Mandarin Textbook™

How to Enable the Textbook Module
2014

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Introduction

Textbook Enabler adds a textbook database to your M3 system, allowing you to track, catalog, and maintain your textbook collection separately from your library collection.

Unlike other library automation systems, M3 has textbook capabilities integrated into each client module, eliminating the process of transferring or re-entering student and textbook data into a separate textbook module. All textbook functions are performed in M3 Cataloging, M3 Circulation, M3 OPAC, M3 Inventory, M3 Group Editor, and ReportTool.

The Textbook Enabler also includes 20 textbook-related reports. For more information, see "Using the Reports".
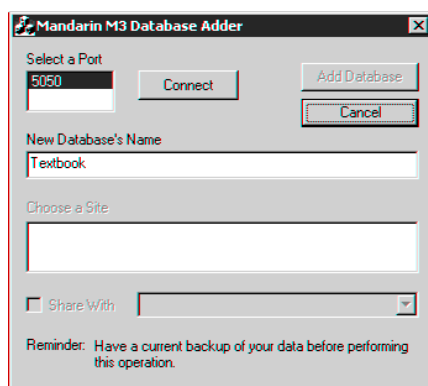
This document describes:
•   How to install Textbook Enabler
•   How to generate barcode labels for your textbooks
•   How to perform textbook functions in M3

Installing Textbook Enabler

Textbook Enabler must be installed on your server.

1. Insert the Textbook Enabler CD into the server's CD-ROM drive.
2. Navigate to the CD-ROM drive (**D:** on most computers) and double-click **TextbookDB.exe**.
3. In the Welcome dialog box, click **Next** to begin installation.
4. In the License Agreement dialog box, review the agreement and click **Yes** to accept and continue the installation. Or, click **No** to discontinue.
5. The module downloads, then the Database Adder dialog box displays (Figure 1).

FIGURE 1

6. In the **Select a Port** box, select the port that you want to have access to the textbook database, and then click **Connect**.
7. The entry **Textbook** appears in the **New Database's Name** box. If you want to give your textbook database a different name, edit this entry.
8. In the **Choose a Site** box, select the site that you want to have access to the textbook database.
9. If you want to share the textbook database with other databases, select the **Share With** check box and select a database in the corresponding list.

NOTE: If you choose to share, the textbook database will have its own bibliographic and holdings tables, but will share the barcode, group, message, transaction, patron, and session tables with the database you selected.
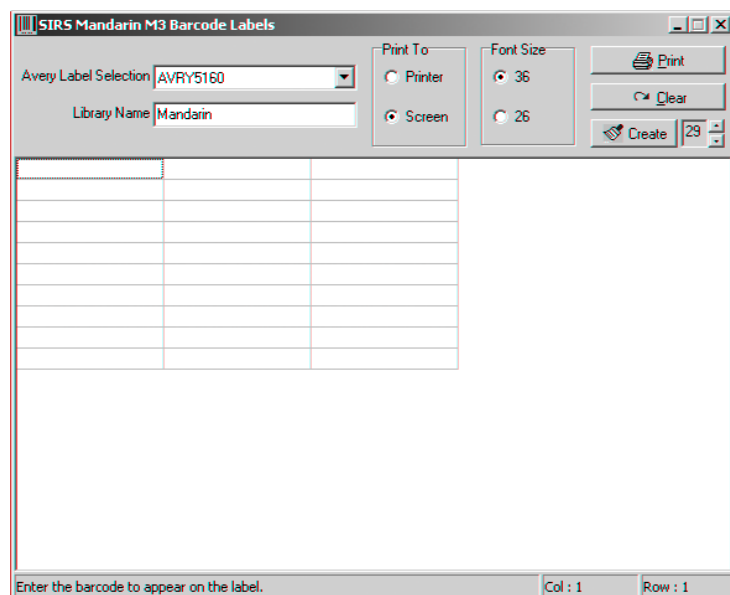
10. When finished, click **Add Database**. At the confirmation prompt, click **OK**.
11. In the Setup Complete dialog box, click **Finish**.
12. If you have MARC records for your textbooks, import them into the text- book database. Otherwise, you will need to create bibliographic and holding records for your textbooks. For instructions on either procedure, refer to Chapter 4, "Using Cataloging," in your M3 Users Guide.

Generating Barcode Labels

M3 includes a Barcode Labels utility that allows you to create and print barcodes for items in your collection.

1.   On the taskbar, click the **Start** button, select **Programs**, select **Mandarin M3**, select **Utilities**, and then click **Barcode Labels**. This displays the Barcode Labels window (Figure 2).

FIGURE 2

Tip: You can change the font size of the printed labels by clicking 36 or 26 in the Font Size box.

2.   In the upper pane, select the Avery label you want to use, then type the library name you want to appear on the printed barcode.

Note: If 852#p does not appear in the record, add it. Right-click in the record,
select Insert Field, select 852, then click OK. Then select p and click OK.

3.   In the first barcode box (shown in Figure 2), type the first barcode in the sequence, and then click **Create**. This fills each of the barcode boxes with a barcode based on your first entry incremented by +1. For example, if you type 1000, then next entry will be 1001, then 1002, and so on.

4.   If you want to preview the barcode labels, click **Screen** in the **Print To** box, then click the **Print** button. When you are ready to print the labels, click **Printer** in the **Print To** box, then click the **Print** button.

5.   You now need to assign a barcode to each textbook holding record. To do so, search for the holding record in the Cataloging module. When it dis- plays in the main window, double-click it. The record now displays in the lower pane of the Holding - Cataloging window (see Figure 3). Click in field **852#p** and then scan the holding's barcode with your barcode scanner. The barcode will appear in the 852#p field. Click **Save** in the holding window and repeat for each holding.

Using Textbook database in M3

In M3, you can use your textbook database as you would your library database: you can catalog, circulate, search for, generate reports for, inventory, and perform other functions with your textbooks.

Using the M3 OPACs

To search your textbook database in the Windows OPAC or Web OPAC:

1.   On the **Databases** tab, select the check box next to the textbook database. Clear the check box next to any database you do not want to search.

2.   Click **Apply**.

3.   Click the Search tab and conduct your search.

Using M3 Cataloging

Once textbook records are in your M3 database (created or imported through the Cataloging module), you can perform all textbook cataloging functions including adding, editing, and deleting data.

To access the textbook database in Cataloging:

1.   On the **File** menu, click **Change Database**. This displays the Change Data- base dialog box.

2.   In the **Current Database** list, select the textbook database, and then click **OK**. You can now perform all cataloging functions in this database.
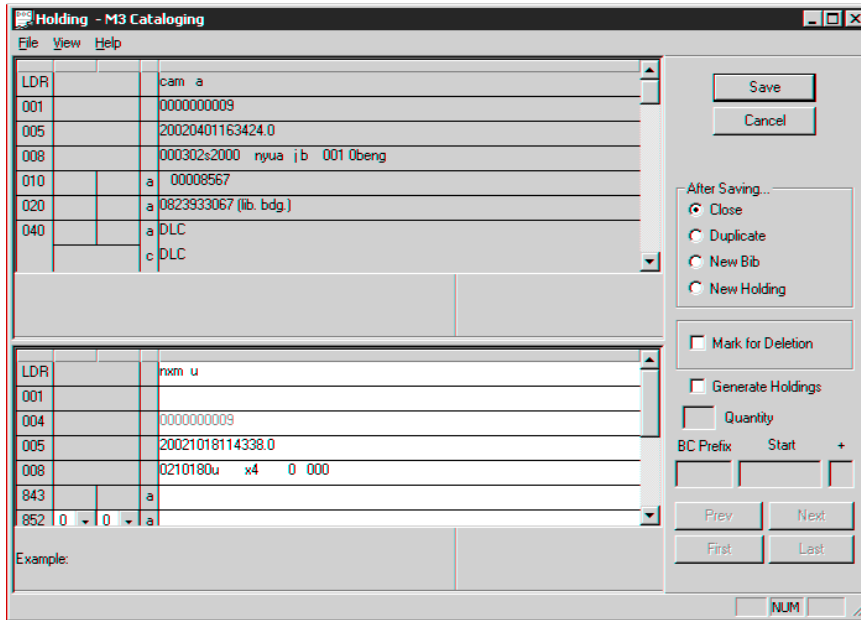
TIPS:
•   *In the holding record, use the 995#a field to enter a textbook's condition. The default choices are New, Good, Fair, Poor, and Unusable.*
•   *In the patron record, use the 852#b field to enter each student's homeroom or the 852#c field to enter each student's teacher. You can then check out textbooks by class; to do so, perform a search for the homeroom teacher in Circulation (selecting Homeroom or Teacher in the drop-down list in the Patron Search dialog box) to obtain a list of all students in the class, allowing you to check out a textbook to each student.*
•   *In the holding record, use the 852#9 field to record each textbook's price. This will be the amount of the fine if the item is lost by the stu- dent.*

Adding Holdings to Textbook Records

The Cataloging module makes it easy for you to add multiple holdings to a text- book record.

1.   Search for the bibliographic record of the textbook you want to add hold- ings to. You search results appear in the upper pane of the main Cata- loging window.

2.   Click the bib record in the upper pane. Then do one of the following:
•   If a holding record similar to the one you want to create appears in the lower pane, use this as a template. Click the holding record, then click **Duplicate** on the **Edit** menu.
•   If no similar holding record exists, select **New** on the **File** menu, and then click **Holding Record**. (If more than one holding template is avail- able, the Templates dialog box displays. Click the desired template, then click **OK**.) This displays the new holding record in the Holding - Cataloging window (Figure 3).

FIGURE 3

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

3.   In the lower pane, enter field and subfield data for the holding records.

4.   Select the **Generate Holdings** check box. This activates the boxes below.

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

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

Tip: The available conditions are New, Good, Fair, Poor, and Unusable.

    C.   The barcode suffix appears in the **Start** box. Modify if desired. The suffix must be a numeric value and will be the starting value for the barcodes of the new holding records.
    D.   In the **+** box, type the number for the suffix to increment by. For example, if the values are **1000** in the **Start** box and **2** in the **+** box, the first holding record will be assigned a barcode of **[Prefix]1000** and the next holding record will be assigned **[Prefix]1002**.

5.   When finished, click **Save**. (NOTE: If a barcode you chose already exists, an error message displays and no holdings are created. Click **OK** and modify the value in the **Start** and/or **+** box, then click **Save** again.)

Using M3 Circulation

You can perform all textbook circulation functions including check out/check in, renewals, viewing status, adding student fines, recording condition of books, and reporting books as lost.

To use the textbook database in Circulation:

1.   On the **File** menu, click **Change Database**. This displays the Change Data- base dialog box.

2.   In the **Current Database** list, select the textbook database, and then click**OK**. You can now perform all circulation functions in this database.

Several common procedures are described in the following sections. Instructions for all circulation functions are available in Chapter 5, "Using M3 Circulation," in the M3 Users Guide.

Checking out a Textbook to a Student
1.   On the Circulation toolbar, click **Loan**.

2.   If you are using a barcode scanner, scan the student's barcode, then scan the barcode of each textbook you want to loan to this student.
>   **OR**
>   A.   In the **Barcode** box, type the student's barcode, and then press ENTER.
>   B.   In the **Barcode** box, type the textbook's barcode, and then press ENTER. Repeat this step for each textbook you want to loan to this student.

The textbooks are now loaned.

Checking in a Textbook from a Student

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

2.   If you are using a barcode scanner, scan the textbook's barcode.
>   **OR**

>   In the **Barcode** box, type the textbook's barcode, and then press ENTER.

3.   The textbook is now returned. To record the textbook's condition:
>   A.   Right-click in the pane where the textbook's data appears (the pane on the right). In the menu, click **Edit**.
>   B.   In the Edit Holding Record window, look near the bottom of the window for the field titled **Condition** (field 995).

If the **Condition** field does not appear, add it. Right-click in the record and select **Insert Field**. In the Insert Field dialog box, select **995-Condi- tion**, then click **OK**. In the Insert Subfield dialog box, select **a-Condition**, then click **OK**. The field now appears.

>   C.   Click the arrow next to the **Condition** field on the right side of the window. In the list, select the desired condition, then click **OK** in the Edit Holding Record window.

Viewing the Status of a Student or Textbook
1.   On the Circulation toolbar, click **Status**.

2.   If you are using a barcode scanner, scan the student's or textbook's bar- code.
>   **OR**

In the **Barcode** box, type the student's or textbook's barcode, and then press ENTER.

3.   The status of the student or textbook appears in the window; any open transactions are listed in the lower pane.

Using the Reports

The Textbook Enabler CD includes a report pack of 20 textbook-related reports, which you can generate using ReportTool. To download these reports:

1.   Insert the Textbook Enabler CD into the workstation's CD-ROM drive.

2.   Navigate to the CD-ROM drive (**D:** on most computers) and double-click **TextbookReportPack.exe**.

3.   In the Location to Save Files dialog box, accept the default location or enter another location. (To browse to another location, click **Change**. Navigate to the desired folder, then click **OK**.) Click **Next**.

4.   When the report download is complete, click **Finish**. You can now generate these reports in ReportTool.

Reports Included in the Textbook Report Pack
- Fine-List(ByGrade&Patron)
- Fine-List(ByHomeroom&Patron)
- Fine-List(ByPatron)
- Fine-List(ByTeacher&Patron)
- Item-List(All-ByTitle)
- Item-List(All-ByTitleWithCondition)
- Item-List(ByPubDateForSelectedLocation)
- Item-List(Deleted-All)
- Loan-List(ByGrade&Patron)
- Loan-List(ByHomeroom&Patron)
- Loan-List(ByPatron)
- Loan-List(ByTeacher&Patron)
- Patron-List(All)-School
- Patron-List(ByGrade)
- Patron-List(ByHomeroom)
- Stats-Circulation(Item)
- Stats-Circulation(Patron-All)
- Stats-Circulation(Patron-ByGrade)
- Stats-Circulation(Patron-ByHomeroom)
- Stats-Circulation(Patron-ByTeacher

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