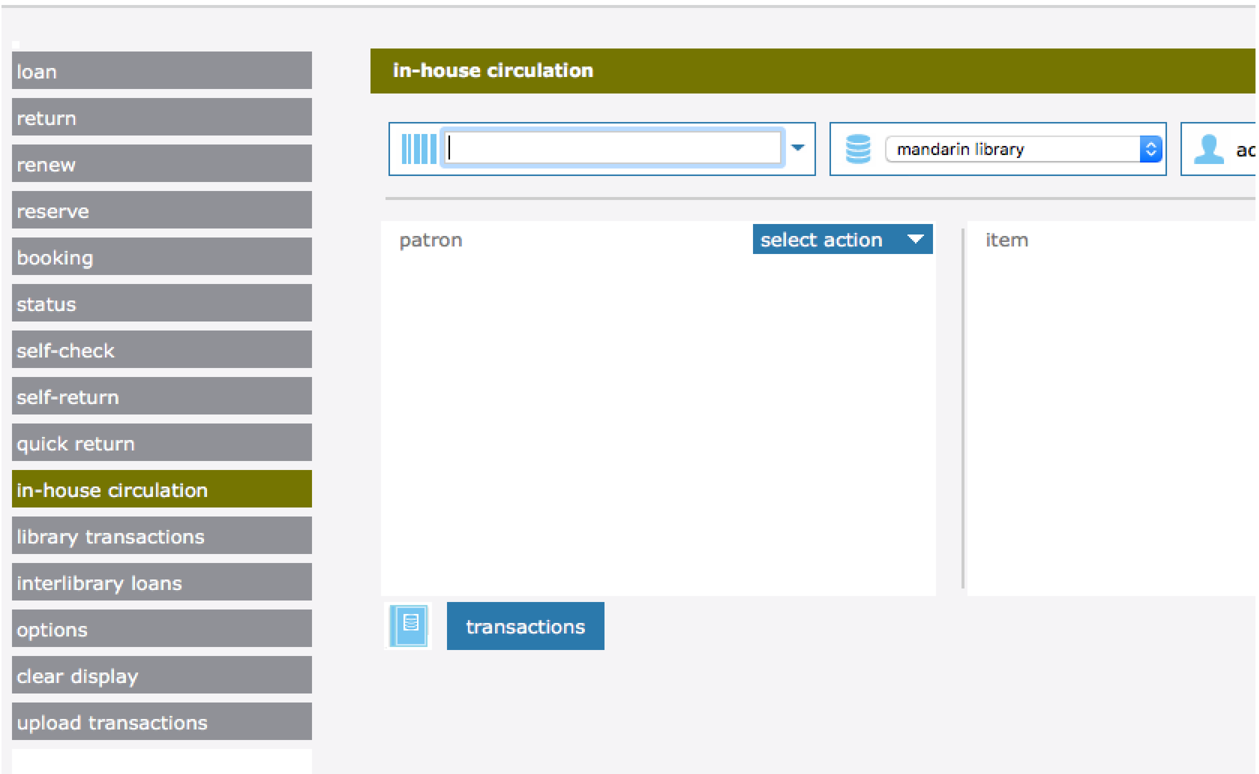
This rapid entry method is designed for situations such as bookdrop returns. Quick Return does not alert you to patron messages since it is assumed that patrons are not present. Quick Return does alert you when a Hold is attached to
an item.

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

In-House Circulation

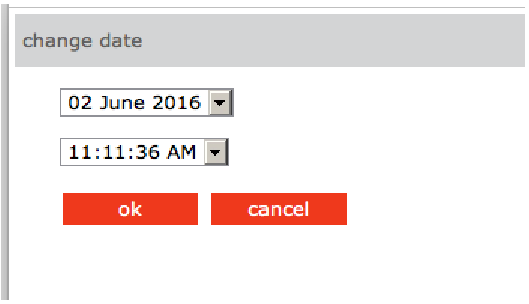
This feature takes the guesswork out of tracking in-library usage of your collection. It is used for items that were removed from shelf positions and left on library tables or desks, presumably used at the library though not checked out. It records one use of each item.

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



Changing an Item's Due Date

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



Recording an Item as Lost or Damage

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

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

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

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

To record items as lost or damaged, use the Transactions menu. For instructions, see **"Using the Transactions Menu".**

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

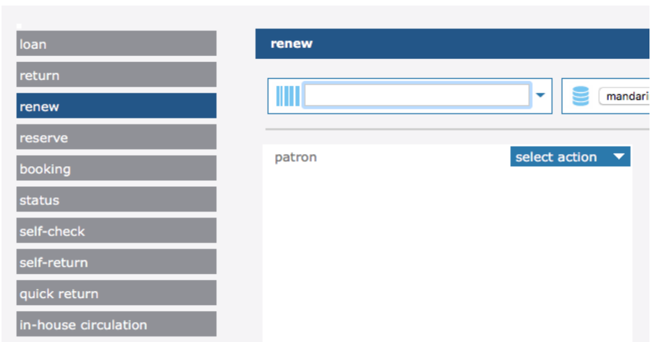
To record items as “Claimed Returned” or “Claimed Never Had,” use the Transactions menu. For instructions, see “**Using the Transactions Menu**”.

Renewing a Loan on an Item

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

Side Menu Method

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



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

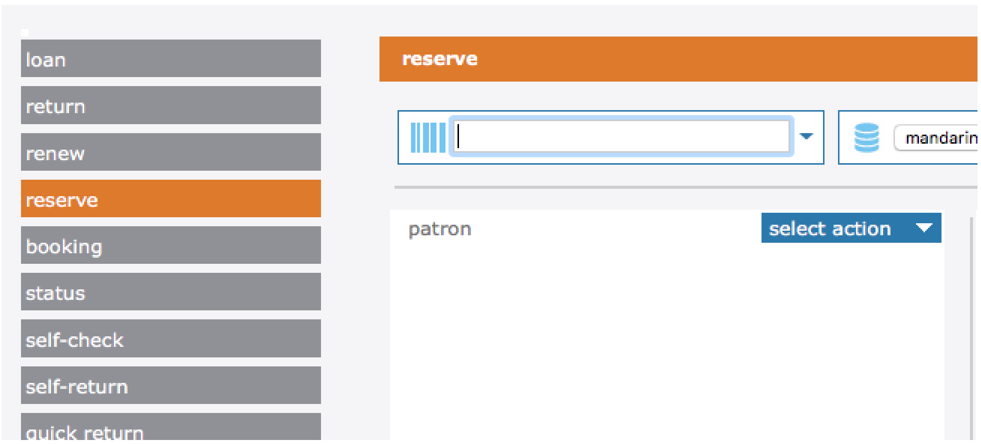
- *Click **Override** to ignore the message and continue with the transaction.*
- *Click **Cancel** to stop the transaction.*

Reserving or Holding an Item

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

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

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



NOTES:

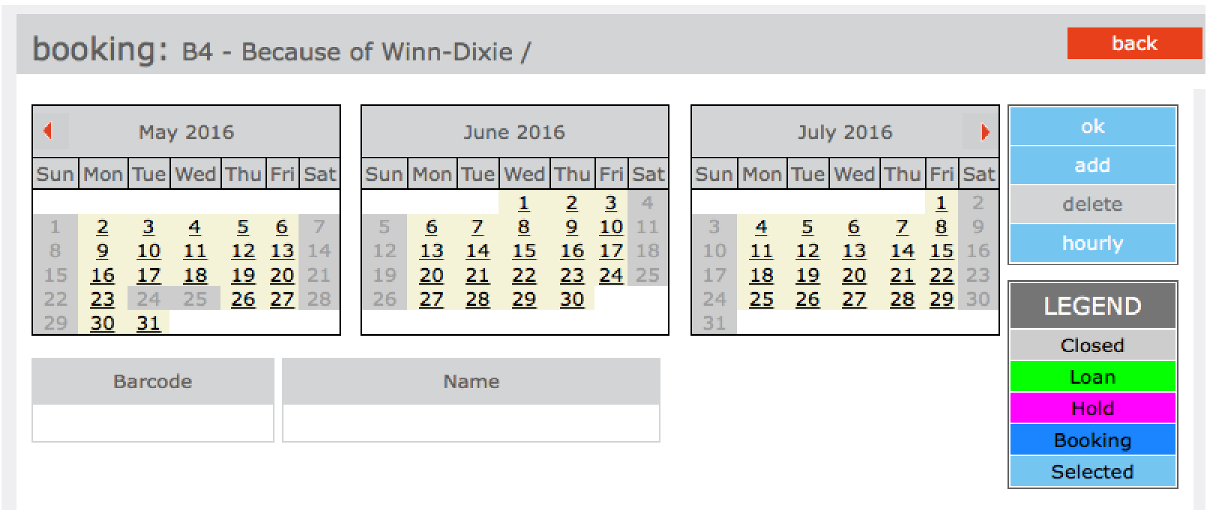
- *If a reserve is placed, a notification e-mail will automatically be sent to the patron when the item is available (if there is an e-mail address in the patron record).*
- *When a reserved item is returned, a message displays indicating the name and barcode of the patron who reserved it.*
- *You can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

Booking an Item

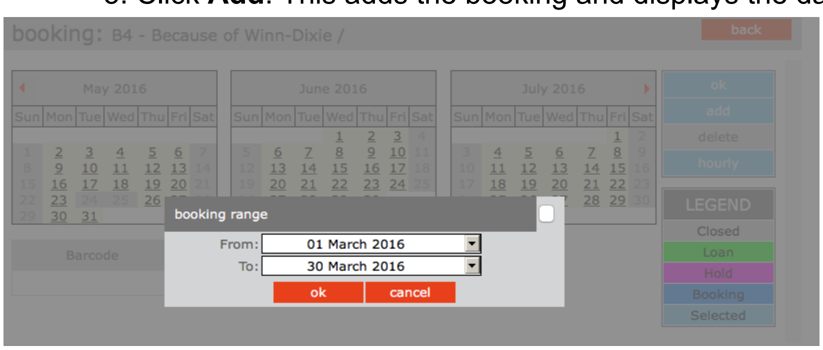
***Note**: You cannot book a deleted item.*

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

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



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



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

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

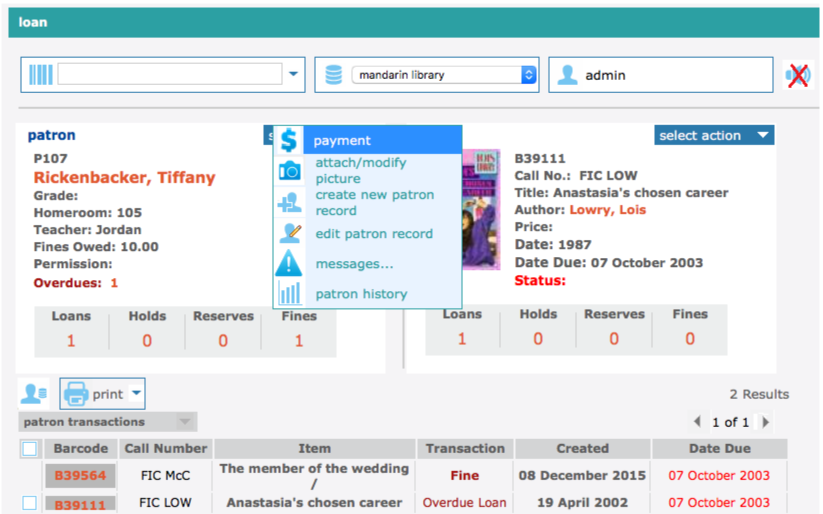
Processing Patron Fines

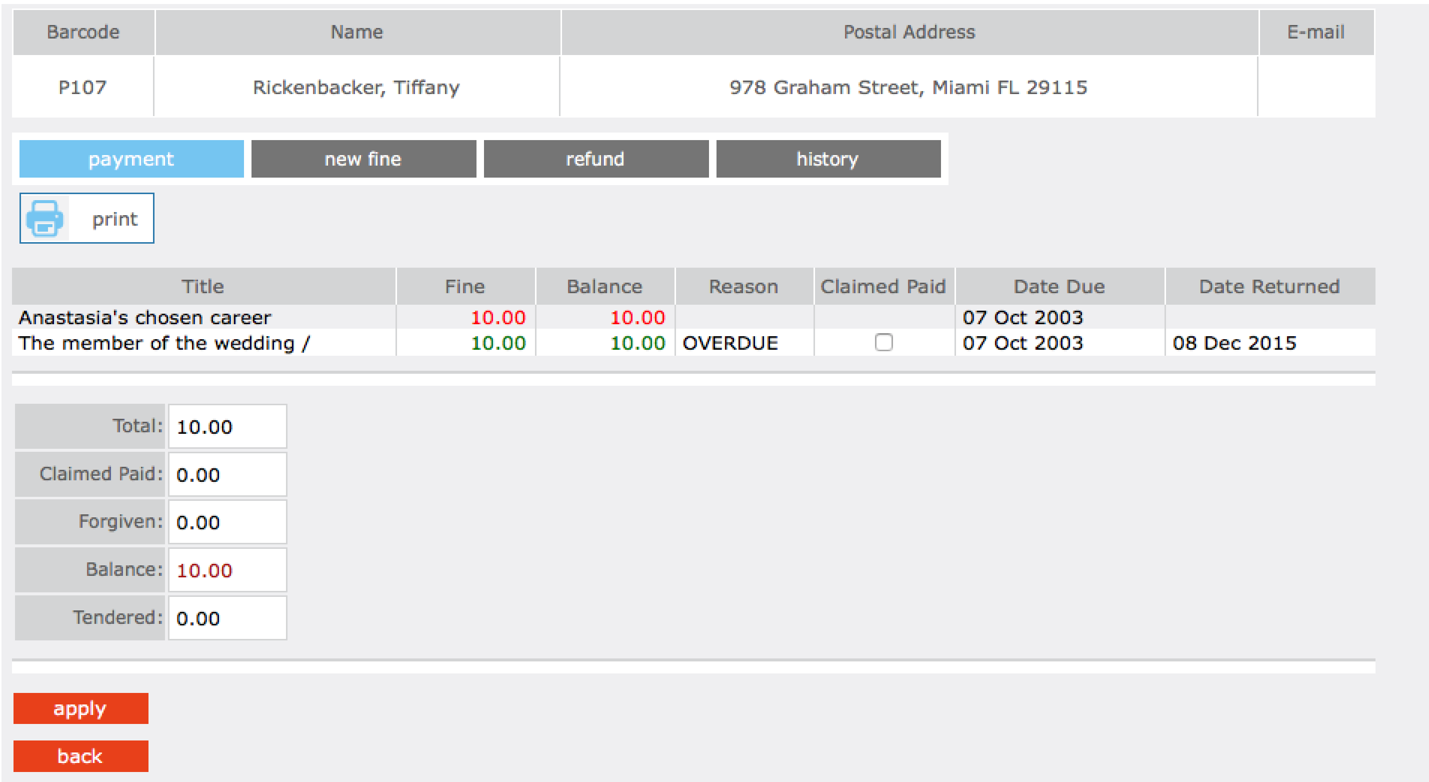
__Note__: To send e-mail notifications to patrons who owe fines, see the preceding section, "Sending E-mail Notifications for Fines and Overdue Items."

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

Recording a Payment

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





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

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

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

Using Self-Check and Self-Return

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

NOTES:

• For system security, once the Self-Check transaction mode is selected, the patron cannot perform any other type of circulation transaction. Similarly, if the Self-Return transaction mode is selected, then the patron is limited to self-return. Libraries using the Self mode can set up a network workstation restricted to self-checkout transactions, and a separate workstation restricted to self-return transactions.

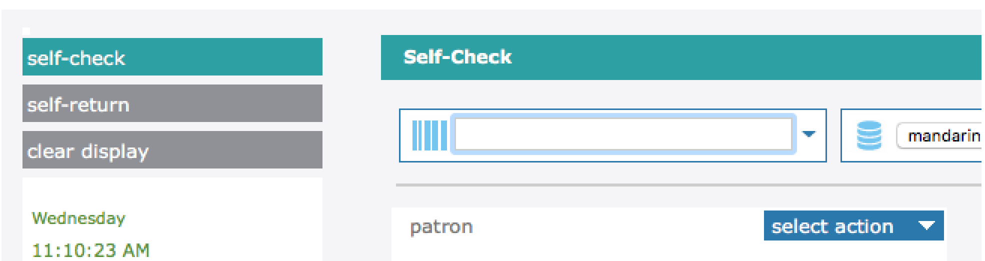
• To enable override messages in Self-Check mode, change the Self Mode entry in the Global.ini.REG file (the default path is **C:\M3 Server\Registry \Common)** to **Skip Override=off**. Otherwise, the only override that will display is if the item is non-circulating.

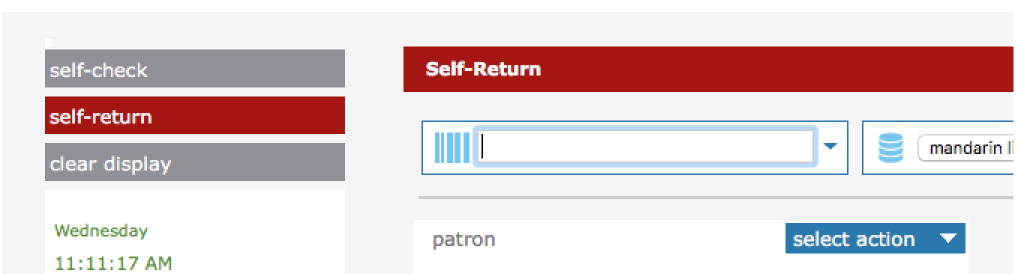
Using Self-Checkout

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

Using Self-Return

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

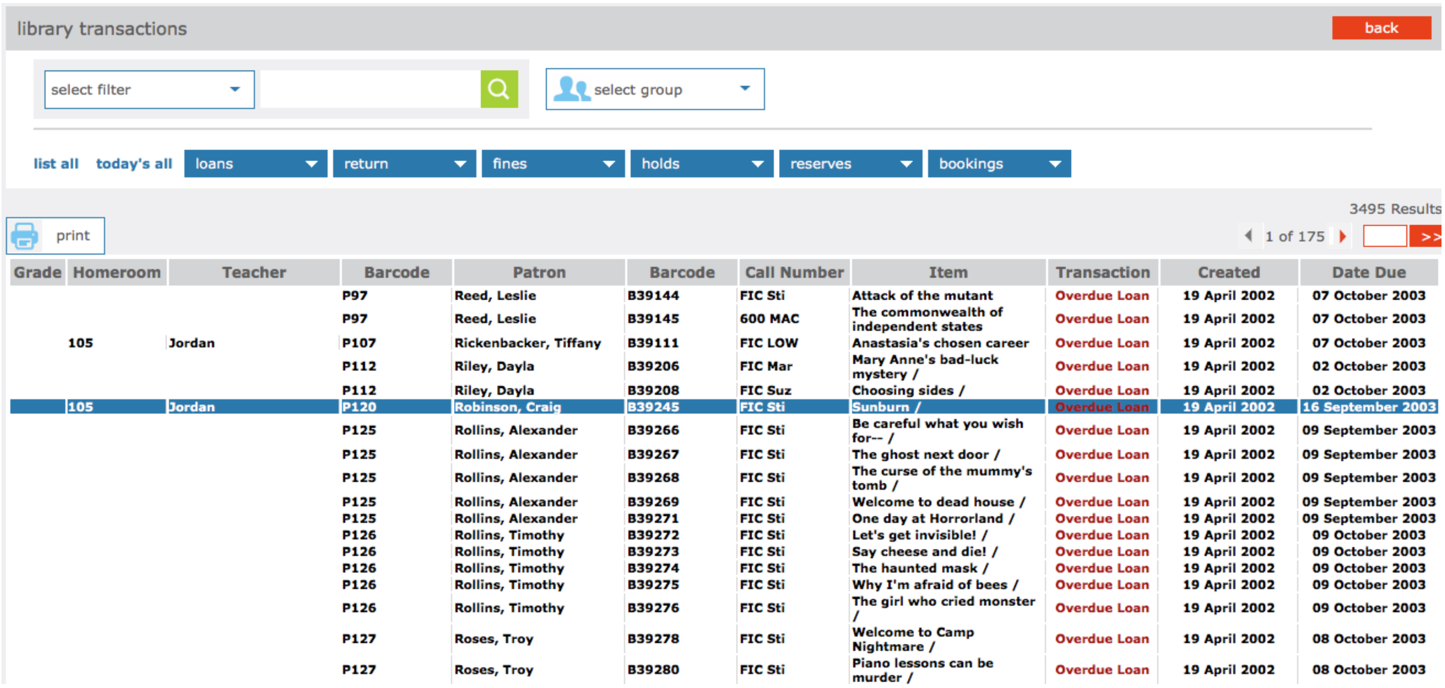




Using Library Transactions Mode

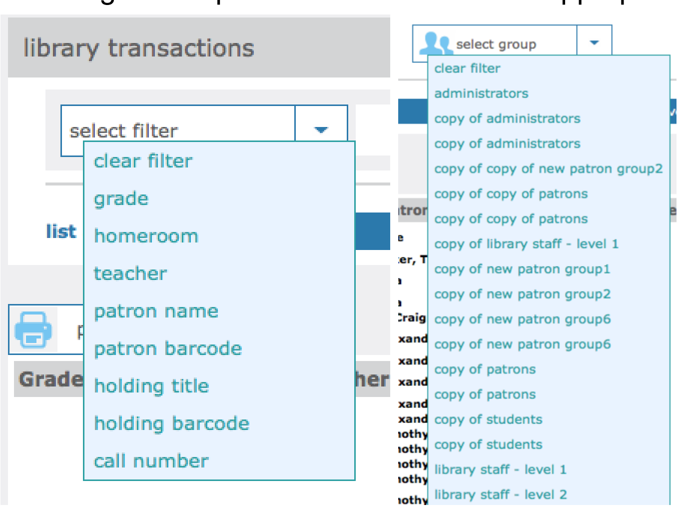
Library Transactions mode allows you to view, sort, and print transactions.

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

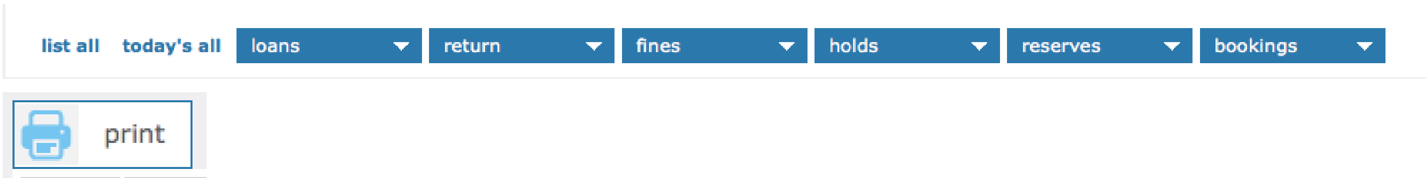


Grade	Homeroom	Teacher	Barcode	Patron	Barcode	Call Number	Item	Transaction	Created	Date Due
			P97	Reed, Leslie	B39144	FIC Sti	Attack of the mutant	Overdue Loan	19 April 2002	07 October 2003
			P97	Reed, Leslie	B39145	600 MAC	The commonwealth of independent states	Overdue Loan	19 April 2002	07 October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

2. You have the following options:
   • Transactions can be filtered by selecting the proper filter in the dropdown menu or by patron group selecting the dropdown list and select the appropriate group



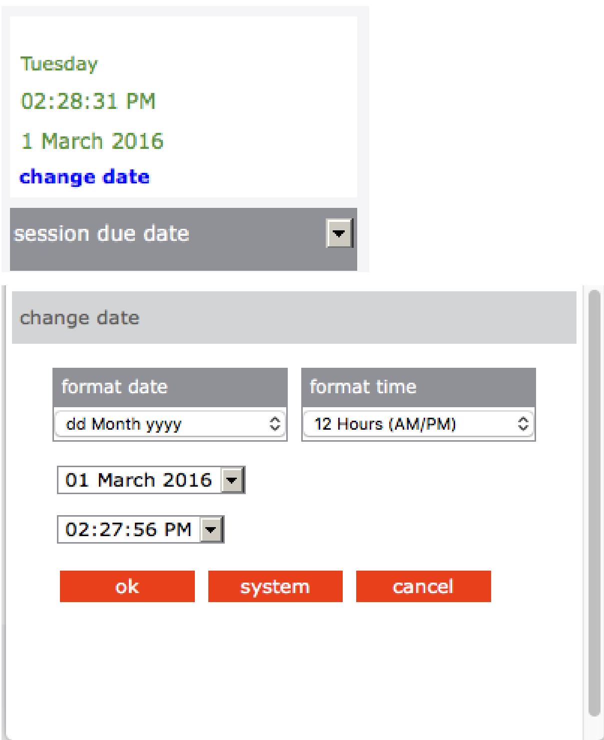
   • To view information related to the transaction, click the transaction anywhere in its row. This displays the patron and item information on the main Circulation page.
   • To sort the transactions by type, click **List All**, **Today's All**, **Loans**, **Fines**, **Holds**, **Reserves**, or **Bookings**.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


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

Changing the M5 System Date

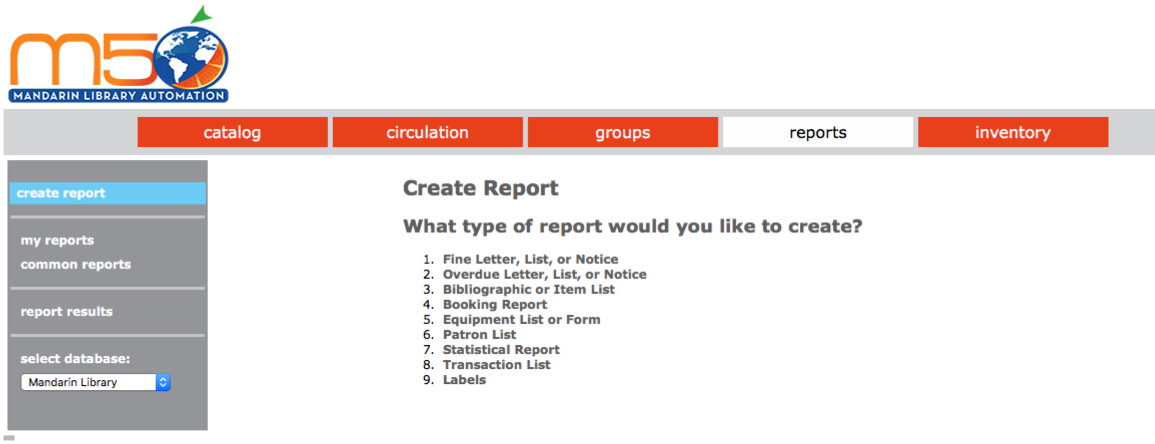
The system date displays in the Circulation side menu. You can change this date if you need to backdate the system calendar to process a return, such as for items returned in evening **bookdrops**.

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



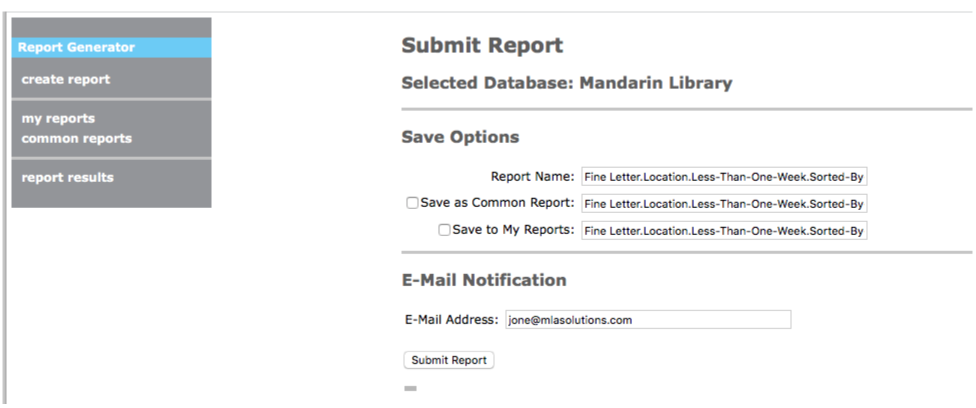
Using the Report Generator

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



Creating a Report

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



On this page, you have the following options:

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

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

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

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

4. Click **Submit Report**. This displays the Report Results. Your report will be listed in the Report Queue while it is processing. When it is ready for viewing, it disappears from the Report Queue and appears in the Report Results.
5. To view the report, do one of the following:
   • In the Report Results list, click the **report name**. This opens the PDF report.
   • If you indicated an e-mail address when you submitted the report, you will receive an e-mail notification when the report is ready. Click the link provided in the e-mail to open the PDF report.

Report Results

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

Delete Selected Reports

Report Queue

	Position	Name	Submitted	User
☐	1.	Fine Letter.Location.Less-Than-One-Week.Sorted-By-Grade	3/1/2016 11:07:09 AM	admin

Delete Pending Reports

Generating Your Saved Reports

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

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

3. To view your report, see step 5.

Generating Common Reports

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

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

3. To view your report, see step 5.

Viewing the Report Results and Report Queue

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

Report Queue

	Position	Name	Submitted	User
☐	1.	Fine Letter.Location.Less-Than-One-Week.Sorted-By-Grade	3/1/2016 11:07:09 AM	admin

Delete Pending Reports

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

Using Inventory

Using M5 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.

Overview

Inventory Overview

Conducting an inventory with M5 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 Inventory. 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 Inventory compares the scanning results to the contents of the holdings database, it groups and categorizes any differences as Newly Found, Missing, Invalid Barcodes, 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.

Signing In to Inventory

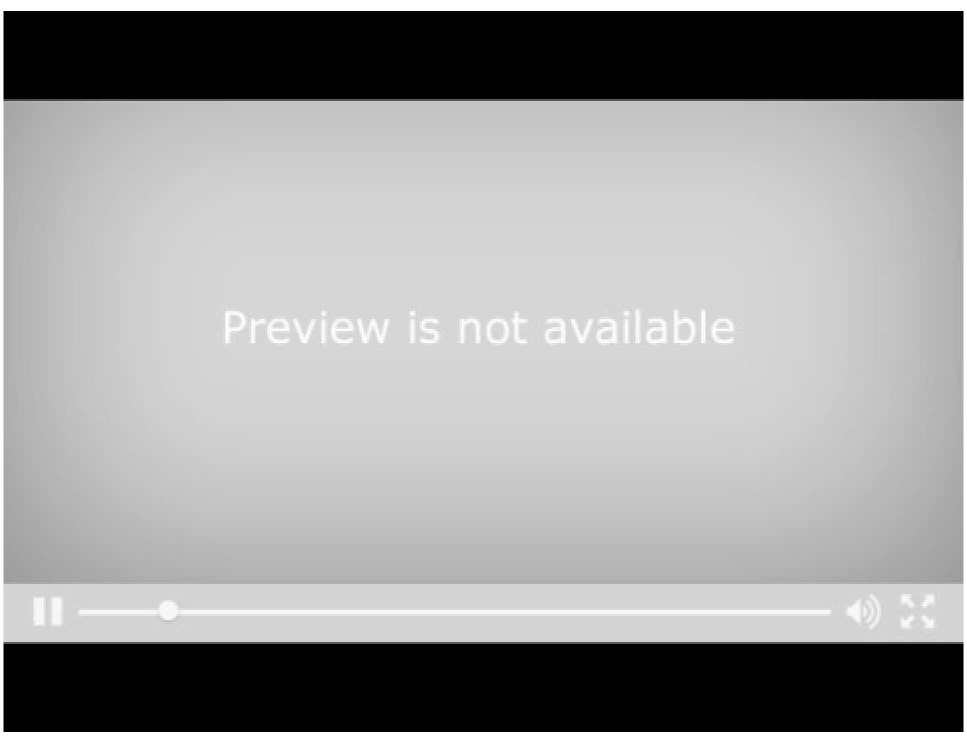
In order to use Inventory, you must sign in to the Catalog with the appropriate permissions.

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

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

Inventory Features

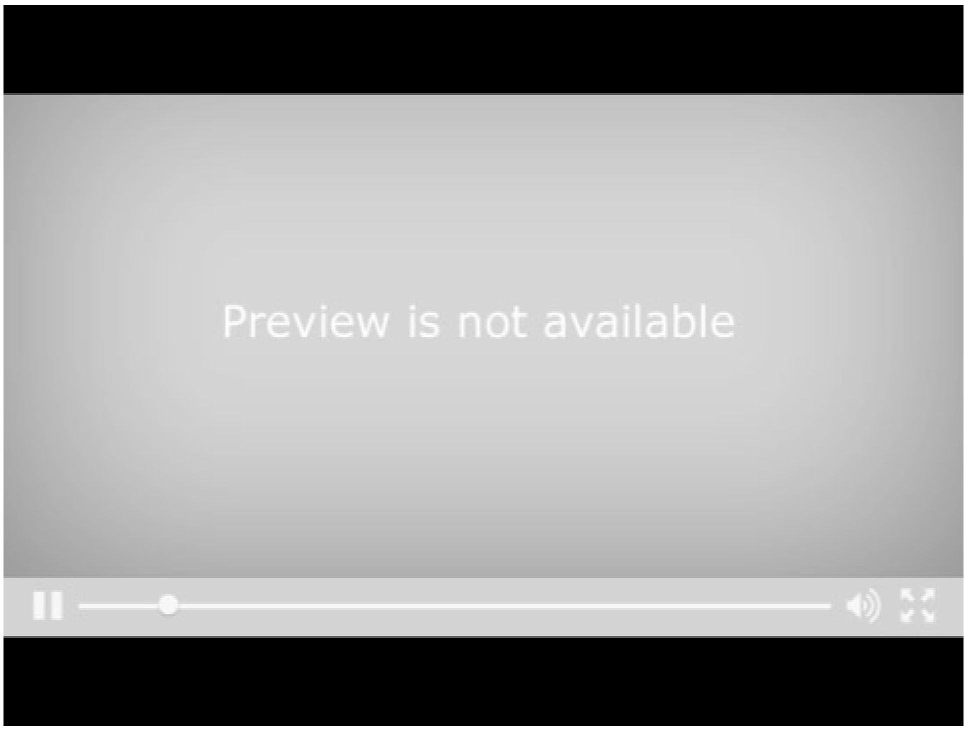
With M5 Inventory, you can create a new inventory session, open an existing session, and view inventory reports. The three Inventory tabs, Home, Session, and Report, indicate which mode you are in.



Setup

To ensure accurate inventory results, you should not circulate or catalog items while the collection is being scanned.

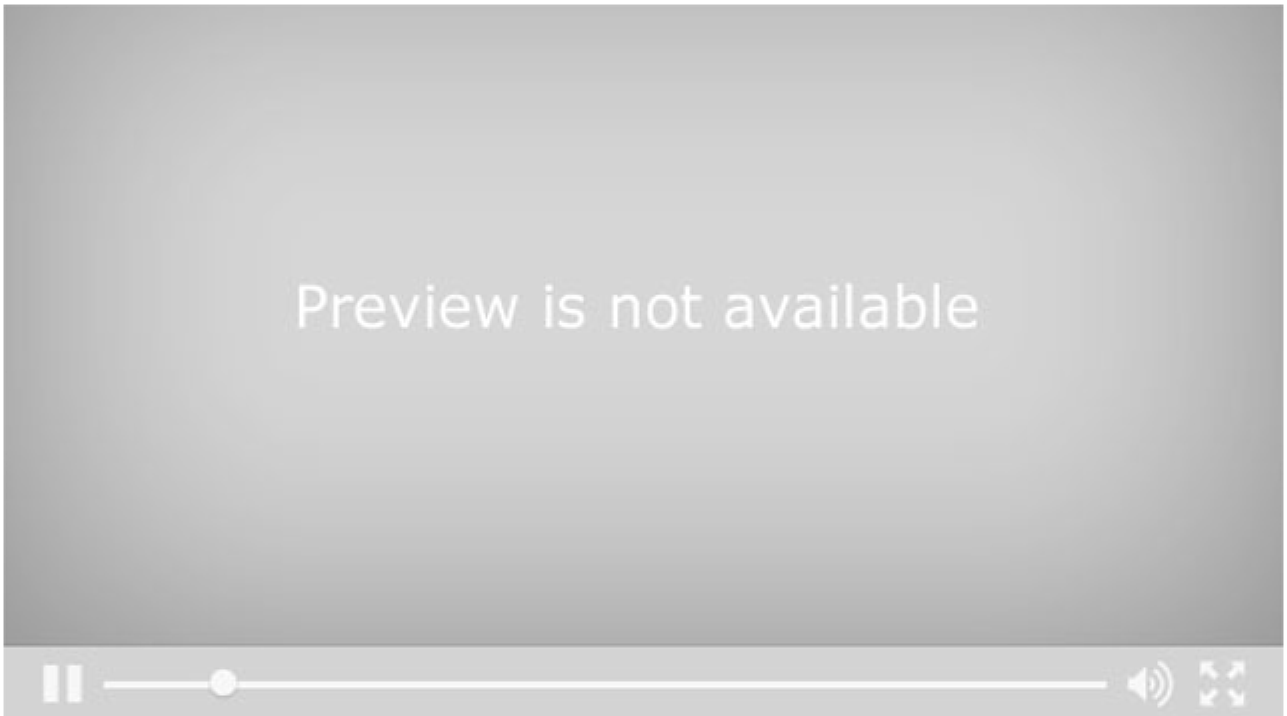
NOTE: A Tricoder can hold an average of 6,000 scanned barcodes at a time. Once that capacity is reached, the information needs to be uploaded into Inventory. It may take several scanning and uploading sessions to build the inventory data.



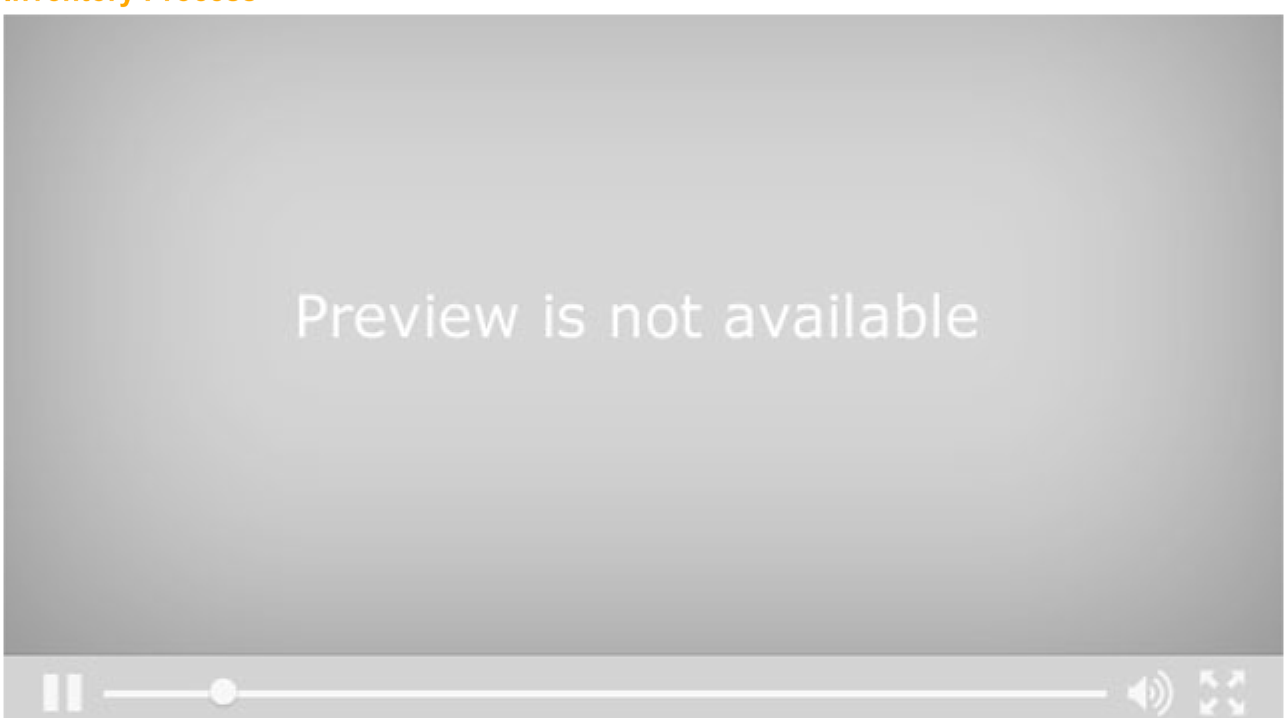
Conducting Inventory

To ensure accurate inventory results, you should not circulate or catalog items while the collection is being scanned.

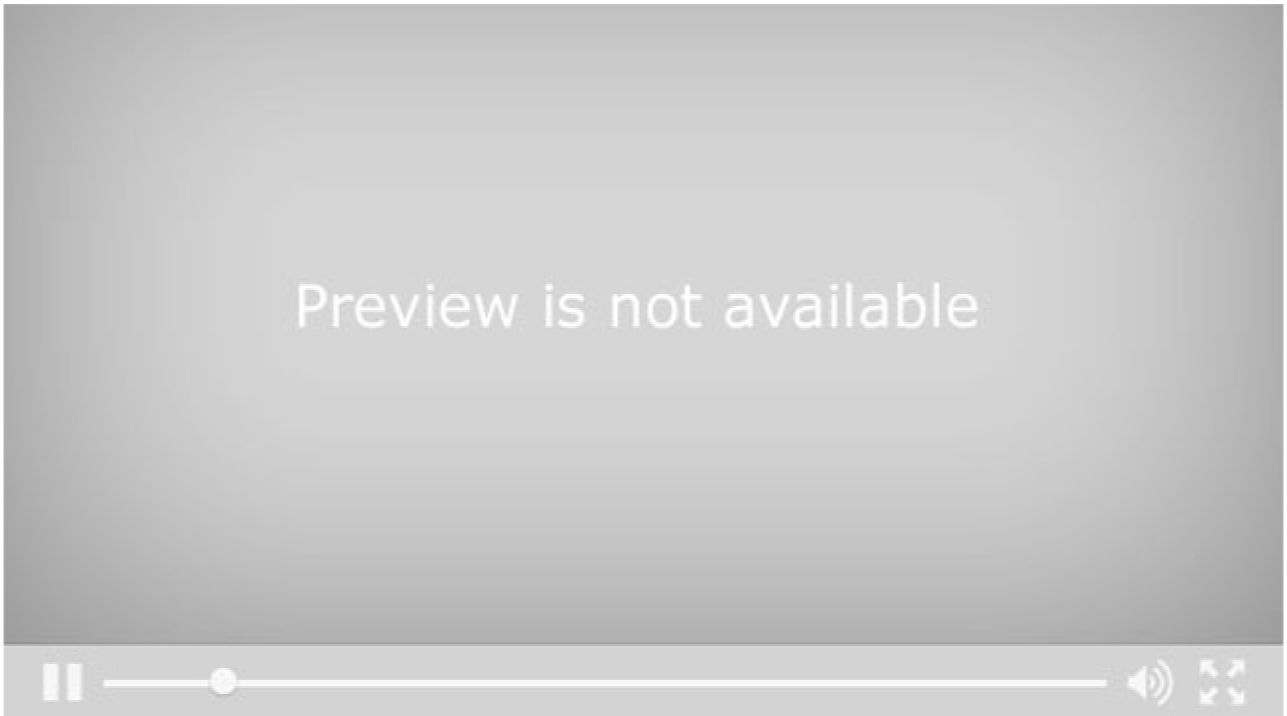
Create Barcode set



Inventory Process



Statistics



Minimum System Requirements

SERVER			
Requirements	Hardware	Operating System	Other Requirements
Minimum Requirements	Intel Core or Xeon @ 2GHz * 4 GB RAM * 500 GB free space	Windows® Server 2008 R2 or later. Include 32 or 64 bit	IIS 7.0 or later** Microsoft® .NET Framewo Microsoft J# Redistributabl
Recommended for fewer than 5 sites*	Intel Core or Xeon @ 2.2GHz * 8 GB RAM * 500 GB free space		
Recommended for 5 sites*	Intel Core or Xeon @ 2.2GHz * 12 GB RAM * 750 GB free space		
Recommended for 10 sites*	Intel Core or Xeon @ 2.4GHz * 16 GB RAM * 1 TB free space		
Recommended for 20 sites*	Intel Core or Xeon @ 2.6GHz * 24 GB RAM * 1 TB free space		
Recommended for more than 20 sites*	Requirements will be determined based on needs		

* SITE: Defined as a Location or Library with an average of 1,000 circulation transaction per day.

** The number of users connecting to M5 can greatly influence the hardware requirements.
The requirements listed here are guidelines; your actual requirements may vary.

*** If the M5 setup does not detect these on your system, they will be installed automatically.

WORKSTATION	
Web Browser	Other Requirements
Microsoft Internet Explorer 11 or later OR recent version of Chrome or Firefox	JavaScript™ enabled Java™ Java Runtime Environment (for viewing online help) Adobe® Reader® or other pdf viewer (for viewing reports) Monitor’s resolution should be set to 1024x768 or higher

NOTES:
Mandarin Library Automation recommends a storage subsystem, such as a RAID, that can deliver at least a sustained 500 IOPS.

The recommended performance configuration is to host the web server and the Mandarin server on different machines. We do not recommend using Mandarin on a server that is also operating Exchange Server, WSUS or Domain Controller. Please contact us if you intend to use Virtual Server.

Last Update 01/17

Appendix

Releases

5.1- July 2016

https://www.mlasolutions.com/m5-v5.1

NOTE: The link will open on a new window

Catalog.

New Features.

1. Each reading program can now be turned on or off individually under Setup > Options > “enable_[reading_program_name]” > on/off. This will add/remove information for each reading program from the record formats and post-query filters.
2. A slider on the Standard Search has been added to pre-query filter a search by Reading Level range. This feature is on by default if any reading programs are active. If all reading programs are disabled, the slider will not display. The slider can also be added/removed manually in Setup > Options > “range_searching” > on/off.

Issues Addressed.

1. A query on the ISBN is now used to populate title and author information for Recommended Readings. The path to the local cover image, if available, will be used and displayed in place of the Syndetic image.
2. MARC tag searches from Visual Search have been implemented. Post-query filters are not currently supported for this feature.
3. Implemented deep-link URL to record details: clicking the Title link now takes the user into Details.
4. When editing an Equipment record, Catalog now uses the correct template/definition.
5. Some improvement in handling operators and stop words when searching PostgreSQL.
6. Some improvement in resource utilization.
7. Tool tip labels have been added to Recommended Reading and Gallery images.
8. When clicking the Home button, search terms and search results are cleared.

Circulation.

1. Circulation no longer references the prior loan when an item that was marked missing is scanned, unless the item was marked missing when there was an open loan transaction.
2. Implemented the ability to forgive fines for lost items that are scanned into Circulation.
3. If a fine had been paid on a lost book, it is now possible to create a Refund for the prior patron when scanning the item in Return or Loan mode.
4. When editing an Equipment record, Circulation now loads the correct template/definition.
5. The Self Mode session has been isolated from returning to a logged-in Catalog or Circulation session.
6. The Payment screen now includes a Due Date column for fines, and a new interface has been added for refunds.
7. Payments and forgiveness can now be applied to specific fines, and these can be partial values.

Advanced Cataloging.

Now supports integration with Mitinet BestMARC.

Group Editor.

When editing an Equipment record, Group Editor now uses the correct template/definition.

5.2- December 2016

https://www.mlasolutions.com/m5-v5.2

NOTE: The link will open on a new window

Advanced Cataloging
1. The Search dialog now applies scope restrictions.
2. On Step 3 of the Import, the list of organizations is now restricted to the accessible organizations for the logged-in user.
3. Orphaned holding records were causing an export of records to fail, creating a 0 KB export file – that has now been addressed.
4. Organizations in the Search dialog are now set to display alphabetically by name.
5. Advanced Cataloging has been optimized to reduce and clean up the number of open socketconnections, resulting in greater availability and stability.
6. It is now possible to upload barcodes directly from a scanner, or from a file, for batch operations in Find/ Replace.

Catalog
1. A simple interface to manage comments has been implemented. The number of comments needing review is reflected in the notification bubble next to My Account on the homescreen.
2. Organizations now appear as a post-query filter after retrieving results from a scoped database.
3. Catalog initiates search on the selected Autocomplete entry without having to separately click the Search button.
4. A new key has been added that allows turning off the bibliographic call number display in the results and record details views.
5. If the user deselected all databases and attempted to search, Catalog would search the first default database in addition to the selected database (if not the default) after the user corrected the original selection error – that has now been addressed to search only the selected database(s).
6. Numerous improvements to scoping access have been implemented.
7. Catalog has been optimized to reduce and clean up the number of open socket connections, resulting in greater availability and stability.
8. When Postgres searching is enabled, Catalog now retrieves bibliographic and holding results exclusively from the Postgres database, resulting in a significant performance increase.
9. Decimal values are now supported for the Reading Counts and Accelerated Reader reading program ranges on the search page.

Circulation
1. In a non-scoped environment, the database name is placed in the header.
2. Self-Mode now has a configurable timeout.
3. When an item is returned that has been reported missing by the prior patron, there is now an option to enter a redesigned Refund screen and process a refund to that patron.
4. When loading an item that has been marked missing, there is no longer a reference to the prior patron, unless ‘missing’ was notated for that patron’s transaction.
5. Receipts have been corrected to reduce unnecessary length.
6. The Self Mode interface has been stripped down to remove elements that the user cannot access.
7. Scope restrictions are applied to holdings when searching from the Barcode field.
8. Patron records can now be duplicated.
9. The issue where uploading and attaching a patron picture caused a random different patron picture to display instead of the uploaded image has been addressed.
10. Receipts can be printed for each approved ILL.

11. 'Overdue loans current week' selection in Library Transactions is now 'Overdue Loans Last 7 Days'.
12. Access group access to the originating library is no longer required to return ILL loans at the requesting library.
13. The following items in Library Transactions were unscoped: Overdue Loans Current Day, Due Tomorrow, Due Within 2 Days, Due Within 3 Days, Overdue Loans Last 7 Days, Overdue Loans Last 14 Days, Overdue Loans Last 30 Days. That has now been addressed so those items are scoped.
14. ILL is now working in non-scoped environments.
15. Numerous improvements to scoping access have been implemented.
16. Circulation has been optimized to reduce and clean up the number of open socket connections, resulting in greater availability and stability.

Group Editor
1. A new, optional flag in Global.ini (Remove Non-accessible Groups=1) allows for the removal of inaccessible group from the display. This is operative if the hierarchy is enforced. The default is to show all groups.
2. The Members tab no longer displays search results when you click on the tab after having performed an earlier search.
3. Scope restrictions are now applied to holdings when searching for bibliographic records.
4. Holdings are no longer aggregated from all selected bibliographic records after searching. Now only the holdings for the selected bibliographic record are visible.

Record Editor
1. The 852#a with the logged-in user’s organization symbol was not added to new patron records. The 852#a was added as an empty field in the editor. Now a new patron includes the symbol of the logged-in user by default.
2. After clicking Cancel or Save, the Record Editor UI is disabled to prevent double-clicking the Cancel or Save buttons, which had been causing a 404 not found error.
3. The Record Type dropdown has been removed from Basic Editor when editing existing records.
4. An issue that could cause a 404 (Not Found) error when clicking on Save or Cancel more than once has been addressed.

Schema
1. An issue that caused 521 Lexile record count to be absent from the filter has been corrected. This happened when the record contained both 521 and 526 fields.
2. The schema has been performance tuned to handle larger numbers of records and large numbers of scope restrictions.

5.2.0.3- January 2017

https://www.mlasolutions.com/m5-v5.2.0.3

NOTE: The link will open on a new window

Advanced Cataloging.
1. There is a new Collections ferature that allows creating virtual collections that can be easily searched from Catalog, for example, by using a Visual Search component.
2. An issue that could cause Find/Replace to hang has been addressed.

Catalog.
1. Comments from the ILL form are now included in the ILL transaction record.
2. When a Reserve is created on an unavailable item, the Hold initiated email is no longer sent.
3. If enable_ill_email is off, the 'ILL request could not be sent' error is not displayed when the lending library email address is absent on the ILL form.
4. An issue that could prevent the user from updating the username/password for installations on the Setup page has been addressed.
5. Share Search has been fixed.
6. An issue that affected queries in Visual Search has been addressed.
7. The Attach Picture interface has been streamlined.
8. Equipment records are now searchable.
9. Authority Cross References are now supported.
10. An issue that caused Catalog to display the incorrect page of results when coming back from Record Editor has been addressed.

Circulation.
1. On the Current Oubound ILL page, it is now possible to restrict the view to those items that have been out 30 days or more, or 60 days or more.
2. In Library Transactions, when the Send Notification button is active, the overdue message is displayed. The user now has the ability change, replace, or append information to the message.
3. Circulation now closed expired Hold and Reserve transactions on the first initialization.
4. Outgoing ILL requests that have not been approved can now be cancelled by the requesting library.
5. When returning an ILL loaned item, the user can now click override to prevent the closeout of the ILL transaction and keep the item for loaning to another patron.
6. When an item that is reserved is returned, the 'set this item aside' message now has focus on the Print link instead of the OK button.

Group Editor.
The Results Per Page dropdown has been restored.

5.3.0.0- April 2017

https://www.mlasolutions.com/m5-v5.3.0.0

NOTE: The link will open on a new window

Advanced Cataloging.
1. There is a new feature allowing Find/Replace to run on an uploaded set of barcodes.
2. The ability to batch upload and attach patron pictures has been implemented.
3. Numerous scoping-related access issues have been addressed.

Catalog.
1. Call Number sorting has been corrected. This also requires an updated to the schema.
2. Queries containing ampersands (&) or exclamation marks (!) no longer fail with 'No Results'.
3. Link paths added to the Gallery must end in .jpg, .jpeg, .gif, .png, .tif, .tiff, or .bmp.
4. Users in scoped environments can no longer edit or delete bibliographic records unless the user has access to all holdings.
5. Pictures uploaded by the Attach Picture feature are no longer resized.
6. MLA and APA formats have been corrected.
7. A new key (enable_standalone) has been added to Options in Setup that turns the installation into a stand-alone web opac.
8. An issue that prevented paging across Equipment results has been addressed.
9. An issue that could corrupt the Visual Search configuration by clicking the Create button twice in quick succession has been resolved.
10. Ampersands will now be saved in template data as '&' in order to prevent corruption of the template.
11. An issue with Boolean operators in the second and third fields of Advanced Search has been addressed.
12. An issue that affected phrase searching has been addressed.

Circulation.
1. Numerous scoping-related access issues have been addressed.
2. When searching by Title or Patron, in Circulation Search Results, the deleted records text is now red.
3. An issue that could prevent items from being successfully returned in a scoped environment at another location has been resolved.
4. The default action on the Reserved message has been changed from OK (close) to Print.
5. A crash that affected Due Tomorrow, Due Within Two Days, and Due Within Three Days in the Library Transactions Overdue Filter has been addressed.
6. Circulation now supports sending email to addresses in 111#m, 112#m, and 113#m as part of the Send Notification process. The feature is on by default, but can be changed by adding the following Global.ini entry:

```
[NOTIFICATION EMAIL]
enable email other contacts=0/1
other contacts email fields=
```

Group Editor.
An issue that prevent saving the selection state of Group Editor on the Utilities page has been addressed.

Record Editor.
1. An issues that prevented DVD Recording and Music CD templates from loading has been addressed.
2. In scoped environments, users without access to all holdings can no longer edit or delete the bibliographic record.

5.4.2.0- November 2017

https://www.mlasolutions.com/m5-v5.4.2.0

NOTE: The link will open on a new window

Advanced Cataloging.

1. Issues that prevented printing more than the first page of results have been addressed in Find/Replace.
2. In Collections, the page no longer shifts up when changing the search attributes or operators.
3. The Patron Overlay has been reverted to earlier handling in scoped environments. Patron records will overlay based on a barcode match – barcodes will not be reused (duplicated).
4. In a scoped database, 995#a is added to imported records that do not have 852 fields, to facilitate finding those records

Catalog.

1. In Expanded Labeled format, the label for Series did not show, unless there was a subfield ‘v’ in the record.
2. There is now an ‘Add Record’ in the dropdown under Catalog below the Advanced Cataloging entry.
3. The Reading Program selection and range are now applied to the Enhanced Search.
4. When adding an 852 field to an existing bibliographic record, if a duplicate barcode is used, the user will now get the warning that the barcode is a duplicate.
5. When the currently selected database was other than the first default database, Add Record would save to the first default data – not to the current database.
6. Long queries in Visual Search that included quoted phrases returned ‘No Results’ erroneously.
7. The Availability count on the Results page was incorrect in some cases where there were deleted holdings.
8. On scoped databases, deleted holdings were returned in patron queries.
9. The columns in the holdings list in the Details view are now sortable.
10. The Library Assistant has been added to the footer when there is a privileged logon.
11. The Setup Options page has been redesigned.
12. The Sort Formulas and All Material Types have been removed from Setup, since their configuration is defined in the schema.

Circulation.

1. In Return mode, the user gets a message when a missing item without transactions is returned, and the status is changed to ‘normal’.
2. The Title can be redacted in notification emails. In the Notification Email section of global.ini, use ‘mask bib title=true’
3. When clicking Override on a missing item in Loan mode, the transaction was not created. It was necessary to rescan the item.
4. When emailing receipts, an issue that caused the first receipt to be sent on each subsequent transaction has been resolved.
5. An issue that caused Upload Transactions to hang has been addressed.
6. The Circulation UI has been improved.

Group Editor.

Record Editor would not launch on patron and item members of Special Reserve groups.

Record Editor.

1. When deleting the barcode subfield from a holding, the corresponding barcode record was not flagged as detached, preventing reuse of the barcode.

2. Record Editor no longer posts back on the Enter key in the barcode subfield. Users can now add barcodes with a scanner.

5.5.0.0- February 2018

https://www.mlasolutions.com/m5-v5.5.0.0

NOTE: The link will open on a new window

Advanced Cataloging.
1. An issue in Find/Replace that prevent printing more than the first page of results has been addressed.
2. In Collections, changing operators or search attributes no longer causes the search form to shift off the screen.
3. Find/Replace will now obey the Global.ini setting ‘Delete bibliographic if last holding deleted’.
4. Find/Replace can search for bibliographic records without holdings.
5. Search results are no longer automatically sorted.
6. In Find/Replace, an issue that prevented the 995 in the bibliographic record being updated when the last holding of a particular organization was removed has been resolved.

Catalog.
1. In Results, the star/rating indicator is now clickable straight through to the Ratings area of Record Details.
2. In 'sign in to add your comment' 'sign in' is now a link to the Sign In page, so that the user does does have to scroll up.
3. The ‘Comment’ button has been renamed ‘Submit’.
4. The user can now submit just a rating or just a comment.
5. The number of overdues bubble now has a tool tip that says 'Overdues' when the user moves the mouse over the bubble.
6. If the ILL Admin permission is off, we will have a dropdown that includes 'overdues =' and 'unreviewed comments = ' for those users. The bubble number will include the total of overdues and unreviewed comments.
7. An issue that prevented a shared search with truncated queries from working has been addressed.
8. Shared searches now work in Visual Search query components.
9. If librarian_mailto is not defined, the Contact Your Librarian link will no longer appear.
10. The Recommended Reading and Gallery widgets have been redesigned to allow scrolling through items without having to click into the full widget.
11. The Gallery now supports a URL on each item, allowing a website to be linked from each image.
12. The Record Fetch button is now obeying the permission to add bibliographic records.
13. A change has been made in ILL for unscoped libraries without symbols to get the lending library email address from the librarian_mailto value in the Setup page.
14. Print and save/email record formats have been simplified to remove cover images and other UI graphics.
15. Lexile BR is now handled as part of the Lexile reading program range.
16. Recommended reading can now optionally be added by ISN.

Circulation.
1. An issue that caused Upload Transactions to hang has been addressed.
2. ILL Management now has a mechanism to effect a recall on selected items.
3. ILL items that are still at the lending library can be returned to normal circulating status by being scanned in Return mode.
4. The Clear button has been restored.
5. When a missing item is scanned, an Override message now appears. If the user overrides, the item’s status will be set to ‘Normal’. A cancel will keep the status as ‘Missing’.
6. Titles in overdue email notifications can optionally be replaced by asterisks.
7. An issue that prevented a loan from being created after an override on a missing item has been addressed.

Record Editor.

A news Status dropdown has been added that allows easily changing the status of a holding (missing, damaged, etc.).

5.6.0.0- June 2018

https://www.mlasolutions.com/m5-v5.6.0.0

NOTE: The link will open on a new window

Advanced Cataloging.
Arabic and Hebrew characters are now handled correctly in the Find/Replace search results printable view.

Catalog.
1. The default selection status of databases that are members of a Database Group can now be set on a per-installation basis.
2. An issue that affected printing from My Account has been addressed.
3. Self-hosted installations will get an 'Upgrade Available' notice after a privileged logon, if an software upgrade is available.
4. Searches would fail after adding a record using the 'Add Record' link.
5. Defining a Database Group would break the Select Library dropdown.
6. The Databases post-query filter has been implemented for installations that have the Postgres interface turned off.
7. The Details view has been removed from Record Fetch results.
8. Postgres integration is automatically disabled if no connection to a Postgres server can be made.
9. In Catalog Setup, the enable_account_change_signin key has been modified to allow changing only the login name. A new enable_account_change_password key has been added to allow for changing just the password. These settings affect the availability of options under Change Login/Password in My Account.
10. Catalog now obeys the Change Login/Password permission in Group Editor.
11. After creating multiple lists, using the Remove All button on one of the lists would cause all the other lists to have the same contents.

Circulation.
1. Items with the status of ON ORDER, IN BINDERY, or WITHDRAWN can now be loaded in Status mode. When attempting to perform a transaction on holdings with these statuses, an Override to change the item's status to Normal is now presented to the user.
2. Arabic and Hebrew characters are now handled correctly in the Library Transactions printable view.
3. The dropdown lists are stickier; the dropdown mechanism has been redesigned to prevent the menus from disappearing before the user can select an item.
4. The Library Transactions page now displays the selected filter on screen and in print so that user can determine what kind of data is being displayed.
5. The Session Due date dialog now stays open/expanded as long as the 'Use session due date' checkbox is selected.
6. The calendars have been redesigned.
7. The email notification summary has been simplified.

Record Editor.
1. It is now possible to set the UCS/Unicode flag for patron records.
2. Record Editor can optionally suggest the next barcode, based on the last one saved, if the key SUGGEST_BARCODE is present in Global.ini.REG with a value of '1'.
3. It is no longer possible to delete the 004 field from holding records.
4. An issue that prevented Record Editor from loading the Equipment template has been addressed.
5. Record Editor now supports printing Avery 5160 barcode and Brodart 55-395-002 spine labels.

Reports.

1. An issue where the database shows as UNKNOWN in Common and My Reports has been corrected.
2. An ‘EasyLabel’ feature has been added to the Create Report page. This feature will allow printing Avery 5160 barcode and Brodart 55-395-002 spine labels for up to 30 scanned barcodes.

5.6.5- September 2018

https://www.mlasolutions.com/m5-v5.6.5

NOTE: The link will open on a new window

Advanced Cataloging.
1. A crash when searching bibs without holdings has been resolved.
2. Collection members can now be printed.

Catalog.
1. Catalog now supports saving records in RIS format from My List.
2. The way lists are handled has been redesigned in this release.
3. The way records are added to a database in Record Fetch has been redesigned in this release.
4. Logon and session postback queries have been optimized, resulting in increased performance.
5. Compatibility issues with Microsoft Edge have been addressed.
6. Alt and Title elements have been added to the Logo image. These are based on the value of the Title field on the Library Settings section in Setup. Additionally, there is a new logo_alttext key in Setup that allows the user to specify a different value for the Alt and Title attributes.
7. An issue that prevented printing the results of a Patron search has been addressed.

Circulation.
1. Added Email and Phone columns for the Public Library display in the Library Transactions view on screen and in print.
2. An issue that caused receipts to be emailed twice has been addressed.
3. Circulation queries on the Group table have been optimized, resulting in a significant performance increase when loading patrons with large numbers of transactions.
4. An issue that would cause Circulation to hang on startup when the logged in user had access only to Self Mode has been addressed.

Group Editor.
1. Printing of group members has been implemented.
2. An issue where members of a Special Reserve group were not refreshed when viewing the members of another special reserve group has been addressed.

5.6.6- November 2018

https://www.mlasolutions.com/m5-v5.6.6

NOTE: The link will open on a new window

Advanced Cataloging.
An issue that prevented all holdings being created when importing bibs with large numbers of 852 fields has been resolved.

Catalog.
1. An issue that could cause some items not to display Google cover images has been corrected.
2. A link to the Comments Management page is present with the number of unapproved comments in the notification bubble.
3. When adding a new bibliographic record, the holding will be created if the only populated 852 subfield is the barcode.
4. An issue that could cause the incorrect cover image to display in the Record Fetch results has been resolved.

Circulation.
1. An issue that caused Circulation to cache group permissions and circulation parameters has been corrected.
2. The Patron History option has been restored to the Patron ‘select action’ dropdown.
3. Circulation now supports an enhanced search feature available under the Patron and Item dropdowns. The search results are static until a new search is performed, or the results are cleared.

Record Editor.
1. A large number of holdings (>1000), and a large number of 852 fields is now supported.
2. Large barcodes are handled by the barcode suggestion feature.

5.6.7- January 2019

https://www.mlasolutions.com/m5-v5.6.7

NOTE: The link will open on a new window

Advanced Cataloging.
1. In Message Management it is now possible to select the database.
2. Message Management now allows setting the message type.

Catalog.
1. The Publication Dates post-query filter now updates based on the Media Type and Reading Program selections.
2. An issue that caused new templates not to be selectable as default templates have been corrected.

Circulation.
1. When returning items that have Reserve transactions there is now a 'Send email' checkbox on the set-aside dialog. A key is available to set the default selection status for this checkbox.
2. An issue that prevented the Reserve transaction being created when returning overdue items has been addressed.
3. When a reserved item is returned the patron will no longer receive two emails. The patron had received the set-aside email as well as the held-for-you email.
4. The Print receipt PDF window in Chrome now includes a Print button.

Easy Label.
1. The speed of Barcode label creation has improved when Postgres is searched.
2. Spine and Barcode label formatting have been improved.
3. Subfields 'k' and 'm' are now included in the Call Number in the Barcode label printout.
4. An error in calculating the length of some titles caused the Barcode label creation to fail.

Inventory.
1. An issue that could cause a large number of invalid barcodes to be reported has been resolved.
2. Missing Title and Author information in the Newly Found and Misplaced lists has been added.

Record Editor.
1. Subfields 'k' and 'm' are now included in the Call Number in the Barcode label printout.
2. Spine and Barcode label formatting have been improved.
3. Barcode label creation no longer fails if the Title contains an '&'.

5.6.8- May 2019

https://www.mlasolutions.com/m5-v5.6.8

NOTE: The link will open on a new window

Advanced Cataloging.
An issue that could prevent scope restrictions from being applied in Find/Replace has been addressed.

Catalog.
The speed at which Search Suggestions will be displayed has been increased.

Circulation.
1. Circulation now calculates the fine taking into account the number of closed days followed by the grace period. Previously, the grace period ran concurrently with the closed days.
2. The Change Date feature now maintains the current time when setting a future date.
3. The email notification process has been optimized internally.

Group Editor.
An issue that prevented changing Boolean operators between fields has been corrected.

Inventory.
The Inventory user interface has been revised and the session handling has been improved.

Record Editor.
It is no longer possible to edit or delete a barcode in a holding that has open transactions.

5.6.8.2- August 2019

https://www.mlasolutions.com/m5-v5.6.8.2

NOTE: The link will open on a new window

Advanced Cataloging.
1. Online resources/ebooks have been removed from the Search for Bibs Without Holdings feature in Find/Replace.
2. We fixed an issue in the Export where the results of a search may fail to display.

Catalog.
1. The Format post-query filter items are now in alphabetical order.
2. The List view now obeys the Reading Program selections.
3. The Contact Your Librarian email has been redesigned to be a submission form. It will now use the sender address in Global.ini, if no library_mailto has been defined.

Circulation.
1. When a scanned barcode is not found, the user now has the option to add a temporary record on the fly.
2. When temporary records are returned, Circulation now pops up a notification that the temporary record will be deleted.
3. An optional automatic renewal feature has been implemented.

Group Editor.
1. An issue that could allow deletion of groups that are not empty has been corrected.
2. The default number of groups displayed on the main page has been increased to 20.

Record Editor.
The current database is now displayed in the header.

5.7- November 2019

https://www.mlasolutions.com/m5-v5.7

NOTE: The link will open on a new window

Catalog.

1. The Share List feature has become ‘Save as Bibliography’ and the Lists page has been redesigned to show the saved bibliographies. Shared lists are now referred to as ‘bibliographies’.
2. The query used by Recommended Readings to load the bibliographic record has been corrected.
3. An issue that could prevent moving Visual Search components has been resolved.
4. Catalog will now obey the date format as defined in the Global.ini.
5. An issue that could cause Record Fetch to appear to get no results has been addressed.

Circulation.

An issue that could cause Circulation to lose its session has been corrected.

Record Editor.

1. An issue that could cause the barcode field to be locked has been addressed.
2. Barcode and Spine labels have been improved with a larger font.

Report Generator.

In Easy Label, Barcode and Spine labels have been improved with a larger font.

Ordering & License

You can **instantly order** the fully licensed version of Mandarin M5 at automation@mlasolutions.com or call 561 995 4065

Please visit www.mlasolutions.com for pricing information.

Contacts & Credits

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

PHONES AND FAX
(800) 426-7477 Toll-free
(561) 995-4065 Local

REGULAR OFFICE HOURS
M-F 8:30AM - 5:00PM EST

TECHNICAL SUPPORT HOURS
24x7x365 - 24 hours/day, 7 days/week

BY EMAIL
Sales & Marketing: automation@mlasolutions.com
Customer Service: automation@mlasolutions.com
Technical Support: support@mlasolutions.com
Webmaster: webmaster@mlasolutions.com

