Getting Started With

Bringing Knowledge & People Closer

EASYLIB

Entire Automation System for Libraries

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SUPPORT INFORMATION

Help is available from many different sources. Please take the time to read the following so we may direct you to the most appropriate help source for you, depending on the type of user you are and how you are using this product.

EASYLIB PRODUCT SUPPORT SERVICES

The services and prices listed here are available in India only. EASYLIB support services are subject to current prices, terms, and conditions, which are subject to change without notice.
For up-to-date support information for other countries, see the following Web site:
http://www.easylibsoft.com

SELF HELP

EASYLIB Professional Online Support can help you get the most Up-to-date answers swiftly and easily. Here you can use self-help tools, plus you can search on a wide variety of technical information.
Visit http://www.easylibsoft.com/helpdoc/

ASSISTED SUPPORT

No-Charge professional Support

You are eligible for 365 days support (beginning the date of installation) for this product via any of the Professional Offerings. You can receive no-charge assisted Professional Support via the web or by telephone. When submitting incidents, be prepared to provide your Product ID ("PID") number.
For desktop operating systems, your PID is a 20-digit number that can be found using three easy steps:

a. Right-click on the "Help" on the Easylib

b. Select "Properties".

c. The PID is found under "Registered to:" on the " General" tab.

Paid Assisted Professional Support

Extended service requirements or service calls after 365 days of installation call for paid assisted professional support. Appropriate fees are billed to you on each instance of the service performed.

Extended Service Warranty and Support

For your benefit and reduction of support fees, EASYLIB has extended service contract that is purchasable/renewable on a yearly basis. The service contract shall make sure that your system runs without fail under normal circumstances in the warranty period. Any issues occurring in this period related to the EASYLIB Software are resolved with no service fee to the customer. [For more information on this, call EASYLIB.

GETTING THE SUPPORT

When you contact Product Support Services (PSS), you should be at your computer and have the following information on hand:

a. The version of your EASYLIB product

b. The type of hardware, including network hardware if applicable

c. The operating system (e.g., Windows 95, Windows, and so on)

d. The exact wording of any informational and what you were doing when the problem occurred A description of what happened and what you were doing when the problem occurred

e. A description of how you tried to solve the problem

Via the web

To submit an incident, go to http://www.easylibsoft.com/

By telephone

India: (080) 65591051, (080) 23191952
Paid assisted Professional Support fees are billed to you.

By local service representatives

For your benefit, a local service representative might be available near your place. Visit the website for local contact details.

Installation Issues

Make sure the system date format is **“dddd, MMMM dd, yyyy”** in the control panel >> regional settings >> Date format.

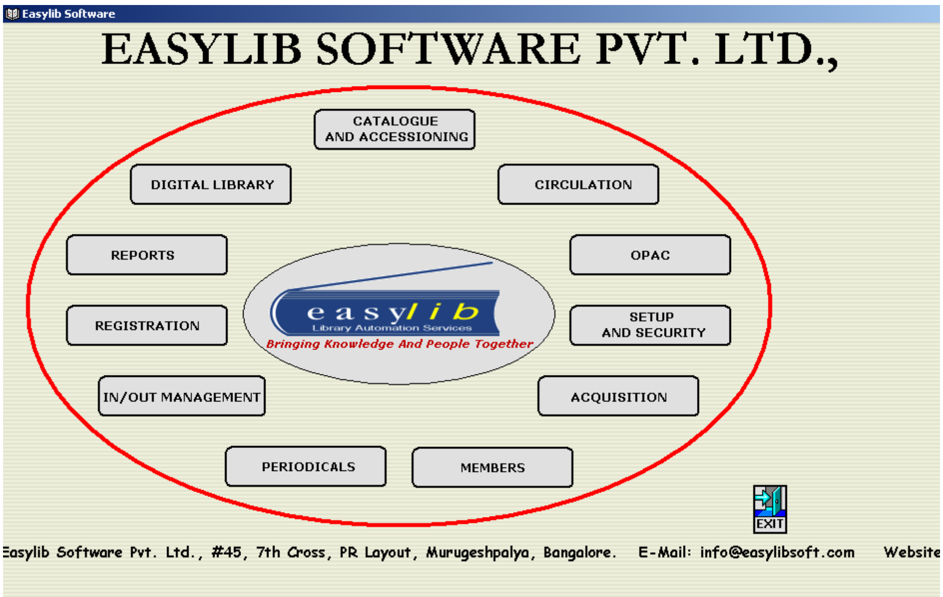
CONTENTS

Introduction:

How to start Easylib software?

Starting the Easylib software is very easy. Just double click on the Easylib icon present on the desktop or on the start menu.
This prompts the front page of Easylib software to appear together with the eleven main modules namely:

1. **Registration**
2. **Set up and Security**
3. **Acquisition**
4. **Catalogue and Accessioning**
5. **Members**
6. **Periodicals / Serial Control**
7. **Circulation**
8. **Digital Library**
9. **Reports**
10. **OPAC**
11. **In / Out Management**



From among these modules choose the appropriate module on which you would like to work. To access each of these ten modules a separate **Easylib Login** screen appears wherein the correct ***user id*** and ***password*** needs to be entered. Once the correct information is entered, the respective main page of the individual module appears, thus giving you the authority to use the various functions under that particular module.

While closing each module screen, an Easylib message box appears asking, ***"Are you sure? You are quitting Easylib!"*** Select the **Yes** or **No** button according to your preference. This same message appears in the Easylib Front Page message box, when you exit from the Easylib software.

How to change the background of Easylib software front page?

Place the cursor anywhere in the front page of Easylib software and click on the right side of the mouse, so that a small box appears with two options. Select Change Back Ground option, to open a screen titled as **Select a Picture**. This screen, contains a list of picture files, where different back ground designs are stored. Select any one from the list, by single click of the mouse, so that the selected name is displayed in the ***File Name***. Click on the **Open** button, to change the background of the front page, according to your choice.

How to change the font color of Easylib software front page?

Place the cursor anywhere in the front page of Easylib software and click on the right side of the mouse, so that a small box appears with two options. Select Change Font Color option, to open a screen titled as **Color**. This screen contains different colors under the Basic colors subpart. Select any color, by clicking on the respective box, followed by clicking on the **Add to Custom Color** button. This will add the selected color under the Custom colors subpart. Now click the **Ok** button to see the selected font color appearing on the screen.

1. *Registration*:

This is an important module that deals with the information regarding your institution as well as registration details. The details should be entered here the first time the library purchases Easylib Software.

How to access the Registration module?

a) Click once on the **Registration** module, which appears on the front page of Easylib software, to open the **Easylib Login** screen.
b) Enter the correct ***User ID*** and ***Password***.
c) The main page appears, containing a list of all the menus and sub-menus of **Registration** module which are displayed below: -

1.1. Institution Details Entry

1.1.1. Institution Details

1.2. Window

1.3. Help

1.1. Institution Details Entry:

1.1.1. Institution Details:

1) Using this screen, you are able to enter the details of the organization, which has purchased this software. The information entered here will be displayed in each module of this software. This screen is also essential to modify the registration details.
2) To activate this function, select the **Institution Details** menu and click on the **Institution Details** submenu.
3) In the screen titled as **Library/Institution Details**, enter all the details like Name, Address 1, Address 2, City, State, Country, etc. The data that you have entered in this screen will be displayed on the homepage of the Easylib Software.
4) You have the option to change any of the above fields, except the ***Name***. After making the changes click on the **Modify** button to confirm the change. The ***Name*** can be modified by getting a valid register number from the Easylib.
5) Press the **Change Institution Name** button to open another screen, titled as **Enter Registration Information**.
6) The ***Registration Number*** will be given by the Easylib, at the time of purchase, to the authorized institution along with other information like, ***Registration Date*** and ***Register To*** details.

List of Common Buttons:

- **ADD** button allows you to add a record to the database.
- **MODIFY** button allows you to modify or change any record or fields according to your preferences.
- **CLEAR** button allows you to clear the records from the currently viewing screen.
- **CLOSE** button allows you to end the current operation and return back to the previous or main page.

List of Keyboard Shortcuts for the buttons:

1) Add ➔ Alt + A
2) Modify ➔ Alt + M
3) Clear ➔ Alt + C
4) Close ➔ Alt + S
5) Ok ➔ Alt + O

2. *__Setup and Security__*:

This module deals with assigning and maintaining the security for each module, present in the Easylib software, by creating the default settings based on various criteria.

How to access the Setup and Security module?

a) Click once on the **Setup and Security** module, which appears on the front page of Easylib software, to open the **Easylib Login** screen.

b) Enter the correct ***User ID*** and ***Password***.

c) The main page appears, containing a list of all the menus and sub-menus of **Setup and Security** module which are displayed below: -

2.1. Security

2.1.1. Users
2.1.2. Security Profile
2.1.3. Button Setup
2.1.4. Subsystem Setup
2.1.5. Menu Setup
2.1.6. Subsystemwise Security
2.1.7. Menuwise Security
2.1.8. Button Level Security
2.1.9. Menuwise Security Advanced

2.2. Setup

2.2.1. System Parameters
2.2.2. Subjects Tree
2.2.3. Initial Setup
2.2.4. Data Import
2.2.5. Member Data Import
2.2.6. Backup
2.2.7. Accn Number Samples
2.2.8. Restore
2.2.9. Compact- Repair Database
2.2.10. Screen Setup

2.3. Window

2.4. Help

2.1. __Security:__

2.1.1. Users:

1) To access Easylib software, creating users are very important. With the help of this screen, users with different security levels can be created.
2) This screen can be accessed from the **Security** menu by clicking on the **Users** submenu. This screen helps in knowing, which users are authorized to login to the Easylib modules.
3) A screen titled as **Administrative Users of the Library Management System** appears. Here, User ID, Name, Profile and Security Profile of the respective records are displayed in the grid.

4) To add a new record, press the **New** button and enter the password in the input message box that appears. Only the Administrator or the Librarian can do this function.
5) Insert all the relevant details in the corresponding fields and click on the **Ok** button. This will add the new record, which can be seen in the displayed list.
6) **Change the Password** button allows you to reset the password for a particular user. Before pressing the button select the profile that has to be changed from the grid.

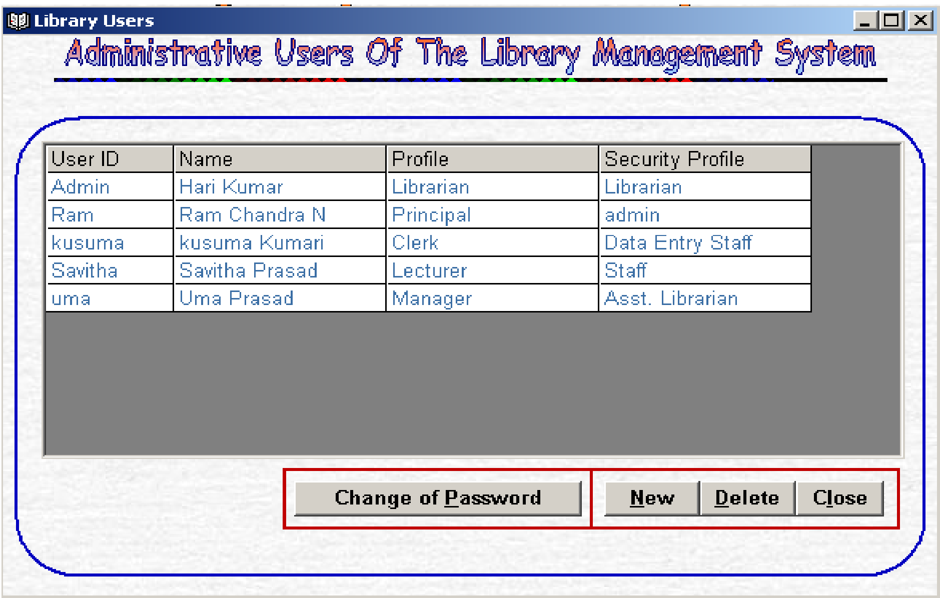


Figure 2.1.1

2.1.2. Security Profile:

Figure 2.1.2

1) To create a different level security, security profiles must be defined. With the help of this screen you are able to define the respective security profiles.
2) To access this screen go to **Security** menu and select **Security Profile** submenu.
3) Here, you are able to view the **Security Profile** that has been already setup in the library by the Administrator or the Librarian.
4) In order to add new records, enter the details in the ***Security Profile*** and click on **Add**. If the **Add** button is disabled, then click on the **Clear** button to enable it.
5) To modify a security profile, select your record from the displayed list. This prompts the selected information to appear in the security profile text box. Now, make the necessary changes and click on **Modify** button to save the information.

6) Once the profile has been added or modified, it can be viewed in all the ***Security Profile*** combo box present in any of the screens.
7) To delete a particular profile, select the security profile from the list and click on the **Delete** button.
   - ***Note*** that if any record exists, with the **Security Profile** that you want to remove, then it will not allow you to delete this record. For this, first you have to change or remove that particular profile from all the entered item records and then delete the profile.

2.1.3. Button Setup:

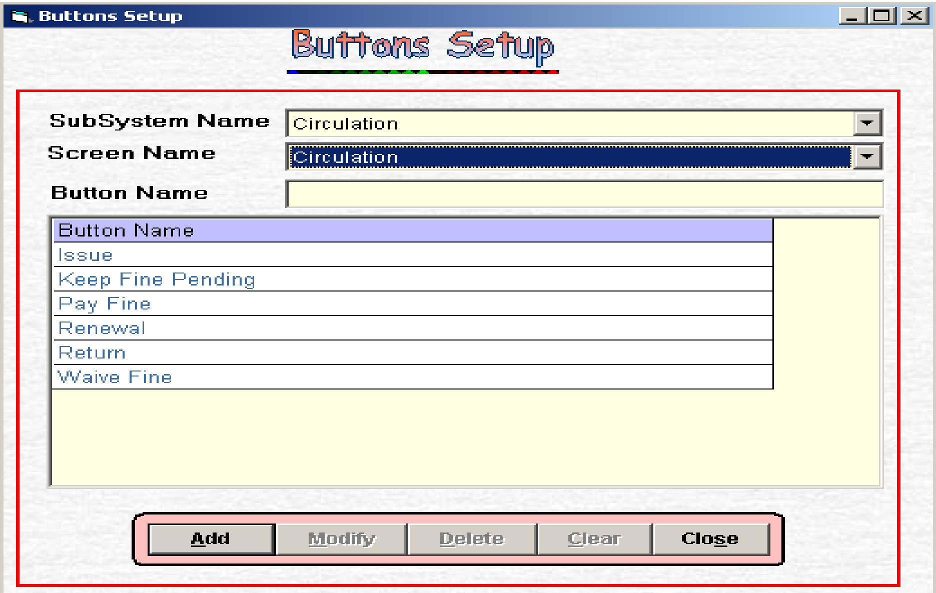


Figure 2.1.3

1) Using this screen, you are able to add the button names for a particular screen, so that you are able to set a button level security for the respective security profiles.
2) This screen can be enabled by, pointing to the **Security** menu and clicking on the **Button Setup** submenu.
3) Select the ***Screen Name***, to view the list of records if it has been entered already or if the records are not present then the list cannot be viewed.
4) Now to add a record, enter data in the ***Button Name*** field and click on **Add** button.
5) You can also **Modify** and **Delete** the records, by selecting the records from the displayed list. This will prompt the selected data to appear at the top of the screen. Next, click on the respective buttons according to your preference.
6) Once you have set the parameter for a particular button, you can go to the **Button Level Security** screen and restrict the use of this button from a particular profile, as you desire.

2.1.4. Subsystem Setup:

1) This screen allows you to add the subsystem names along with a unique ID so that you are able to provide a subsystem level security for the respective security profiles.
2) Click on the **Security** menu and select the **Subsystem Setup** submenu to view the screen.

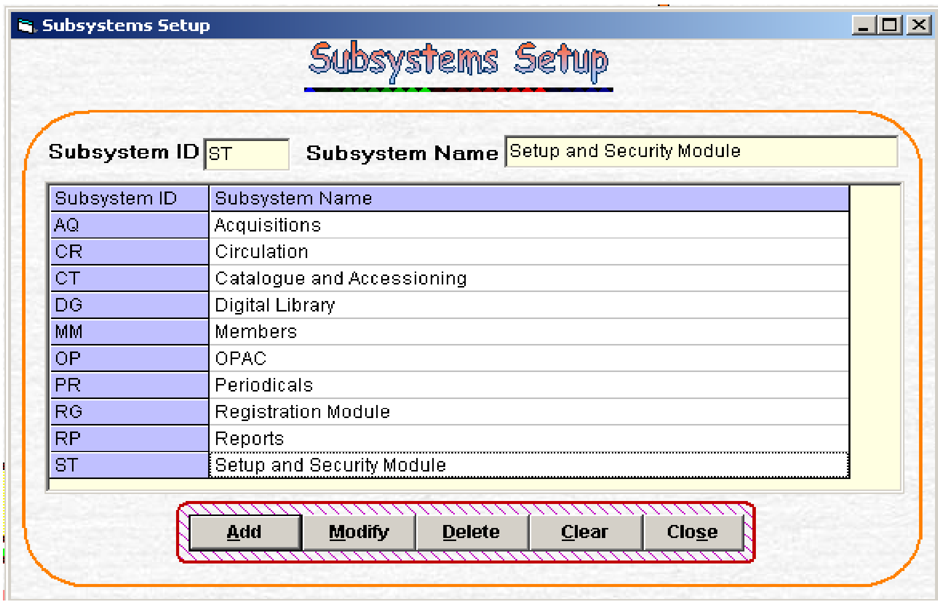


Figure 2.1.4

3) Here, you can set the parameters for the subsystems (modules) along with the subsystem id. Next, go to the **Subsystemwise Security** screen and assign the profile wise access to the particular subsystems, as you prefer.
4) This is done, so that you can restrict the use of any subsystem by a particular profile and thus, maintain the security for each of the Easylib modules.
5) Enter the subsystem id and subsystem name and click on the **Add** button to save the record.
6) Here also, you can **Modify** and **Delete** the records, by selecting the records from the displayed list that prompts the selected data to appear at the top of the screen. Click on the respective buttons, as per your preference.

2.1.5. Menu Setup:

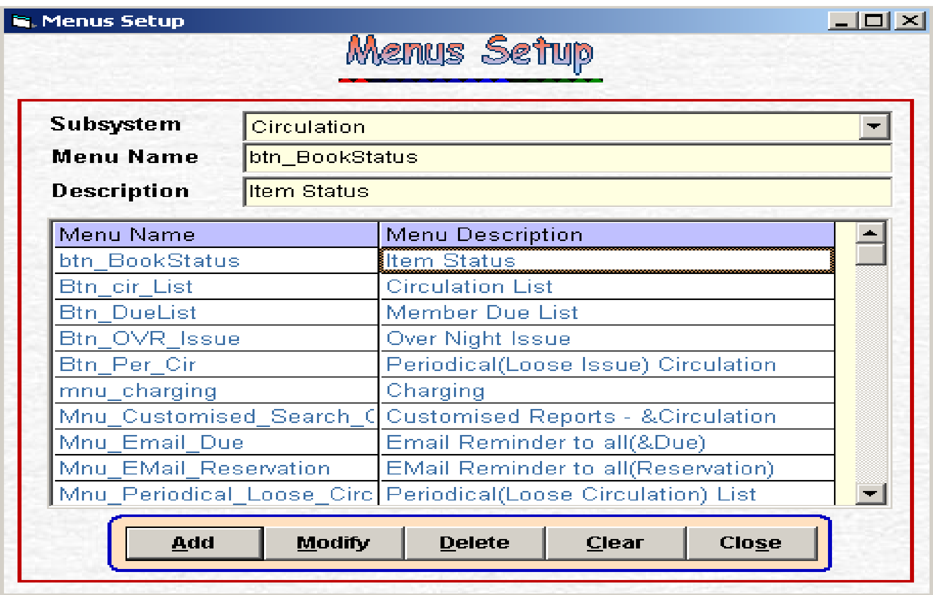


Figure 2.1.5

1) Using this screen, you are able to add the menu names for a particular subsystem, which will provide a menu level security for the respective security profiles.
2) Select **Security > Menu Setup** submenu, to activate the screen. Here, you are able to set the parameters for the corresponding menus, so that later on, you are able to assign profile wise security to the respective menus from the **Menuwise Security** screen.

3) Select the ***Subsystem***, to view the already entered details in the grid. If you want to add new menus then, enter the ***Menu Name*** and ***Description*** and click on the **Ok** button.
4) Select the records from the displayed list, so that the selected data appears at the top of the screen in the respective boxes. Now, click on either the **Modify** or **Delete** buttons, as you prefer, to perform the respective actions.

2.1.6. Subsystemwise Security:

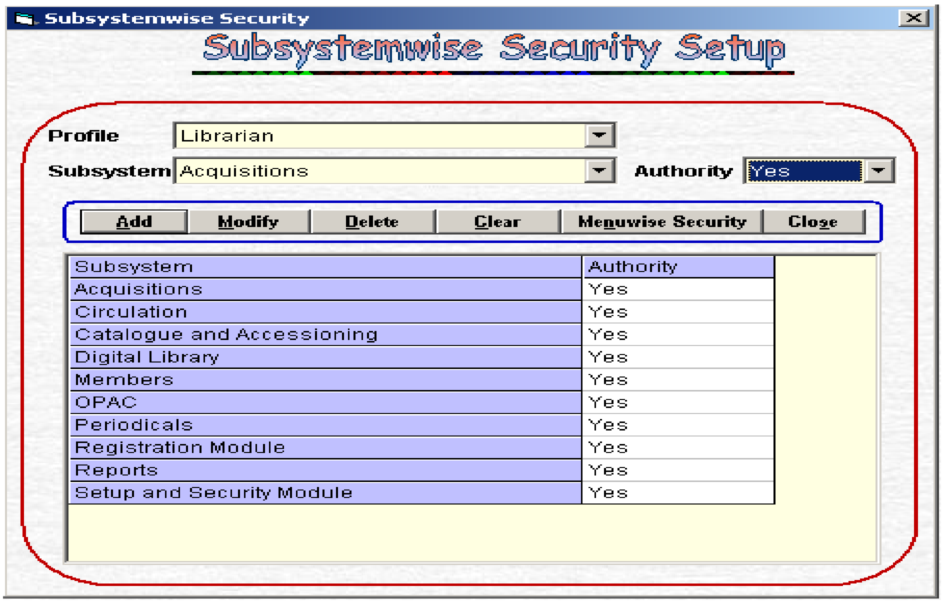


Figure 2.1.6

1) This screen allows you to assign the Subsystem security for the respective security profiles by selecting the “Yes” or “No” option.
2) To access this screen go to **Security** menu and select **Subsystemwise Security** submenu.
3) From this screen you can assign the authority to view any subsystem by a particular profile. Here, you cannot enter any new Subsystem name.
4) Before assigning the authority, select the ***Profile*** and the ***Subsystem***. Click on “*Yes*” option, to allow the profile to view the subsystem and “*No*” option, to restrict the user from viewing that particular subsystem.
5) Select **Add** button, to save the changes and add it to the list displayed in the grid.
6) You can also set the security for menu wise and button wise criteria from this page, by clicking on **Menuwise security** and **Buttonwise security** buttons present in the next screen.
7) Once the security has been setup, it will be set for all future references. Only the administrator or the librarian has the authority to change the security setup.

2.1.7. Menuwise Security:

1) This screen is essential to set the Menuwise security for a particular subsystem according to the security profile by selecting “Yes” or “No” options and entering the menu name.
2) This screen can be enabled by pointing to the **Security** menu and clicking on the **Menuwise Security** submenu.

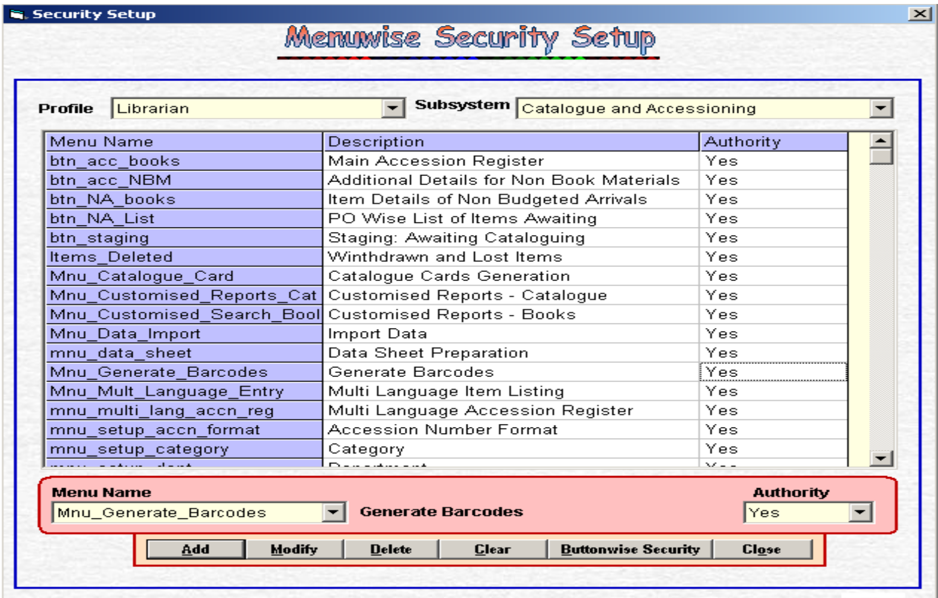


Figure 2.1.7

3) With the help of this screen, you can restrict users of any profile from viewing a particular menu. It can be either for a single menu or more than one menu.
4) Select the profile and subsystem for which the menu has to be disabled and add the option. Now, whenever this selected profile tries to access the subsystem, the selected menu will be disabled. It should be noted that you cannot enter any new menu name here. It has to be done in **Menu Setup** screen.
5) From this screen, you can set the security for buttons also, by clicking on the **Buttonwise security** button.
6) Click the **Modify** and **Delete** buttons, to perform the corresponding actions.
7) Once the security has been setup, it will be set for all future references. Only the administrator or the librarian has the authority to change the security setup.

2.1.8. Button Level Security:

1) Using this screen, you are able to set the Button level security for a particular screen according to the security profiles, by selecting the “Yes” or “No” options.
2) Select **Security > Button Level Security** submenu to activate the screen.

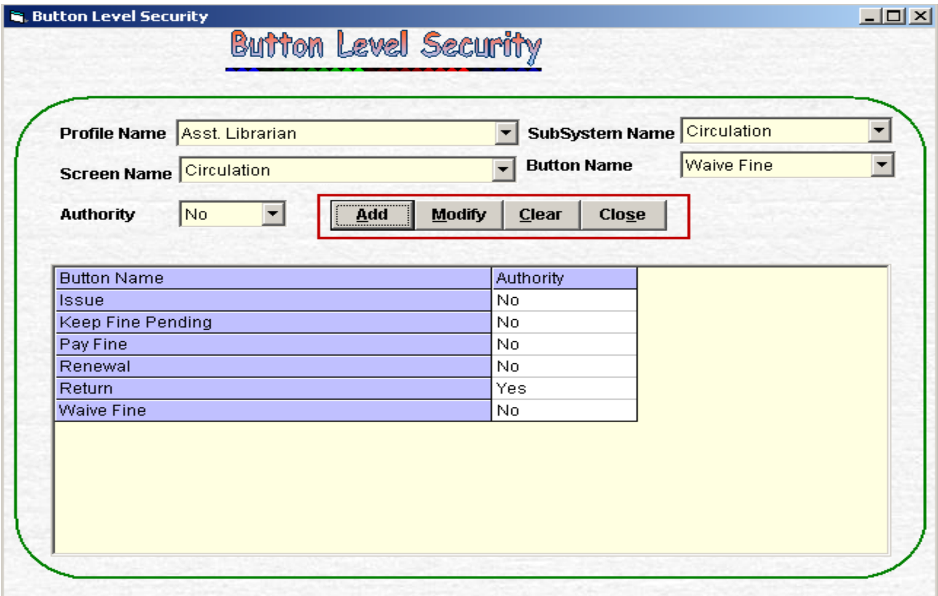


Figure 2.1.8

3) This screen is similar to the above screens, where you can restrict the particular user profile from accessing the buttons that you have secured.
4) Select from the Profile Name, Screen name, Button Name, and Authority to assign the security.
5) Here, it should be noted that, you cannot enter any button name for any screen. This has to be done in the **Button setup** screen.
6) Once the security has been setup, it will be set for all future references. Only the administrator or the librarian has the authority to change the security setup.
7) You cannot delete any entered data, but can only modify it by clicking on the corresponding button.

2.1.9. Menuwise Security Advanced:

1) Using this screen, you are able to set the Menuwise security for a particular subsystem according to the respective security profile. This screen is essential, as you are able to authorize multiple menus at a time.
2) This screen is similar to the **Menuwise Security** submenu, and can be opened by selecting **Menuwise Security Advanced** submenu from the **Security** menu.
3) In this screen, on selecting the profile and the subsystem fields, the entire menu of the selected subsystem will be displayed. Here, instead of selecting and entering the records as done earlier, you have the option to directly select the menus from the displayed list. This can be done either by, clicking on the respective check boxes next to the menu name or clicking on the **Select All** or **Deselect All** buttons respectively.
4) After the selection has been made, click the **Save** button and enter the password in the input message box. This will update the records and will set for all future references.

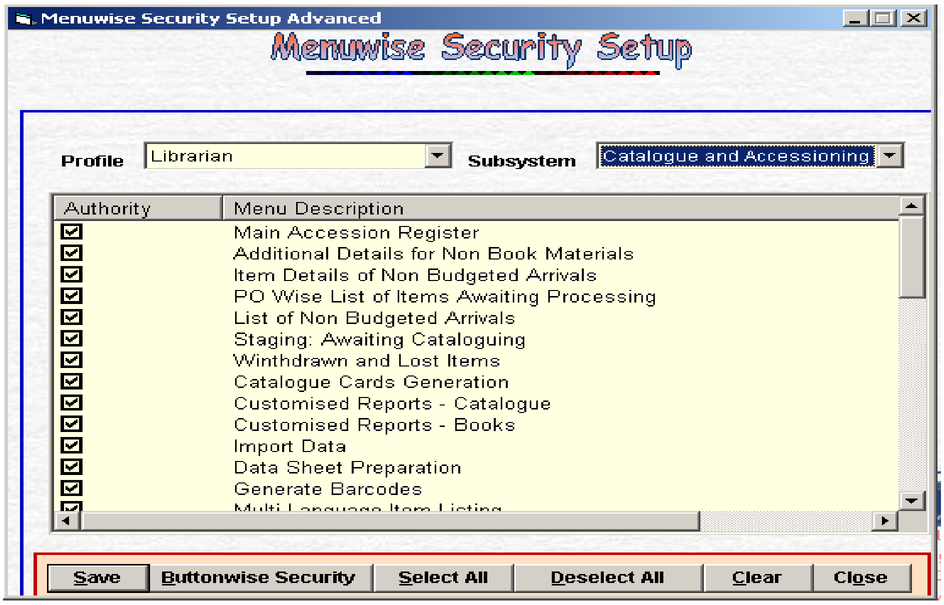


Figure 2.1.10

2.2. Setup:

2.2.1. System Parameters:

1) This is an important screen wherein you can set the system parameters, according to your requirements, by selecting the respective fields.
2) This screen can be accessed from the **Setup** menu by clicking on the **System Parameters** submenu.

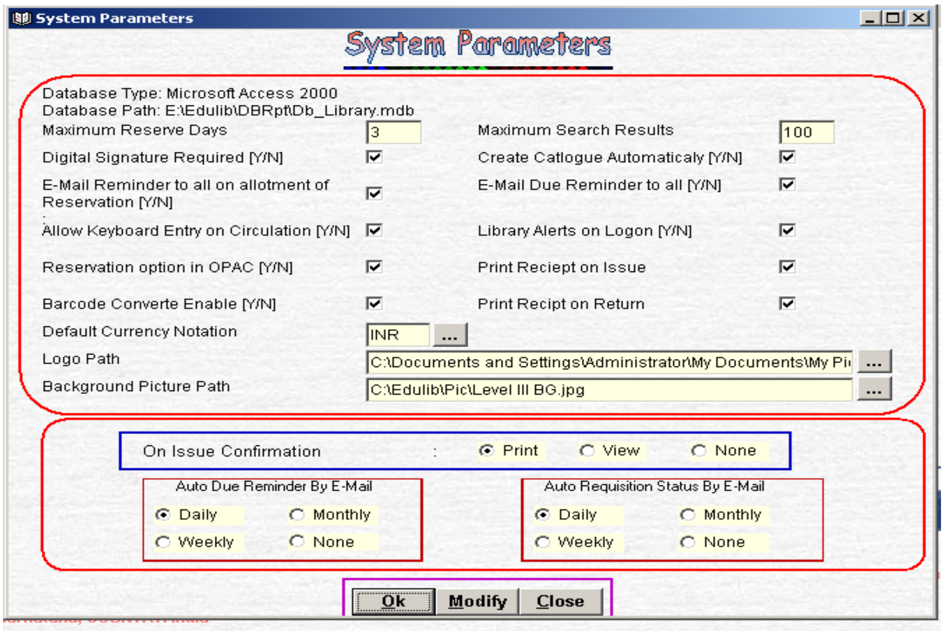


Figure 2.2.1

3) This is an important screen, wherein you can set the system parameters according to your requirements, by selecting the respective fields.
4) A brief description about the fields is given below. You have to select the check boxes to set the parameters: -
    - ***Maximum reserve days*** → This will reserve an item for the entered number of days.
    - ***Maximum search results*** → This is the maximum number of search records that will be displayed in the screen at one time.
    - ***Background picture path*** → This will display the background picture path of the Easylib main page and can be changed by browsing through the **Three Dot** button (...)
    - ***Digital signature required [y/n]*** → This will enable/ disable the Digital Signature in the Circulation module according to the entered option.
    - ***Create catalogue automatically [y/n]*** → This will show the print preview of the catalogue cards automatically, according to the entered option.
    - ***E-mail remainder to all on allotment of reservation [y/n]*** → This will enable or disable the E-mail remainder to all button, in the reservation screen, according to your preference.
    - ***E-mail due remainder to all [y/n]*** → This will also enable or disable the E-mail remainder to all button, as you prefer, in the respective screens.
    - ***Allow keyboard entry on circulation [y/n]*** → This will enable or disable the keyboard entry for the circulation module.
    - ***Library alerts on logon [y/n]*** → This will enable or disable the Library alerts screen whenever you login to this software.
    - ***Reservation option in OPAC [y/n]*** → The Reservation button will be enabled or disabled in the OPAC screen, as per your preference.
    - ***Print Receipt on issue*** → This will automatically print the receipt when you issue the item.
    - ***Barcode Convert Enable [y/n]*** → This will enable or disable the automatic conversion of the accession numbers into the barcode numbers.
    - ***Print Receipt on return*** → This will automatically print the receipt when you return the item.
    - ***Default Currency Notation*** → This will allow you to change the Currency Notation according to your preference by browsing through the **Three Dots** button (...).
5) After you have finished setting the parameters, click on the **Ok** button to save the record or on the **Modify** button if you have made any changes.

2.2.2. Subjects Tree:

This has been described below in the **Initial Setup** submenu. You may refer the document below.

2.2.3. Initial Setup:

These are the basic information screens, for data entry of library items. From these screens, you are able to create and maintain a master record of basic information like Publisher Details, Vendor Details, Financial Year, Academic Year, Department, Subject Details, etc.

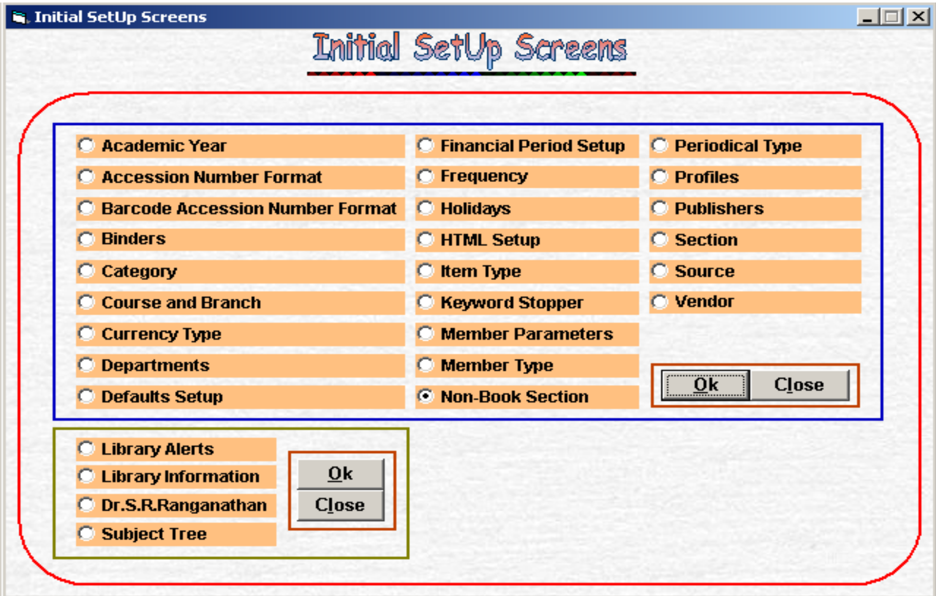


Figure 2.2.3

Version Number 4.3.1

1. **Academic Year:**

   i. This screen is required to set the current academic year. Once set, it will remain the same for all future references, especially in the Member module. It is useful during the generation of reports.

   ii. **Academic Year** submenu can be accessed through two Easylib modules namely:
      - Setup and Security
      - Members

   To view the screen, select the **Setup** menu from the respective modules and click on the **Academic Year**. Another common way, of accessing this screen, is by pressing the **F3** button from your keyboard, after you place the cursor in the **Academic Year** combo box, present in any of the screens.

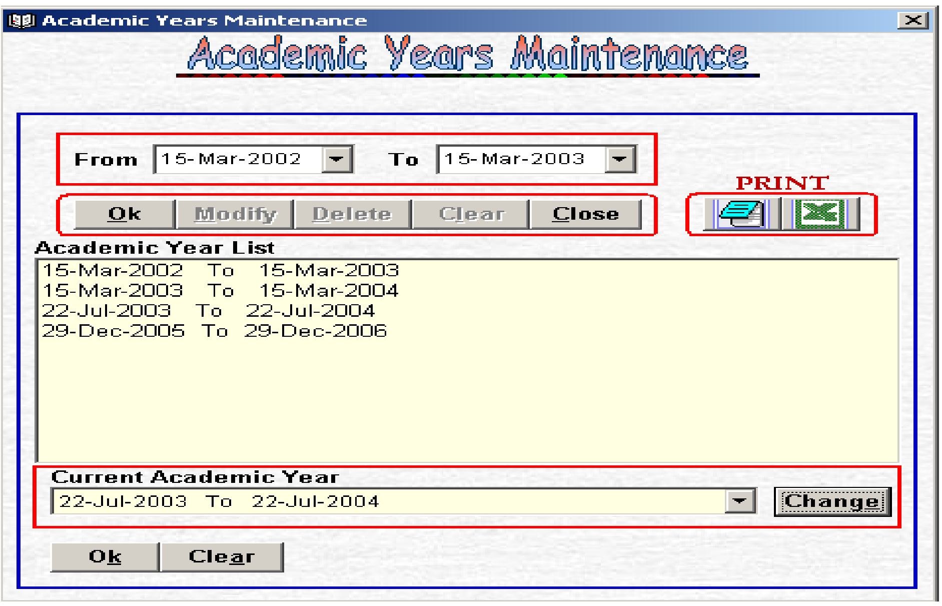


Figure 2.2.3 (1)

iii. All the above actions, prompts a screen titled **Academic Year Maintenance** to appear, where **Academic Year List** is displayed. Along with this **Current Academic Year** is also shown.
iv. You can set your preferred academic years, by selecting **From** and **To** dates and selecting the **Ok** button. It should be noted that, the *To* date must be greater than *From* date. If the **Ok** button is disabled, click on the **Clear** button to enable it.
v. In order to modify a particular *Academic Year*, select your record from the displayed list. This prompts the selected information to appear in *From* and *To* date. Now make the necessary changes and click on the **Modify** button, to save the information.
vi. To delete an academic year, select the desired academic year from the list and click on the **Delete** button.
vii. An important point to remember is that, you cannot **Delete** or **Modify** any record present in the **Current Academic Year** drop – down box. You have the option, to only **Change** the **Current Academic Year** by selecting any date range from the drop-down list box. After you select the preferred dates, select the **Change** button followed by the **Ok** button to confirm your action.
viii. Here, you are able to view the print in **Notepad** as well as **Excel** Format.
ix. Also on clicking the **Clear** button *From* and *To* dates revert back to the current date.
   - ***Note*** that if any record exists, with the **Academic Year** date, which you want to remove, then it will not allow you to **delete** this record. For this, first you have to change or remove that particular academic year from all the entered item records and then delete it.
   - ***Note*** that modifying any record, will affect the existing records also.

List of Common Buttons:

- **CLEAR** button allows you to clear the records from the currently viewing screen.
- **ADD** button allows you to add a record to the database.
- **MODIFY** button allows you to modify or change any record or fields according to your preferences.
- **DELETE** button allows you to delete a record from the database.
- **CLOSE** button allows you to end the current operation and return back to the previous or main page.
- **NEW** button allows you to enter a new record.
- **SAVE** button allows you to save all the records to the database.
- **REMOVE** button will delete the record from the database.
- **CANCEL** button will cancel the current action and take you back to the previous screen.

2. Accession Number Format:

i. With this screen you are able to set and maintain a standard accession number format (e.g. alphanumeric). This will be helpful during accessioning of the items.
ii. This screen can be accessed from two different Easylib modules namely:
   - Catalogue and Accessioning
   - Setup and Security

   In both of the above modules, go to the **Setup** menu and select the **Accession Number Format** submenu, to view the corresponding screen. Another way is by placing the cursor at the **Accession Number Format** combo box present in any of the screens and pressing the **F3** button from the keyboard.
iii. In this screen, you are able to set and maintain a standard accession number format (alphanumeric). In case you need to change it, you can modify it as per your needs and select **Modify** button. This format will remain for all future data entry.
iv. **Accession Number Format** screen will prompt you to enter the Prefix, Middle, Suffix and Post Suffix of the accession number of selected section.

   For example: if your Accession Number format is “UG00001” then
   Prefix = 2
   Middle = 0
   Suffix = 5
   Post Suffix = 0

   Now click on the **Modify** button to change the format as given above.
v. The format of the accession number will become as XXNNNNN, where XX represents the first two characters and NNNNN the next five numbers of the accession register. Example; GN00001.

vi. Based upon your preference, you may change the accession number format any time. However, it is recommended that you use one format for all the accession numbers. This will bring uniformity in the numbering. You may prefix the accession number with the source of the book, middle it with two characters for the department it belongs to and suffix the next number as sequence numbers.

vii. Another important feature of this screen is the **Auto Change Accession Number Format**. Each item type such as Book, Audio CD, Video CD, etc. may have different accession number format belonging to different sections. As mentioned above, once the accession format has been set it will remain the same for all future data entry. You can create different accession number format for different sections by clicking on the **Yes** radio button. This will automatically change the accession number format according to your requirement. If you select the **No** radio button, then each time you will have to manually set the accession number format while entering the different sections. Refer the first point to see the various ways by which you can access this screen.

viii. Here, you have the option to only **Modify** a particular format. There is no provision to **Delete** or **Cancel** any format.

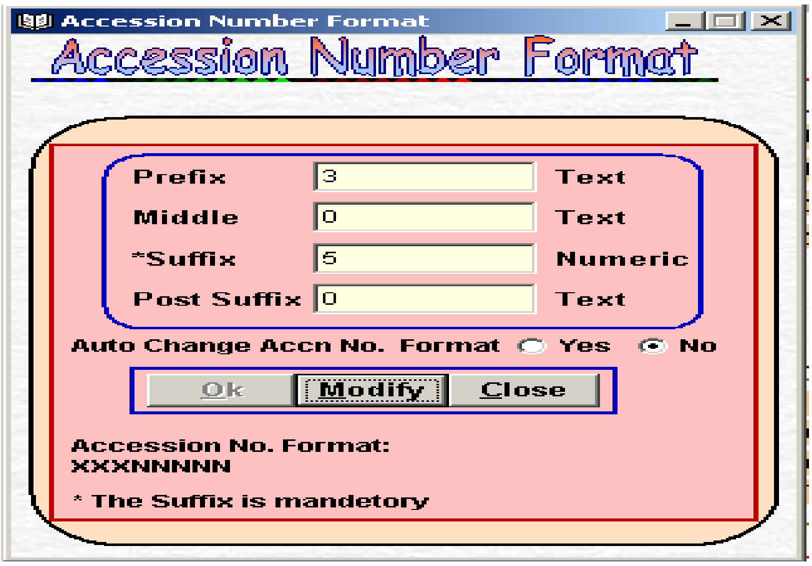


Figure 2.2.3 (2)

3. Barcode Accession Number format:

i. With this screen you are able to convert any type of barcode numbers into Easylib standard format. Usually, it is in numeric format.

ii. It is possible to access this screen through two different Easylib modules, namely:
   - Setup and Security
   - Catalogue and Accessioning (Only if it has been selected in the System Parameters submenu present in the Setup and Security module.)

   Here, you have to click on the **Setup** menu, present in the respective modules and select the **Barcode Accession Number format** option.

iii. This is a special screen that is used to set the barcode format according to the Easylib Barcode Format.

iv. With this screen, whatever barcode format you have set in your library previously, it will be converted to the barcode format that has been set by the software without need to change the existing barcode labels in your library. This is helpful during the scanning of the barcode labels for entering data into the respective fields.

v. In this screen ***Prefix, Middle, Suffix*** and ***Post Suffix*** fields are present, which can be set according to your preference. Once set, this format will be used for all future references and can be changed only by the authorized person.

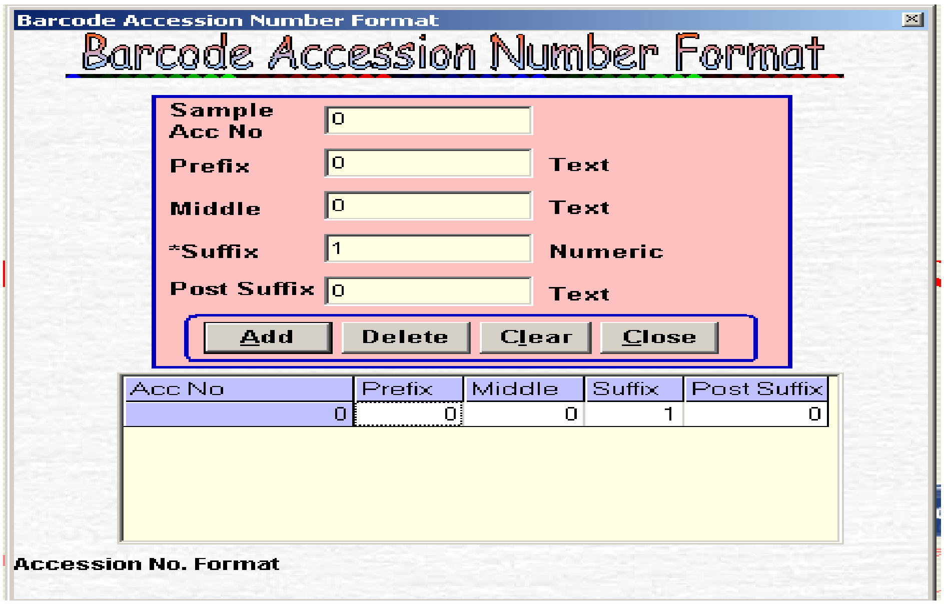


Figure 2.2.3 (3)

4. **Binders:**

   i. With this screen you are able to keep a track about the binder details. This will be useful during binding and accessioning of items (Acquisition Module) and also during the report generation.
   ii. It is possible to access this screen through two different Easylib modules, namely:
      - Setup and Security
      - Acquisition

   Here, you have to click on the **Setup** menu, present in the respective module and select the **Binders** option. You can go also directly to this screen, by pressing the **F3** button from your keyboard, after placing the cursor in the **Binders** combo box, present in any of the screens.

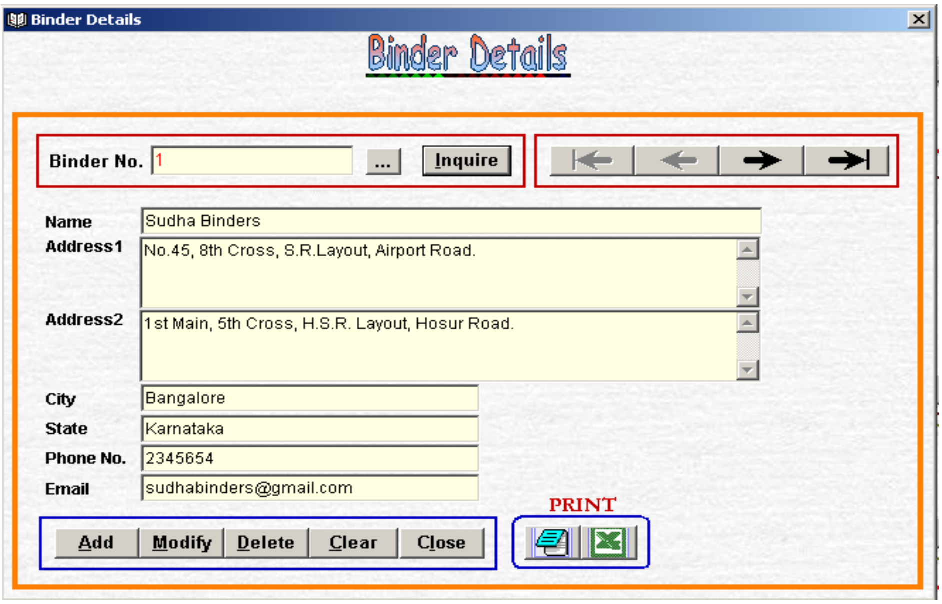


Figure 2.2.3 (4)

   iii. The screen titled **Binder Details** appears, once you perform the above actions. You can see the previously entered records, by scrolling through the Navigation buttons provided at the top corner of the screen.
   iv. To enter a new record, click on the **Clear** button to automatically generate the **Binder Number**. After entering the details, click on the **Add** button to save this new record.
   v. You can use the **Three dot** (…) button, to view the entire list of binders. Double click on any record and the details related to that binder would be shown on the screen.
   vi. To **Inquire** about a particular binder, you must enter the corresponding **Binder Number**.

vii. You can **Modify** or **Delete** any records, by selecting the records from the displayed list so that, the selected data appears at the top of the screen and then clicking on the respective buttons as you prefer.

viii. There is an option to take the **Print** of the Binders List in **Notepad** and **Excel** Format.

5. Category:

i. In library, there are many books which belong to different categories like Issue section, Reference, SC/ST Books, etc. These categories can be entered through this screen, which will be useful during the accessioning of items and also during the generation of reports.

ii. This screen can be accessed through two different Easylib modules namely:
- Catalogue and Accessioning
- Setup and Security

In both of the above modules, go to the **Setup** menu and select the **Category** submenu, to view the corresponding screen. Another common way, of accessing this screen, is by pressing the **F3** button from your keyboard, after you place the cursor in the **Vendor** combo box, present in any of the screens.

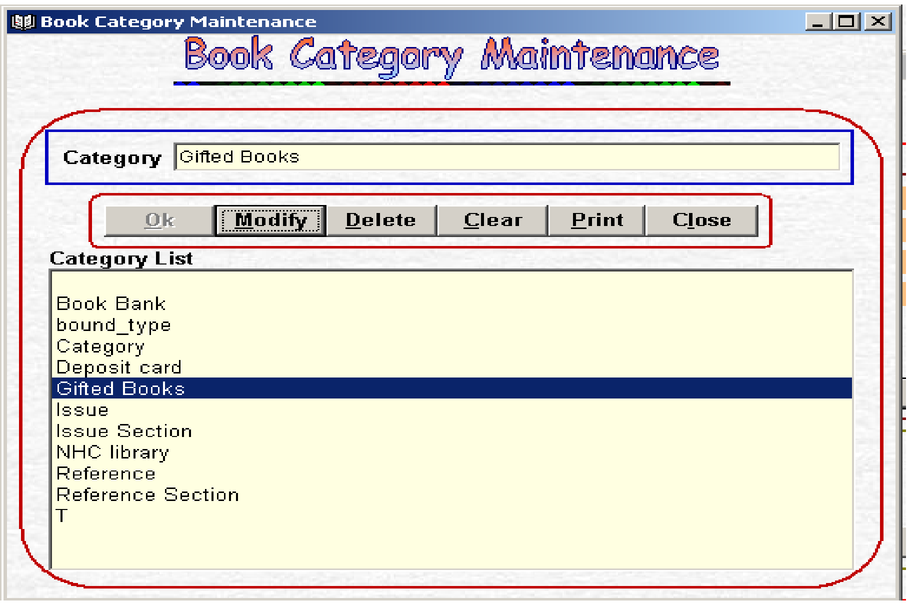


Figure 2.2.3 (5)

iii. In the screen titled as **Book Category Maintenance**, you are able to view the **Category List** that has been already setup in the library for classifying the books.

iv. In order to add new records, enter the details in the **Category** and click on **Ok**. If the **Ok** button is disabled, then click on the **Clear** button to enable it.

v. In order to modify a category, select your record from the displayed list. This prompts the selected information to appear in the category text box. Now, make the necessary changes and click on **Modify** button to save the information.

vi. **Print** option allows you to print the displayed list on the screen, in the **Notepad** format.

vii. To delete a particular category, select the category from the list and click on the **Delete** button.
- ***Note*** that if any record exists, with the **Category** name, which you want to remove, then it will not allow you to delete this record. For this, first you have to change or remove that particular category from all the entered item records and then delete the category.
- ***Note*** that modifying any record, will affect the existing records also.

6. Course and Branch:

i. In general, there are different types of members like students, professors, etc. The students belong to different courses and branches. By using this screen you are able to define different types of course and branch for the corresponding members. This will be useful for generating the reports.

ii. It is possible to access this screen through two different Easylib modules namely:
- Setup and Security

- Members

Here, you have to click on the **Setup** menu, present in the respective module and select the **Course and Branch** option. You can go also directly to this screen, by pressing the **F3** button, from your keyboard, after placing the cursor in the **Course and Branch** combo box, present in any of the screens.

iii. In the screen titled as **Course Master**, the **Course List** and the **Branch** details are displayed for your convenience.

iv. To add new records, enter the data in the **Course** and the **Branch** and select the **Add** button.

v. You can also **Modify** and **Delete** the records, by selecting the records from the displayed list, so that the selected data appears at the top of the screen and then clicking on the respective buttons as you prefer.

vi. The functionality of all the other buttons are listed in the **List Of Common Buttons**.

❖ ***Note*** that if any record exists, with this **Course and Branch,** which you want to remove, then it will not allow you to **delete** this record. For this, first you have to change or remove that particular course and branch from all the entered item records and then delete it.

❖ ***Note*** that modifying any record, will affect the existing records also.

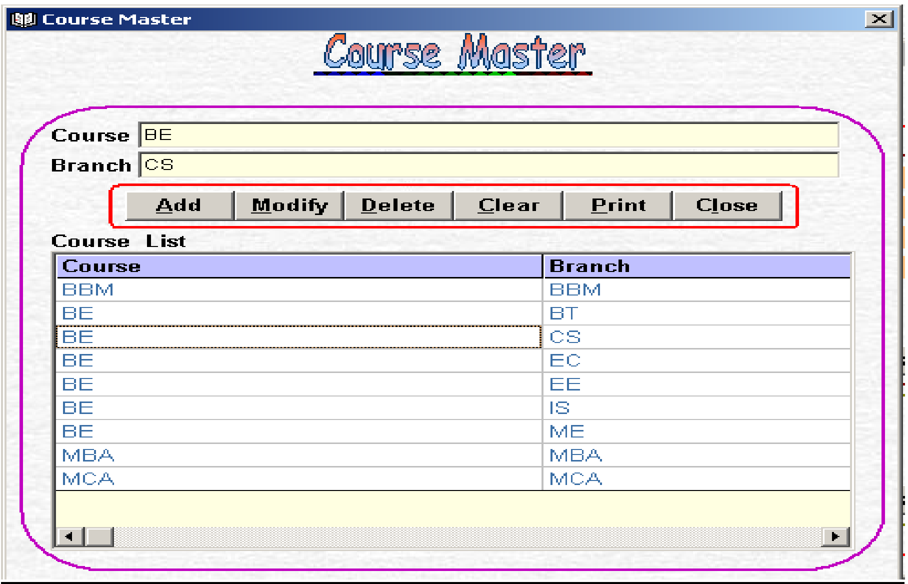


Figure 2.2.3 (6)

7. Currency Type:

i. This screen is essential to set the values for different currencies that are used globally according to your currency notation. This will be useful while taking the reports.

ii. The **Currency Setup** screen can be accessed through four Easylib modules namely:

- Catalogue and Accessioning
- Setup and Security
- Periodicals
- Digital Library

Click on the **Setup** menu, present in the respective modules and select the **Currency** submenu to view this screen. You can go also directly to this page, by pressing the **F3** button from your keyboard, after placing the cursor in the Currency combo box, present in any of the screens.

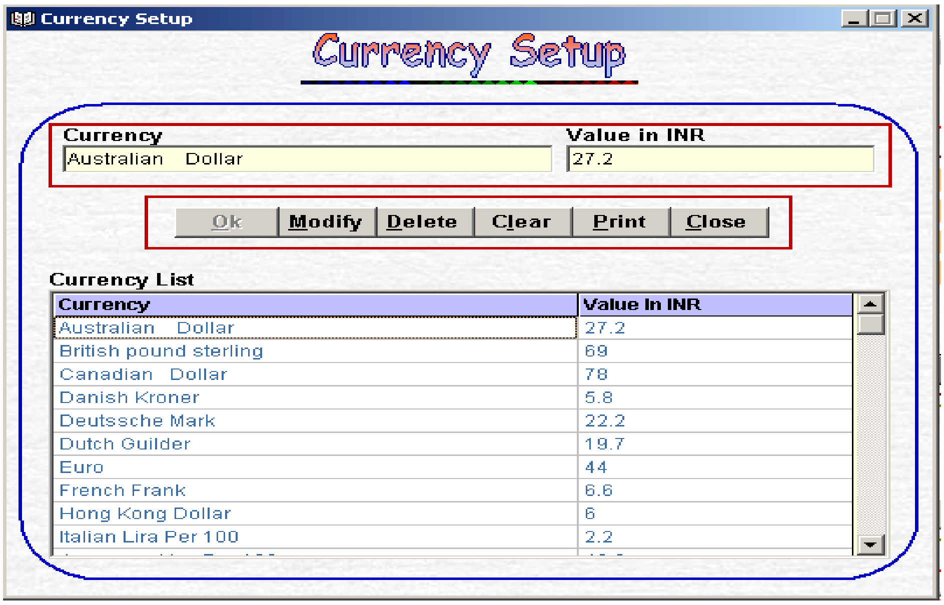


Figure 2.2.3 (7)

iii. In this screen, lists of all the various Currency types are displayed along with their **Value in …** (As per the user requirement).

iv. To change the above values as per your preference, simply select **System Parameters** submenu from **Setup and Security** module > **Setup** menu. Here, make the required changes in the **Default Currency Notation** and click on **Modify** button to save the changes.

v. Addition of a new record can be done, by entering the data into text box at the top of the screen and then selecting the **Ok** button. If the **Ok** button is disabled, then click on the **Clear** button to enable it.

vi. Select any record from the **Currency List** to view the individual record, at the top of the screen.

vii. In order to modify, either the description for the Currency type or the Value in rupees, select the particular Currency Type from the displayed list. This prompts the selected information to appear at the top of the screen. Now make the necessary changes and click on **Modify** button, to save the information.

viii. **Print** option allows you to print the displayed list on the screen, in the **Notepad** format.

- ***Note*** that when you modify the current value of the currency, it will be used only for the new additions. The rates of already accessioned items will remain the same.
- ***Note*** that if any record exists, with the **Currency type,** which you want to remove, then it will not allow you to delete this record. For this, first you have to change or remove that particular Currency type, from all the entered item records and then delete the Currency type.

8. Department:

i. In the library, there may be various books belonging to different departments. These departments can be defined through this screen, which will be useful during the accessioning of the items, while adding the members and also while generating the report.

ii. The **Departments Maintenance** screen can be accessed from six Easylib modules namely:

- Catalogue and Accessioning
- Setup and Security
- Acquisition
- Members
- Periodicals
- Digital Library

Click on the **Setup** menu present in the respective modules and select the **Department** submenu to view this screen. You can go also directly to this page, by pressing the **F3** button from your keyboard, after placing the cursor in the **Department** combo box, present in any of the screens.

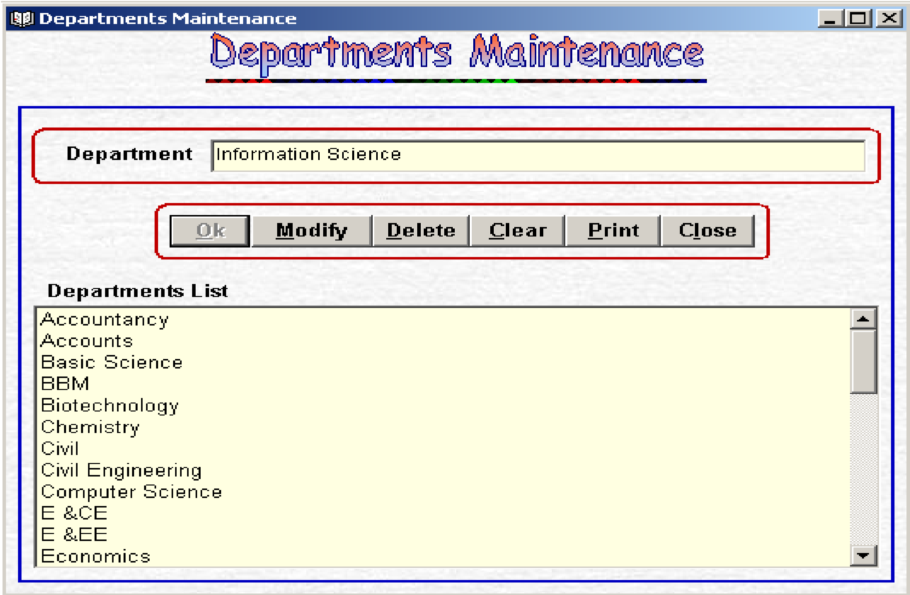


Figure 2.2.3 (8)

iii. All these actions will prompt a screen titled **Departments Maintenance** to appear, wherein you are able to view a complete list of all the departments that has been set in your library.

iv. In order to add new records, enter the details in the **Department** and click on **<u>Ok</u>**. If the **<u>Ok</u>** button is disabled then click on the **<u>Clear</u>** button to enable it.

v. In order to modify a department, select your record from the displayed list. This prompts the selected information to appear in the department text box. Now make the necessary changes and click on **<u>Modify</u>** button to save the information.

vi. **<u>Print</u>** option allows you to print the displayed list on the screen, in the **Notepad** format.

vii. To delete a particular department, select the department from the list and click on the **<u>Delete</u>** button.

- ❖ ***<u>Note</u>*** that if any record exists, with the **Department** name, which you want to remove, then it will not allow you to **Delete** this record. For this, first you have to change or remove that particular department from all the entered item records and then delete the department.
- ❖ ***<u>Note</u>*** that modifying any record, will affect the existing records also.

9. Defaults Setup:

i. Sometimes there are chances that few libraries may have permanent vendor, binder, category, etc. These fields can be set as default, so as to avoid entering the same data every time. Once the default parameters have been set it will remain the same for all future references. This will be helpful during the accessioning of the items.

ii. This screen can be accessed from **Setup and Security** module and selecting **Setup** menu followed by clicking on **Initial Setup Screens** submenu.

iii. A screen titled as Default Value Setup appears wherein you are able to view a complete list of all the created Setup and their corresponding Default Value that has been set in your library by the authorized person.

iv. In order to add new records, you must first select the data from the Setup by single click of the mouse. This prompts the selected information to appear at the top of the screen. Now, select the data from the Default Value and click on Set as Default button to save the record and add it to the displayed list.

v. Select the record from the displayed list by single click of the mouse and click on the **<u>Remove Default</u>** button to remove the added record from the displayed list.

vi. Print preview of this screen can be viewed in **<u>Notepad</u>** and **<u>Excel</u>** formats and the respective printouts can be taken by clicking on the Print icon button present in the menu bar.

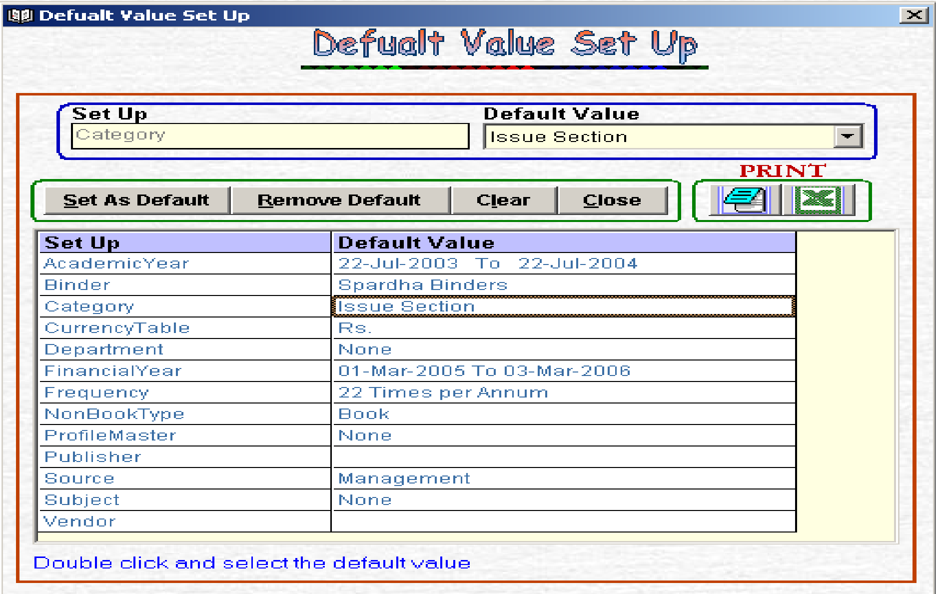


Figure 2.2.3 (9)

10. Financial Period Setup:

i. This screen is required to set the current financial period, which will remain the same for all future references. This feature is useful especially in the Acquisition module, during budget allocation, RFP, payments, etc.

ii. This screen can be accessed through three different Easylib modules namely:
   - Catalogue and Accessioning
   - Setup and Security
   - Acquisition

   In all the above modules, go to the **Setup** menu and select the **Financial Period** submenu, to view the corresponding screen. Another common way, of accessing this screen, is by pressing the **F3** button, from your keyboard, after you place the cursor in the **Financial Period** combo box, present in any of the screens.

iii. All the above actions prompts a screen titled **Financial Period Maintenance** to appear, where **Financial Periods List** is displayed. Along with this, **Current Financial Period** is also shown.

iv. You can add your preferred financial period, by selecting **From** and **To** dates and clicking the **Ok** button. It should be noted that, the *To* date must be greater than *From* date. If the **Ok** button is disabled, click on the **Cancel** button to enable it.

v. In order to modify a particular financial period, select your record from the displayed list. This prompts the selected information to appear in From and To dates. Now, make the necessary changes and click on **Modify** button to save the information.

vi. To delete a financial period, select the financial period from the list and click on the **Delete** button.

vii. An important point to remember is that, you cannot **Delete** or **Modify** any record present in the **Current Financial Period** drop – down box. You have the option to only **Change** the **Current Financial Period**, by selecting any date range, from the drop-down list box. After you have selected the preferred dates, select the **Change** button followed by the **Ok** button, to confirm your action.

viii. **Print** option allows you to print the displayed list on the screen in the **Notepad** format.

ix. On clicking the **Cancel** button, *From* and *To* dates revert back to the present date.
   - ***Note*** that if any record exists, with the **Financial Period** date, which you want to remove, then it will not allow you to **delete** this record. For this, first you have to change or remove that particular financial period from all the entered item records and then delete the financial period.
   - ***Note*** that modifying any record, will affect the existing records also.

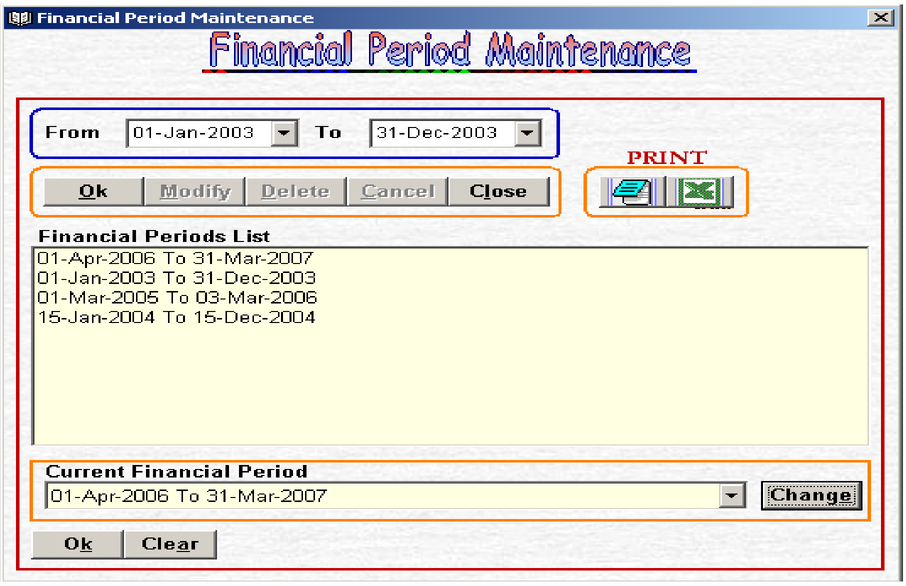


Figure 2.2.3(10)

11. Frequency:

i. In the library there may be different types of serials, journals, magazines, etc. which belongs to different frequencies. All these types of frequencies can be entered through this screen, which will be useful during the periodical entry and also report generation.

ii. This screen can be also be accessed through two Easylib modules, by clicking on the **Setup** menu, present in the respective modules and selecting the **Frequency** submenu. The two modules are listed below as:
- Periodicals
- Digital Library
- Setup and Security

Whenever you place the cursor at the **Frequency** combo box, present in any screen, you are able to view the above same screen, by pressing on the **F3** button from the keyboard.

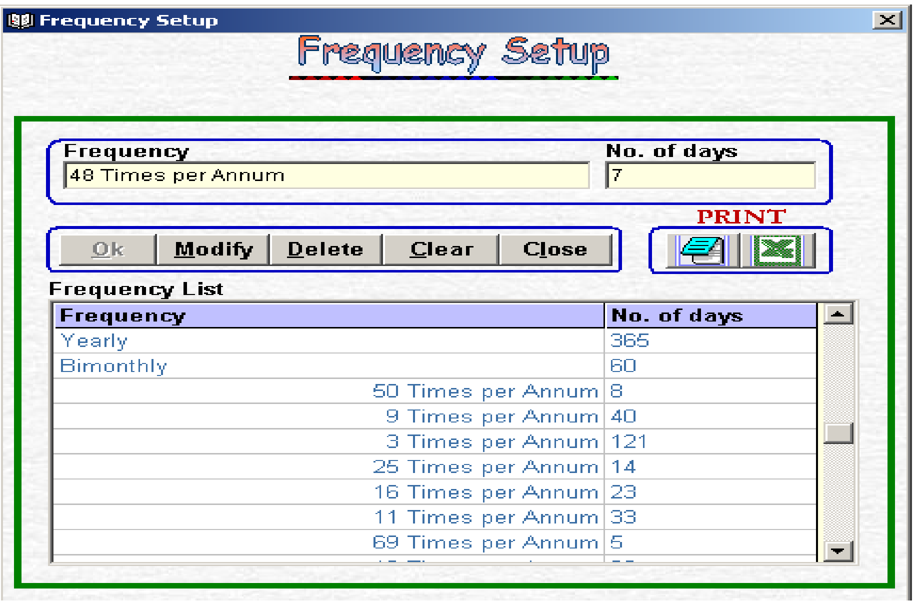


Figure 2.2.3 (11)

iii. In the screen titled as **Frequency Setup**, you are able to view the **Frequency List**, along with the **Number of Days** that has been allotted for each frequency.

iv. To add new records, enter the data in the **Frequency** and the **Number of Days** and select the **Ok** button. Before clicking on the **Ok** button, it should be noted that it is in the enabled mode. If it is disabled, click on the **Clear** button to enable it.

v. You can also **Modify** and **Delete** the records, by selecting the records from the displayed list, so that the selected data appears at the top of the screen and then clicking on the respective buttons as you prefer.

vi. Here you are able to view the print in **Notepad** as well as **Excel** Format.

- ***Note*** that if any record exists, with this **Frequency** type, which you want to remove, then it will not allow you to **delete** this record. For this, first you have to change or remove that particular periodical type from all the entered item records and then delete it.

Note that modifying any record, will affect the existing records also.

12. Holidays Setup:

i. Using this screen you are able to set the holidays. This will be useful while calculating the fines for the items.

ii. Go to **Setup** menu and select **Holidays** submenu to open this screen.

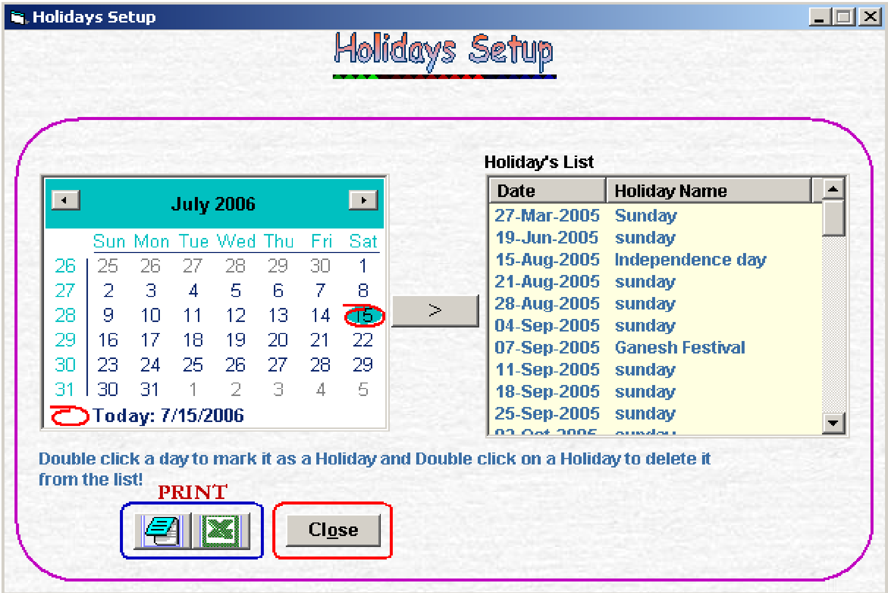


Figure 2.2.3 (12)

iii. This screen is basically used for adding or deleting any holidays in the current year.

iv. By default, all Sundays are marked as Holidays. In addition to this you can add any number of holidays and also specify the reason for it.

v. This is useful in calculation of fines, as the fines are not counted for holidays.

13. HTML Setup:

i. This screen is basically used for making changes in the **HTML Report format**.

ii. It is one of the most common screens, which can be accessed through six Easylib modules namely:

- Catalogue and Accessioning
- Circulation
- Acquisition
- Members
- Periodicals
- Digital Library

In all the above modules, go to the **Setup** menu and select the **HTML Setup** submenu, to view the corresponding screen.

iii. With this screen, you can set the format for HTML printing, by entering your preferences like *Align Table*, *Font Color*, *Background Color*, *Table Border Color*, *Font Style* and *Font Size*.

iv. After you have made your preferred changes, select the **Set Default** button to save your changes.

v. For all future references, this format will be executed unless you change the HTML settings.

- ***Note*** that, the *Print Preview* for the HTML feature can be accessed only from the Microsoft Internet Explorer 6 and above.

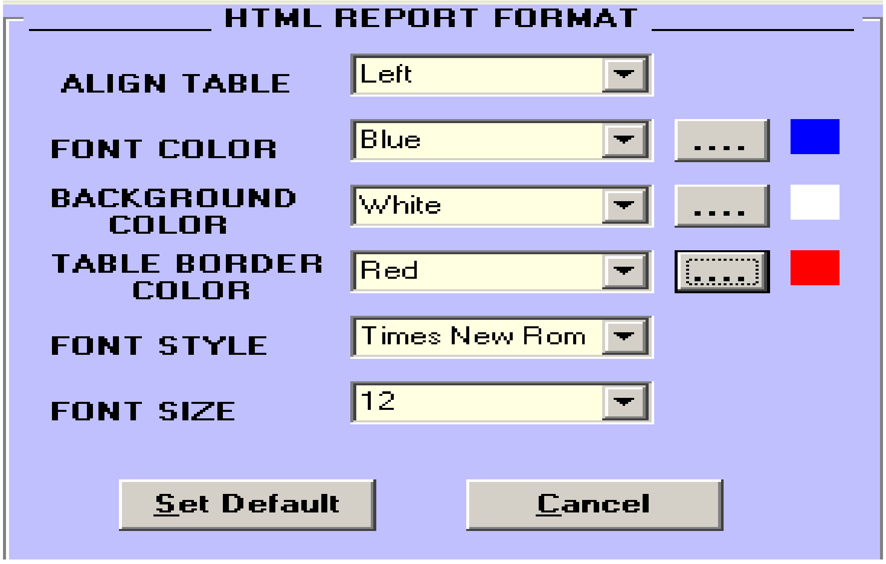


Figure 2.2.3 (13)

14. Item Types:

i. In the library, there may be different types of items like, Book, CD, Project Reports, etc. These item types can be entered through this screen, which is useful during the accessioning of the items and report generation.

ii. The **Item Types** screen can be accessed through three Easylib modules namely:
   - Catalogue and Accessioning
   - Setup and Security
   - Acquisition

   In order to view the screen in all the above modules, go to the **Setup** menu and select the **Item Types** submenu. You can go also directly to this page, by pressing the **F3** button, from your keyboard, after placing the cursor in the **Item Type** combo box, present in any of the screens.

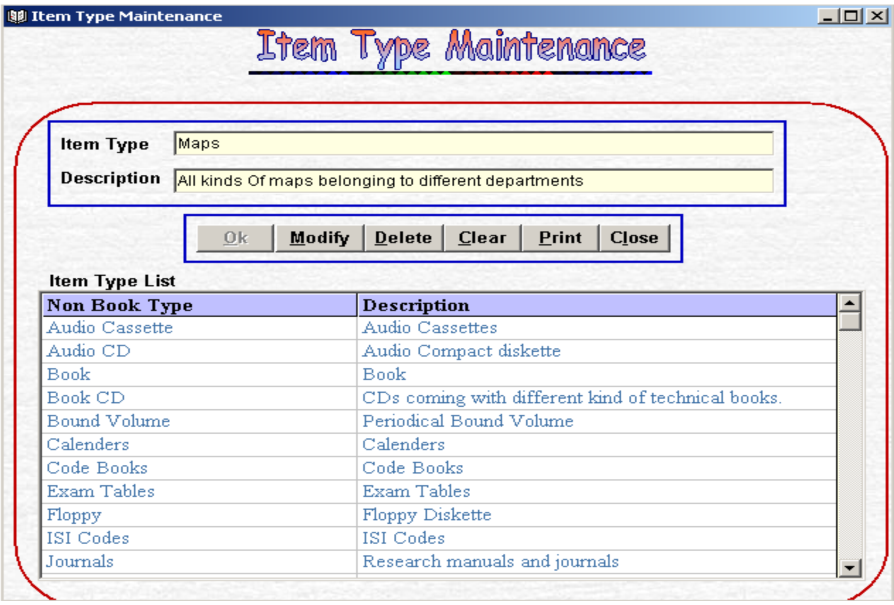


Figure 2.2.3 (14)

iii. This screen will contain a list of **Non Book Material Types**, along with their respective descriptions, which are being used in the library.

iv. In order to add a new record, make sure the **Ok** button is enabled. Enter the details and click **Ok** to save the data. If **Ok** button is disabled, select **Clear** to enable it.

v. You can also **Modify** and **Delete** the records, by selecting the records from the displayed list, so that the selected data appears at the top of the screen and then clicking on the respective buttons, as you prefer.

vi. **Print** option allows you to print the displayed list on the screen in the **Notepad** format.

15. Keyword Stopper:

i. The main feature of this screen is that it will prevent auto generation of keywords like and, :, &, or, etc.

ii. Here also, the screen can be accessed through two different Easylib modules namely:
   - Catalogue and Accessioning
   - Setup and Security

Click on the **Setup** menu, present in the respective modules and select the **Keyword Stopper** submenu, to view this screen. The respective screen can also be viewed when you click on the **Stoppers** button, present in any of the screen.

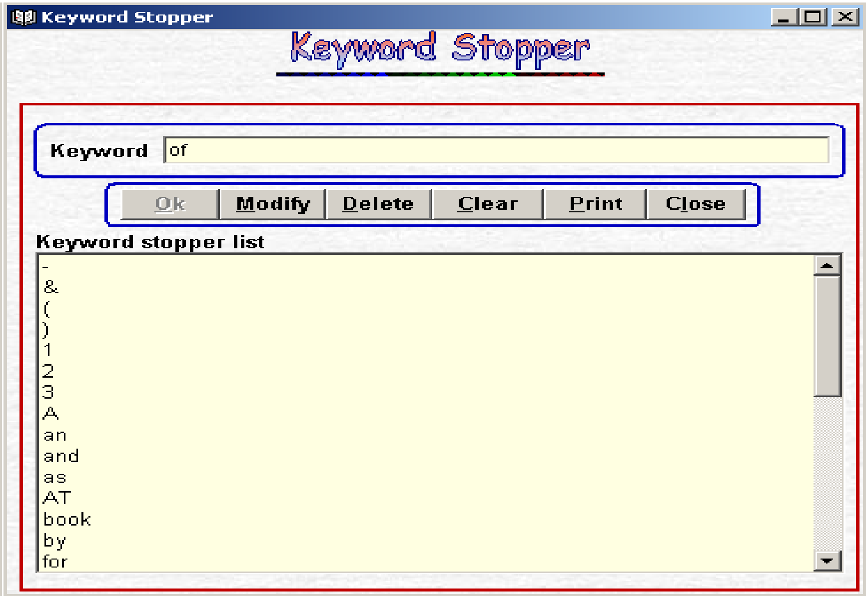


Figure 2.2.3 (15)

iii. After entering the **Title** of the book in the **Accession Register** screen, when you click on the **Keywords**, it will automatically generate keywords, based on the Title of the book. Sometimes a, and, of, etc. also forms a part of the keyword which is unnecessary. To deal with this problem, we have created a separate screen titled **Keyword Stopper**.

i. Once you open this screen, enter the strings that you don't want to generate as a keyword and then press **Ok** button. This will add the string to the list of non-keywords. If the **Ok** button is disabled, then click on the **Clear** button to enable it.

ii. In order to modify a keyword, select your record from the displayed list. This prompts the selected information to appear in the keyword text box. Now, make the necessary changes and click on **Modify** button to save the information.

iii. **Print** option allows you to print the displayed list on the screen, in the **Notepad** format.

iv. To delete a particular keyword select the keyword from the list and click on the **Delete** button.
   - ***Note*** that modifying any record, will affect the existing records also.

16. Member Parameters:

i. This screen is essential for setting the member parameters like, category of books allowed, maximum number of items renewed, maximum number of items issued, maximum number of reserve days, etc. Here, you are also able to set the surcharges for a particular category along with the corresponding profile.

ii. This function can be accessed from the **Setup** menu, by clicking on the **Member Parameters** submenu.

iii. The setup screen appears prompting for member profile to be selected. Here, you can choose any profile from among the entire list of users in the library like, Professor, Reader, Lecturer, and so on.

iv. After the member profile has been selected, you can set the parameters for that profile according to your preference. If the parameter has already been set then it will be displayed on the screen as soon as you select the profile.

v. In this screen, two main parameters namely, **Book Parameters** and **Non – Book Parameters** can be set for a particular profile.

vi. Parameters will be like **category of books allowed, maximum number of items permitted, max no. of issue days, maximum no. of reserve days, Fine/day in INR and maximum number of renewals**. These are same for both Book Parameters and Non – Book Parameters.

vii. To add a new parameter, just type the information and press **Ok**. If **Ok** button is disabled, then press **Clear** button to enable it. Once you enter information and press **Ok**, the information gets inserted and circulation parameters come into immediate effect.

viii. With this feature, you can restrict a certain section of the books to a certain profile as you prefer.

ix. Another advantage of this screen is that, you can set the default **Maximum Number of Allotments/ Reservations** for book as well as non-book for a particular profile.

x. **Surcharge** button allows you to calculate the surcharges for the respective members. You can also add or delete the surcharges.

xi. Once you set the parameters, this will be applicable to all the functions. In case, any change has to be made, then you have to come back to the member parameters screen and modify the changes.

xii. The print preview for the Notepad and Excel format can be viewed by clicking on the respective buttons.

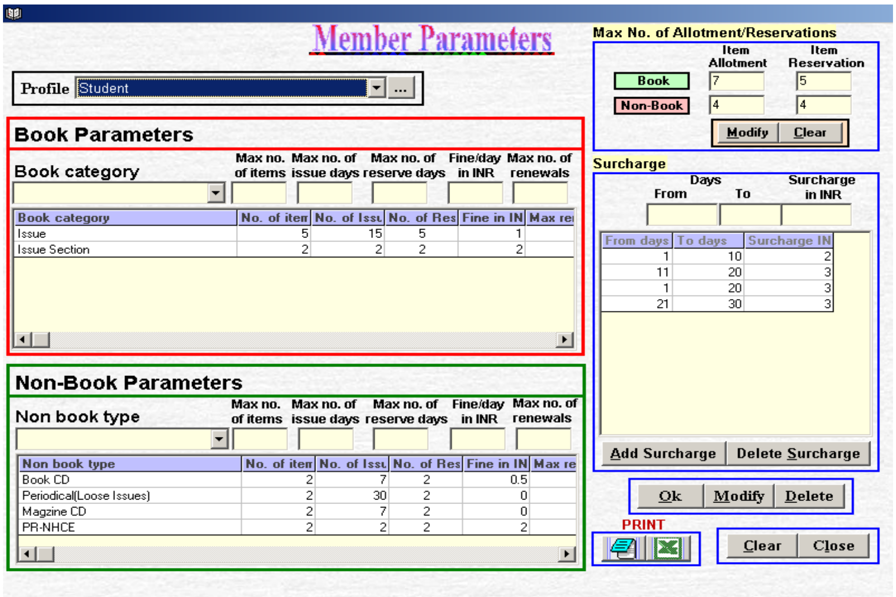


Figure 2.2.3 (16)

17. Member Type:

i. There are different types of members who are accessing the library. Using this screen you are able to define the member type, which is useful while adding the members and also while generating the records.

ii. To enable this function click on the **Setup** menu and select the **Member Type** submenu.

iii. All the data that has been entered previously can be viewed in the **Member Type List**.

iv. You can add your desired member, by entering the data in the **Member Type** and selecting the **Ok** button. Before clicking on the **Ok** button, it should be noted that it is in the enabled mode. If it is disabled, click on the **Clear** button to enable it.

v. Once you add a new record in the member type, then this record will be automatically displayed at the top of the **Library Members** screen.

vi. You can also **Modify** and **Delete** the records, by selecting the records from the displayed list so that the selected data appears at the top of the screen and then clicking on the respective buttons as you prefer.

vii. Here, you are able to view the print in **Notepad** as well as **Excel** Format.

- ***Note*** that if any record exists, with the **Member Type, which** you want to remove, then it will not allow you to **delete** this record. For this, first you have to change or remove that particular member type from all the entered item records and then delete it.

❖ ***Note*** that modifying any record, will affect the existing records also.

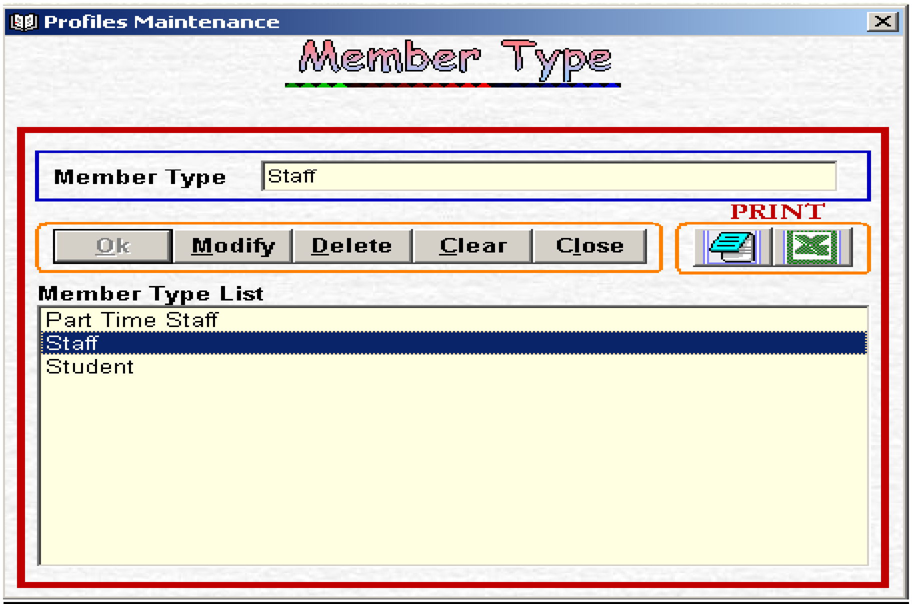


Figure 2.2.3 (17)

18. Non Book Section:

i. In the library, items may be of different types like Books and Non-Books. Non-Book Item may be an Audio CD or Book CD or Videocassette etc. Using this screen, item name and code for different Non-Book Item types can be created which helps in accessioning the non–book items and also for generating reports.

ii. The **Non-Book Section** screen can be accessed, only through the **Catalogue and Accessioning** module, by clicking on the **Setup** menu and selecting the **Non-Book Section** submenu. Another common way, of accessing this screen, is by pressing the <u>**F3**</u> button from your keyboard, after you place the cursor in the **Non-Book Section** combo box, present in any of the screens.

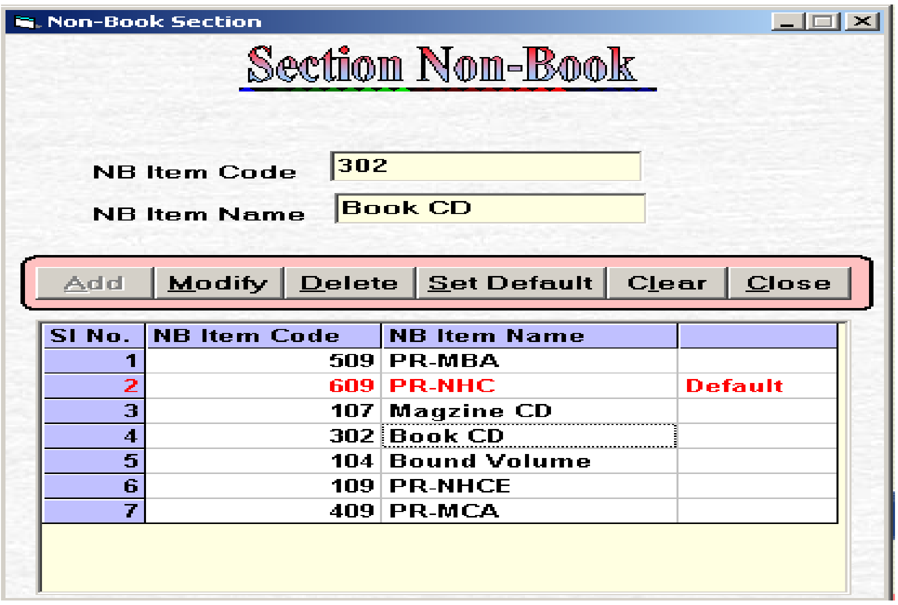


Figure 2.2.3 (18)

iii. The screen will now prompt you to enter the **NB Item Code** and **NB Item Name**.

iv. In **NB Item Code** you have to enter the prefix of the **NB Item Name** e.g., if **NB Item Name** is *Compact Disk* then **NB Item Code** is *CD*.

v. Enter the **NB Item Name** that you want to see in the Non Book Accession register and note that the same should appear in "Item Type" also. Now, click **Add** button to save the record.
vi. To set *Default Item Type* in Non Book Accession Register, select any one from the **NB Item Name** list and click on the **Default** button. It will set the default section in Non Book Accession Register.
vii. To modify the **NB Item Code** and **NB Item Name**, select the appropriate record from the list and change the existing data. After making the changes click on the **Modify** button, which then will ask you for the password, enter the ***Administrator Password*** and click **Ok** to modify the data.
viii. To delete any Non Book Section, select the appropriate record from the list and then click the **Delete** button. Enter the ***Administrator Password*** and click **Ok**, to delete the respective non-book section from the list.

19. Periodical Type:

i. A periodical may belong to different type like national, international, etc. Using this screen you are able to define the various periodical types, which will be listed in a combo box. This will be useful while accessioning the periodicals.
ii. The **Periodical Type** screen can be accessed through two Easylib modules namely:
   - Setup and Security
   - Periodicals

   To access this page, click on the **Setup** menu present in the respective modules and select the **Periodical Type** submenu. Another common way, of accessing this screen, is by pressing the **F3** button from your keyboard, after you place the cursor in the **Periodical Type** combo box, present in any of the screens.
iii. All these actions prompts a screen titled as **Periodical type Maintenance** to appear.
iv. Here you are able to see all the records, which have been already entered in the **Periodical Type List**.
v. Enter any **Periodical Type** in the text box provided at the top of the screen and click on the **Ok** button if you wan to add a new record. If this button is disabled, then click on the **Clear** button to enable it.
vi. Select your desired record first from the displayed list if you want to **Modify** or **Delete** it, so that the selected data is displayed at the top of the screen.
vii. The **Print** option allows you to print the displayed list on the screen, in the **Notepad** format.
   - ***Note*** that if any record exists, with the **Periodical Type,** which you want to remove, then it will not allow you to **delete** this record. For this, first you have to change or remove that particular periodical type from all the entered item records and then delete it.
   - ***Note*** that modifying any record, will affect the existing records also.

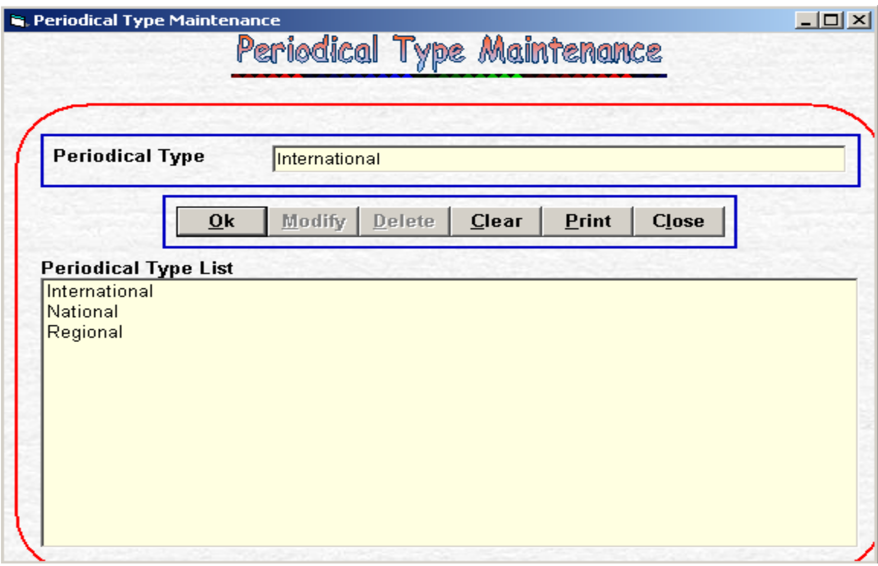


Figure 2.2.3 (19)

20. Profiles:

i. Library members may belong to different profiles like student, staff, asst librarian, etc. Using this screen, you can enter the required profile, which will be useful in setting the member parameters, while adding members, while authorizing the security level and also during report generation.

ii. The **Profiles** screen can be accessed from two Easylib modules, by clicking on the **Setup** menu, present in their respective modules and selecting the **Profiles** submenu. The two modules have been listed below as:
   - Setup and Security
   - Members

   Also, whenever you place the cursor at the **Profiles** combo box, present in any of the screens, you are able to view the same screen by pressing on the **F3** button from the keyboard.

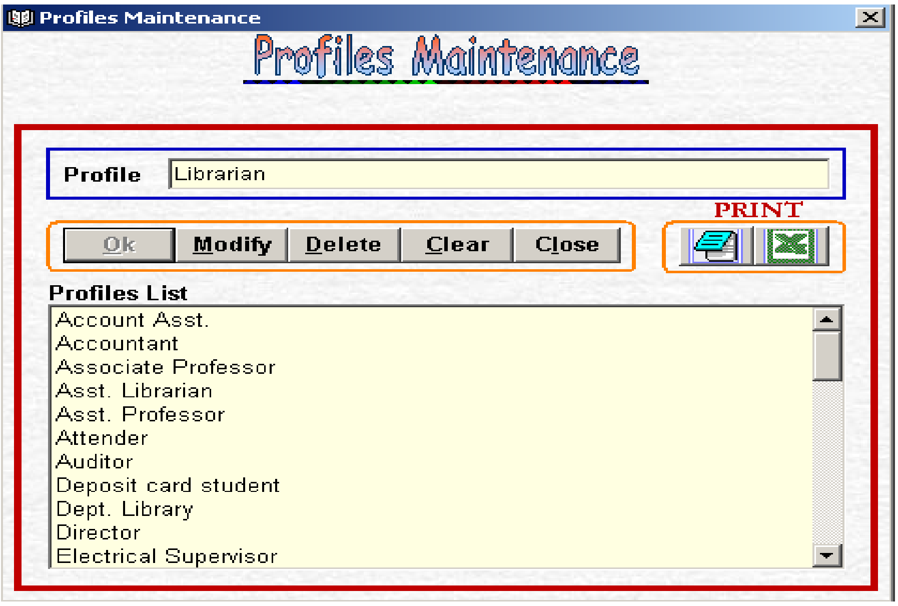


Figure 2.2.3 (20)

iii. In this screen you can maintain the records of all the users that are currently using the software, by assigning each person with a **Profile**.

iv. All the data that has been entered previously can be viewed in the **Profiles List**.

v. You can add your desired profile, by entering the data in the **Profile** and selecting the **Ok** button. Before clicking on the **Ok** button, it should be noted that it is in the enabled mode. If it is disabled, click on the **Clear** button to enable it.

vi. You can also **Modify** and **Delete** the records, by selecting the records from the displayed list so that the selected data appears at the top of the screen and then clicking on the respective buttons as you prefer.

vii. Here, you are able to view the print in **Notepad** as well as **Excel** Format.
   - ***Note*** that if any record exists, with the **Profile** type, which you want to remove, then it will not allow you to **delete** this record. For this, first you have to change or remove that particular profile from all the entered item records and then delete it.
   - ***Note*** that modifying any record, will affect the existing records also.

21. Publisher Details:

i. Using this screen you are able to enter the publisher details that will be listed in a combo box. This will be useful during the accessioning of books and also while taking the report.

ii. The **Publisher Details** screen can be accessed through five Easylib modules, namely:
   - Catalogue and Accessioning
   - Setup and Security
   - Acquisition
   - Periodicals
   - Digital Library

   In all the above modules, go to the **Setup** menu and select the **Publishers** submenu to view the corresponding screen. Another common way, of accessing this screen, is by pressing the

F3 button from your keyboard, after you place the cursor in the **Publisher** combo box, present in any of the screens.

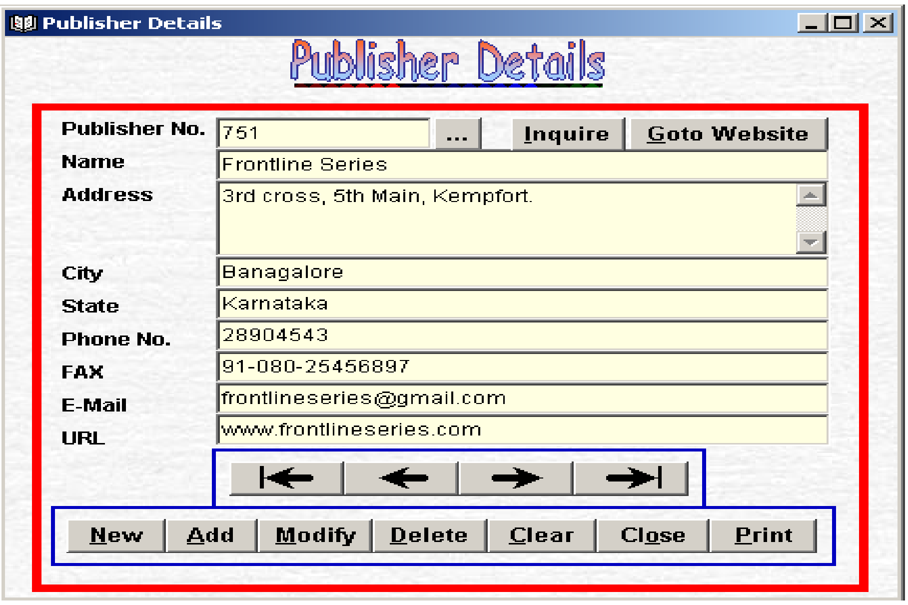


Figure 2.2.3 (21)

iii. You can see the previously entered records, by scrolling through the Navigation buttons.
iv. To enter a new record, click on the **New** button to automatically generate a Publisher Number. After entering all the records, click on the **Add** button to save this new record.
v. You can use the **Three dot** (…) button, to view the entire list of publishers. Select any one to see the details related to that publisher.
vi. Click on **Modify** button, only after you have made the necessary changes in a particular record.
vii. Enter either the exact **Publisher Number** or **Name** to **Inquire** about a particular record.
viii. Here, there is an option to directly **Goto Website** if you have entered the URL, for that particular publisher. For this action to happen, Internet facility should be present.
ix. **Delete**, **Clear**, **Close** and **Print** buttons have the same functionality as described earlier.
   - ***Note*** that if any record exists, with the **Publishers** name, which you want to remove, then it will not allow you to delete the record. You have to first remove the association of the publishers from all the items and only then, can you delete the publishers.
   - ***Note*** that modifying any record, will affect the existing records also.

22. Section:

i. Library contains books that belong to different sections like UG, PG, etc. Using this screen, you are able to create these sections, which will be useful to accession different section books and also while generating reports.
ii. This screen can be accessed only from the **Catalogue and Accessioning** module, by clicking on the **Setup** menu and selecting the **Section** submenu. You can go also directly to this page, by pressing the **F3** button from your keyboard, after placing the cursor in the **Section** combo box, present in any of the screens.
iii. This screen will prompt you to enter the **Section** and **Section Name**.
iv. In the **Section**, enter the prefix of the Section say for e.g., if Section Name is UGC then you may enter the Section as U.
v. Enter **Section Name**, which you want to see in the Accession register **Section**, then click **Add** button to save the record.
vi. To set the *Default Section*, select any one **Section** from the list and click on the **Default** button. It will set the selected section as the *Default Section* in Accession Register.
vii. To modify the **Section** and **Section Name**, select the appropriate **Section** from the list and change the existing data. After changing the data, click the **Modify** button. Now it will ask for password, enter ***Administrator Password*** and click **Ok** to modify the data.

viii. To delete the **Section**, select appropriate section from the list and then click the **Delete** button. Here also, it will ask for password, enter the ***Administrator Password*** and click **Ok** to delete the section.

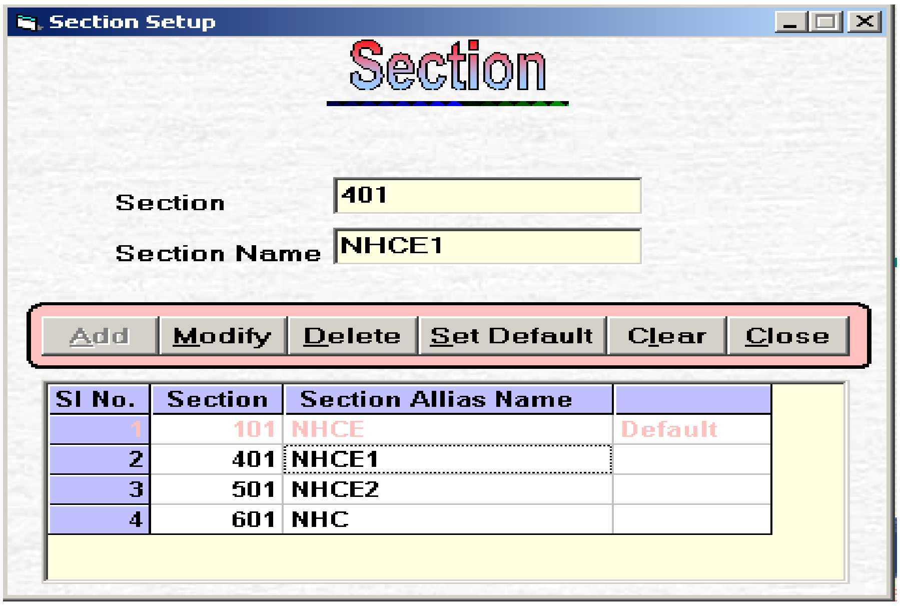


Figure 2.2.3 (22)

23. Source:

i. The budget that is assigned to purchase new items into the library may belong to different sources, like Management, Donation and Gift etc. This screen is therefore required to enter these sources, which will help in allocating the budget and also while generating the report.

ii. This screen can be accessed from three Easylib modules, by clicking on the **Setup** menu, present in the respective modules and selecting the **Source** submenu. The three modules are listed below as:

- Setup and Security
- Acquisition
- Periodicals

Also, whenever you place the cursor at the **Source** combo box present in any of the screens, you are able to view the screen by pressing the **F3** button, from the keyboard.

iii. On performing the above actions, a screen titled **Source Maintenance** appears where all the details entered in the **Source List** are displayed.

iv. In order to add a new record, make sure the **Ok** button is enabled. Enter the details and click **Ok** to save the data. If **Ok** button is disabled, select **Clear** to enable it.

v. You can also **Modify** and **Delete** the records, by selecting the records from the displayed list, so that the selected data appears at the top of the screen and then clicking on the respective buttons as you prefer.

vi. **Print** option allows you to print the displayed list on the screen in the **Notepad** format.

- ***Note*** that if any record exists, with the **Source** name, which you want to remove, then it will not allow you to **delete** this record. For this, first you have to change or remove that particular source name from all the entered item records and then delete the source.
- ***Note*** that modifying any record, will affect the existing records also.

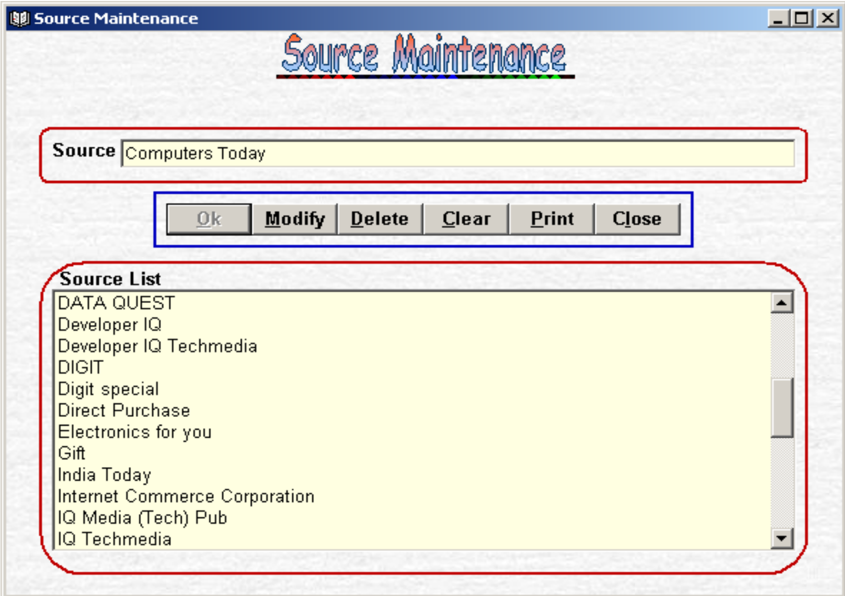


Figure 2.2.3 (23)

24. Vendor Details:

i. Using this screen you are able to enter the vendor details, which will be listed in a combo box. This will be useful in accessioning of items and also generation of reports.

ii. This screen can be also be accessed through five different Easylib modules namely:
- Catalogue and Accessioning
- Setup and Security
- Acquisition
- Periodicals
- Digital Library

In order to view the screen in all the above modules, go to the **Setup** menu and select the **Vendors** submenu. Another common way, of accessing this screen, is by pressing the **F3** button from your keyboard, after you place the cursor in the **Vendor** combo box, present in any of the screens.

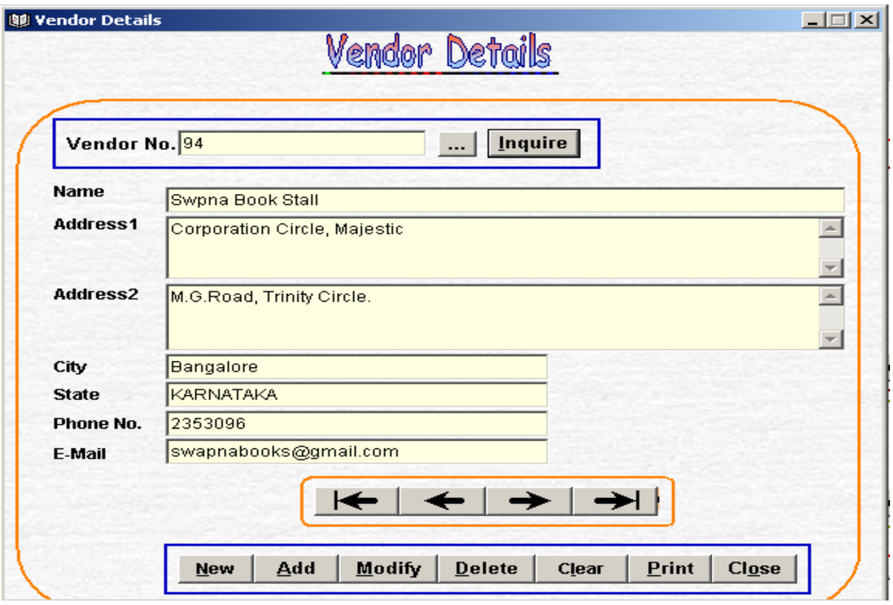


Figure 2.2.3 (24)

iii. You can see the previously entered records, by scrolling through the Navigation buttons.

iv. Here, you must enter the **Vendor Number** to **Inquire** about a particular record.

v. To **Add** a new record, *Vendor Number, Name, Address 1, City* and *State* are the mandatory fields, which have to be entered.

vi. Click on the **New** button, to automatically generate Vendor number.

vii. You can use the **Three dot** (…) button, to view the entire list of vendors. Select any one, to see the details related to that vendor.
viii. **Print** option allows you to print the displayed list on the screen, in the **Notepad** format.
ix. All the other common buttons are present here also.
- ***Note*** that if any record exists, with the **Vendors** name, which you want to remove, then it will not allow you to delete the record. You have to first remove the association of the Vendors from all the items and only then, can you delete the Vendors.
- ***Note*** that modifying any record, will affect the existing records also.

25. Library Alerts:

This screen lists the important information regarding books, members, etc present in the library, while logging into the setup and security module.
It will display the summary of the current statistics present in the library like;
The number of: -

- Library items overdue as of today.
- Reservations waiting to be allotted.
- Items held for pick up.
- Total overdue of fines as of today.
- Memberships expiring within next one month.
- National serial subscription expiring within the next 30 days.
- International serial subscription expiring within the next 90 days.
- Items awaiting processing in new arrivals.
- Items awaiting processing in staging area.
- Periodicals expected to be received today.
- Periodicals delayed by more than 7 days.
- Amount pending against invoices for payment.

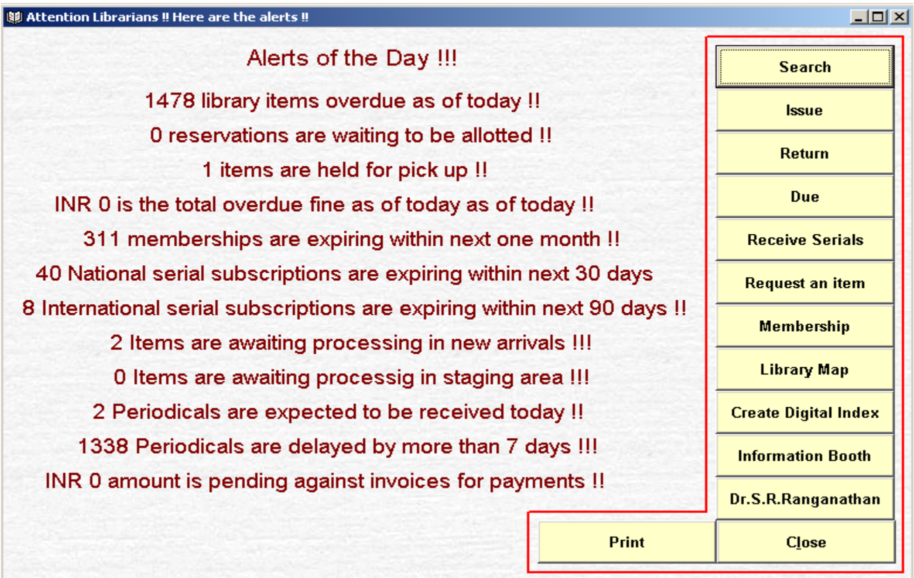


Figure 2.2.3 (25)

You can view the print preview of this screen in the Notepad format by clicking on the **Print** button. In addition various buttons like **Search**, **Issue**, **Return**, **Due**, **Receive Serials**, **Request an item**, **Membership**, **Library Map**, etc, are present which will prompt the respective screens to appear when you click on any of the above buttons.

26. Library Information:

This screen will give a brief statistics about the library like the number of library members, books in library, non book items in library, digital library articles, national and international serials subscribed, readers per day, issue/return per day, purchases for the last year, as well as budgeted purchases for the current year. Print preview of this screen can be viewed in

Notepad and **Excel** formats and the respective printouts can be taken by clicking on the Print icon button present in the menu bar.

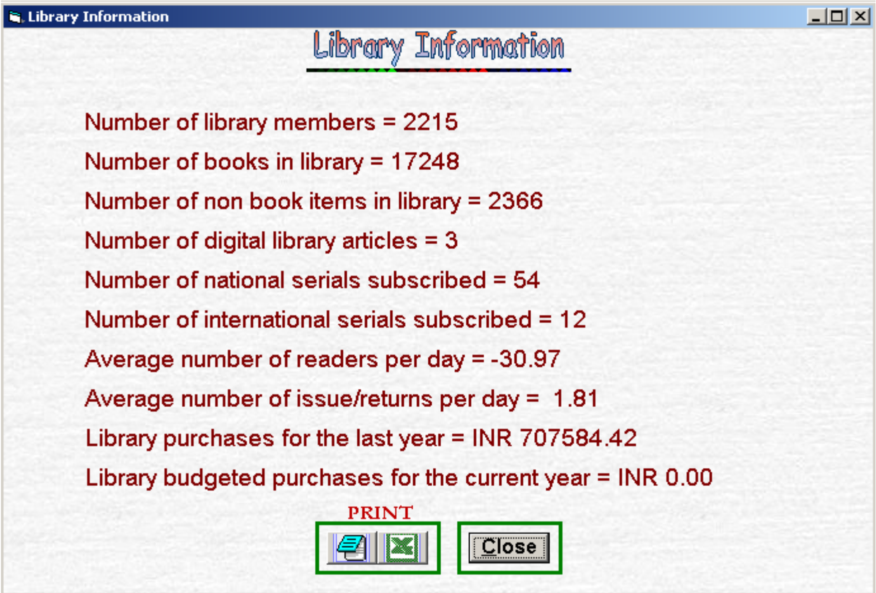


Figure 2.2.3 (26)

27. Dr. S.R. Ranganathan:

This screen will give you a brief description about Dr. S.R. Ranganathan who is considered as "The Father of Library Science in India" and also about his five laws.

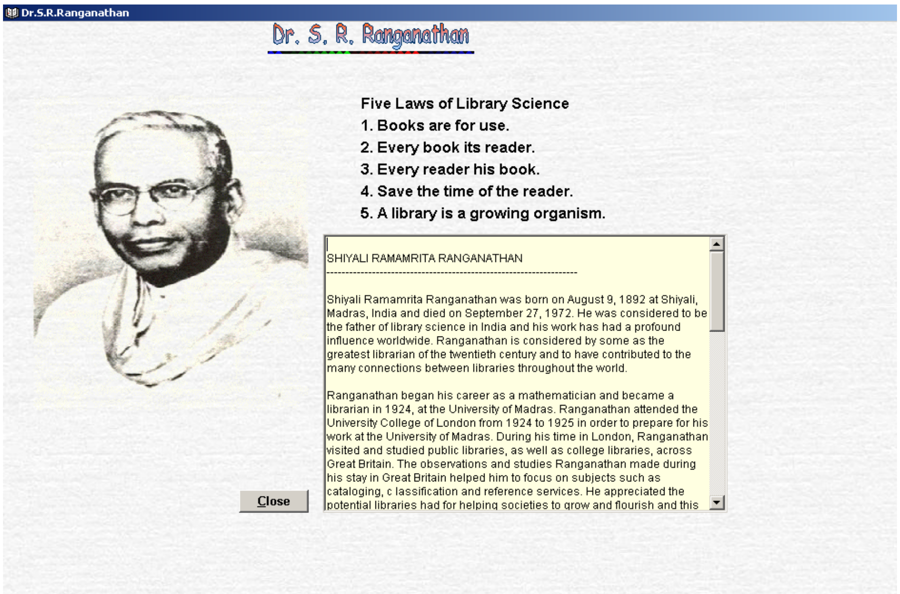


Figure 2.2.3 (27)

28. Subjects Tree:

i. Using this screen you can make your subjects as a tree view and this will be helpful at the time of item's classification. Adding classification number to subject will make your classification as semi automatic. This function is useful during the accessioning of the items and also report generation.

ii. The **Subjects Tree** screen can be accessed through five Easylib modules namely:
   - Catalogue and Accessioning
   - Setup and Security
   - Acquisition
   - Periodicals
   - Digital Library

In all the above modules, go to the **Setup** menu and select the **Financial Period** submenu, to view the corresponding screen. Another way to reach this screen is, by placing the cursor either at the **Subject (1)** or **Subject (2)** combo box, present in any of the screens and pressing the **F3** button, from the keyboard.

iii. In the screen titled as **Classification of Subjects**, you are able to view a list of all the subjects that has been already setup in the library, for classifying books and non-books.

iv. If you want to add a new subject then, first decide where you want to insert it, that is, under which **Parent Subject**. Place the cursor at the desired position and select it. Now right click on the mouse, to get the *Add*, *Modify* and *Delete* options. Click on the **Add** option.

v. This action will prompt a new folder to appear, wherein you can enter the desired subject name. Click on the mouse, to get an input box asking you to, ***"Please enter the class number"***. Insert your preferred value. Thus, your new record has been added successfully.

vi. To view the class numbers along with the subject, you must enter the class number while entering the subject name itself.

vii. If you want to shift any subject from one **Parent Subject** to the other then, first select the subject to be moved, then click on the **Three Dot** (…) button. Select the parent subject under which you want to shift and give the **Select** option. Next, press the **Save** button to add this new subject successfully.

viii. When you select any subject from the displayed list, all the accession details of the books, which have been accessioned under this subject are seen in the middle of the screen.

ix. **View All Subjects** and **List View** buttons are provided, so that you can see the entire *Subjects Tree* in two formats namely, *Format 1* and *Format 2*. Here the major difference is that, you can only see the reports through **View All Subjects**, while you can take the **Print** as well as view the list, in **List View** option.

x. To make it easier while searching, you are also provided with **Search by Class Number** feature.

xi. To delete a particular subject, click on the **Delete** button, after selecting the subject from the list.

- ***Note*** that if any record exists, with the **Subject** name, which you want to remove, then it will not allow you to **delete** this record. For this, first you have to change or remove that particular subject from all the entered item records and then delete the subject.

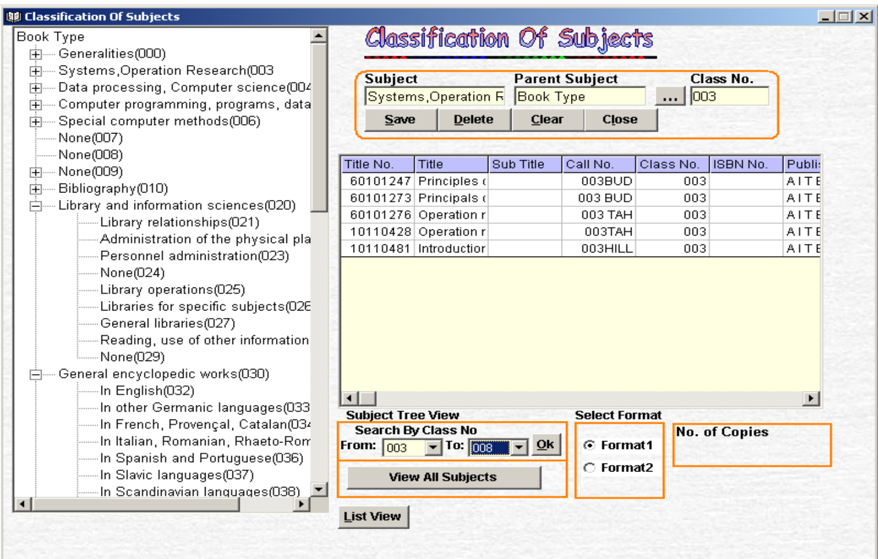


Figure 2.2.3 (28)

29. Toolbar:

i. This submenu will display the icons of some of the selected submenus on the menu bar so that you are able to go directly to the respective screens.

ii. The **Toolbar** screen can be accessed through four Easylib modules namely:

- Catalogue and Accessioning
- Circulation
- Acquisition

- Periodicals

To access this submenu, go to the **Setup** menu and select the **Toolbar** option.

iii. This option allows you, to enable or disable the **Toolbar** menu.

iv. The important screens present in the respective modules have been listed here, so that you can go directly to the corresponding screens without losing your time in searching for them.

30. Screen Setup:

i. This screen allows you to customize the menus that you want in a particular module by selecting the check boxes provided for the corresponding menu names.

ii. **Screen Setup** is one of the most common screens, that can be accessed through most of the Easylib modules namely:
- Setup and Security
- Acquisition
- Catalogue and Accessioning
- Members
- Circulation
- Periodicals
- Digital Library
- In/Out Management

In order to view the screen in all the above modules, go to the **Setup** menu and select the **Screen Setup** submenu.

iii. A list of the entire submenus that is present in the respective modules will be displayed on the screen. The important feature of this screen is that here you are able to setup the respective screens according to the user **Profile**. It should be noted that you cannot enter any new profile from this screen. To add a new profile you must go to the **Security Profile** submenu present in the **Security** menu of **Setup and Security** module.

iv. The screen names can be selected/deselected by clicking on the respective check boxes. Click on the **Save** button, to save the changes. Only the concerned person has the authority to customize the screens according to the **Profile**, since this action requires you to enter the **Super – User Password**. This feature has been provided for securing this function and to avoid unnecessary modifications. Once the correct password is entered a confirmation message box appears as ***"Records saved successfully".***

v. The created setup screens will be accessible only when you exit from the respective module and login again with the created profile.

2.2.4. Data Import:

1) This is one of the additional features of the Easylib where you can import the item details from the Excel format into the Easylib format.
2) This screen can be accessed by clicking on the **Data Import** submenu present in the **Setup** menu.
3) Before the **Data Import and Data Preview** screen opens, a small message box appears as ***"Do you want to load the mapped fields previously"*** This will reload the items, which you had mapped the last time. Select the desired option to open the respective screen.
4) Select a file for the Data Import, by clicking on the **Three Dot** (…) button in the ***File Name***.
5) Click the **Read from File** button to display the contents of the file in the grid.
6) Here, you can map the files and the database fields. This can be done by first selecting the data from ***Map the File Fields*** followed by selecting the data from the ***Map the Database Fields***. Click the **Ok** button, to view the added record in ***Mapped Fields*** grid.
7) Select the **Remove** button to delete the record from the ***Mapped Fields*** grid.

2.2.5. Member Data Import:

1) This is one of the additional features of the Easylib where you can import the member details from the Excel format into the Easylib format.
2) This screen can be accessed by clicking on the **Member Data Import** submenu present in the **Setup** menu.
3) Before the **Data Import and Data Preview Member** screen opens, a small message box appears as ***"Do you want to load the mapped fields previously"*** This will reload the

items, which you had mapped the last time. Select the desired option to open the respective screen.

4) Select a file for the Data Import, by clicking on the **Three Dot** (…) button in the ***File Name*** field.
5) Click the **Read from File** button to display the contents of the file in the grid.
6) Here, you can map the files and the database fields. This can be done by first selecting the data from ***Map the File Fields*** followed by selecting the data from the ***Map the Database Fields***. Click the **Ok** button, to view the added record in ***Mapped Fields*** grid.
7) Select the **Remove** button to delete the record from the ***Mapped Fields*** grid.

2.2.6. Backup: (MS Access)

This screen is essential for taking the backup (or copy) of the application database. This will be useful in future to restore the data that has been destroyed under circumstances like system crashing, data corruption, etc.

Select the **Setup** menu and click on the **Backup** submenu to activate this function. This feature allows you to create a backup for the database by copying it to another location. Enter the ***Database Path*** and ***Backup Path*** by clicking on the **Browse** button. First, open the database path and select the file to be copied. Now, you can paste the contents of the selected file, by creating a new folder and pressing on the **Ok** button to accept the changes.

2.2.7. Accn Number Samples:

1) To access this screen, select the **Accn Number Samples** submenu from the **Setup** menu.
2) This is a special screen that is used to convert any type of Barcode accession number to Easylib standard Accession Number format. Usually, it is in numeric format.
3) With this screen, whatever accession format you have set in your library previously, it will be converted to the accession format that has been set by the software without need to change the existing barcode labels in your library.
4) In this screen ***Prefix, Middle, Suffix*** and ***Post Suffix*** fields are present, which can be set according to your preference. Once set, this format will be used for all future references and can be changed only by the authorized person.

2.2.8. Restore:

Using this screen, you can restore or recover your application database from the place where you had stored it, if it has been destroyed under circumstances like system crashing, data corruption, etc.

Click on **Setup** menu and select the **Restore** submenu to activate this function. This feature allows you to restore the backup for the database that has already been created. Enter the ***Database Path*** and ***Backup Path*** by clicking on the **Browse** button. First, open the database path and select the backup file. Now, you can paste the contents of the selected file, by creating a new folder and pressing on the **Ok** button to accept the changes.

2.2.9. Compact- Repair Database (Required for only MS Access database users):

This will repair the minor problems and remove the unnecessary space created by the application during the transactions in the database.

2.2.10. Screen Setup:

This screen can be accessed by clicking on the **Screen Setup** submenu present in the **Setup** menu. This feature has already been described in the **Initial Setup** Submenu. You may refer the above document for your reference.

3. Acquisition:

Acquisition deals with the procedure of procuring the items into the library along with budgeting. It consists of three parts namely Requisition, Budgeting and Accessioning.

A Note for new users:
To learn the Easylib Software fast, you can skip this module, continue with other modules and then come back to this module and study.

How to access the Acquisition module?

a) Click once on the **Acquisition** module, which appears on the front page of Easylib software, to open the **Easylib Login** screen.
b) Enter the correct ***User ID*** and ***Password***.
c) The main page appears, containing a list of all the menus and sub-menus of **Acquisition** module which are displayed below: -

3.1. Requisition

3.1.1. Item(s) Requisition

3.1.2. Item(s) Requested List

3.1.3. Request for Proposal

3.2. Acquisition

3.2.1. Budget Source

3.2.2. Budget Allocation

3.2.3. Quotation Entry and Comparison

3.2.4. PO Header

3.2.5. Received/Receivable Item List

3.2.6. Delivery [Receive]

3.2.7. PO Invoice

3.2.8. Payments

3.3. Accession

3.3.1. Return Damage/Excess Item(s) to Vendor

3.3.2. Transfer all Received Items' Details for Staging

3.3.3. PO Wise list of Item(s) Awaiting Processing

3.3.4. DC Wise list of Item(s) Awaiting Processing (Not Ordered)

3.3.5. Staging: Awaiting Cataloguing

3.4. Binding

3.4.1. Binding Order

3.4.2. Binding Order List

3.4.3. Binding Return

3.4.4. Binding Return List

3.5. Reports

3.5.1. Customized Search on Requisition

3.5.2. Customized Search on RFP

3.5.3. Customized Search on PO

3.5.4. Customized Search on Invoice

3.5.5. Customized Search on Payments

3.5.6. Customized Search on Delivery Challan

3.5.7. Customized Search on Quotation

3.5.8. Search Item(s) Returned To Vendor(s)

3.5.9. Others Reports

3.6. Account

3.6.1. Define Schedules and Account Heads

3.6.2. Receive Amount

3.6.3. Pay Amount

3.7. Setup

3.7.1. Binders

3.7.2. Departments

3.7.3. Subjects Tree

3.7.4. Publishers

3.7.5. Item Type

3.7.6. Source

3.7.7. Vendors

3.7.8. Financial Period

3.7.9. Html Setup

3.7.10. Screen Setup

3.7.11. Tool Bar

3.8. Window

3.9. Help

3.1. Requisition:

3.1.1. Item(s) Requisition:

1) Using this screen, any member of the library can place a request for new items or for existing items, by specifying the details regarding the desired item. This will be useful while placing a RFP (Request For Proposal) and also during the generation of reports.
2) Select the **Requisition** menu and click on the **Item(s) Requisition** submenu, to activate the screen titled as **Requisition of Item(s).**
3) Enter the Requisition Number and click on the **Inquire** button, to view the details regarding that particular record, if it exists.
4) Here, request for more copies of an existing item can be placed, by searching about the item with the help of **Search** button. A search screen appears where you can get the results based on the entered search criteria.
5) Double click on the record, for which you want to place the request. This action will simultaneously copy the details into the respective fields in the **Requisition of Item(s)** screen. Now enter the remaining details to add the request.

6) The Status of the Placed Requisitions can be found by scrolling through the navigation buttons.
7) To enter a new request, select the **<u>New</u>** button. This will clear the screen and place the cursor in the ***Requisition No.*** field.
8) Generally, new request can be placed for an old item as well as for an item not present in the library. After entering the relevant details, click on the **<u>Add</u>** button to save the record.
9) You can also import any data from the prepared excel sheet, that contains the list of requested items, by clicking on the **<u>Import Data</u>** button.
10) Only Members are allowed to access this submenu.

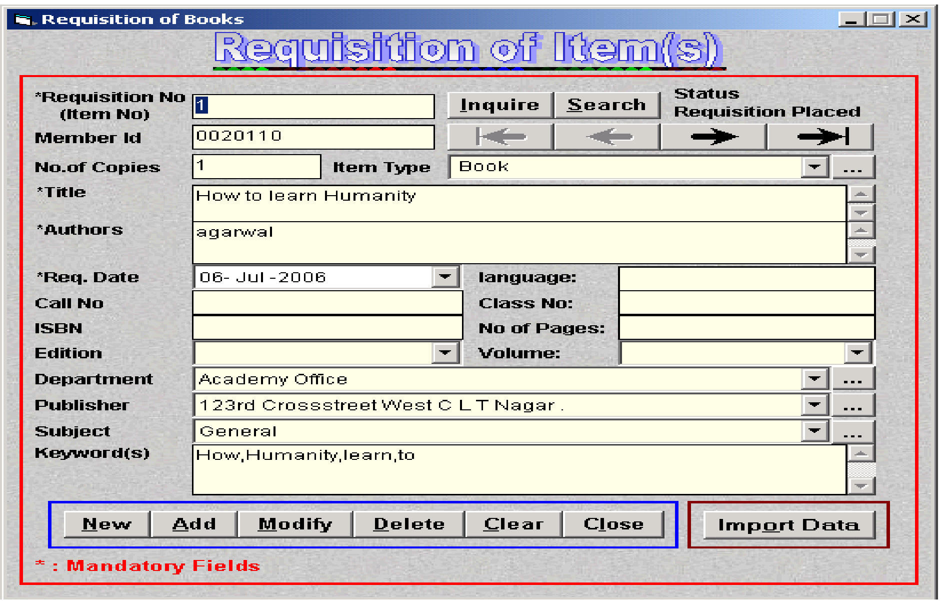


Figure 3.1.1

3.1.2. Item(s) Requested List:

1) This screen allows you to view the list of the request that has been placed by the library members. This can be done in two ways namely, Department wise and Member wise.
2) This screen can be accessed by, selecting the **Requisition** menu and clicking on **Item(s) Requested List** submenu.
3) From this screen, you are able to view the request lists, which have been entered in the above screen. This can be done, by selecting data from either the ***Department*** or the ***Member ID***.
4) Next, click the **<u>List</u>** button, to display the request list in the grid as Req. No., Title, Author, Keyword and Status. The status of the entered request will be displayed as *Requisition Placed*. This list can be sorted as per your requirement by selecting from the ***Sorting Option***.
5) The print preview of the above list can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.
6) Also, the list of items requested can be searched, by entering any of the various criteria namely, ***Title***, ***Author*** and ***Keyword*** and selecting the **<u>Search</u>** button.

3.1.3. Request for Proposal:

1) Once a particular member has placed the request, the librarian or any other authorized person will add all the requested items through this screen and place it as a Request for Proposal. This can be sent to the vendors for receiving the quotations.
2) Select the **Requisition** menu and click on the **Request for Proposal** submenu, to open the screen titled as **RFP Detail**.

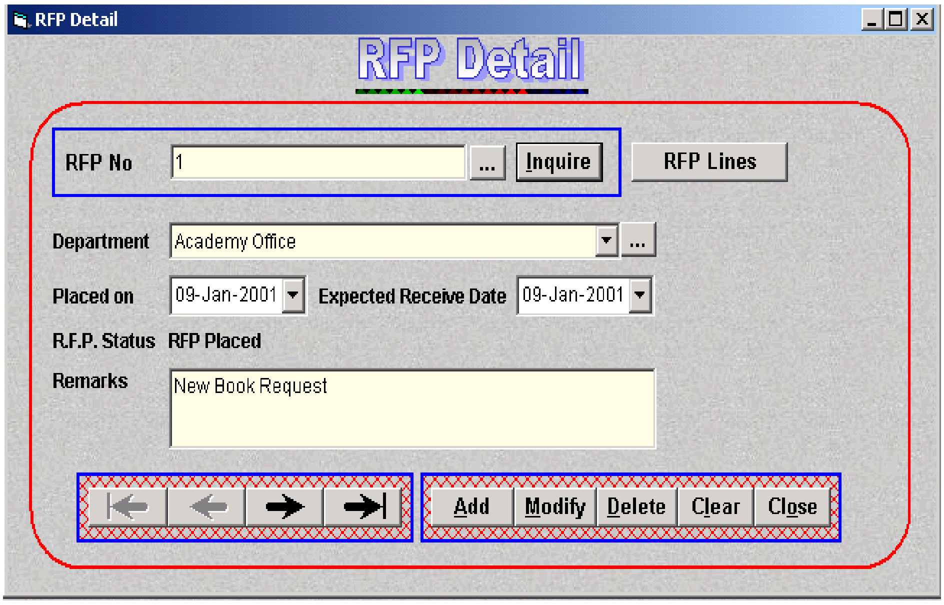


Figure 3.1.3

3) Once the request has been placed by a particular member, the librarian or any authorized person will add all the requested items through this screen and place it as request for proposal. This can be sent to the vendors for receiving the quotations.
4) Once the **RFP No.** has been created, the requests under this RFP number is placed through **RFP lines** by clicking on the **RFP lines** button.
5) Request for proposal (RFP) can be placed in two ways, i.e., either for department-wise or non-department wise as described below:
   - RFP for an Individual Department is created by assigning the RFP No. for a department and adding all the requests made by this particular department member, under this RFP No. using RFP Lines. Here you can add all the requests made by the Department.
   - RFP for non-department wise (General) is created by assigning the RFP No. and mentioning *General Department* in the ***Department*** combo box. Here, the requests made by all the departments can be placed under this RFP No. using RFP Lines, where you can list the requested items by either selecting the ***Department*** from which requests are to be added or the ***Member ID*** of any department's member who has placed the request/s.
6) Items under a particular RFP can be added using **RFP Lines** button in the screen, where requests from different departments and members can be listed and added to this RFP No. by any of the above mentioned method.
7) Select the items displayed in the grid titled **Requested Item/Details of a particular department** and click on the **Add Selected** button to move it to the **List of Elements in RFP** grid.
8) **Add All** button allows you to add the entire list to the **List of Elements in RFP** grid without having to select it separately.
9) **Delete Selected** and **Delete All** buttons will allow you to delete the records from the grid separately or entirely.
10) **Sort By** option is provided for **Requested Item/Details of a particular department** grid.
11) **Select All** and **Deselect All** radio buttons will select and deselect the records in the grid respectively.
12) Modification of the entered quantity can be done by entering the **Req. no.** and the **Quantity** and clicking on the **Modify** button.
13) Click on the **RFP Report** button to generate the reports in the Notepad or Excel formats and sent it to the corresponding Vendor. The Edit Template button allows you to add or remove additional fields from the RFP report format according to your preference.

3.2. Acquisition:

3.2.1. Budget Source:

1) This screen allows you to enter the budget details for a particular financial period from various sources like Donation, Management, etc. This will be useful during allocation of the budget to the respective departments for the selected financial period.
2) First, set the Financial Period by going to the **Setup** menu and opening the **Financial Period** submenu. Here, select the ***From -To*** Date ranges that you would like to add. Click on the **Ok** button to save the record and display it in the ***Financial Periods List***. To set the current financial period, select the desired date range from the ***Current Financial Period*** and click on **Change** button, followed by the **Ok** button to confirm the action. Close this screen.
3) Now, click on **Acquisition** menu and select **Budget Source** submenu to open the function.
4) Here, select the dates from ***Financial Period*** that have been entered by the above method. By default, the ***Current Financial Period*** and the ***Financial Period*** will display the date ranges that have been set in the **Financial Period** submenu.
5) If you want to add a new record, click on the **New** button to automatically generate the Serial Number. Select the Date, Source, Amount, etc. and click on the **Add** button to display the record in the ***List of the Fund Collected*** table along with the *Total cost* displayed at the end.
6) Once the budget source is added, it can be allocated to various departments as required with the help of **Budget Allocation** button in the screen. The features of this screen are explained in the next submenu.
7) **Modify** and **Delete** button will allow you to perform the respective actions.
8) The print preview of the above list can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

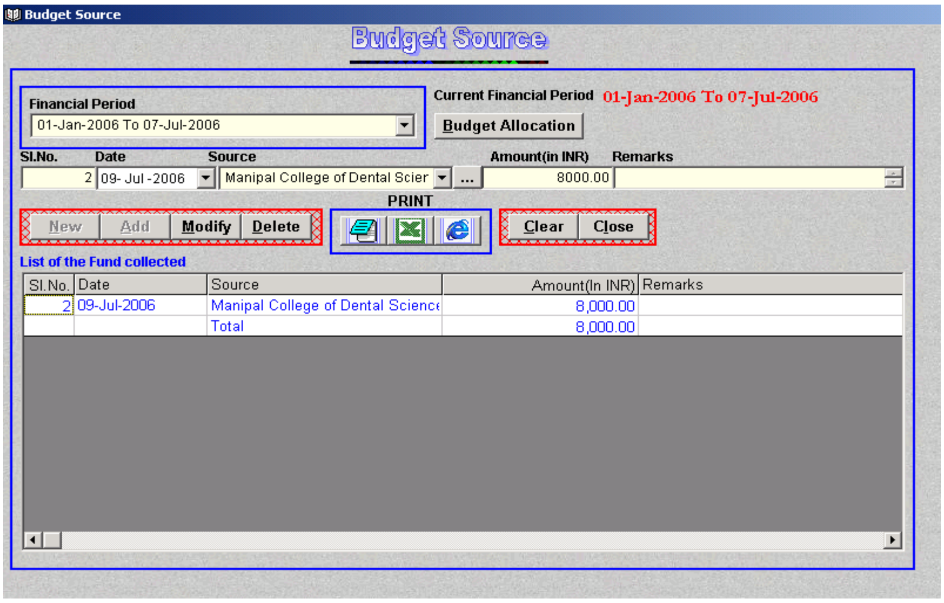


Figure 3.2.1

3.2.2. Budget Allocation:

1) Once the source has been defined for the current financial year, it will be allocated to various departments according to the request placed by the respective department.
2) Budget Allocation for different departments can be made using this screen, which can be accessed by selecting the **Acquisition** menu and clicking on the **Budget Allocation** submenu.
3) A screen titled, as **Budget Allocation Status** appears, where you can select the entered ***Financial Period*** for which the budget source has been added.
4) If no budget has been allocated then no items can be procured or received.
5) ***Budget Source***, ***Budget Allocated*** and ***Budget Remaining*** details are displayed at the top right corner of the screen. In the grid, the ***Total Allocation***, ***Total Spent*** and ***Net Balance*** are also listed for your reference.

6) The print preview of the above list can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.
7) Click on the **Update/View Details** button to open another screen titled as **Budget Allocation Details**. This screen, allows you to see the amount that has been allocated to a particular department, along with the allocated date.
8) Here, you can also add the record, by selecting the ***Department,*** for which you want to allocate the budget and entering the Date of allocation, Amount, etc.. The current financial year is displayed in the ***Financial Period***. Click on the **Add** button to add the record in the ***Allocation List***.
9) The Allocated Amount, Spent Amount and Net Balance details are also described at the top right corner of the screen.
10) The print preview of the above list can be obtained in Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.
11) You can also update the ***Allocation List*** records by using the **Modify** button.
12) Once added, all these records will be displayed in the **Budget Allocation Status** screen for all future references.

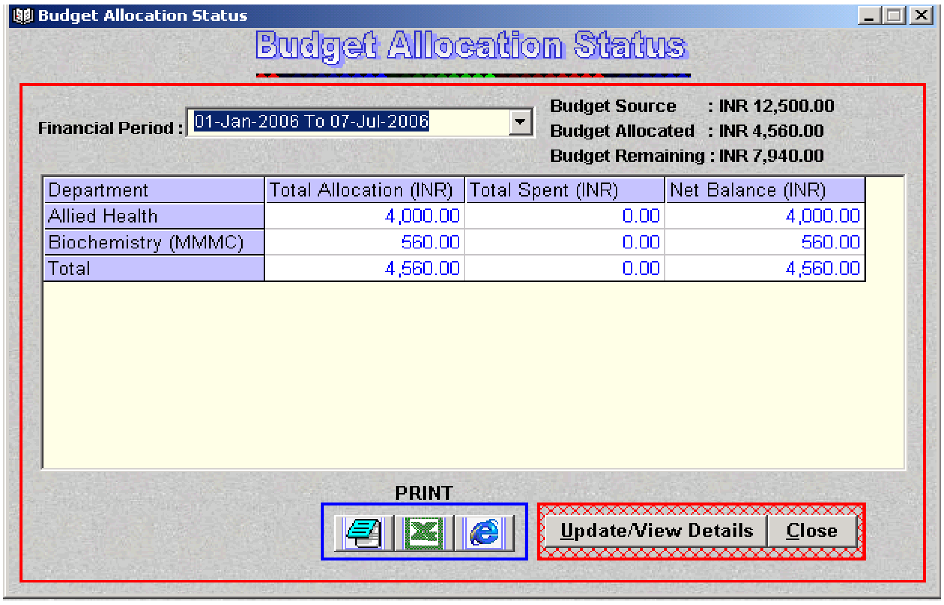


Figure 3.2.2

3.2.3. Quotation Entry and Comparison:

1) Various quotations received for the RFP's sent to the different vendors, are added with all the relevant information, using this screen and also the comparison between the vendor price list can be obtained.
2) To activate this function, select the **Acquisition** menu and clicking on the **Quotation Entry and Comparison** submenu.
3) In the **Quotation Entry** screen, select the RFP No. from the ***RFP No.*** Here, only the numbers that have been created in the **RFP Detail** screen are present. On selecting the particular *RFP No.*, the list of the items placed under this number is displayed in the ***Item Price List for a Vendor*** grid.
4) Select the Vendor, Quotation Date and also create a Quotation No. for this vendor. For the same *RFP No.* different quotations can be received from different vendors. These details can be tracked with the help of Quotation No.
5) Now, select the *Item* from the grid by double clicking on the mouse so that the details are displayed in the respective list boxes above the grid. Enter the price details and click on the **Save** button to add the record to the displayed list.
6) Item that is being requested for the second time can be searched and can be added directly, without entering the price manually for the corresponding Vendor.
7) Once the Item price obtained from various Vendors has been added, a comparison price-list between the Vendors in Notepad and Excel format can be obtained by clicking the **Quotation Comparison Report** button.

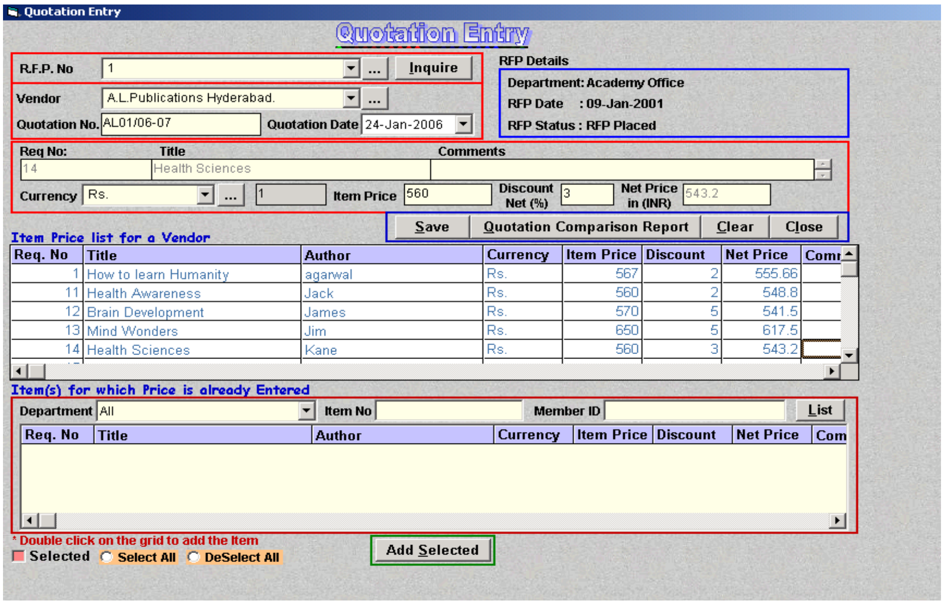


Figure 3.2.3

3.2.4. PO Header:

1) Once the quotations has been received or obtained and the comparison has been made the next procedure is to place the purchase order to the vendor that has quoted the least for the specified items.
2) This screen can be accessed by, selecting **PO Header** submenu from the **Acquisition** menu.

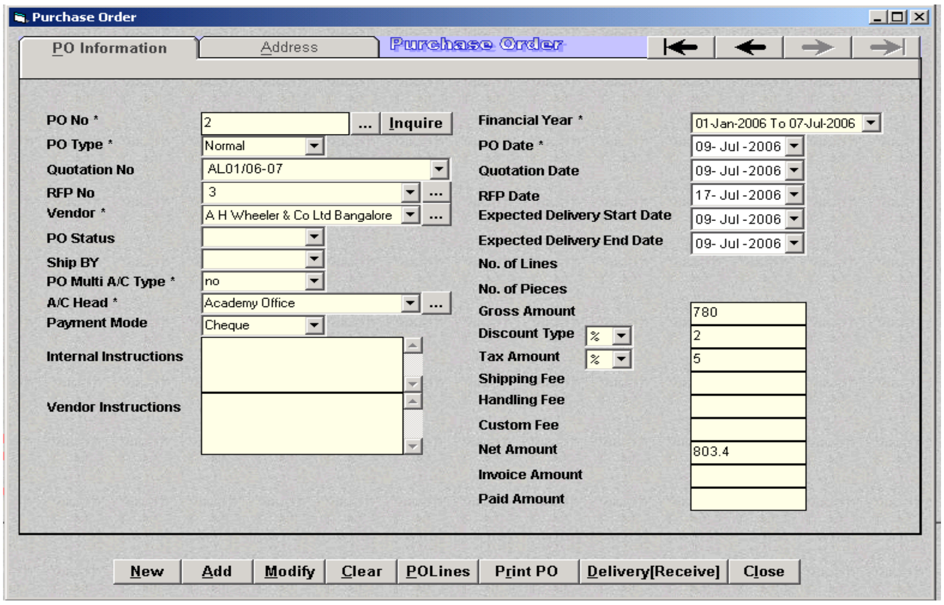


Figure 3.2.4

3) Purchase Orders (PO) can be created for different RFP's and for different Vendors. Click on **New** button and enter the mandatory fields like PO No., PO. Type, Vendor, Financial Period, etc, and click on the **Add** button.
4) Item(s) under the particular PO can be added using **PO Lines** button, where item requests from various Departments and Members can be added under this Purchase Order. Also, Item(s) under different RFP's can also be added under the same PO, if required.
5) Amount for each ordered item can be entered individually while adding an item or total amount of all the item(s) under the PO can be added without entering individual Item Price.
6) In the **PO Lines** screen, the ***Details of the Requested Item(s)*** will be displayed which can be listed according to the Department, Member Id and RFP No. Next, select any record and click the **Add Selected** button.

7) Once all the items under this PO are added, you can add the item(s) received by clicking on the **Delivery (Receive)** button.
8) The reports can be obtained by clicking on the **Print PO** button and sent to corresponding Vendor in two formats namely,
   - Format 1: A Report with Item Details & Quantity Ordered for each Item under this PO is obtained. No price details are printed here.
   - Format 2: A Report with all the above details along with Price details (Currency, Cost & Net Cost) is obtained.
9) Select the **Address** button present at the top of the screen to enter the Vendor, Billing and Shipping information.
10) The details of the previous records can be obtained by scrolling through the navigation buttons.

3.2.5. Received/Receivable Item List:

1) To keep a track of the item that has been received and is yet to be received (receivables), a report can be obtained with the help of different listing criteria present in this screen.
2) Select the **Received/Receivable Item List** submenu from the **Acquisition** pull down menu.
3) This screen is basically used for adding item(s) delivered by the vendor, by first searching for the item(s) ordered.
4) Here, you may select a maximum of any two-search criteria from the following fields namely, PO No., Department, DC No., Item Type, Received Date, Po Date and No. of Items Ordered.
5) After selecting the options from the above search criteria, a list of received and receivable item(s) will be displayed separately under the ***Receivables List*** grid and ***Received List*** grid.
6) You can move the item(s) from ***Receivables List*** to ***Received List*** by receiving the particular item. This can be done by selecting the item and clicking the **Down Arrow** button.
7) Clicking the **Down Arrow** button will open a new screen titled as **Items Delivery Details** where user can see two options:-
   - **Add** button: To receive an item, Delivery Challan details must be entered first. After adding DC information, you can receive the items by clicking on the receive button.
   - **Receive** button: Once you add all the DC details, you can now add the items received. On clicking the Receive button it will lead you to a new screen where the details of the corresponding items can be added.
8) On clicking the **Receive** button, **Items under Challan** screen is opened. Here, if only one item is received under this DC No., then click on **Receive** button to receive the item.
   - Partial Supply: If the supply is partial, i.e., you have received only two out of the three copies that you ordered, then you can manually mention Quantity Supplied by selecting the particular item. You can do this manually for each and every item received under this PO No. and DC No. These items will be displayed in Pink color.
   - Item Supplied (Not ordered): To receive an item that is not ordered, but as the request has been created already under the same DC No., click on the ***Item Supplied*** **Three dot** (…) button to list all the requests from various departments and members. These items will be displayed in Green color.
   - Excess supply items will be displayed in Yellow color.
9) If the items received under this DC No. are more than one and if the copies received is equal to the copies ordered (exact supply), then to receive all those items under the same DC No. click on **Receive All** button.
10) The Receive option can be used in the following cases like:
    - To receive only the selected item.
    - To receive any excess supply like copies supplied is more than copies ordered.
    - To receive any unordered item like the Item for which no PO has been created but sent along with the Items ordered.
11) The print preview of the above list can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

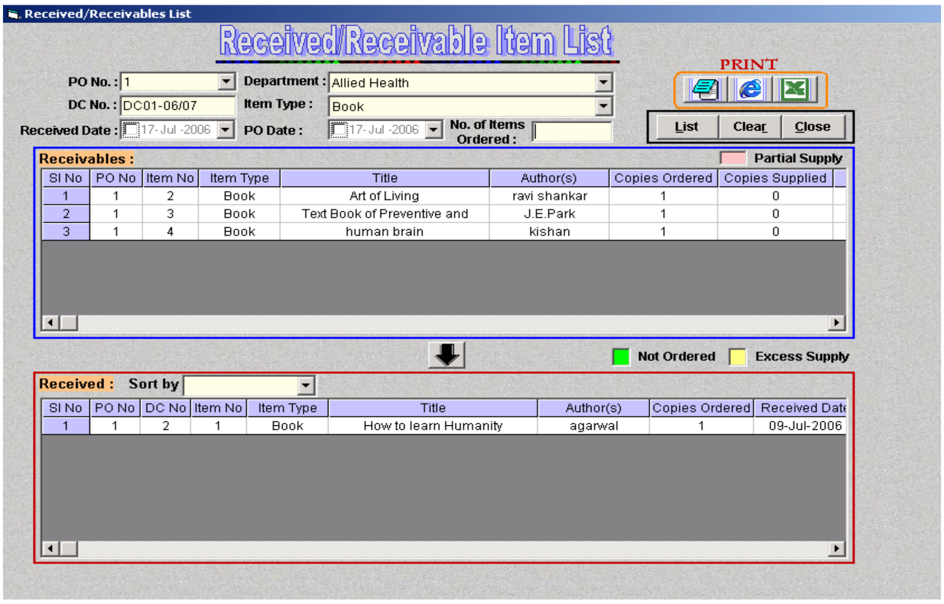


Figure 3.2.5

3.2.6. Delivery [Receive]:

1) This screen allows you to receive the items for which Purchase Order has been created as well as the items for which no Purchase Order has been created.
2) Select the **Acquisition** pull down menu and click on the **Delivery [Receive]** submenu to open a screen titled as **Delivery Tracking**.
3) This function can be used for receiving items, for which no PO has been created as well as for receiving items for which PO has been created.
4) To receive the item(s) for which no PO has been created (Not Ordered), you must enter the ***Delivery Challan Information,*** under which the item is delivered and click on the **Deliver** button.
5) Click on the **Deliver** button to open a new screen titled as **Items under Challan,** where **Receive** and **Receive All** options have been provided whose functions has been discussed above.
6) This helps in keeping a track about who received the delivery of the items from the respective vendors.
7) The print preview of the delivered items under that particular challan no. can be obtained in Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.
8) Navigation buttons are provided to scroll through the previous records.

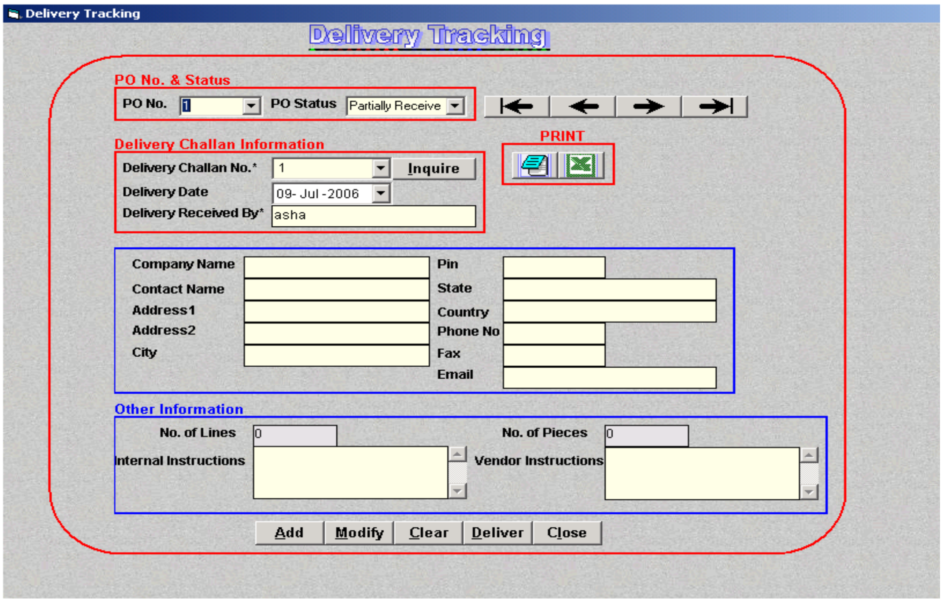


Figure 3.2.6

3.2.7. PO Invoice:

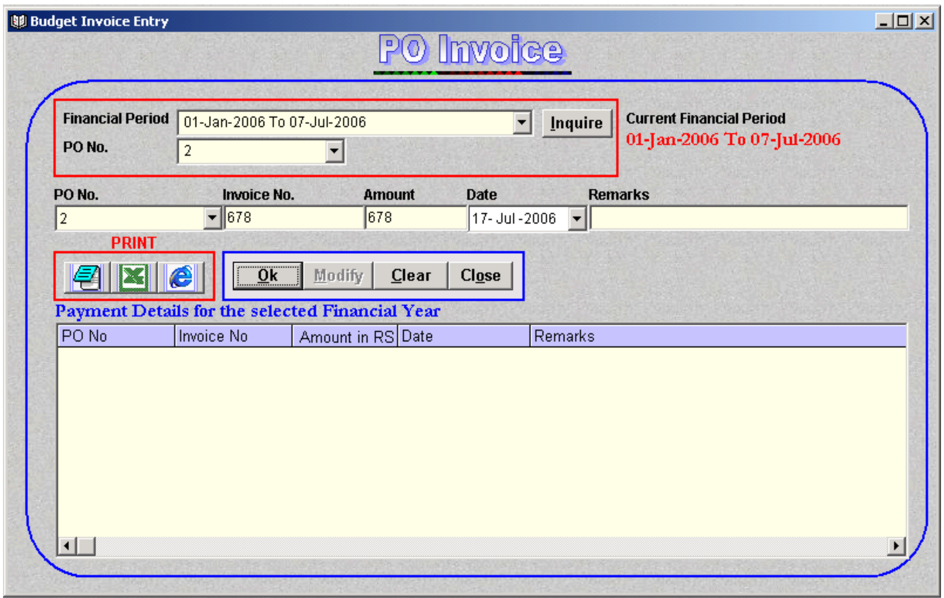


Figure 3.2.7

This screen is used for adding the Invoice received from the vendor for a particular PO and can be accessed by clicking the **PO Invoice** submenu from the **Acquisition** pull down menu. For a particular PO there may be more than one Invoice, in such case, you can split the amount according to the invoice that can be added separately under the corresponding Invoice No. The Payment details for the selected financial year list can be printed in HTML, Notepad and Excel formats by clicking the Print Icon button in the menu bar.

3.2.8. Payments:

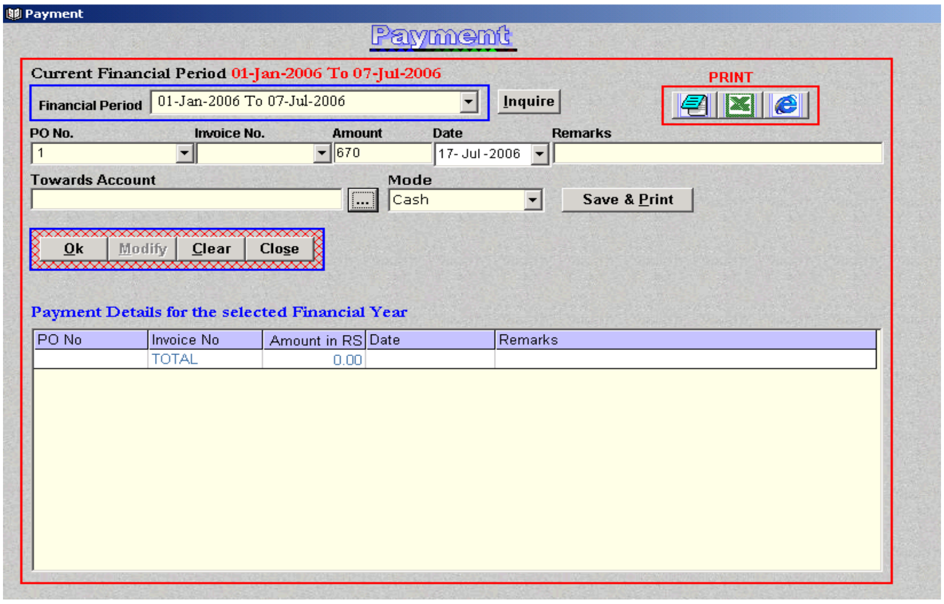


Figure 3.2.8

Using this screen, you are able to keep a track of the payments, which are made for the current financial period.

Select the **Acquisition** menu and click on the **Payments** submenu to access this screen. For all the Invoices that have been created, the details of payments can be added or maintained with the help of this screen. Here, you can add the Towards Account Details by clicking on the **Three dot** (…) button, where the Party Account No., Bank Details and other details, depending on the mode of payment for the Vendor (Party) are entered. Also, the Payment details for the selected financial year list can be printed in HTML, Notepad and Excel formats by clicking the Print Icon button in the menu bar.

3.3. Accession:

3.3.1. Return Damage/Excess Item(s) to Vendor:

1) The items that have been received from the vendor may sometimes contain damaged copies or extra copies. Using this screen, you are able to return back these copies to the respective vendors.
2) This screen can be accessed from the **Accession** menu by clicking on the **Return Damage/Excess Item(s) to Vendor** submenu.
3) Select the vendor name from the ***Vendor*** and click on the **List** button to list the ***Items delivered by the above vendor*** as well as the ***Excess/ Not Ordered Supply of items*** by the above Vendor in the grid.
4) Suppose any copy of a particular item is damaged, you can return it by selecting the item and clicking on **Return Selected** button.

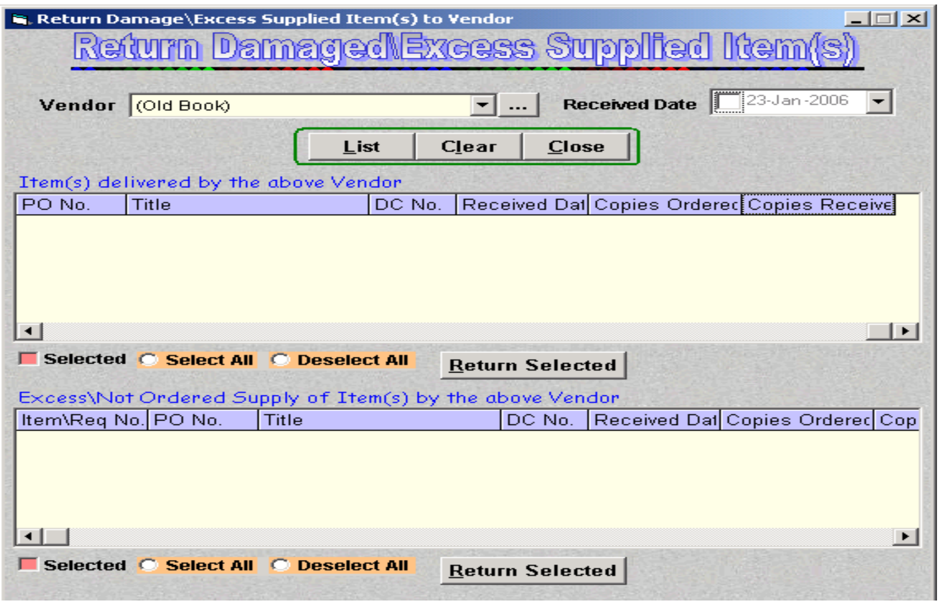


Figure 3.3.1

3.3.2. Transfer all Received Items' Details for Staging:

Staging is a process of passing the received items for accessioning. Through this screen you can transfer all the items that have been recently procured into the library and maintain the corresponding records.

This function allows you to transfer details of all the items received (i.e., only for the items received under the PO) before staging the items for accessioning. A small message box appears asking ***"Do you want to transfer all the details of the newly received items for accessioning"***. If you select the **Yes** button another message box appears confirming that all newly received items are transferred for accessioning. If you select the **No** button then the action will be terminated.

3.3.3. PO Wise list of Item(s) Awaiting Processing:

1) With this screen you are able to obtain the list of items that are yet to be accessioned according to the Purchase Order.
2) To activate this function click on **Accession** menu and select **PO Wise list of Item(s) Awaiting processing** submenu.

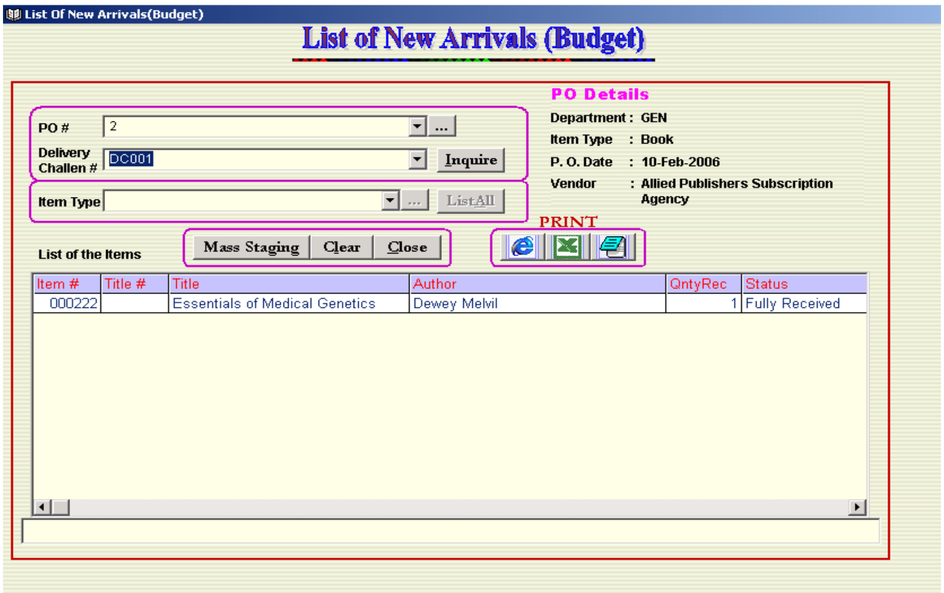


Figure 3.3.3

3) Here, you can list the received items according to ***PO No.*** and ***DC No.*** or according to the ***Item Type***. The ***PO Details*** are displayed at the top right corner of the screen for reference.
4) Once the records are displayed in the ***List of Items*** grid, you can stage the items before accessioning by clicking on the **Mass Staging** button.
5) Staging can be done in two ways.
   - Double click on the item to be staged where you must enter the Accession no. and Title No. under which the item is to be accessioned.
   - You can Mass Stage all the Items received by clicking **Mass Staging** button, provided that the Title Numbers for all the items are entered previously
6) The print preview of the above list can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

3.3.4. DC Wise list of Item(s) Awaiting Processing (Not ordered):

1) Using this screen, you are able to list all the items according to the DC No. (Specially for those items that are not ordered/ no PO has been created) and stage the items before accessioning.
2) Select the **Accession** menu and click on the **DC Wise list of Item(s) Awaiting Processing (Not ordered)** submenu.

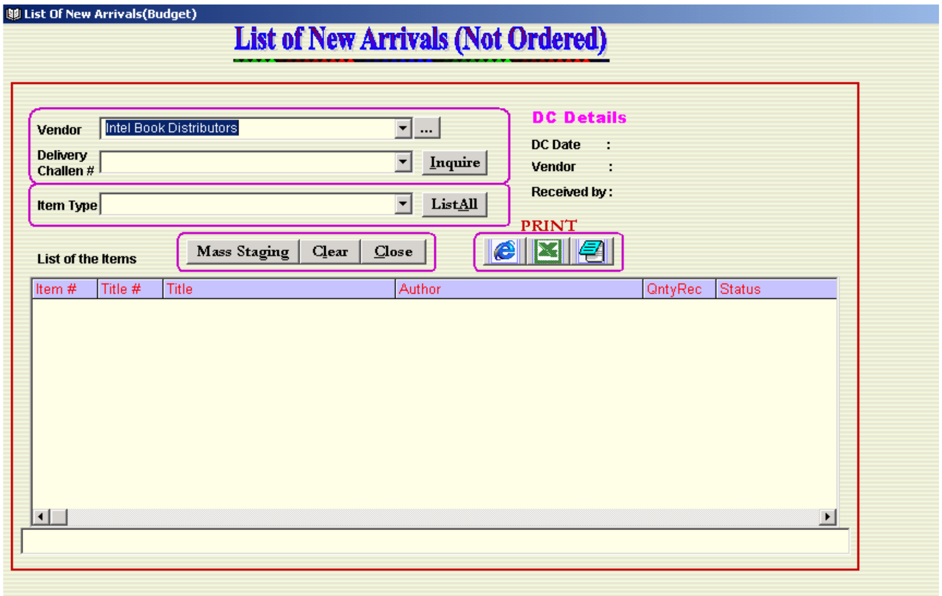


Figure 3.3.4

3) Here, also you can list the received items according to ***PO No.*** and ***DC No.*** or according to the ***Item Type***. The ***PO Details*** are displayed at the top right corner of the screen for reference.
4) Once the records are displayed in the ***List of Items*** grid, you can stage the items before accessioning by clicking on the **Mass Staging** button. Staging can be done in two ways that has been explained in the above section.
5) The print preview of the above list can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

3.3.5. Staging: Awaiting Cataloguing:

1) Staging is a process of passing the received items for accessioning. With this screen you are able to obtain the list of items that are yet to be accessioned according to the item type.
2) Select **Staging: Awaiting Cataloguing** submenu from the New Arrivals menu to open the screen titled as **List of New Arrivals in Staging.**
3) All the items that you had staged earlier, from the previous screens, will be displayed here when you select the appropriate **Item Type** along with the details such as **Accession no, Title, etc.**

4) Select each **accession no** displayed in the **List of items ordered** one by one and press on **Accession** button. The item is accessioned and list reloaded. **Accession All** button will send the entire data to the accession register.
5) The print preview of can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

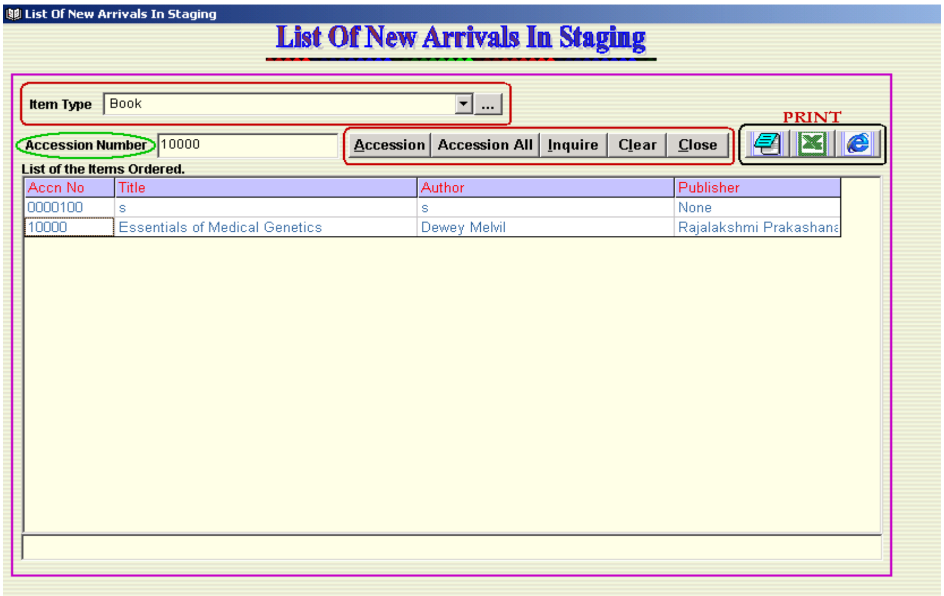


Figure 3.3.5

3.4. Binding:

3.4.1. Binding Order:

1) This screen is required for placing the binding order for the received items maintaining the details.
2) To enable this function click on the **Binding Order** submenu present in the **Binding** menu.

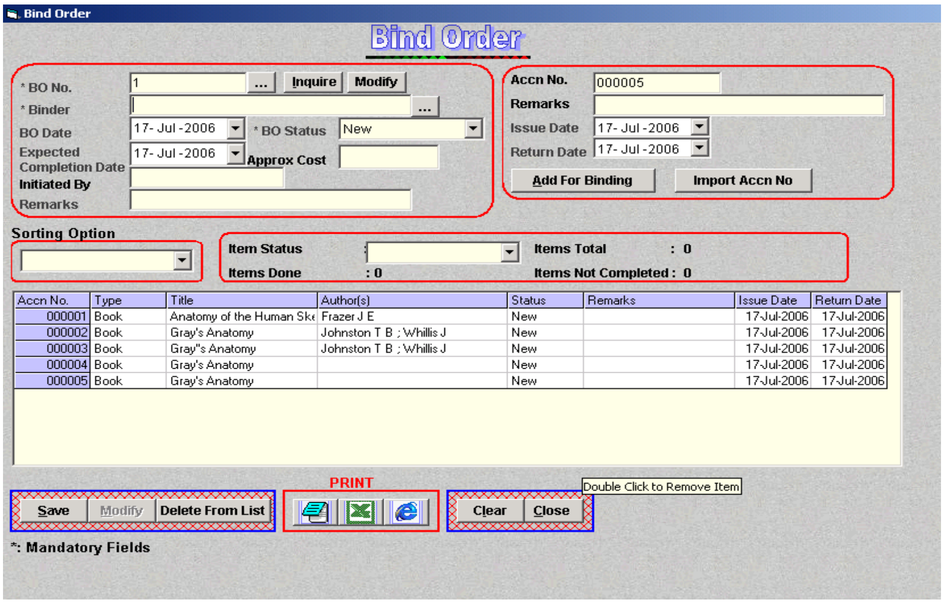


Figure 3.4.1

3) Here, you can add the ***Accession No.*** of the item being sent for binding along with the binder details by using **Add for binding** button.
4) You can also import a list of Accession Nos. saved in any .txt files, to be sent for binding with the help of **Import Accession No** button.
5) The displayed list can be sorted out as per your preference by selecting from the ***Sorting Option***.

6) The Item Status along with the other item details will also be displayed in the respective fields.
7) **<u>Delete from List</u>** button allows you to delete the record from the list after you have selected the particular record.
8) The print preview of can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

3.4.2. Binding Order List:

With this screen you can keep a track of the binding orders that have been placed to the respective binders.

To access this screen, select **Binding** menu and click on **Binding Order List** submenu. List of items sent for binding can be obtained according to the Binding Status or according to the Binder's Name. The print preview of the above list can be obtained in Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

3.4.3. Binding Return:

1) Using this screen you are able to keep a record of the received items, which had been sent for binding, according to the binding challan number and binder details.
2) Select the **Binding Return** submenu from the **Binding** pull down menu to activate the screen.

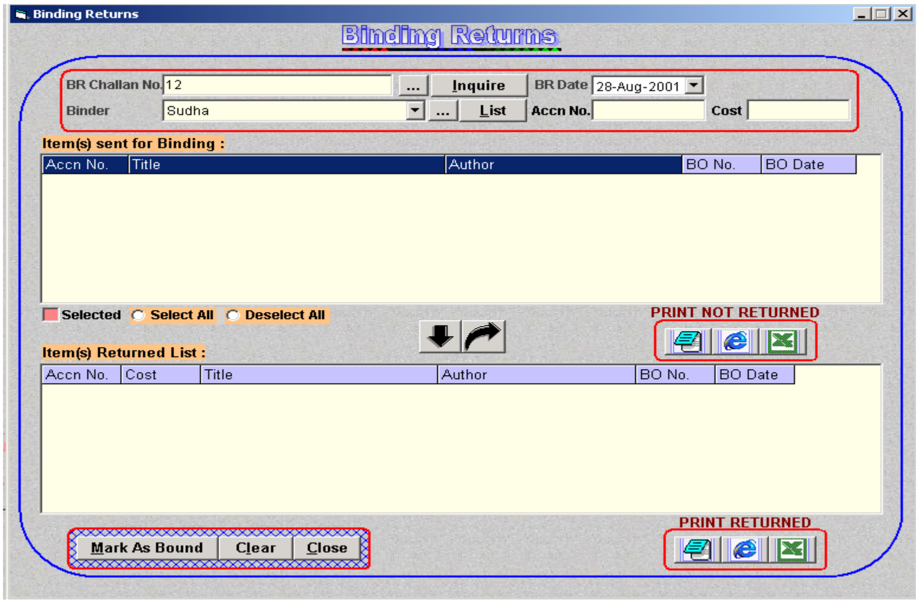


Figure 3.4.3

3) Enter the details of the Challan No., Binder Name etc, to Inquire or List the records.
4) Items that are returned back from the Binders can also be added using this screen. All Items (Books) that are sent to a particular Binder can be listed here and the selected items from the list can be moved to the ***Items Returned List*** grid by clicking the **<u>Down Arrow</u>** button.
5) While moving the items you will be asked to enter the binding cost for each item. Two options are provided here:
   - <u>Cost of Selected Items</u>: With this option, whatever the cost you enter in this box, it will be assigned to all the selected items. For ex: If you select 5 items and enter 30 in this box, cost for all the 5 items will be assigned 30 each.
   - <u>Total Cost of all the Selected Items:</u> Here, whatever the cost you enter in this box, it will be divided by no. of items selected. For ex: If you select 5 items and enter 500 in this box, cost for all the 5 items will be assigned 100 each. i.e., 500/5=100
6) Separate Print options like **<u>Print Not returned</u>** and **<u>Print Returned</u>** are provided for ***Items Sent for Binding*** and ***Items Returned from Binding*** respectively.

3.4.4. Binding Return List:

This screen allows you to keep a track of the items that have arrived after binding. Click on **Binding Return List** submenu from the **Binding** pull down menu to open the screen. List of the items that are received back from the Binder can be entered using this screen. The print preview of the above list can be obtained in Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

3.5. Reports:

3.5.1. Customized Search on Requisition:

1) Using this screen you are able to search for any request, that have been already placed by the library members, which are based on different search criteria present in the screen. It is useful for report generation also.
2) Select the **Reports** menu and click on the **Customized Search on Requisition** submenu to enable this function.
3) Here, you can search for the list of requested items and its details, by giving one or more search criteria, along with the combination of Boolean functions such as *AND*/*OR*. This will help in searching the exact record that you are looking for.
4) You can collectively search the records, by using all the search criteria combination, present in the screen and clicking on the **Search** button.
5) **List All** button is provided which will list the entire records in the **Customized Search Results** screen.
6) The records matching the entered criteria are displayed on the **Customized Search Results** screen, where you can sort the records, by choosing the available data from the **Sort criteria** list box. Here, you are able to view the **No. of Records** and **No. Of Copies** for the entered criteria.
7) The print preview of the above list can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.
8) Select the boxes of the required **Fields** and **Field Length** from the given options. All the marked fields are listed in the box, provided at the right side of the screen.
9) If you want to arrange the marked fields according to your priority, then select the particular field from box, by a single click of the mouse. Now, click on the **Up** or **Down** arrow keys depending upon your priority.
10) Also, you can sort the records, by three combinations present in the **Order By** option namely **First**, **Second** and **Third**, where the preference is given to the **First.**
11) In the **Notepad Format**, two additional options, **"Comma separated (Full Length)** and **Comma Separated**" are given. This will cause the reports to be displayed in such a way, where all the fields are separated by commas, instead of being displayed in the default tabular format.

3.5.2. Customized Search on RFP:

1) This screen allows you to search for the RFP details that have been already placed by the Librarian or any other authorized person, depending on the various search criteria present in the screen. This is useful during report generation.
2) Select the **Reports** menu and click on the **Customized Search on RFP** submenu to enable this function.
3) Here, you can search for the list of RFP and the details of items under it, by giving one or more search criteria, along with the combination of Boolean functions such as *AND*/*OR*. This will help in searching the exact record that you are looking for.
4) You can collectively search the records, by using all the search criteria combination, present in the screen and clicking on the **Search** button.
5) **List All** button is provided which will list the entire records in the **Customized Search Results** screen.
6) The records matching the entered criteria are displayed on the **Customized Search Results** screen, where you can sort the records, by choosing the available data from the **Sort criteria** list box. Here, you are able to view the **No. of Records** and **No. Of Copies** for the entered criteria.
7) The print preview of the above list can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

3.5.3. Customized Search on PO:

1) This screen is required for searching the details regarding the Purchase Order that have been already placed by the Librarian, based on the various search criteria present in the screen. Also, this is useful for generating reports.
2) Select the **Reports** menu and click on the **Customized Search on PO** submenu to enable this function.
3) Here, you can search for the list of PO and the details of items under it, by giving one or more search criteria, along with the combination of Boolean functions such as *AND*/*OR*. This will help in searching the exact record that you are looking for.
4) You can collectively search the records, by using all the search criteria combination, present in the screen and clicking on the **Search** button.
5) **List All** button is provided which will list the entire records in the **Customized Search Results PO** screen.
6) The records matching the entered criteria are displayed on the **Customized Search Results** screen, where you can sort the records, by choosing the available data from the **Sort criteria** list box. Here, you are able to view the **No. of Records** for the entered criteria.
7) The print preview of the above list can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

3.5.4. Customized Search on Invoice:

1) Using this screen, you are able to search for the Invoice details based on the different search criteria present in the screen and also generate the respective reports.
2) Select the **Reports** menu and click on the **Customized Search on Invoice** submenu to enable this function.
3) Here, you can search for the list of Invoices and the details of items under it, by giving one or more search criteria, along with the combination of Boolean functions such as *AND*/*OR*. This will help in searching the exact record that you are looking for.
4) You can collectively search the records, by using all the search criteria combination, present in the screen and clicking on the **Search** button.
5) **List All** button is provided which will list the entire records in the **Customized Search Results** screen.
6) The records matching the entered criteria are displayed on the **Customized Search Results** screen, where you can sort the records, by choosing the available data from the **Sort criteria** list box. Here, you are able to view the **No. of Records** and **No. Of Copies** for the entered criteria.
7) The print preview of the above list can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

3.5.5. Customized Search on Payments:

1) This screen allows you to search for payment details based on the search criteria present in the screen and generate the respective reports.
2) Select the **Reports** menu and click on the **Customized Search on Payments** submenu to enable this function.
3) Here, you can search for the list of payments made along with Invoice details and Vendor details, by giving one or more search criteria, along with the combination of Boolean functions such as *AND*/*OR*. This will help in searching the exact record that you are looking for.
4) You can collectively search the records, by using all the search criteria combination, present in the screen and clicking on the **Search** button.
5) **List All** button is provided which will list the entire records in the **Customized Search Results** screen.
6) The records matching the entered criteria are displayed on the **Customized Search Results** screen, where you can sort the records, by choosing the available data from the **Sort criteria** list box. Here, you are able to view the **No. of Records** and **No. Of Copies** for the entered criteria.
7) The print preview of the above list can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

3.5.6. Customized Search on Delivery Challan:

1) This screen allows you to search for delivery challan details, that has been received by the librarian or by any other authorized person, based on the search criteria present in the screen. It is useful during report generation.
2) Select the **Reports** menu and click on the **Customized Search on Delivery Challan** submenu to enable this function.
3) Here, you can search for the list of delivery challan along with invoice no. and payment details, by giving one or more search criteria, along with the combination of Boolean functions such as *AND*/*OR*. This will help in searching the exact record that you are looking for.
4) You can collectively search the records, by using all the search criteria combination, present in the screen and clicking on the **Search** button.
5) **List All** button is provided which will list the entire records in the **Customized Search Results Delivery Challan** screen.
6) The records matching the entered criteria are displayed on the **Customized Search Results Delivery Challan** screen, where you can sort the records, by choosing the available data from the **Sort criteria** list box. Here, you are able to view the **No. of Records** for the entered criteria.
7) The print preview of the above list can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

3.5.7. Customized Search on Quotation:

1) This screen allows you to search for information regarding the quotation details for a particular RFP along with the vendor, based on the search criteria present in the screen. This is also useful for generating reports.
2) Select the **Reports** menu and click on the **Customized Search on Quotation** submenu to enable this function.
3) Here, you can search for the list of quotations obtained from different Vendors along with RFP details, by giving one or more search criteria, along with the combination of Boolean functions such as *AND*/*OR*. This will help in searching the exact record, which you are looking for.
4) You can collectively search the records, by using all the search criteria combination, present in the screen and clicking on the **Search** button.
5) **List All** button is provided which will list the entire records in the **Customized Search Results** screen.
6) The records matching the entered criteria are displayed on the **Customized Search Results** screen, where you can sort the records, by choosing the available data from the **Sort criteria** list box.
7) The print preview of the above list can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

3.5.8. Search Item(s) Returned To Vendor(s):

1) Using this screen you are able to view the list of items that have been returned to the vendor based on the different search criteria present in the screen. It is useful while generating reports.
2) Select the **Reports** menu and click on the **Search Item(s) Returned To Vendor(s)** submenu to enable this function.

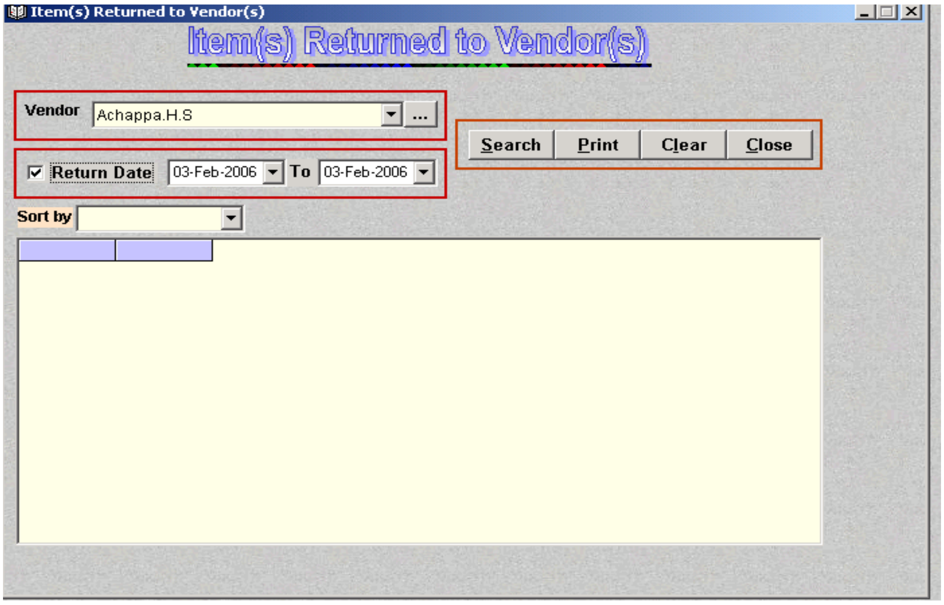


Figure 3.5.8

3) Here, you can search for items that are returned back to Vendors entering the desired search criteria.
4) The Returned Items can be searched for a particular Vendor, for a Date Range or both the above criteria present in the screen and clicking on the **Search** button.
5) The records matching the entered criteria are displayed in the grid, where you can sort the records, by choosing the available data from the **Sort By** list box.
6) The print preview of the above list can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

3.5.9. Others Reports:

1) In this screen the entire reports in Budget system have been grouped under this submenu. This screen can be accessed by selecting the **Reports** menu and clicking on the **Other Reports** submenu.
2) *Budget*, *Requisition* and *Purchase Order* are some of the main reports, for which reports can be generated. Plus sign (+) indicates that there are various sub reports available under that particular main report.
3) For your reference the list has been shown below:

A. Budget
- Annual Budget Summary

B. Accession Register
- RFP
  - RFP Details
- Quotation
  - Quotation Received
  - Quotation Comparison Txt

C. Purchase Order
- Vendor Details
- Binder Details
- All POs Report
- PO Invoice/ Payment Report

3.6. *Account:*

3.6.1. Define Schedules and Account Heads:

1) This screen is required to maintain the information regarding vendors or party account details as well as various other account types.
2) This screen can be accessed by, selecting the **Account** menu and clicking on the **Define Schedules and Account Heads** submenu.

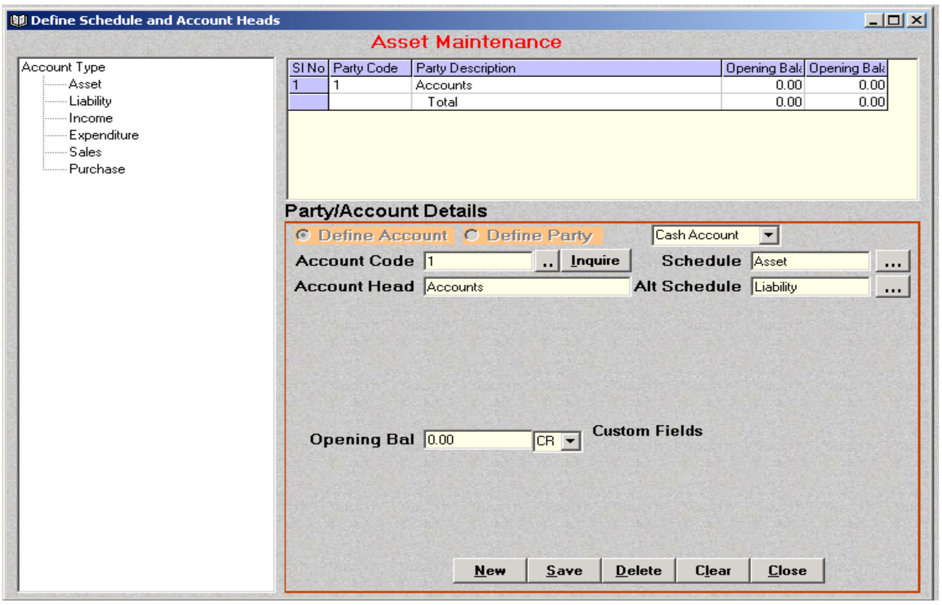


Figure 3.6.1

3) Here, you can maintain information of Vendors or Party Account details and various Account Types.
4) Each Vendor (Party) must be given a unique Party Code and Account details must be added under the Party Code.
5) Party and Account Details can be entered into different Account Types like Sales, Expenditure, Purchase, etc., as required.
6) After all the relevant details have been entered click on the **Save** button to add the records.

3.6.2. Receive Amount:

1) This screen allows you to maintain the details of amount received from the party towards the library asset.
2) Click on the **Receive Amount** submenu from the **Account** pull down menu.

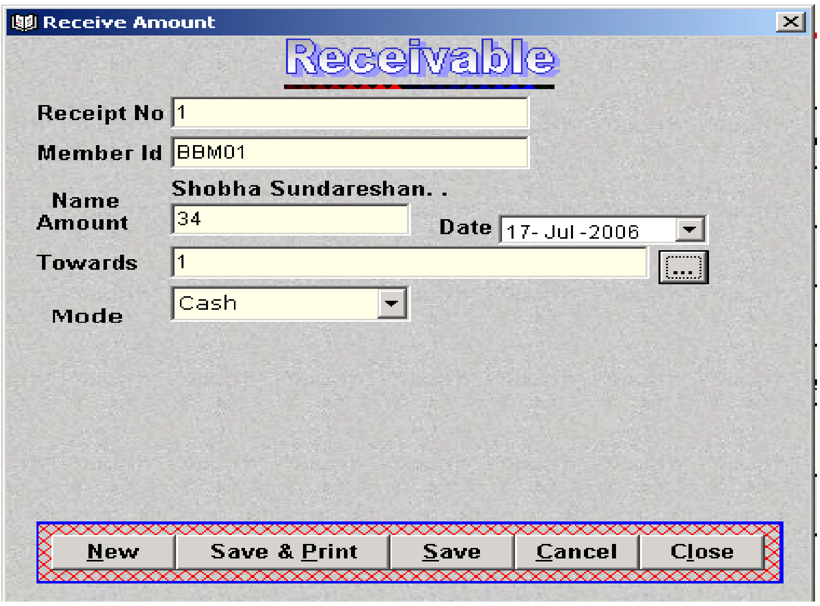


Figure 3.6.2

3) Click on the **New** button if you want to enter a new record. The ***Receipt No***. is automatically generated in this case.
4) The amount received from a member, can be added along with mode of payment. Click on the **Save** button to add the record.

5) **Save and Print** button allows you to save the record and simultaneously take a print out of the same. This can be printed as a receipt for receiving the amount and given to the concerned Member.

3.6.3. Pay Amount:

1) This screen is useful for maintaining the details of amount paid from the library asset to the member.
2) This function can be enabled by, clicking on the **Account** menu and selecting **Pay Amount** submenu.

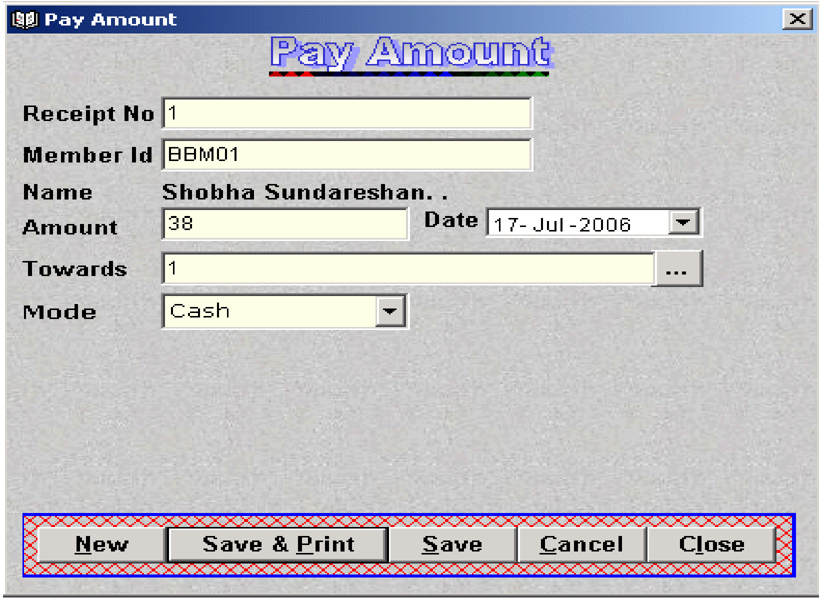


Figure 3.6.3

3) Click on the **New** button if you want to enter a new record. The ***Receipt No***. is automatically generated in this case.
4) The amount paid to a member can be added along with mode of payment and other details. Click on the **Save** button to add the record.
5) By using **Save and Print** button, a receipt for paying the amount from the Library Asset can be printed and maintained as a proof of payment.

3.7. Setup:

All these functions have been described in the **Setup and Security** module under the **Initial Setup screens** submenu. You may refer the above document if you require.

3.7.1. Binders
3.7.2. Departments
3.7.3. Subjects Tree
3.7.4. Publishers
3.7.5. Item Type
3.7.6. Source
3.7.7. Vendors
3.7.8. Financial Period
3.7.9. Html Setup
3.7.10. Screen Setup
3.7.11. Tool Bar

4. CATALOGUE AND ACCESSIONING:

Being one of the most important features, it is a key to the resources of a library. This module will allow you to efficiently enter the catalogue and accession details of both book as well as non-book materials. It also provides you the ability to transfer data, import data from text and excel sheets, stock verification, multi language data entry, catalogue card generation, customized and statistical reports, extensive search facility etc.

How to access the Catalogue and Accessioning module?

a) Click once on the **Catalogue and Accessioning** module, which appears on the front page of Easylib software, to open the **Easylib Login** screen.

b) Enter the correct ***User ID*** and ***Password***.

c) The main page appears containing a list of menus and sub-menus of **Catalogue and Accessioning** module which are displayed below: -

4.1. New Arrivals

4.1.1. List of Non Budgeted Arrivals

4.1.2. Item details of Non Budgeted Arrivals

4.1.3. PO Wise List of Items Awaiting Processing

4.1.4. Staging: Awaiting Cataloguing

4.2. Accession and Catalogue

4.2.1. Book Accession Register

4.2.2. Non Book Accession Register

4.2.3. Customized Accession Register

4.2.4. Multi Language Accession Register

4.2.5. Multi Language Item Listing

4.2.6. Catalogue Cards Generation

4.2.7. Data Sheet Preparation

4.2.8. Location set up by Subjects

4.3. Stock Verification

4.3.1. Reference Dates Maintenance

4.3.2. Stock Verification Numbers Maintenance

4.3.3. Stock Entry

4.3.4. Missing Stock Generation

4.3.5. Customized Search on Stock Entry/ Missing Stock

4.3.6. Withdrawn and Lost Items

4.4. MARC

4.4.1. MARC 21 Reader

4.4.2. Import Data

4.9. Window

4.10. Help

4.1. New Arrivals:

New Arrivals feature, will keep a track of the new items that arrives in the library. Here, before accessioning the items, its details can be entered and once the item gets the approval from the management it can be accessioned either individually or in bulk.

4.1.1. List of Non Budgeted Arrivals:

1) Using this screen, you are able to view the list of newly arrived items that have been procured without placing the purchase orders. Staging of these items can also be performed from this screen.
2) To enable this function click on the **New Arrivals** menu and select the **List of Non Budgeted Arrivals**.
3) This screen allows you to see the list of all the newly entered items in the library that has not been accessioned yet.
4) First select the **Item Type** to view the display list in the grid. These items have not been accessioned.
5) Before accessioning a particular record, you need to stage the record. This can be done by selecting the **Stage** button to assign accession number for individual records or **Mass Stage** button to assign accession nos. for more than one record.
6) Select any print button to view the preview in Notepad, Excel or HTML format.

4.1.2. Item details of Non Budgeted Arrivals:

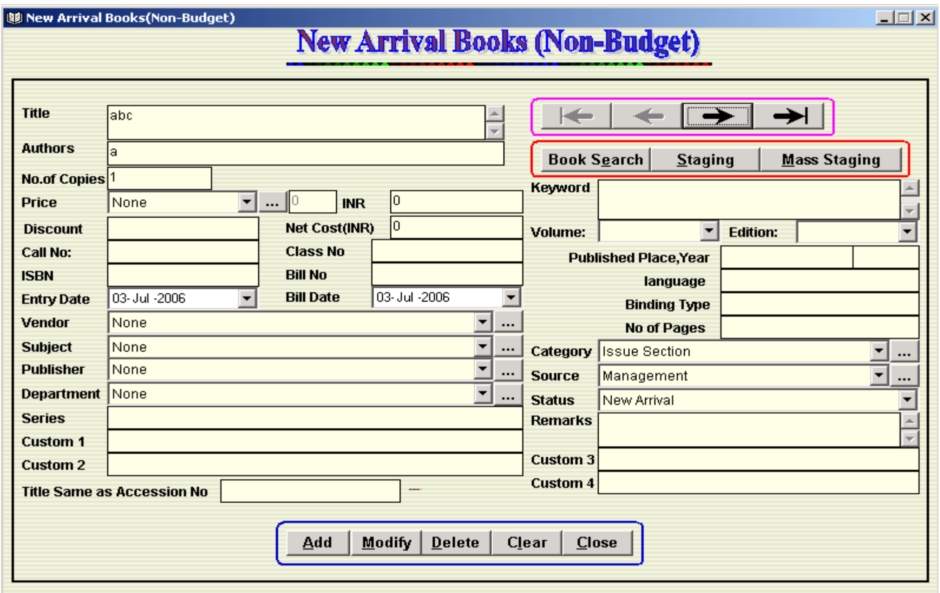


Figure 4.1.2

1) This screen is required to enter the details of the newly arrived items procured without the purchase order.
2) Go to the **Item Details of Non Budgeted Arrivals** submenu in the **New Arrivals** menu to view the screen.
3) This screen is used for entering the details of a particular item that will be displayed in the **List of Non Budgeted Arrivals** screen.
4) Here the advantage is that you can enter all the details without providing any **Accession Number** for the entered record.
5) Once you complete the data entry of all the new arrivals, select **Staging** option for assigning **Accession number** individually, for the specific item you have received (all copies included) or you can select **Mass Staging** to generate **Accession numbers** at once for all the entries that you have made.

6) When you chose to **Stage** a book, the accession number is locked for the specific book and you cannot assign the same number to any other item even though it has not been accessioned yet.
7) The option to search for a particular book has also been provided in the screen through **Book Search** button.
8) Navigation buttons are present so that you can see browse through the entered records.

4.1.3. PO Wise List of Items Awaiting Processing:

1) With this screen you are able to obtain the list of items that are yet to be accessioned according to the Purchase Order.
2) Click on **New Arrivals** pull down menu and select the **PO Wise List of Items Awaiting Processing** submenu to go to this screen.
3) In the screen titled as **List of New Arrivals (Budgeted)** choose the purchase order number by scrolling through the list. The *PO Details* like ***Department***, ***Item Type, P.O. Date*** and ***Vendor*** appear on the right side of the screen. Here, only the purchase orders that have been delivered are listed in the combo box.
4) Choose the **Delivery Challan** on the scrolling list. Only the delivery challans that have been delivered are listed in the combo box.
5) The list of new arrivals is loaded on the screen by this action.
6) In case, you want to see the list of all new arrivals of a specific type, irrespective of purchase order and delivery challan, press **Clear** button and choose the ***Item type***. This will list all the relevant items in the screen.
7) Here also you can do **Mass Staging** of new arrivals as mentioned above.

4.1.4. Staging: Awaiting Cataloguing:

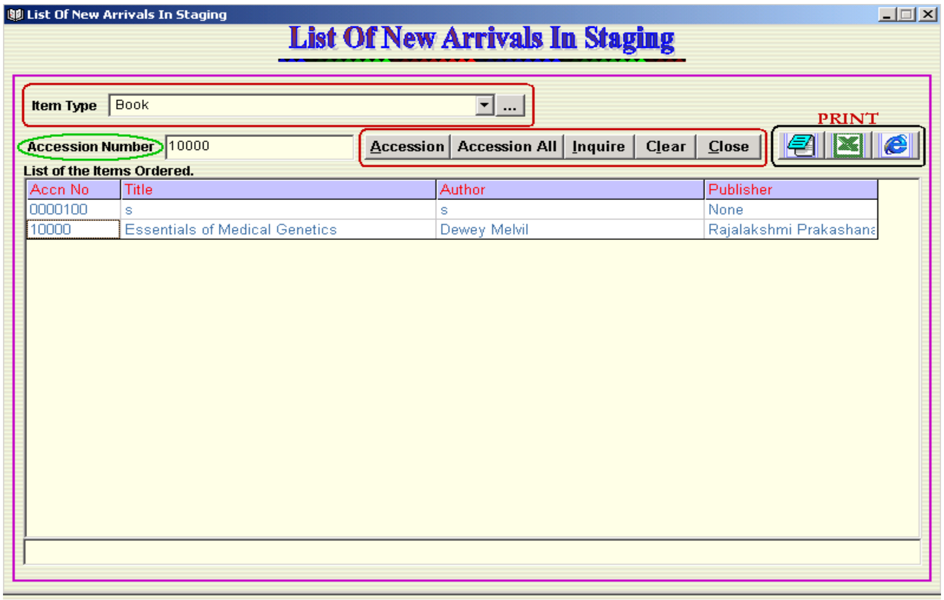


Figure 4.1.4

1) Staging is a process of passing the received items for accessioning. Here, you are able to obtain the list of items that are yet to be accessioned according to the item type and also accession them.
2) Select **Staging: Awaiting Cataloguing** submenu from the **New Arrivals** menu to open the screen titled as **List of New Arrivals in Staging.**
3) All the items that you had staged earlier, from the previous screens, will be displayed here when you select the appropriate **Item Type** along with the details such as **Accession no, Title, etc.**
4) Select each **accession no** displayed in the **List of items ordered** one by one and press on **Accession** button. The item is accessioned and list reloaded. **Accession All** button will send the entire data to the accession register.
5) Click on any of the three print buttons to view the preview.

4.2. Accession and Catalogue:

4.2.1. Book Accession Register:

How to start?

First categorize whether the details to be entered is for a book or a non-book type. According to the selected category, go to the Accession and Catalogue menu and select **"Book accession register"** or **"Non book accession register".**
Before starting the data entry, first you have to make some initial settings like creating the **Section** and setting the **Accession number format** for the **Section** according to your preference.

How to create Section for Books?

This procedure has been explained in the **Setup and Security** module under the **Initial Setup Screens** submenu. You may refer the document there if you require.

How to Create Section for Non Books (NB)?

This procedure has been explained in the **Setup and Security** module under the **Initial Setup Screens** submenu. You may refer the document there if you require.

Accession number format procedure has been explained in the **Setup and Security** module under the **Initial Setup Screens** submenu. You may refer the document there if you require.

How to enter details of Books in Accession register?

1) This screen is essential for accessioning a particular book by entering the relevant details. This will be useful during cataloguing and also while circulating the book.
2) Click on **Accession and Catalogue** menu in the menu bar. Select **Book Accession Register**. A screen appears with the caption as **Accession Register**. You are also able to access this screen by pressing **Ctrl + A** buttons, from the keyboard.

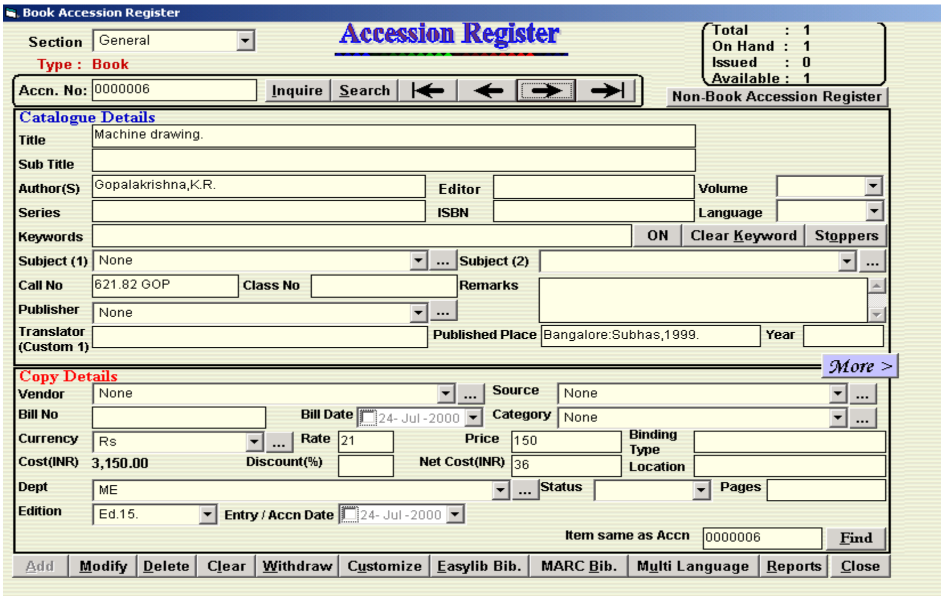


Figure 4.2.1

3) First select the appropriate **Section** in which you want to add the book. On selecting the data, you are able to view the first, last, next and previous records if any record exists in that particular section.
4) To enter a new record, click on the **Clear** button. Start entering the details of the new book beginning from the accession number.
5) To make it easier for you, we have provided an example that is generic in nature.

Example 1:

- Select *General* from the **Section**. Clear the screen and enter the **Accession number** as *000001*. You can confirm whether this accession number already exists by clicking on the **Inquire** button after entering it.

- A pop up message box appears, as ***"Accession number does not exist";*** this message confirms that you can continue entering the details of the new book. If the number you entered is already present then it will automatically display all the details that were entered.
- Enter all the main fields like **Title**, **Authors**, **Subjects**, **Vendor**, **Price Details**, etc.
- An **ON** / **OFF** button has been provided for the Keyword list box. If you click on the **ON** button, it will automatically generate the keywords as you enter the Title. On clicking the **OFF** button, no keywords will be generated automatically.
- After the desired catalogue and copy details have been entered click on the **Add** button.
- Enter the number of copies that you want to newly add in the "**No. of copies"** input box, in this case we have entered 2 and clicked on **Ok** button. This will accession the present book together with its copies. The books will be accessioned in the increment of one as accession numbers have a unique value like *000001* and *000002.*
- A pop up message screen appears informing that **"*Records from Accession Number 000001 to 000002 added successfully!*"** Select the **Ok** button to proceed ahead.

5) On the right top corner of the screen you can see the Total, On Hand, Issued and Available number of copies. This feature gives you a brief list of all the copies of a particular book for your quick glance.
6) If a particular record has to be modified then make the desired changes and select the **Modify** button. If you are modifying any catalogue details, it will ask you whether this modification is to be applied to all the copies or for that particular copy. Select your desired option.
7) A pop up message box appears with the message **"*Record modified successfully*!"** Select the **Ok** button.
8) To locate a particular record, clear the present screen and insert the accession number. You can enter the above Accession number: *000001*. Select the **Inquire** button. The records for the entered accession no. are obtained like Title, Authors, ISBN, Price, Vendor, Publisher, etc.
5) In addition to this you can also search for books by selecting the **Search** button. A separate **Search** screen appears. Select the criteria for any of the given fields and give the search option to view the display of all the matching records and their fields related to the search criteria. Select any one of the desired records to view the **Selected Book Catalogue Details.** If you double click on the selected details a new screen named **Copy Details** appears. Here, you are able to see the copy details and reservation states of the selected title. And from here you are also able to reserve any book by a particular copy.
9) By clicking on the **Reserve** button and selecting the **Title** wise reservation in search screen, it will reserve the book by Title wise for selected title with the available copy. The detailed procedure for reserving a book has been explained in **OPAC** module titled as **Procedure for reserving any item**. You may refer the document by going to the above module.
10) You can withdraw (weed out) a particular book by selecting the **Withdraw** button. This action prompts an input box to appear where in you can select the book belonging to the particular Financial Period, the Reason for withdrawing as well as your Remarks regarding it.
11) **Customize** button gives you the freedom to customize the Accession Register screen according to your preferences.
12) An important feature of this software is the **Easylib Bibliography Search** facility. Select this button so as to open Easylib Bibliography Search screen. List any criteria and select the search button. A list of items will be displayed in the table that matches the above criteria. From this list you can select any record to see the additional details on the side screen. If your search is successful then this record can be copied into the Accession Register screen through the **Transfer** button. Also you can take three types of printouts according to your preferences namely, **Notepad Report**, **HTML Report** and **Excel Report**. Through this feature you can import the data from other libraries using Easylib Software.
13) **MARC Bibliography Search** is another different kind of search through which you can import the data in the MARC format.
14) **Delete** button allows you to delete the records successfully but only after entering yes in the warning message box. A pop up message box appears informing the successful deletion of the records.
15) You can also go to the Search screen by selecting the **Find** button. Here the difference is that, while double clicking on the selected record, control will be transferred to the Accession Register by copying the complete details of the selected record.
16) **Multi language** option helps you to enter title, author and keywords in any of your desired Indian language.
17) You can see the details of all the records entered through the Accession Register, by simply scrolling through the, backward ← and forward → buttons, which stands for Previous Record and

Next Record respectively. Also you can go directly to the First Record and Last Record, by clicking on fast backward **|🡐** and fast forward **🡒|** buttons respectively.

List of Common Buttons:

- **CLEAR** button allows you to clear the records from the currently viewing screen.
- **ADD** button allows you to add a record to the database.
- **MODIFY** button allows you to modify or change any record or fields according to your preferences.
- **DELETE** button allows you to delete a record from the database.
- **CLOSE** button allows you to end the current operation and return back to the previous screen or main screen.
- **PRINT** button allows you to view the print preview of a particular page or record. In this software you have an additional feature of printing it in three formats namely, Notepad, Excel and HTML.
- **NEW** button allows you to enter a new record.
- **INQUIRE** button gives you the option to view whether the particular record exists or not. If the record exists then it will display it or else a message appears that this record does not exist.
- **FIND** button allows you to find a particular record related to the entered accession number by directly going to the Search screen.
- **🡐** And **🡒** buttons allows you to scroll through the Previous Record and Next Record respectively.
- **|🡐** And **🡒|** buttons allows you to go directly to the First Record and Last Record respectively.

List of Keyboard Shortcuts for the buttons:

1) Add 🡒 Alt + A
2) Modify 🡒 Alt + M
3) Delete 🡒 Alt + D
4) Withdraw 🡒 Alt + W
5) Customize 🡒 Alt + U
6) Easylib Bibliography 🡒 Alt + E
7) MARC Bibliography 🡒 Alt + B
8) Multi Language 🡒 Alt + U
9) Reports 🡒 Alt + R
10) Close 🡒 Alt + C
11) Find 🡒 Alt + F
12) Inquire 🡒 Alt + I
13) Search 🡒 Alt + S
14) Clear Keyword 🡒 Alt + K
15) Stoppers 🡒 Alt + O

4.2.2. Non Book Accession Register:

How to enter details of Non Book items in Accession Register?

1) This screen is essential to accession the non-book items by entering the respective details. This will be useful while cataloguing and circulating the book.
2) Click on the **Accession and Catalogue** menu in the menu bar. Select **Non Book Accession Register** to view the respective screen. You can also access this screen by pressing the **Ctrl + N** buttons from the keyboard.

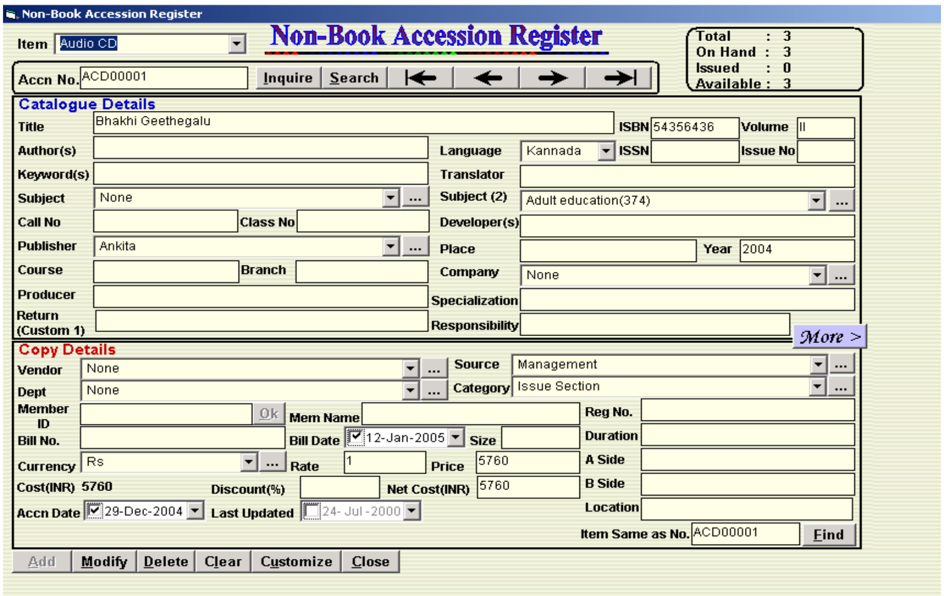


Figure 4.2.2

3) First select the appropriate Item (created earlier by using Non book Section from Setup menu) in which you want to add the Item/Non book. On selecting the data, you are able to view the first, last, next and previous records if any exist in that particular section.
4) Here an example is shown for better understanding of this function.
   Example 3:
   - Select *Book CD* from the **Item**. On selecting this data, the first previously entered record is displayed on the screen.
   - **Clear** the screen and enter the **Accession Number** as *BCD00001*. In case of any doubt, whether this accession number already exists, you can click on the **Inquire** button and check it. If the message box appears as ***"This Accession number doesn't exist"***, then you can proceed with the entering of the required details like Title, Authors, Subject, Company, Vendor, Cost, etc.
   - Click on the **More** button to view additional details like Order Numbers, E-mail Id, etc.
   - Once you enter the desired data, then select the **Add** button. Enter the number of copies that has to be added in the **Number of Copies** input box, in this case, enter 1 and click on **Ok**.
   - A message box appears as, ***"Record with Accession Number BCD00001 is added successfully!"*** Press the Enter button.
   - Now you are able to view the Total, On Hand, Issued and Available copy details, of the newly entered record, on the top right corner of the screen.

5) In addition, the facility to choose only required fields for corresponding non-book item is also provided. You can customize the screen, by selecting the required fields for the corresponding non-book item, with the help of **Customize** button.
5) The other buttons like **Modify**, **Delete**, **Close**, **Search** and **Find** have got the same functions as mentioned above in the **List of Common Buttons**.
6) Note that, you can only enter records that are related to Non Book items.

4.2.3. Customized Accession Register:

How to use Customized Accession Register?

1) Using this screen you are able to accession the book by selecting or entering the details that are available in the combo box. This will be useful while cataloguing the book and also during circulation.
2) From the **Accession and Catalogue** menu in the menu bar, select **Customized Accession Register** submenu, to view the screen.

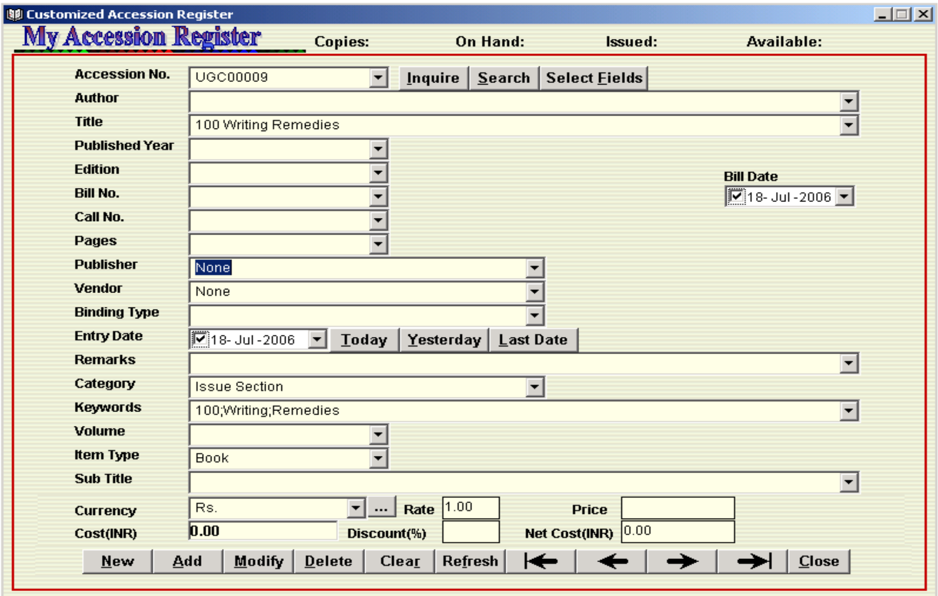


Figure 4.2.3

3) An important feature of **Customized Accession Register** or **My Accession Register** is that you can enter the details of a new book that has not been entered through the **Book Accession Register**. As the name suggests, in this screen, you have the choice of customizing the screen (or selecting your own fields), according to your preferences.
4) After entering the data, select the **<u>Add</u>** button. This action allows the successful addition of the record in the database list.
5) If you want to enter a new record, then first click on the **<u>Clear</u>** button and then select the **<u>New</u>** button. This will generate a new accession number automatically, wherein you can fill in all the desired fields.

4.2.4. Multi Language Accession Register:

<u>Entering of data in Multi Language Accession Register:</u>

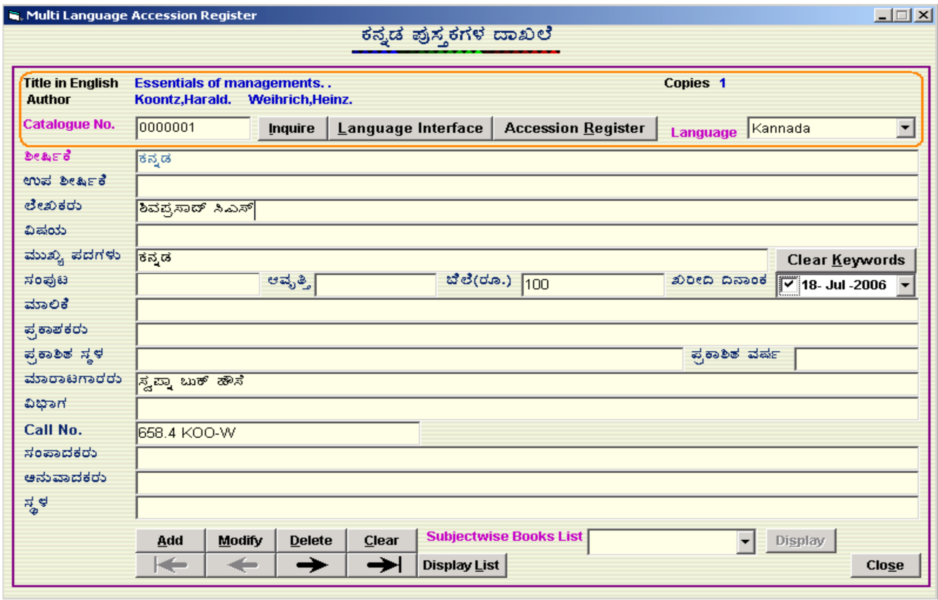


Figure 4.2.4

1) This is a special feature of Easylib, which allows you to accession the items in your local language and is also useful during the generation of reports.
2) In the **Accession and Catalogue** drop-down menu, choose the **Multi Language Accession Register** or you can view this screen, by simply pressing **Ctrl + L**.
2) Immediately, a message box appears as **“*Start The Language Interface Now*”**

3) For example, say you select the **Yes** option then, *Baraha Application Window* is opened along with a message box mentioning, ***"Make sure the Interface Language is Kannada or KGP_kbd".*** Click **Ok** to view the **Multi Language Accession Screen.**
4) If you select **No** option, then the *Baraha Application Window* will not be opened and the language settings of the screen will be according to the default one.
5) *Baraha Application Window*, allows you to select the language of your preference. In this software a list of different languages have been provided.
6) It should be noted that, first you have to enter the book details in the **Book Accession Register** and only then, can you can enter and add details of the book in the selected language, through the **Multi Language Accession Register**.
7) If you want to exit this application, just select **Exit** button from the menu bar. Enter **Ok** in the message box **"*Exit Baraha"***. If you want to open this application again, then click on the **Language Interface** button present in the **Multi Language Accession Register** screen.
8) In case, you have not entered the records of a particular book in the **Book Accession Register** then, you can go to this screen directly, by clicking on the **Accession Register** button.
9) For example, say that you want to change the language from *Kannada* to *Hindi*. Go to the **Language** drop down list box and select *Hindi*. Press the **Enter** button in the message box showing ***"Make sure your Interface Language is Hindi".*** Now, you can start entering the fields in *Hindi*.
10) If you are not able to enter the records in *Hindi*, then click on the **Language Interface** button and select *Hindi* from the list box. This will now allow you to enter the details in *Hindi*.
11) You can switch *ON* and switch *OFF* the **Baraha Language Interface**, by just clicking on the **F11** key.
12) **Display List** button, allows you to view the entire list of books, entered in the language of your choice, along with the Title Number, Title, Authors and Keywords.
13) In addition, the usual **Add**, **Delete**, **Modify** and **Close** functions are also present.

4.2.5. Multi Language Item Listing:

1) Using this screen you are able to keep a track of all the accessioned items that have been entered in the local language.
2) You can access this screen from the **Accession and Catalogue** menu by clicking on the **Multi Language Item Listing** submenu.
3) This feature enables you to see all the records that have been entered through **Multi Language Accession Register,** for a select language of your choice.
4) For example, you can view all the item records, entered in *Kannada* language, by selecting *Kannada* from the **Language** drop down list box.
5) If you feel, the displayed list is long then you can enter a particular title number, in the **Starting Title Number** list box and click on the **List** button.
6) This will now show you the list of books, starting from the entered title number onwards.
7) Also, if you double click on any record, in the displayed list then, the details of that record can be viewed at the bottom of the screen.
8) Again if you want to change any fields then, you can do so by making the changes in the bottom of the screen. Select **Add** button. A message box appears as ***"This Record already exist do you want to modify the record?"*** Enter "**Yes"** option to view the newly modified record in the display list.
9) The other buttons like **Delete**, **Clear**, **Print** and **Close** have got the same functionality, as mentioned in the **List of Common Buttons.**

4.2.6. Catalogue Cards Generation:

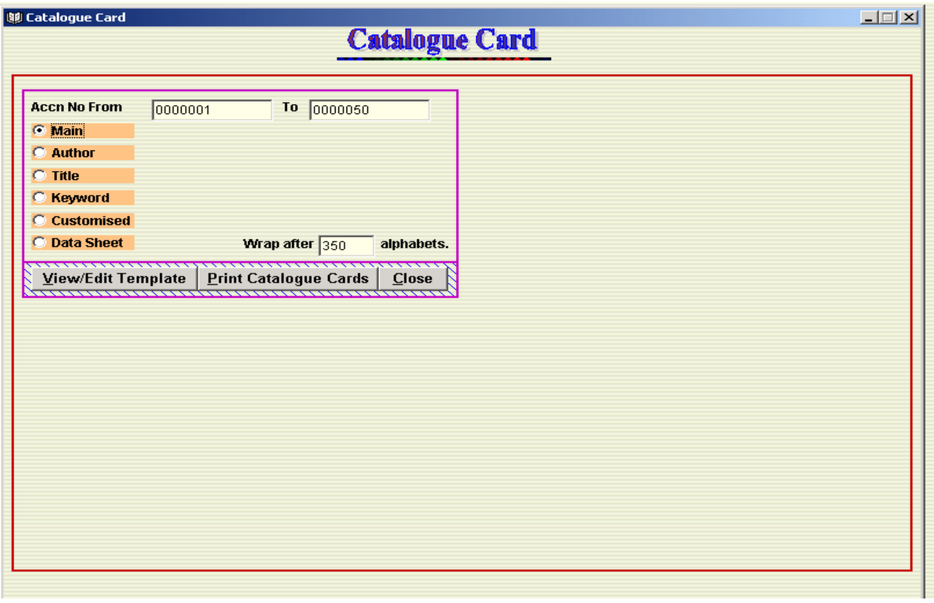


Figure 4.2.6

1) This is an important feature that has been provided in Easylib. It allows you to generate the catalogue card and also take the print for the accessioned item, as per your requirement.
2) Go to **Accession and Catalogue** main menu and select **Catalogue Card Generation** to view the corresponding screen.
3) The importance of this screen is that, you can directly print catalogue cards based on Main, Author, Title, Keyword, Customized, and Data sheet.
4) For example, enter in the **Accession number from** as *0000001* to *000005.*
5) Select **<u>Main</u>** radio button and click on **<u>Print Catalogue Cards</u>** button.
6) The cards will be printed in the format as shown below for the above criteria:

780RSJ

0000001
The songs of India
Bangalore:
Advaita Ashrama, 2006

7) Here, you also have the facility to **Wrap Alphabets,** which helps you to print data in multiple lines.
8) To perform this operation, enter the desired number in the **Wrap after Alphabets** text box and then click on the **<u>Print Catalogue Cards</u>** button.

4.2.7. Data Sheet Preparation:

1) This is one of the important features of this software wherein you can perform the mass updation of item details.
2) Click on the **Accession and Catalogue** menu and select **Data Sheet Preparation**, to go to the **Data Sheet** screen.
3) The important feature of this screen is that, you can perform **<u>Mass Update</u>** function, either for single, or for any number of multiple records.
4) Also, you have the option to **Print Catalogue Cards,** for all the multiple records, which you have entered, by clicking on the **<u>Data Sheet</u>** button.

<u>Example 4:</u>

- For example say, you have entered the values in the **Accession number** as *0000001* to *0000005*. Select the **<u>Ok</u>** button to view, a list of all the records in this range.
- Select any particular record by a single left click of the mouse, to view the **<u>Item Details</u>** on the top right hand corner of the screen.
- Here two **Accession Number** are given. They are for displaying a single record and for a particular range of records.
- Select *Published Year* (or any criteria), from the **Mass Update** drop- down list box.

- Enter *2006* in the text box present next to the **Mass Update** and select the **Ok** button for confirmation of your action.
- A message box appears as ***"Do you want to mass update Published Year"***. Select the **Yes** button.
- Another message box appears as, ***"Records updated successfully"***. Press the **Ok** button. The above action will now change the *Published Year* of all the records to *2006*.
- To print the above records in the catalogue card format, click on the **Data Sheet** button. This action leads you to the **Catalogue Card** screen.
- Select the **Main** radio button and click on **Print Catalogue Cards** button, to view the list in the notepad format.
- To take a print, go to *File > Print* and give the required details regarding the printer.

5) **Remove From List** button, will remove the selected record, temporarily from the displayed list. It should be noted that, it will not delete the record.
6) **Import Data** function allows you, to Import data from anywhere, which is stored as ".txt files".
7) **Clear** and **Close** buttons, have got the same functions, as mentioned above in the **List of Common Buttons.**

4.2.8. Location set up by Subjects:

1) Many times, members have difficulty in locating the books. This screen allows you to create a library map on the system so that members will be able to locate a particular item easily.
2) To enable this function, go to **Accession and Catalogue** menu and select **Location setup by Subjects** submenu. A screen titled as **Item Location** appears.

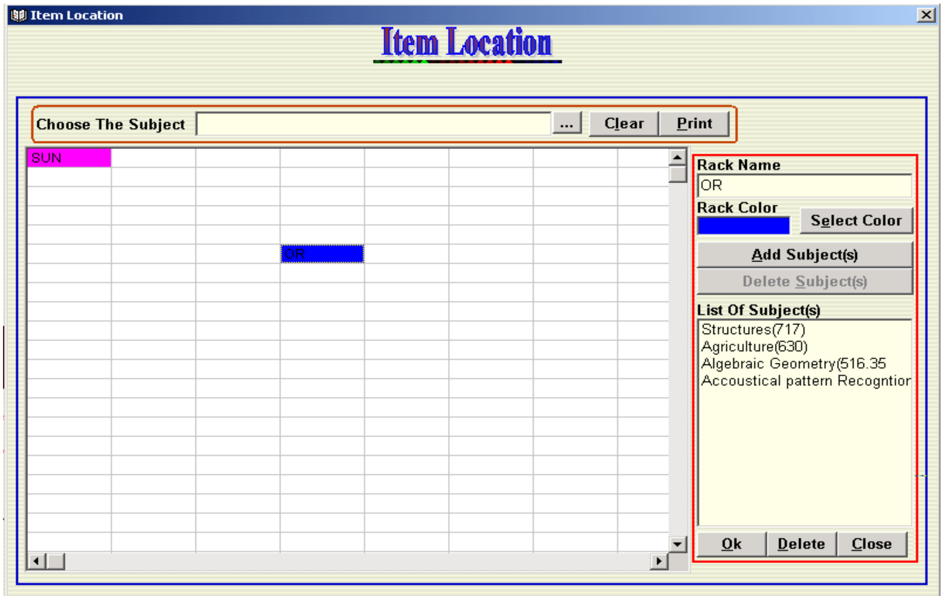


Figure 4.2.8

3) The importance of this screen is that, it helps you set your own library map on the system, so that you will be able to know what, is the location of a particular book.
   Example 5:
   - Select *Economics* from **Choose the Subject** drop-down list box.
   - Enter *ECO* in the **Rack Name** text box.
   - Select any cell, from the Grid, that is displayed in the middle of the page.
   - Now click on the **Select Color** button and select any color of your choice, say for example, *Green*. Hit the **Ok** button, to confirm your selection.
   - Immediately, the selected cell from the Grid will be displayed in *Green* color and the **Rack Name** *ECO* will be written on top of it.
   - The next step now, is to select which all subject books should be kept in this rack. For this, click on **Add Subject(s)** button and select the subject name from **Subject** window, by double clicking the mouse or by hitting the **Enter** button, from the keyboard.

- Here, let us select *Economic and professional ethics (174)*. You can add any number of subjects and all the added subjects will be displayed in the **List of Subject(s)** list box.
- If you want to delete a particular subject from the list then, first select the subject from the list to delete and then click on the **Delete Subject(s)** button.
- Now click on **Ok** button to completely add all the records.
- **Delete** button will delete this newly created rack, from the database.
- By giving the **Print** option, you can see as well as take a print in the notepad format of the, rack wise subjects that you have created, for a particular rack.

4) This screen will thus, help you in solving your difficulty, in locating the books in the library.

4.3. Stock Verification:

Stock Verification is the process, through which we can verify all the stocks that are present in the library, according to their accession numbers. This is an important function that will help in reducing the burden of keeping a track about the library stock.

4.3.1. Reference Dates Maintenance:

1) This screen allows you to maintain the reference dates of verified stocks by different users on different dates. This will be helpful during the generation of reports.
2) The **Stock Verification Reference Dates Maintenance** can be accessed, by clicking on the **Stock Verification** menu and selecting, the **Reference Dates Maintenance** submenu.
3) First, select a **Reference Date**, that is, the date at which you want to do stock verification. Enter the **Start Date** and an approximate **End Date**. You can add or modify the existing dates that are displayed in the grid by just selecting them.
4) If you want to start a fresh stock verification, click on **Clear Past Data** button to clear the previous data. A message box appears containing the message **"*Would you like to clear past verification records*?"** Press **Yes** or **No** depending upon your option. When you clear the past data, the entire data of prior stock verification is deleted and the system is made ready for a fresh stock verification.
5) You are advised to be very careful in using **Clear Past Data** button, as it will erase the entire data of all the past stock verifications. You will not be able to get old stock verification reports. This button should be pressed only once, in the beginning of new stock verification every year.
6) Also, you can go the next screen by double clicking on the records, present in the grid.

4.3.2. Stock Verification Numbers Maintenance:

1) With this screen, you are able to track the details regarding the stock verification numbers. Stock verification has a unique ID corresponding to the user.
2) To activate this screen go to the **Stock Verification** menu and select the **Stock Verification Numbers Maintenance** submenu.
3) With this screen, you can assign the **Stock Verification Number** and **User ID**, to the person who is in charge of verifying the stocks. In this way, you are able to maintain the details about the person who has verified the stocks and also the item details, for that particular reference date.
4) **Reference Date**, **Start Date** and **Start Time** are the mandatory fields that have to be entered here. **Start Date** and **Start Time** have been set by default to the present date and time. Click on the **Add** button to save this record.
5) Once the data has been saved, it will be displayed in the grid for your reference.
6) Also, you can go directly to the **Reference Dates** screen or the **Stock Entry** screen by clicking on the respective buttons.

4.3.3. Stock Entry:

1) Stock verification can be done in two ways, either by using a scanner or by doing it manually. This screen provides you to verify the stock by both these methods.
2) This screen allows you to do stock verification and this can be enabled by clicking on the **Stock Verification** menu and selecting the **Stock Entry** submenu.

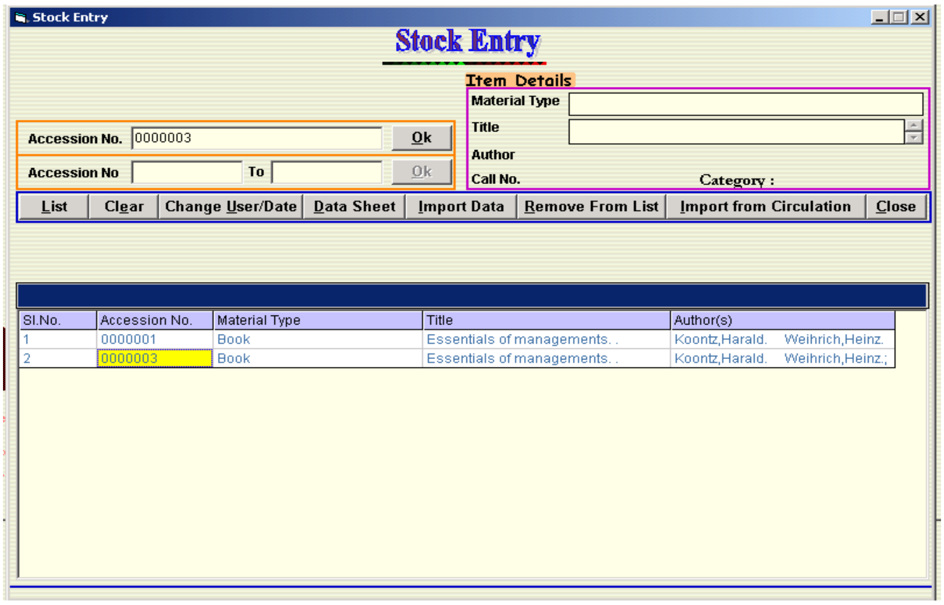


Figure 4.3.3

3) Stock verification can be done in two ways; either by using a scanner or by manually entering the accession numbers for each item in the respective fields.
4) Before starting with the verification, you have to first select the **Reference Date** and **Stock Verification Number**. Press **Yes** or **No** depending upon whether you are using a scanner.
5) If you have said **Yes** for scanner, then use the scanner to start scanning the barcodes or Accession Numbers. As soon as an item is scanned, system takes it as stock verified and adds it to the list instantly along with information of **Accession No, Material type, Title and Description.**
6) If you press **No** button then enter the **Barcode** number one-by-one manually and then press **Ok** for each record**.** You can view the resultant screen appear in the tabular form, with the details of the item viz., **Accession No, Material type, Title, Description.**
7) Click on **Change User /Date** if you want to make changes in either the reference date or the stock verification number.
8) To print the above records in the catalogue card format, click on the **Data Sheet** button. This action leads you to the **Catalogue Card** screen.
9) If you want to open some records that are already saved in some *".txt"* files, then you have the option to open that file by pressing the **Import Data** button.
10) Some books might be in circulation when the stocks are being verified. To verify these books under stock verification, **Import From Circulation** button is provided which will stock verify all the books that are currently under circulation.
11) The books that have been verified by the user will be displayed in the grid. On selecting any of the record in the list, the item details can be seen at the top right corner of the screen.

4.3.4. Missing Stock Generation:

1) Once the stock verification has been done, all the missing stock can be marked as withdrawn or lost by using this screen.
2) Select the **Stock Verification** menu and click on the **Missing Stock Generation** submenu to view the corresponding screen.
3) Once stock entry is over, you can list all the missing stock from the Library with the help of this screen.
4) Select the appropriate **reference date** on which you have made the stock entry. This action will prompt a list of all the entries, which have been made for that particular reference date, to appear on the screen.
5) Now click on **Load Missing Stock** button, to list all the records of the missing accession numbers. This function will compare between the stock verified items and the total items present in the library and hence will display the missing stock on the screen.

6) You can go directly to the **Stock Entry** and **Reference Dates** screen by clicking on the respective buttons.
7) Once all the records are listed, you can see the print preview in **Notepad** and **Excel** formats depending on your requirement.

4.3.5. Customized Search on Stock Entry/ Missing Stock:

1) This screen is essential for obtaining information about either stock entry or missing stock depending on the various search criteria present in the screen. This will be useful during generation of reports.
2) As the name suggests, this feature allows you to do the customized search on either **Stock Entry** or on **Missing Stock**.
3) Click on the **Customized Search on Stock Entry/ Missing Stock** submenu present in the **Stock Verification** menu.
4) Here also, various search combinations are possible along with **Reference Date**, **Stock Verification Number**, **Stock Verification Date** and **Accession Number**.
5) The search results can be viewed in the corresponding **Customized Search Results** screens, where the print preview of the reports can be seen in Notepad, HTML and Excel formats.

4.3.6. Withdrawn and Lost Items:

1) Using this screen, you are able to keep a track of all the withdrawn and lost items that were missing during the stock verification process. This will be helpful while generating the reports.
2) To activate this function, click on the **Withdrawn and Lost Items** submenu in **Stock Verification**.
3) After the stock verification has been done and the missing stock generated, you can verify through this screen whether the missing stock have been lost or withdrawn due to damage.
4) The items that have been withdrawn through the Accession register can also be viewed here. To find the missing stock, first select the **Financial year**, the **Item type** and the **Reason** for losing. These entries will help in keeping the track of the lost items in the library.

4.4. MARC:

4.4.1. MARC 21 Reader:

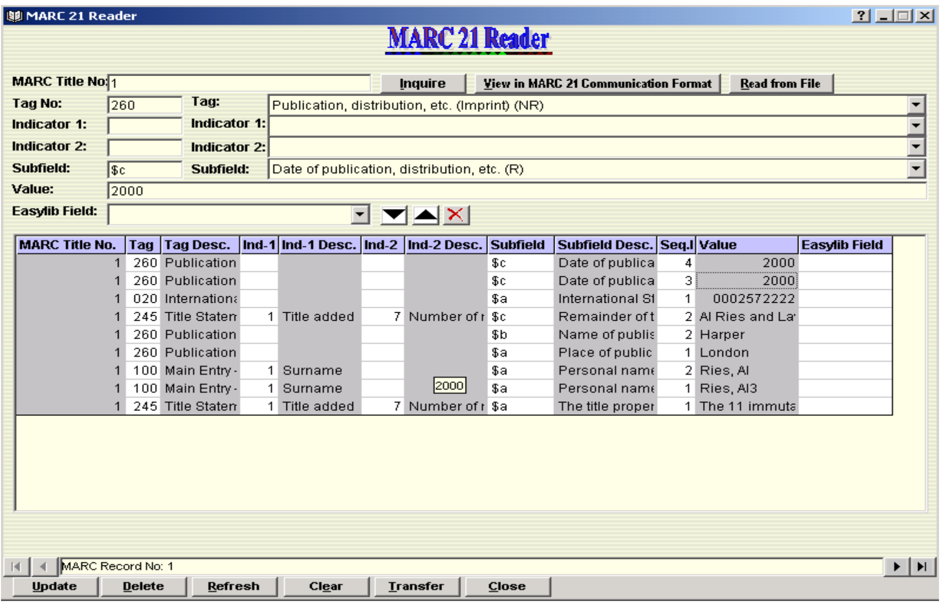


Figure 4.4.1

4.4.2. Import Data:

This submenu can be accessed by selecting the **MARC** pull down menu and clicking on the **Import Data** submenu. This screen has already been described in Setup and Security module. You may refer the document by going to the Setup menu above module.

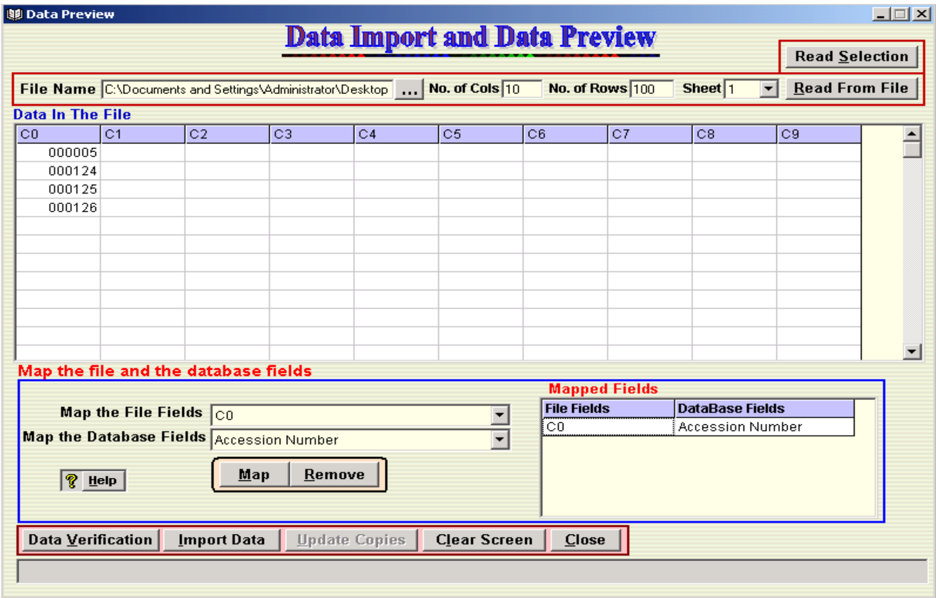


Figure 4.4.2

4.5. Reports:

This function, allows you to arrange all your documents, in a very systematic and easily accessible way, by generating customizable reports. Here, you are able to see all the reports, related to library information. In addition, various Statistical Reports are present. Each of these reports can be printed, sent as an e-mail etc.

4.5.1. Customized Reports – Books:

How to generate a particular report?

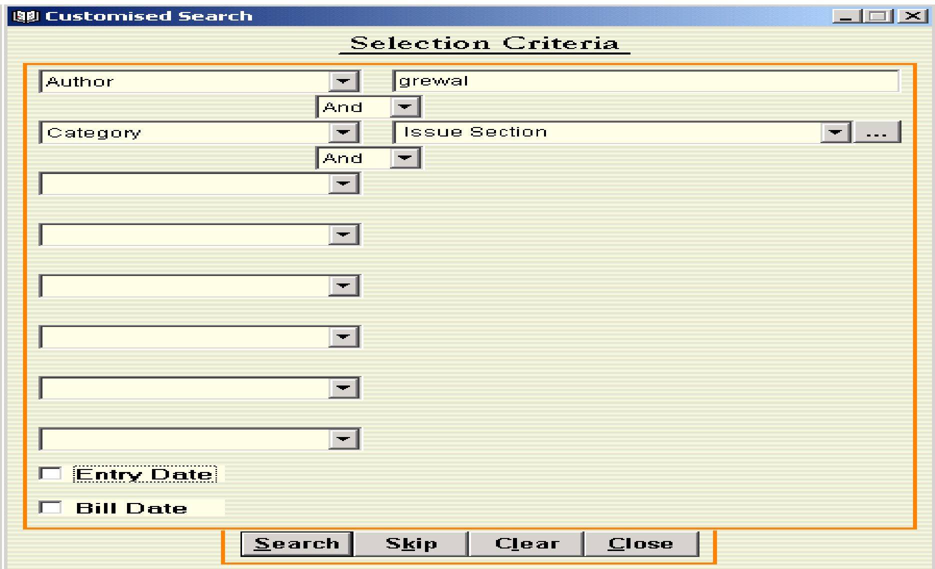


Figure 4.5.1

1) This screen allows you to search for the book details based on the customized search criteria and also generate the reports.
2) Select the **Reports** main menu and click on **Customized Reports – Books** to activate this feature, which is also titled as **Customized Search**.

3) Here, you can search for the individual book accession, by giving one or more search criteria, along with the combination of Boolean functions such as *AND*/*OR*. This will help in searching the exact record that you are looking for.
   E.g., suppose the first search criterion that you choose is *Subject* and the value for it is *Mathematics*, the second search criteria chosen is *Author* and the value given is *Khanna*. If you give *AND* option, it will search only for books, written by *Khanna* under the *Mathematics* Subject. If you give the *OR* option, then it will give the search result for either *Mathematics* subject or for books written by *Khanna*.
4) You can collectively search the records, by using all the search criteria combination, present in the screen and clicking on the **<u>Search</u>** button. Next, select an option from the **Search Type**, which is mandatory.
5) Once the records are displayed on the **Customized Search Results** screen, you can sort the records, by choosing the available data from the **Sort criteria**. Here, you are able to view the **No. of Records** for the entered criteria. Click **<u>Print</u>** to print your report in HTML, Excel or Text Format.
6) Select the boxes of the required **Fields** and **Field Length** from the given options. All the marked fields are listed in the box, provided at the right side of the screen.
7) If you want to arrange the marked fields according to your priority, then select the particular field from box, by a single click of the mouse. Now, click on the **<u>Up</u>** or **<u>Down</u>** arrow keys depending upon your priority.
8) Also, you can sort the records, by three combinations present in the **Order By** namely **First**, **Second** and **Third**, where the preference is given to the **First**.
9) In the **Notepad Format**, two additional options, **"Comma separated (Full Length)** and **Comma Separated**" are given. This will cause the reports to be displayed in such a way, where all the fields are separated by commas, instead of being displayed in the default tabular format.
10) If you want to print some records that are already present in some *".txt"* files, then you have the option to skip this search procedure and go directly to the **Customized Search Result** screen, by clicking on the **<u>Skip</u>** button.
11) Now click on the **<u>List form File</u>** button and select the file in which the records are saved, so that the records are displayed in the **Customized Search Result** screen. From here, you have the option to view or print the **<u>Catalogue Card</u>** by clicking on this button.
12) **<u>Groupwise Reports</u>** feature, allows you to see the search reports related to a particular group, like Departmentwise, Subjectwise, Subject-2wise, Itemwise, Publisherwise, Categorywise, Sourcewise and Vendorwise. These groups are same like the fields displayed in the **Customized Search Result** screen. Here, two types of format namely, **<u>Format 1</u>** and **<u>Format 2</u>** are given. The difference being that, in Format 2 some additional fields are added.
   - ❖ **<u>Note:</u>** This format can be changed according to your requirements, only by the Easylib Support Team.

4.5.2. Customized Reports – Catalogue:

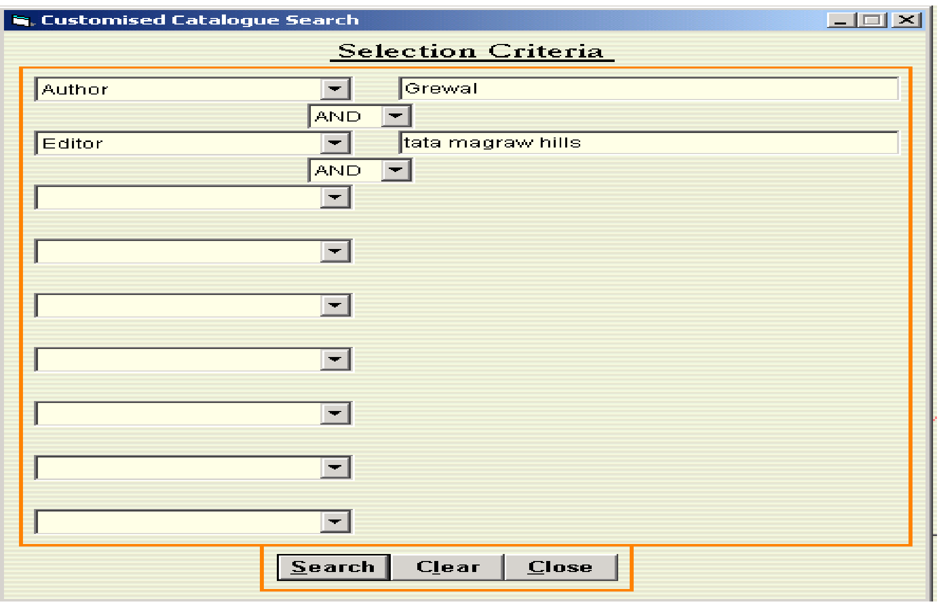


Figure 4.5.2

1) This screen is required to search the catalogue details based on the customized search criteria and also generate the reports.
2) Go to **Reports** menu and select **Customized Reports – Catalogue**, to activate this function.
3) This screen is similar to **Customized Reports – Books** screen mentioned above. However, the main difference between these two submenus is that, this screen allows you to search for books based on the *Title Number*, where as in the **Customized Reports – Books** screen you have the provision to search for books, based on the *Accession Numbers* as well as the *Title Numbers*.
4) This feature allows you to enter one or more search criteria, along with the combination of Boolean Functions such as *AND OR*.
5) Click on the **Search** button and select any one from the **Search Type** mandatory field, according to your preference. This action will prompt the **Customized Search Result** screen to appear, where you are able to view the **Number of Copies** as well as the **Number of Records**.
6) It should be noted that here, you do not have the option to **Skip** the search criteria and go directly to the result screen.
7) You have the option to view and print the catalogue cards, by clicking on the **Catalogue Card** button.
8) Once the records are displayed on the **Customized Search Results** screen, you can sort the records, by choosing the available data from the **Sort criteria**. Click **Print** to print your report in HTML, Excel or Text Format.

4.5.3. Customized Reports – Non Books:

1) Using this screen, you are able to search for Non-book details based on the customized search criteria. It is useful while generating the reports.
2) To access this screen, go to the **Reports** menu and select **Customized Reports – Non Books**.
3) This screen has got same function as the **Customized Reports – Books** screen, which has been discussed above.
4) With this screen, you are able to generate reports for all the non-book items, which have been already entered in the library records.
5) You can collectively search the records, by using all the search criteria combination including the *AND*/*OR* option, present in the screen.
6) An additional feature of this screen is that, if you want to open some records that are already saved in some *".txt"* files then you have the option to skip this search procedure and go directly to the **Customized Search Result** screen, by clicking on the **Skip** button.
7) Here, click on the **List form File** button and select the file in which the records are saved, so that the records are displayed in the **Customized Search Result** screen.
8) Once the records are displayed on the screen, you can sort the records, by choosing the available data from the **Sort criteria**. Here, you are able to view the **No. of Records** for the entered criteria. Click **Print** button, to get the print preview of your report in HTML, Excel or Text Format.
9) **Groupwise Reports** feature allows you to see the search reports in **Format 1**, related to a particular group, like Departmentwise, Subjectwise, Itemwise, Publisherwise, Categorywise, Sourcewise and Vendorwise. These groups are same like the fields displayed in the **Customized Search Result** screen.
   - ❖ **Note:** This format can be changed according to your requirements, only by the Easylib Support Team.

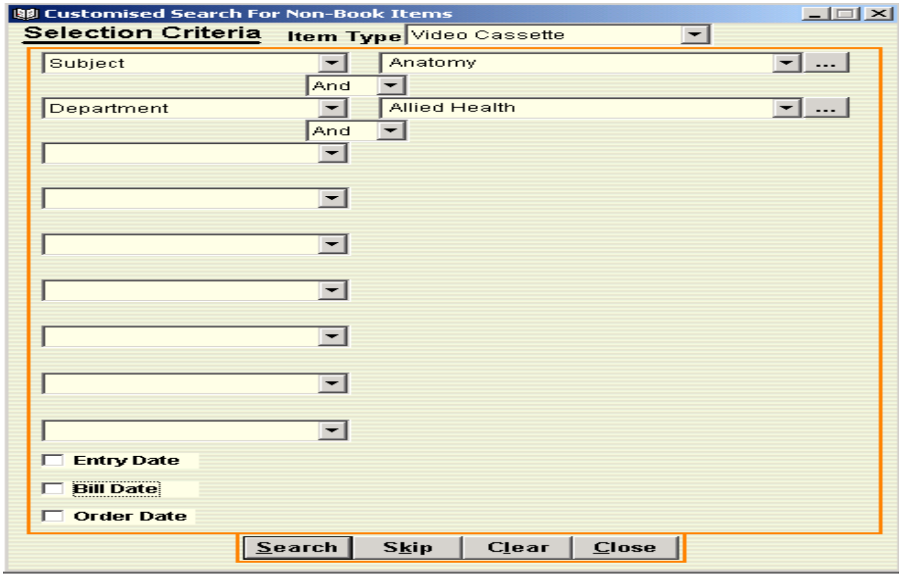


Figure 4.5.3

4.5.4. Generate Barcodes:

1) This screen allows you to generate barcode for sequential accession numbers with different formats. Here, you can also import the non-sequential accession numbers stored in a file.
2) This screen can be accessed by clicking on the **Reports** menu and selecting the **Generate Barcodes** submenu or by pressing **Ctrl + B** button from the keyboard, to open it directly.

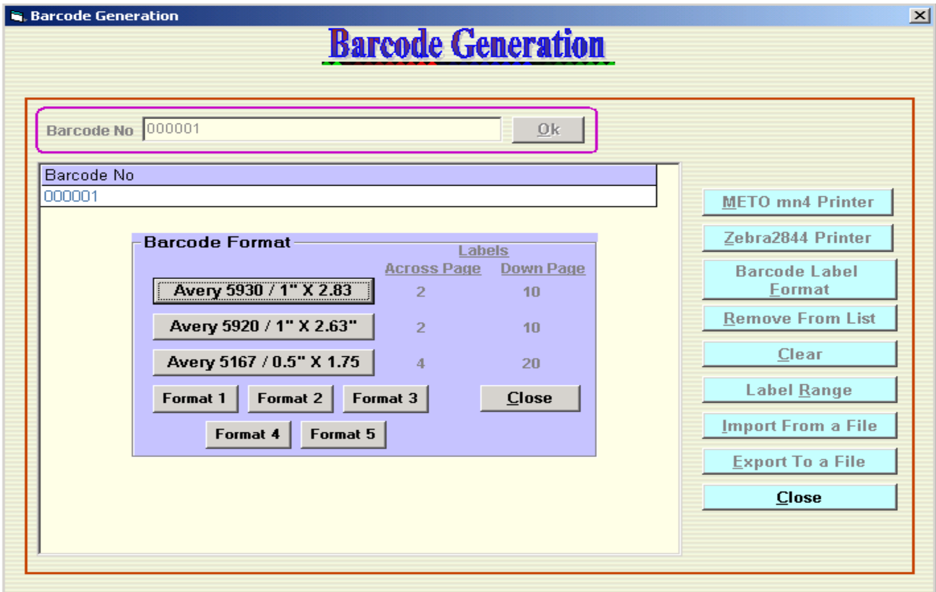


Figure 4.5.4

3) With the help of this function, you are able to generate and take the print of the Barcodes if you have the required printer. Barcode number can either be the accession or the title number of an item.
4) Here, first you have to enter the barcode number in the **Barcode Number**. There are three ways to enter the number,
   I. Firstly, by typing the correct barcode number in the **Barcode Number** text box and then click on the **Ok** button.
   II. Secondly, by clicking on the **Import From a File** button if you have already saved the accession number in any *".txt"* files.
   III. Thirdly, by clicking on the **Label Range** button. Here, you have to first set the Barcode Number format, by entering the values in the Prefix, Middle, Suffix and Post suffix, and then set the **No. of Labels** and **No. of Copies** field. Now insert the value in the **First Barcode Number** text box and click **Ok** button.

All the above actions will prompt the entered barcodes numbers to be displayed in the center of the screen.

5) Once the list has been displayed then, click on the **Barcode Label Format** button. Here, you have the option to select any format from the already predefined formats. These formats have been set for A4 size sheets for Normal DeskJet or Laser Printers.
6) **METO mn4 Printer** and **Zebra2844 Printer** are the printers that are used only for printing barcodes. If you have any one of these, then you can connect it and just click on the above mentioned buttons.
7) **Remove From List** button allows you to remove the selected number from the displayed list.
8) Also, there is an option to save this list for your reference by clicking on the **Export to a File** button.

4.5.5. Statistical Report – Catalogue:

1) This screen is required to obtain a brief statistics about the catalogue details depending on the search criteria present in the screen, such as Item Type, Publisher and Subject.
2) To enable this function, click on the **Report** menu and select the **Statistical Report – Catalogue** submenu.

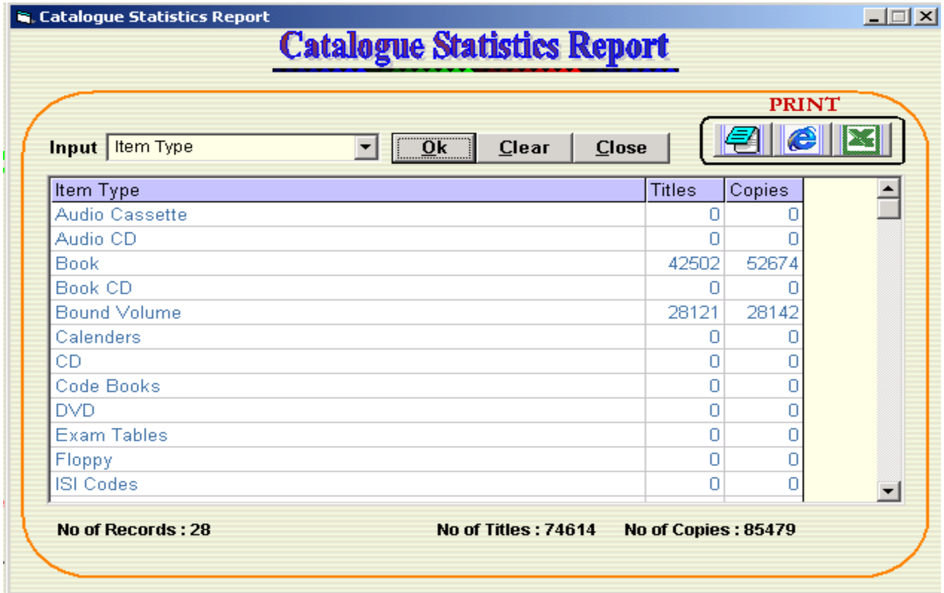


Figure 4.5.5

3) This screen gives you the statistical reports like the Number of Records, Number of Titles and Number of Copies for the Catalogue Details like Item Type, Publisher and Subject as entered in the Book Accession Register.
4) After you select the input click on the **Ok** button to view the list on the screen.
5) Here also, you have the option to take the Print of your reports in three formats namely, HTML, Excel or Text Format.

4.5.6. Statistical Report – Book Master:

1) This screen gives you a brief statistics about the book details based on the search criteria such as Category, Source, Vendor and Department.
2) Select the **Report** pull down menu and click on the **Statistical Report – Book Master** submenu, to view the respective screen.
3) This screen is same as the above mentioned Catalogue screen. The difference being that, here you can view the statistical reports for the Copy Details of the book that have been already entered in the library through the Book Accession Register.
4) The statistics can be obtained for *Category*, *Source*, *Vendor* and *Department*.
5) Here, **Number of Records** and **Number of Copies** are seen for the displayed list in the screen, wherein you can take the HTML, Excel or Text Format print.

4.5.7. Title Statistics:

1) This screen will list the statistics of titles present in the library, based on various criteria such as item type, category, subject, department, etc. Here, you are able to generate the graphical reports.
2) Go to the **Report** pull down menu and select the **Title Statistics** submenu, to activate this screen.
3) This screen is a combination of the ***Statistical Report – Catalogue*** and ***Statistical Report – Book Master*** submenus.
4) In this screen, two additional options like **Accession Date (Entry Date)** and **Bill Date** are given that are present in the **Book Accession register** screen, so that you are able to generate reports for a particular date range, by selecting the *From* and *To* dates.
5) Select any of the radio buttons titled as *All*, *Non Books* and *Books* so that you can view the items in the **Choose Field** list box.
6) This screen will provide you, only the statistics related to the *No. of Titles*, *No. of Copies*, *Total Cost* and *Total Net Cost*.
7) Here, you are also able to view the different **PI Chart** and the **Bar Graph** formats for the *Cost*, *Net Cost* and the *No. of Copies*.
8) In addition, you have the option to get the print preview of the reports in HTML, Excel or Text Format.

4.5.8. Other Reports:

1) In this screen the entire reports in Accession system have been grouped under this submenu. This screen can be accessed by selecting the **Reports** menu and clicking on the **Other Reports** submenu.

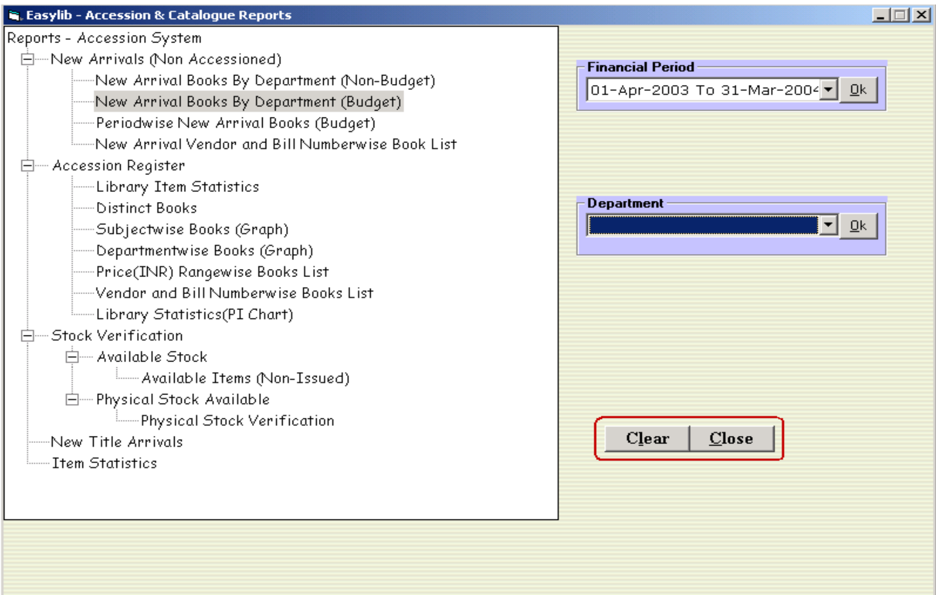


Figure 4.5.8

2) *New Arrivals (Non Accessioned)*, *Accession Register* and *Stock Verification* are some of the main reports, for which reports can be generated. Plus sign (+) indicates that there are various sub reports available under that particular main report.
3) For your reference the list has been shown below:

D. New Arrivals (Non Accessioned)

New Arrivals Books by Department (Non Budget)
New Arrivals Books by Department (Budget)
Periodwise New Arrivals Books (Budget)
New Arrival Vendor and Bill Numberwise Book list

E. Accession Register

Library Item Statistics
Distinct Books
Subjectwise Books (Graph)
Departmentwise Books (Graph)
Price (INR) Rangewise Books list

Vendor and Bill Numberwise Books list
Library Statistics (PI Chart)

F. **Stock Verification**
Available Stock
Available items (Non Issued)
Physical Stock Available
Physical Stock Verification

G. New Title Arrivals -

H. Item Statistics – Select *From* and *To* date range to view the reports on all the *Volumes Added to the Library* for that particular date range.

4.6. Search Catalogue:

All the submenus displayed below have already been explained in detail in the **OPAC** module. You may refer the document by going to the above mentioned module if you require. However, the procedure to access this screen from the **Catalogue and Accessioning** module has been explained below each submenu.

4.6.1. By Title, Author and Keyword:

Click on **Search Catalogue** menu, present in the **Catalogue and Accessioning** module and select **By Title, Author, Keyword** or, use the keyboard shortcut **Ctrl + S** to access this screen**.**

4.6.2. By Extensive Fields:

To enable this function, go to **Search Catalogue** menu and select **By Extensive Fields** submenu.

4.6.3. List by keywords:

In the **Search Catalogue** drop-down menu, select **Keywords List and Book Search** submenu to activate this search screen.

4.6.4. Quick Search:

Go to **Search Catalogue** menu and select **Quick Search** submenu to access this screen.

4.6.5. See New Arrivals:

To activate this screen, go to **Search Catalogue** and select **See New Arrivals** sub menu.

4.6.6. Item Status:

This screen can be accessed, by clicking on **Search Catalogue** > **Item Status** to view the **Item / Reservation Status** screen.

4.6.7. Author, Title Statistics:

The significance of this screen is that here, you are able to view the statistics regarding the number of copies corresponding to a particular Author or Title.

This screen is used mainly, for searching **Author** and **Title** for books and also non-book type materials. Simply select the *Author* or *Title*, from the **Select Author/Title** list box. Enter the name, to see a list of records in the display list. It must be noted that, you have to enter any one of the five options, in the **Search Type** mandatory field, namely:-

- **Search All** → This will search for all the words that you have entered in the search criteria.
- **Search Letter (Beginning**) → This will search for records beginning with the first letter.
- **Search Word (Beginning)** → This will search for records beginning with the first word in your search criteria.
- **Search a Word** → This will search for any word that matches your criteria.

- **Exact Search** → This will search only for the exact word whether it matches the entered criteria.

For example, if you select *Author* and type in *Grewal* as the Author name then, it will display *Grewal* under **Author** and *4* under **Total no. of Titles** respectively. As soon as you double click on this result, it goes to the **Customized Search Result** screen, where you can see the display for each record, as entered in the database. An additional feature is that, when you double click on the **Title Number**, it goes directly to the **Item/ Reservation Status** screen, which gives you the option, to **Reserve** the book.

4.7. Local Language:

Both the submenus displayed below have already been explained in detail in the **OPAC** module. You may refer the document by going to the above mentioned module if you require. However, the procedure to access this screen from the **Catalogue and Accessioning** module has been explained below each submenu.

4.7.1. Search by Title, Author and Keywords:

Click on **Local language** menu and select **Search by Title, Author and Keywords.** This action will prompt **Multi Language Search** screen to appear where you have to select the **Language** from the combo box.

4.7.2. List by Keywords:

Click on **New Arrivals** > **List by Keywords** submenu to go to the screen titled as **Keyword List and Book search.**

4.8. Set up:

All the submenus listed below have been explained in detail in the **Setup and Security** module. You may refer the document under the **Initial Setup Screens** submenu of the above module.

4.8.1. Publishers
4.8.2. Vendors
4.8.3. Currency
4.8.4. Category
4.8.5. Department
4.8.6. Accession Number Format
4.8.7. Barcode Accession Number Format
4.8.8. Keyword Stoppers
4.8.9. Item Types
4.8.10. Financial Period
4.8.11. Subjects Tree
4.8.12. Section
4.8.13. Non Book Section
4.8.14. Html Setup
4.8.15. Toolbar
4.8.16. Screen Setup

5. <u>Members:</u>

This module helps in maintaining a systematic and detailed record about all types of member information including the photograph specimen of the respective member.

<u>How to access the Members module?</u>

a) Click once on the **<u>Members</u>** module, which appears on the front page of Easylib software, to open the **Easylib Login** screen.
b) Enter the correct ***User ID*** and ***Password***.
c) The main page appears containing a list of all the *menus* and *sub-menus* of **<u>Members</u>** module which are displayed below: -

5.1. Membership

5.1.1. Members

5.1.2. ID Cards

5.1.3. Borrowers Cards

5.1.4. Data Sheet for members

5.2. Reports

5.2.1. Customized Reports – Members

5.3. Setup

5.3.1. Member Type

5.3.2. Department

5.3.3. Course and Branch

5.3.4. Academic Years

5.3.5. Profiles

5.3.6. HTML Setup

5.3.7. Screen Setup

5.4. Search

5.4.1. Member Search

5.5. Window

5.6. Help

5.1. <u>Membership:</u>

5.1.1. Members:

<u>How to enter the Member details and view the records?</u>

1) With this screen you can maintain the member details according to the profile and member type.
2) To open this screen click on **Membership** pull down menu and select the **Members** submenu or use the keyboard shortcut **Ctrl + M**.
3) A screen titled as **Library Members** appears for different **Member Type** like **Staff**, **Student**, **Department**, **Member**, **Others** and **General**.
4) First select the **Member Type** and then select the **Profile / Designation** so as to view the previously entered records.

5) You can also use the navigation buttons, to view the various records that come under the selected profile or you can enter **Member Id** and click on **<u>Inquire</u>** button to get the information for the particular member with the entered member id.

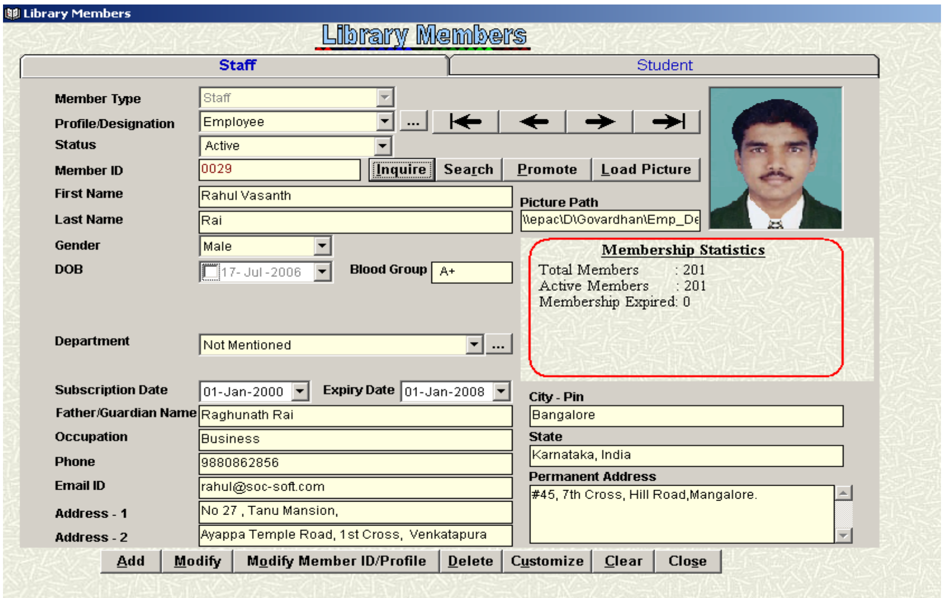


Figure 5.1.1

6) You can add the records by entering the member id and other relevant details followed by clicking on the **<u>Add</u>** button.
7) Changing some details and clicking on **<u>Modify</u>** button can modify any existing data.
8) To change the member id or profile then click on **<u>Modify Member Id/Profile</u>** button. A separate screen with **Old member id**, **Old profile**, **New member id**, **New profile** etc. is displayed. Enter the **New member id**, specify **Subscription** and **Expiry dates** and then click on **<u>Modify</u>** to save the changes. You can also change the profile simultaneously by selecting the New **Profile/ Designation**.
   Navigation buttons are provided for multiple modifications. Now you are able to view the new member id for the old record.
9) You can search for member details by clicking on **<u>Search</u>** button. The screen titled as **Member Search** appears where the **Profile** is displayed. Select the profile and enter name, course and branch to do the combination search, by clicking on **<u>Search</u>** button.
10) Once the search is over, select the desired record from the displayed list and click on the **<u>Return</u>** button to copy the details to the **Library Members** screen.
11) Another important feature of this function is the promotion of members. Suppose the members like Students are promoted, that is, students have passed on to the next academic year. Then the member details should also change such as profile, class etc. To perform this action click on **<u>Promote</u>** button. You will get a **Student Member Promotion** screen wherein, you will be having two sections namely **From** and **To**. In the **From** section, you have to select the **Course**, **Branch** and **Department** so that the member records within that selected range will be listed under **Roll No.**, **Member Id** and **Name**. Select the students who have been promoted and then select to which course and branch the promotion has been made. All the records can be promoted at the same time by clicking on the **<u>Select All</u>** button and then pressing on **<u>Promote</u>** button to promote the students. For promoting individual record click on the **<u>Promote</u>** button directly. The members who have been promoted will be displayed on the right side of the screen.
12) Click on **<u>Close</u>** to close the screen and return to the **Library Members** screen.
13) **<u>Load Picture</u>** option allows you to load picture from any file. Here, you can select the picture from its current location and then open it. It will be loaded in its place.
14) A brief statistics of members, titled as **Membership Statistics** is displayed to help you in getting the information about *Total members*, *Active members*, *Membership expired*, etc.

<u>List of Common Buttons:</u>

- **<u>CLEAR</u>** button allows you to clear the records from the currently viewing screen.

- **ADD** button allows you to add a record to the database.
- **MODIFY** button allows you to modify or change any record or fields according to your preferences.
- **DELETE** button allows you to delete a record from the database.
- **CLOSE** button allows you to end the current operation and return back to the previous or main page.
- **PRINT** button allows you to view the print preview of a particular page or record. In this software you have an additional feature of printing it in three formats namely, Notepad, Excel and HTML.
- **NEW** button allows you to enter a new record.
- **INQUIRE** button gives you the option to view whether the particular record exists or not. If the record exists then it will display it or else a message appears that this record does not exist.
- **FIND** button allows you to find a particular record related to the entered accession number by directly going to the Search screen.
- ← And → buttons allows you to scroll through the Previous Record and Next Record respectively.
- |←And →| buttons allows you to go directly to the First Record and Last Record respectively.

List of Keyboard Shortcuts for the buttons:

1) Add → Alt + A
2) Modify → Alt + M
3) Delete → Alt + D
4) Customize → Alt + U
5) Clear → Alt + C
6) Close → Alt + S
7) Inquire → Alt + I
8) Search → Alt + R
9) Promote → Alt + P
10) Load Picture → Alt + L
11) Modify Member ID/ Profile → Alt + O

5.1.2. ID Cards:

How to generate Member ID cards?

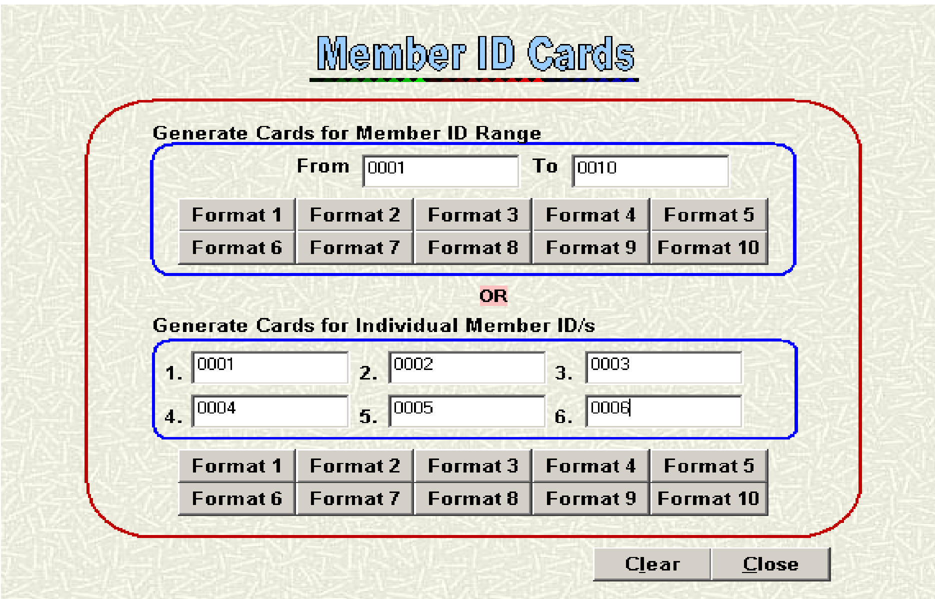


Figure 5.1.2

1) This screen allows you to generate ID cards for the library members based on various formats.
2) To enable this screen go to the **Membership** menu and select **ID Cards** submenu.

3) In this screen, you are able to either generate cards for a particular member id range or generate cards for individual member id depending upon your requirement.
4) Here, you will be having two frames in which the details have to be entered. In the first frame, you have to enter the range of member ids in **From** and **To** text box, for which you want to generate cards and then click any one of the different formats available**.** In the second frame, you have to enter the individual member ids for which you want to generate the card and then click on format of your choice.
5) You are able to view the print preview in the respective formats. Only after you give the print option it will start the printing procedure.

List of Keyboard Shortcuts for the buttons:

1) Clear ➔ Alt + L
2) Close ➔ Alt + C

5.1.3. Borrowers Cards:

How to generate Borrowers Cards?

1) With this screen you are able to generate Borrowers cards for any member belonging to the library based on various formats.
2) To open this screen click on the **Borrowers Cards** submenu present in the **Membership** menu.
3) This screen is similar to the ID cards screen where you have two frames, one having **Generate Cards for Member ID range** and the second having **Generate Cards for Individual Member ID.**
4) The difference between these two screens is that here you do not have any formats for printing the Borrowers cards. Only one format is present and that is set as default.
5) After entering the member id in your desired frame press **Ok** button to get the print preview of the entered record. Click on the **Print** option if you want to take a print out.

List of Keyboard Shortcuts for the buttons:

1) Clear ➔ Alt + L
2) Close ➔ Alt + C
3) OK ➔ Alt + O
4) OK ➔ Alt + K

5.1.4. Data Sheet for members:

How to perform Mass Updation of Member Details?

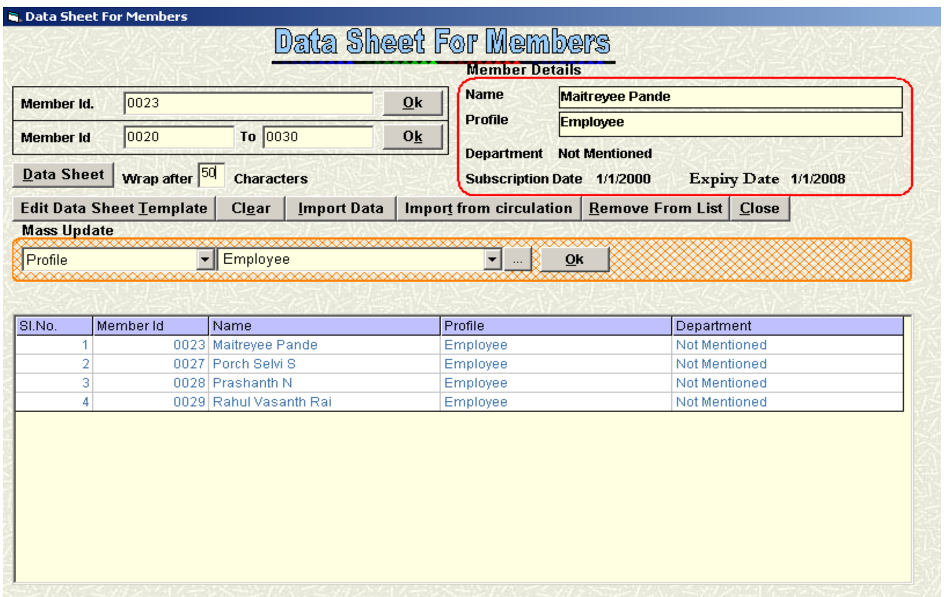


Figure 5.1.4

1) This is one of the special features of this software where you can perform the mass updation of member details, either for single, or for any number of multiple records.
2) To activate this screen, select **Data Sheet for Members** submenu from the **Membership** pull down menu.
3) Enter the member id corresponding to single or multiple records in the respective fields and click on **Ok** button to view the list of all the records in this range.
4) Select any particular record by a single left click of the mouse, to view the **Member Details** on the top right hand corner of the screen.
5) To perform mass update function, select any criteria from the **Mass Update** drop – down list box.
6) Enter the data with which you want to update the entire records and press **Ok** to confirm your action. This will result in the updation of all the records present in the grid.
7) Click on the **Data Sheet** button to view the entire details of the member in the notepad format, for either a single member id or the entire member id range.
8) If you want to change the format or design your own notepad format then select the **Edit Data Sheet Template** button. Here, remove the comment sign (#) from the particular field that you want to add in the format.
9) **Import Data** option allows you to import any data that have already been stored in some "*.txt*" files.
10) In the same way, you are able to import all the details of the members who have taken books from the library, by selecting the **Import from Circulation** button.
11) To remove a record from the display list click on the **Remove from List** button.

List of Keyboard Shortcuts for the buttons:

1) Data Sheet ➔ Alt + D
2) Edit Data Sheet Template ➔ Alt + T
3) OK ➔ Alt + O
4) OK ➔ Alt + K
5) Clear ➔ Alt + E
6) Close ➔ Alt + C
7) Import Data ➔ Alt + I
8) Import From Circulation ➔ Alt + T
9) Remove from List ➔ Alt + R

5.2. Reports:

5.2.1. Customized Reports – Members:

How to get Customized Reports of Members?

1) This screen allows you to generate reports regarding the member details depending on the various customized search criteria present in the screen.
2) Point to **Reports** on menu bar and then click on **Customized Reports-Members** to open a screen titled as **Customized Search Members**.
3) Here, you can search for member details, by giving one or more search criteria, along with the combination of Boolean functions such as *AND*/*OR*. This will help in searching the exact record that you are looking for.
4) When you select a search criterion, the corresponding fields will be displayed adjacent to it and you have to select the desired record.
5) For e.g., when you select two search criteria using **AND** in between them, then the function will search for the member details that has both the search criteria satisfied. Where as in case of **OR**, it will search for either of the two criteria or both.
6) Additional information like **Register Number**, **Roll Number**, **Subscription date** and **Expiry date** are provided at the end of the screen.
7) After selecting the various criteria by which you want to search click on the **Search** button to go to another screen called **Customized Search Results Members** where the results of the above search criteria will be displayed.
8) You can sort the list as per the requirements, by selecting one of the required data from the **Sort Criteria**.
9) The total Number Of Records is displayed at the top of the screen.

10) To view the preview report of the searched members just click on **Print** button and select any one of the three formats namely, Notepad, HTML or Excel.

List of Keyboard Shortcuts for the buttons:

1) Search → Alt + S
2) Clear → Alt + L
3) Close → Alt + C

5.3. Setup:

All the submenus displayed below, have been explained in detail in the **Setup and Security** module under the **Initial Setup Screens** submenu. You may refer the document by going to the above submenu.

5.3.1. Member Type

5.3.2. Department

5.3.3. Course and Branch

5.3.4. Academic Years

5.3.5. Profiles

5.3.6. HTML Setup

5.3.7. Screen Setup

5.4. Search:

5.4.1. Member Search:

How to search the details of a Member?

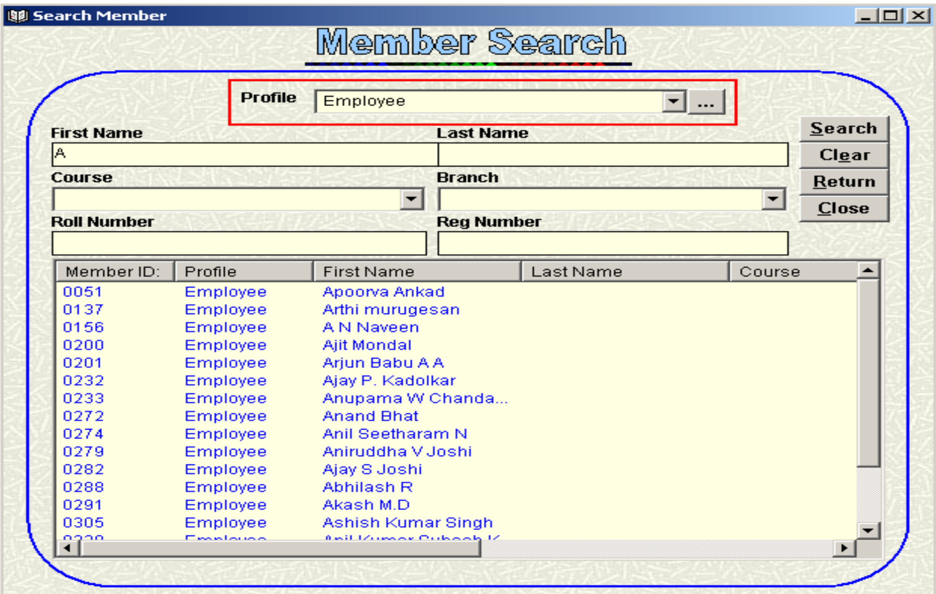


Figure 5.4.1

1) Using this screen you are able to search for the member details based on the selected profile by specifying the first name, last name, roll number, register number, etc.
2) Select the **Search** menu and click on the **Member Search** submenu to view this feature.
3) To start the search function, first you have to select the desired **Profile** from the list box.
4) Enter the minimum details regarding First Name, Last Name, Course, Branch, Roll Number or Registration Number and press the **Search** button.
5) If the entered search criteria exist then the entire list of matching records will be displayed along with the Member ID, Profile, First Name, Last Name, Course, Branch, Roll Number and Registration Number.

6) If you find the desired member details then select the record by single click of the mouse and press the **<u>Return</u>** button. This will directly copy the details of the member into the **Library Members** screen.

<u>List of Keyboard Shortcuts for the buttons:</u>

1) Search ➔ Alt + S
2) Clear ➔ Alt + E
3) Close ➔ Alt + C
4) Return ➔ Alt + R

6. ***Periodicals/ Serial Control***:

Periodicals are different types of journals, magazines, etc. that comes in a definite time period. Effective management and tracking of these kinds of items can be done in a very comprehensive way by using the Periodicals module.

How to access the Periodicals module?

a) Click once on the **Periodicals** module, which appears on the front page of Easylib software, to open the **Easylib Login** screen.

b) Enter the correct ***User ID*** and ***Password***.

c) The main page appears containing a list of all the menus and sub-menus of **Periodicals** module which are displayed below: -

6.1. Periodicals Entry

6.1.1. Periodicals Information

6.1.2. Periodicals List Subscription Management

6.2. Receivables

6.2.1. Receivables Generation and Tracking

6.2.2. Annual Subscription Generation

6.2.3. Receive Periodicals

6.2.4. Summary of Receivables / Received

6.3. Indexing

6.3.1. Periodical Indexing

6.3.2. Content Manager

6.4. Accessioning

6.4.1. Binding and Accessioning

6.4.2. Accession Register for Periodicals

6.5. Serials Reminders

6.5.1. Serials Remainders

6.5.2. Reminder Creation

6.5.3. Routing

6.5.4. Weekly Cardex

6.5.5. Received / Receivable Report

6.5.6. Monthly Cardex

6.5.7. Periodical Report

6.6. Reports

6.6.1. Customized Reports – Articles

6.6.2. Subscription Search

6.1. Periodicals Entry:

6.1.1. Periodicals Information:

1) Using this screen you are able to maintain the information about periodicals, journals, etc. Here, you are able to provide the necessary information and thus keep a track of the subscription details. This will help you during report generation and while searching about a particular periodical.
2) To enable this function select the **Periodicals Entry** menu and click on the **Periodicals Information** submenu or simply press **Ctrl + P** from the keyboard to open it directly.
3) A screen titled as **Serials Control** appears, containing three subparts namely, *Periodicals Information Entry, Subscriptions Entry* and *Subscriptions List* each containing different fields. ISSN stands for International Standard Serial Number, which is a 10-digit number.
4) The advantage of this screen is that you have to enter the *Periodicals Information Entry* details only once and you can subscribe the issues every year. If the vendor details have changed, then make the changes in the *Subscriptions Entry* subpart and click on the

Modify button. Every time you enter the periodical id all the entered details will be displayed in the screen.

5) The Periodical ID is a unique number that is generated by the Easylib Software. If you want to enter any new details click on the **Clear** button first, so as to clear the previously entered records and then click on the **New** button. The Periodical ID will be automatically generated.
6) Every periodical has a possibility of being renamed or changed in such a way that the previous details need to be stored. For this reason the **Previous Details** button is provided on the screen. Click on this button to open the screen titled as **Previous Title Details** where Title, Periodicity (Monthly, Bimonthly, Fortnightly, etc.) are the important fields.
7) While transferring the previous details, you are prompted to enter **from** and **to** dates, during which the previous details existed.
8) The **Previous Details** button will be enabled only if there are any previous details for that particular periodical.
9) In the *Subscriptions Entry* subpart, the Library Subscription No. is usually entered as the year of subscription like 2006, 2007 etc.
10) The added records are listed in the grid titled as *Subscriptions List*. Select any record by single of the mouse, to see the details in the *Subscriptions Entry* subpart.
11) Click on **Modify** and **Delete** buttons to change or delete any record.
12) Indexing of any article from the periodical can be done, by clicking on the **Periodical Indexing** button.
13) **Search** button takes you to the **Subscription Search** screen where search results can be seen for the criteria that have been entered.
14) You can view all the entered records by scrolling through the Navigation buttons.

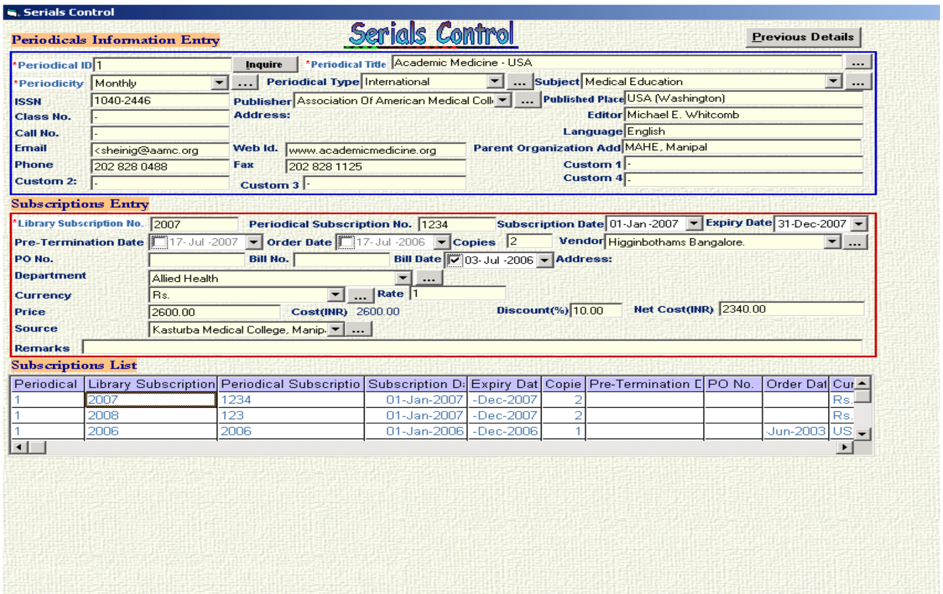


Figure 6.1.1

6.1.2. Periodicals List:

1) This will keep the track of all the periodicals that you have subscribed which will be helpful during the generation of the reports and also while searching for a particular periodical.
2) To view this screen, select the **Periodicals Entry** pull down menu and click on the **Periodicals List** submenu.
3) This is basically a list screen, which displays the entire records that have been entered in the database, starting from the first record.
4) Double click on the mouse or press enter key after selecting any single record from the grid. This will allow you to see the details of the selected record as displayed in the **Serials Control** screen.
5) **Sort By** helps you to sort the entire list according to your requirement.
6) As the listed records are too large, you have the option to do a quick search by selecting any data from the **Search By** and entering the data in the corresponding list box.
7) On clicking the **Search** button, **Subscription Search** screen appears, wherein you can do customize search and view the results.

8) The **Periodicals List** can be printed in three formats namely, HTML, Notepad and Excel by clicking on the Print icon present in the respective format screens.

6.1.3. Subscription Management:

1) Using this screen, you are able to keep a track of all the periodicals that you have subscribed based on two options namely, Current and All. This will be useful during the generation of the reports.
2) Go to **Periodicals Entry** menu and click on **Subscription Management** submenu to open this screen.

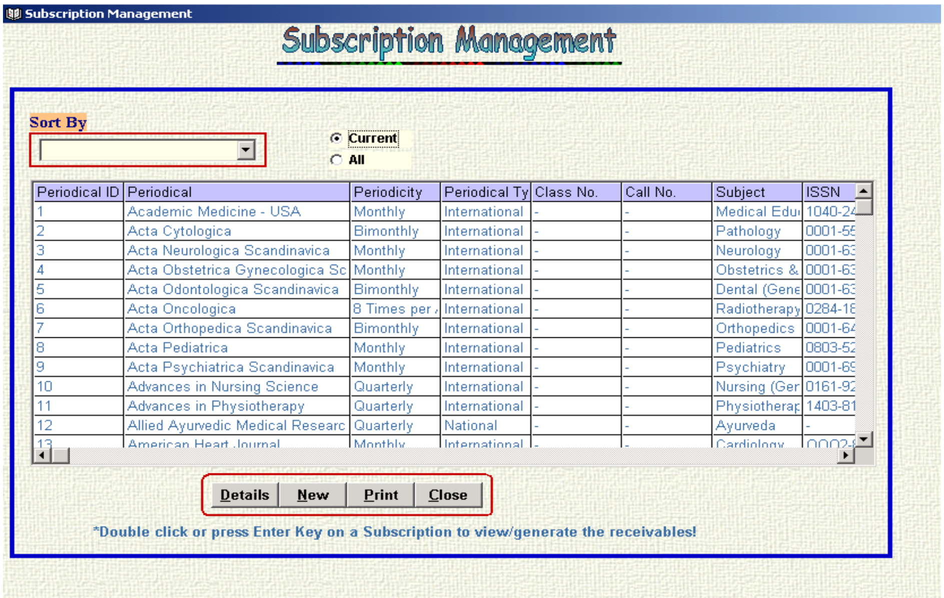


Figure 6.1.3

3) Listing of the records can be done in two ways, that is, either by selecting the **Current** radio button or by selecting the **All** radio button. **Current** option will display the list of all actively subscribed periodicals in the library while **All** option will display both the current as well as the past records.
4) Sorting of the displayed list can be done by, selecting your requirement from **Sort By**.
5) To view the details about any particular record, click on the **Details** button. This will prompt the **Serials Control** screen to appear, wherein you can either enter the particular periodical id, or use the navigation buttons to search the details.
6) If you click on the **New** button, it will prompt the **Serials Control** screen to appear with the new periodical id, wherein you can start entering the details about the new periodical.
7) Once the record has been added it will appear in the **Subscription Management** screen along with the rest of the list.
8) The above list can be printed in three formats namely, HTML, Notepad and Excel by clicking on the Print icon present in the respective format screens.
9) The advantage of this screen is that when you double click on the mouse or press the enter key on a subscription then you are able to view/generate receivables, by going to the **Receivables Generation and Tracking** screen.

6.2. Receivables:

6.2.1. Receivables Generation and Tracking:

1) This screen is essential for generating the periodical issues, according to the periodical type and thus, maintains a track of all these records. This will be helpful while generating the reports, receiving the periodical and also while generating the barcodes.
2) All the periodical details that have been recorded in the previous menu needs to be generated as received whenever the issue comes to the library. This can be done by clicking on the **Receivables Generation and Tracking** submenu from the **Receivables** drop down menu list.
3) Select from the **Periodical Name** the periodical, whose issue has to be generated. Next, select the **Subscription Number** from the combo box.

4) This generates the periodical list automatically. The issues that have already been received by the librarian will be displayed under the **Received** box and the issued that are yet to arrive in the library will be displayed under the **Receivables** box.
5) You can separately sort both the **Received** and **Receivables** list according to your requirements by selecting from the **Sort By** list box. It should be noted that for the **Received list,** you have the option to sort by *Expected Receive Date,* whereas in the **Receivables list,** you have the option to sort by *Received Date*.
6) Click **Select All** button to prompt a small screen titled **Select One** to appear. Here, if you select the **Receivables** check box then, all the records present under the **Receivables** box will be selected and if you select the **Received** check box then all the records present under the **Received** box will be selected. Once selected, now you can move it to any of the two boxes.
7) Another way to move the records between both the boxes, is to select one or more records from the respective boxes and then press the **>** or **<** button to move it to the other side box.
8) For adding a new issue, say a supplementary issue, for the same periodical, which has already arrived, or some extra copy that is yet to arrive, click on the **Add** button. Select the option from **Select One** screen and enter the mandatory fields like Volume, Issue no, Copy, etc. in the **Add New Received** screen. Press **Ok** button to add the records to the **Received** and **Receivable** list.
9) The above list can be printed in three formats namely, **HTML**, **Notepad** and **Excel** by clicking on the Print icon present in the respective format screens.
10) When you enter the details for a new periodical, you need to generate the receivables; so as to keep tracks of the expected receive date of each issue for that periodical. This is done by, clicking on the **Generate Receivables** button. Also, the receivables will be generated according to the frequency that you have already set in the respective Setup screens.
11) This will prompt a screen titled as **Enter these Details** to appear, wherein all the details has to be entered, as all the fields are mandatory. Click on the **Generate** button to generate the issues automatically.
12) Here **Generate Barcodes** button is provided for you reference, so that you can generate barcode labels for the periodicals also.
13) By clicking on the **Subscriptions** button, you can go directly to the **Subscription Management** screen, where you are able to view the list of the *Current* and *All* records.
14) Click on the **Track by Date** button, to go to the **Receive Periodicals** screen where you can track the required records for a particular date range or other criteria. The details regarding this screen are explained in the following submenu.

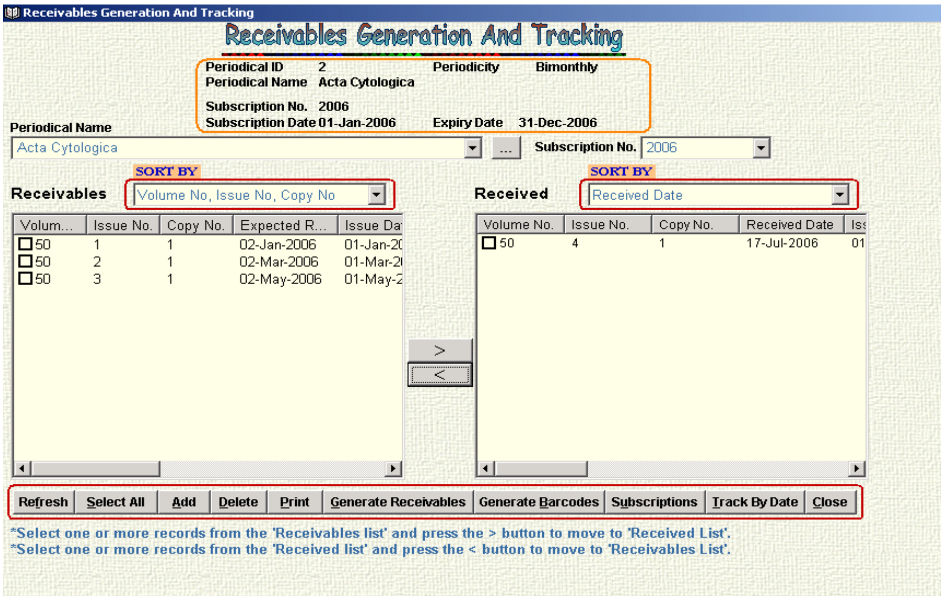


Figure 6.2.1

6.2.2. Annual Subscription Generation:

1) This is an important screen wherein you are able to subscribe and generate the receivables for the selected periodicals (one or more) at a time according to the specified subscription year.
2) This screen can be accessed by, clicking on the **Receivables** menu and then selecting the **Annual Subscription Generation** submenu.
3) An input message box appears asking you to ***"Enter the Subscription Year"***. Enter the year for which you want to view the subscription list and press the **Ok** button to open the screen titled as **Annual Generation of Receivables.** This helps in avoiding unnecessary information and also waste of time.
4) If you do not want to enter any particular year then press Ok button without entering any data. This will open a blank **Annual Generation of Receivables** screen.
5) If you have entered the year then the above screen opens containing the names of all the periodicals subscribed for the entered year under the **Title** list box.
6) If the subscription for a periodical has already been generated then the name of this periodical will be displayed in RED color. Similarly, if the issues have already arrived in the library and the receivables generated then it will be displayed in GREEN color. If the periodical has not been subscribed or the issues have not yet arrived in the library then the name of the periodical will be displayed in BLACK color.
7) Click on any Periodical Name to see the calculated subscription and receivables details on the right side of the screen.
8) For generating any subscription, select the periodical and press **Generate Subscription** button. The subscription will be generated and now the name will be displayed in RED color.
9) Similarly, for generating receivables then select the periodical and press **Generate Receivables** button. Now, the name will be displayed in GREEN color after the above action has been performed.
10) **Modify** button allows you to modify any details, by entering the new value and pressing the button.

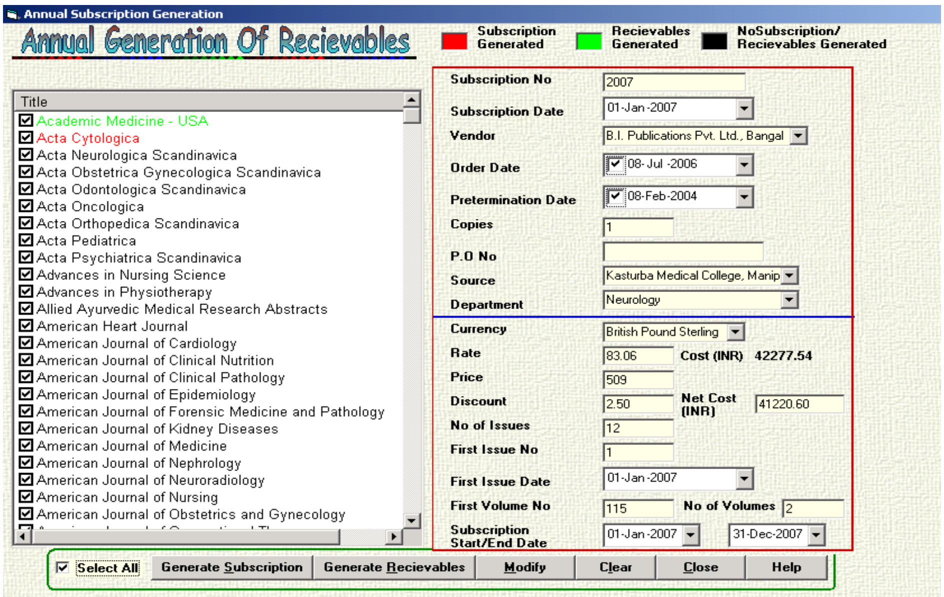


Figure 6.2.2

6.2.3. Receive Periodicals:

1) This screen allows you to keep a track of all the periodicals that you have subscribed based on Vendor, from date, to date and also by selecting any one of the search criteria namely, Next issues receivable for all subscriptions, Received by date and vendor, Receivables by date and vendor. You can also add the supplementary copy of a particular periodical by entering the necessary information.
2) To activate this screen select **Receive Periodicals** submenu from **Receivables** pull down menu list.

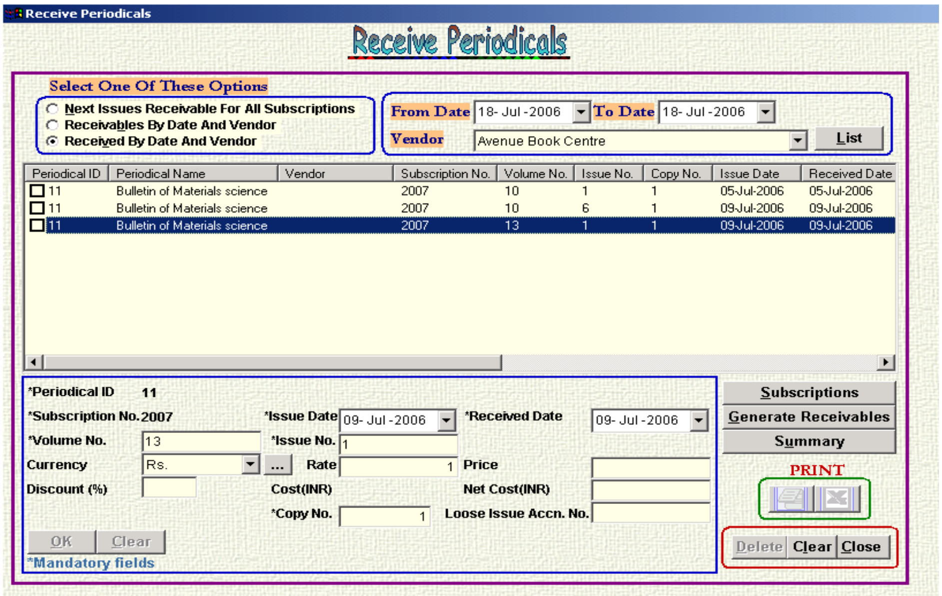


Figure 6.2.3

3) This is a kind of search screen where you have the option to view the details regarding the receiving of a particular periodical.
4) Three search criteria have been listed under **Select One of these Options** caption. Select the **Next Issues Receivable for all Subscription** radio button, to view the next expected date of all the subscriptions that will arrive in the library. You can also press **Alt + N**, from the keyboard to select the above radio button. Once this criterion is selected, click the **List** button to view the records in the grid.
5) **Receivables by Date and Vendor** radio button will allow you to list the entire receivables periodical list from a particular vendor within a certain date range. The date range and the vendor name can be selected from the respective fields followed by clicking on the **List** button to view the records in the grid. You can also press **Alt + B**, from the keyboard to select the above radio button.
6) Here, you can select the periodical that has arrived from the displayed list and press the **Receive** button to generate it as received by the library.
7) **Received by Date and Vendor** radio button allows you to list the records that have been already received by the library, from a particular vendor for a certain date range. This allows you to keep a track, regarding when all the periodicals were received, along with the received date, issue date, etc. You can also press **Alt + V**, from the keyboard to select the above radio button.
8) For all the above three cases, select any record from the displayed list to view the Periodical details, present below the grid. Here, you can modify. For this, first click the **Clear** button and then after entering the new values, press the **Ok** button.
9) **Subscriptions** and **Generate Receivables** button will take you to the respective screens on clicking them.
10) To view the summary or total number of all the receivables and received periodicals for a certain date range, click on the **Summary** button.
11) The above list can be printed in two formats namely, **Notepad** and **Excel** by clicking on the Print icon present in the respective format screens.

6.2.4. Summary of Receivables / Received:

1) This will keep a track of the all the periodicals that have been received and are yet to be received and hence will be useful while generating the reports.
2) Go to **Receivables** menu and select **Summary of Receivables / Received** submenu to enable this function.

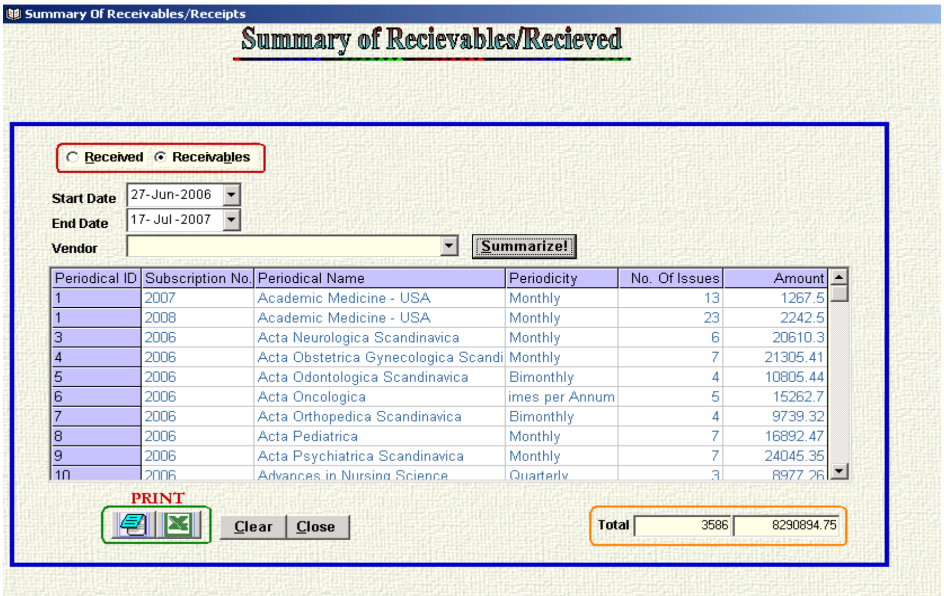


Figure 6.2.4

3) This screen basically gives you a statistical report about the Number of Issues and Amount that have been generated either for the **Receivables or** Received category. Periodical ID, Subscription Number, Periodical Name and Periodicity are the additional details that are displayed in the grid.
4) First, select any button from the two options namely, **Receivables** or **Received**. Next select the Start Date, End Date from the respective fields and click on the **Summarize** button. This action will display the matching records in the grid for your reference. The search can be done, by selecting the vendor also. The periodicals under received or receivables category for the selected vendor will be listed.
5) Double click on any record in the grid to go directly to the **Receivables Generation and Tracking** screen.
6) The Total number of issues and the amount will be displayed at the bottom of the screen.
7) The above list can be printed in two formats namely, **Notepad** and **Excel** by clicking on the Print icon present in the respective format screens.

6.3. Indexing:

6.3.1. Periodical Indexing:

1) Using this screen, you are able to index the topic or information by providing the title, page number, creator, etc. This will be useful while generating the reports and searching for the particular article.
2) By selecting the **Indexing** menu and clicking on the **Periodical Indexing** submenu, you can access this screen.
3) The main feature of this screen is to index any important information about a particular article from a periodical, so that it can be used for all future references.
4) To enter a new record, click on the **New** button and start entering the details like keyword, periodical, volume no., issue no., article title, etc. Here, it should be noted that **the Easylib Software automatically generates Index ID**.
5) After entering all the required data, press the **Add** button to save the record.
6) The periodical from which the article has been added should already be present in the Periodical Name list.
7) Scrolling through the entire records can be done by pressing the navigation buttons.
8) **Modify** and **Delete** buttons are provided for performing the required function.

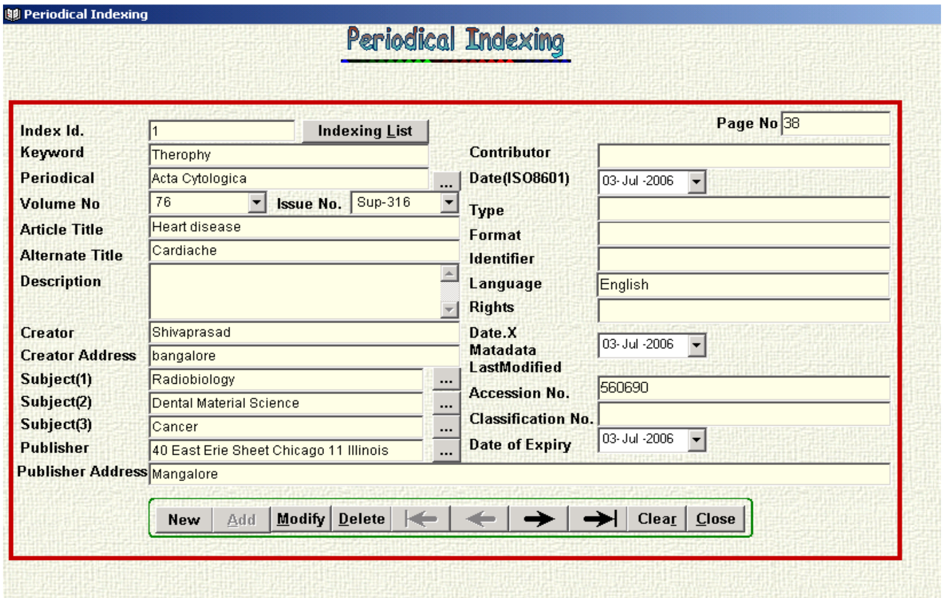


Figure 6.3.1

6.3.2. Content Manager:

1) This will keep a track of the indexes and will help during the generation of reports.
2) To enable this function select **Content Manager** submenu present in the **Indexing** menu.
3) All the articles that have been indexed in the previous screen can be listed here, in a tabular format by, selecting the name of the periodical from the **Periodical** and pressing the **Inquire** button.
4) It should be noted that, this function will not display all the entered article records when you click the **Inquire** button. Instead, you are able to only see the periodical wise listing of the articles.
5) Sorting of the displayed list can be done by, selecting you requirement from **Sort By** list box.
6) **Indexing** button will prompt the **Periodical Indexing** screen to appear where you can see the details about the article and perform the desired function.
7) In case, you want to search about an article, you can do so by clicking on the **Article Search** button. Enter the criteria in the respective fields and press the **Search** button to get the results.
8) When you double click on any one record present in the list, the **Periodical Indexing** screen will be opened along with the details of the selected record.

6.4. Accessioning:

6.4.1. Binding and Accessioning:

1) Using this screen, you are able to bind a group of issues/ volumes of a particular periodical and accession them.
2) Periodicals can also be accessioned and binded together like the book and non-book item types. To open this screen click on the **Binding and Accessioning** submenu from the **Accessioning** menu.
3) Suppose for a particular periodical, there are ten issues for one volume. For easy reference, you want to bind all these ten issues as one volume. This can be done easily with the help of this screen.
4) To start with select the periodical name from the Periodical by clicking on the **Three Dot** button. In case, you want further details regarding the selected periodical, press the **More Details** button. This will open the **Serials Control** screen containing the detailed information about the same periodical as entered in the library.
5) When the periodical name is selected, it will display the issues list along with subscription number, issue no., volume no., etc. on the screen.
6) Two options namely **Accessioned Status** and **Binding Status** are present at the top of the screen. **Accessioned Status** contains **Non Accessioned** and **Accessioned** radio buttons while the **Binding Status** contains **Unbound Volumes** and **Bound Volumes** radio

button. One button each from **Accessioned Status** and **Binding Status** must be selected, to list the items. Different types of combinations can be tried out.

7) Select the volumes you want to Bind or Accession by clicking on the respective check boxes.
8) Now enter the binding order details like the **Binding Order Number**, **Binding Bill Number** and **Bound Volume Number**. Three different options are provided for performing different types of functions.
9) **Only Bind** button will allow you to only bind the selected volumes and not accession them. To see the list of such items, select the **Non Accessioned** and **Bound Volumes** radio button.
10) **Accession as One Volume** button will both, accession and bind the selected volumes simultaneously. After clicking this button, you will be prompted to **Enter the Accession Number** in the corresponding field. The accession no. must be entered in the format as set already in the Setup menu. To see the list of such items, select the **Accessioned** and **Bound Volumes** radio button.
11) **Accession Individually** button will only accession the selected volume and not bind them. In this case, you do not have to enter any details in the **Binding Order Number**, **Binding Bill Number** and **Bound Volume Number**. Click on this button to open a small screen, where you have to **Enter the Accession Number** in the corresponding field. To see the list of such items, select the **Accessioned** and **Unbound Volumes** radio button.

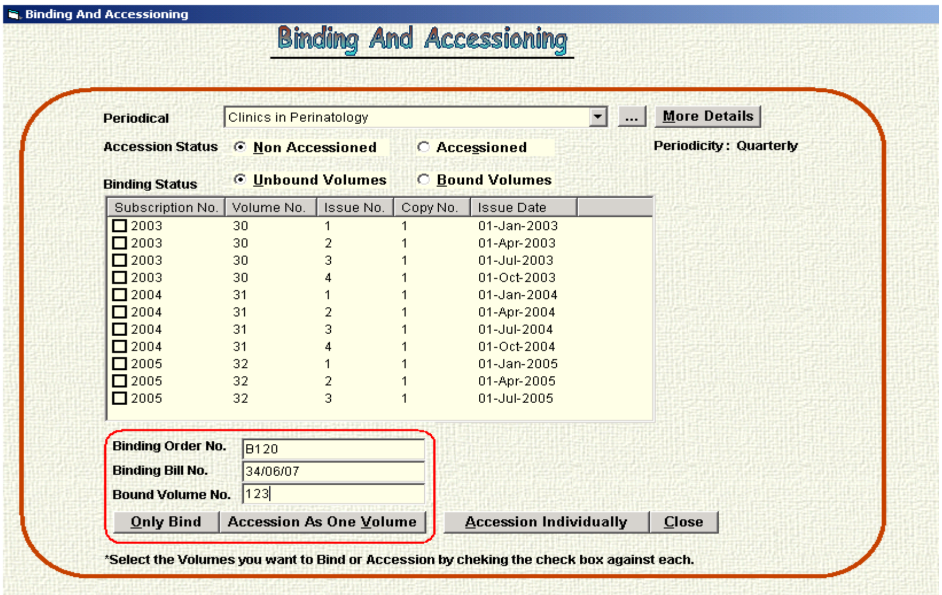


Figure 6.4.1

6.4.2. Accession Register for Periodicals:

1) This screen is required for accessioning a periodical by entering the periodical and binding details. This will be useful while generating the reports and also during the periodical circulation.
2) To activate this function select **Accessioning** menu and click on the **Accession Register for Periodicals** submenu.

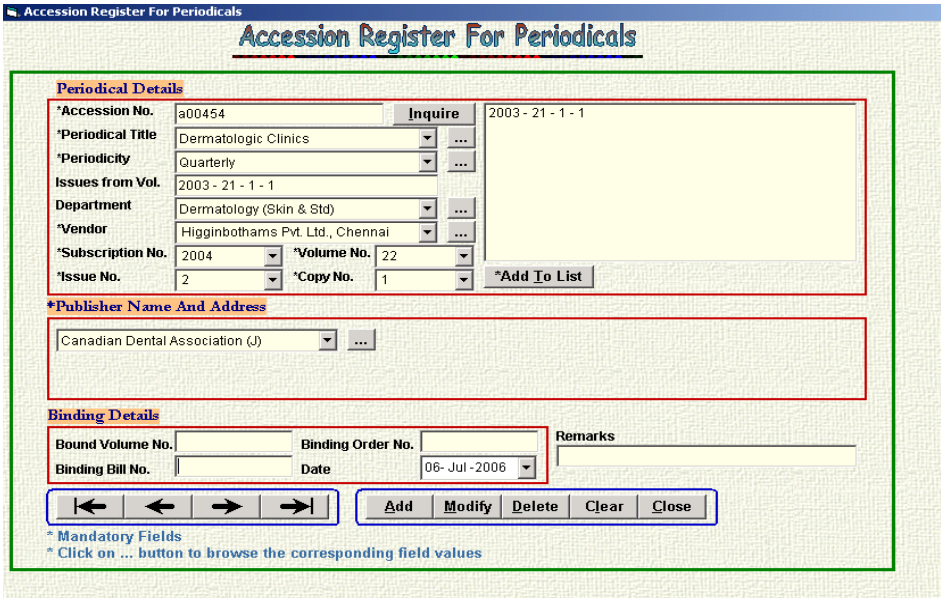


Figure 6.4.2

3) This screen contains three subparts namely, **Periodical Details**, **Publisher Name and Address** and **Binding details**.
4) All the records accessioned in the **Binding and Accessioning** screen can be viewed in this screen either by entering the **Accession No.** and clicking on the **Inquire** button or by clicking on the navigation buttons and scrolling through the previously entered records.
5) Here, you have the option to add multiple *Subscription number, Volume number, Issue number* and *Copy number* for a single accession number, by selecting the details from the above-mentioned fields and clicking on **Add to List** button. The added records will be displayed on the right side of the screen.
6) The binding details like Binding volume number, Binding order number, Binding bill number and Date as entered in the previous submenu, will be displayed for the accessioned volumes, on pressing the **Inquire** button.
7) If you want to add a new accession number then, enter the Accession number, Periodical title, Periodicity and other mandatory fields and click on **Add** button to save the record.
8) To make some changes in the existing record, change the required fields and click on **Modify** button.
9) To delete any record, first search for the record and then click on **Delete** button. The record once deleted, will not be available for any future reference.

6.5. Serials Reminders:

6.5.1. Serials Reminders:

1) This screen allows you to create and send a reminder regarding the issues of a periodical that are yet to be received, damaged or other related information to the respective vendor by specifying the necessary details.
2) Selecting the **Serials Reminders** pull down menu and clicking on the **Serials Reminders** submenu can activate this screen.
3) Once the reminder for a particular serial has been generated and sent to the concerned vendor, it needs to be recorded. Similarly, the reminder that you may have received from a particular vendor also needs to be recorded. With the help of this screen you can keep a track of all these details.
4) Select the data from the ***Periodical field*** and click **Inquire** button to view the previous details, if any. The entered Date and Time when the reminder was sent/ received will be displayed in the grid.
5) To enter a new record, click on the **New** button and start entering the details. Select the *Sent* or *Received* option from the ***Sent/ Received*** list box and click on the **Add** button once the record has been added.
6) **Modify** and **Delete** button allows you to perform the respective function as per your requirement.

6.5.2. Reminder Creation:

1) This is a specific screen that allows you to generate reminders for the issues of a particular periodical that are yet to be received. This reminder can be directly mailed to the concerned vendor by entering the vendor details or you can take a print of this report and send it to the desired vendor.
2) This screen can be accessed from the **Serials Reminders** pull down menu by clicking on the **Reminder Creation** submenu.
3) Sometimes the subscribed issue or a periodical might not arrive in the library on time. With this feature, you can send a reminder to the concerned vendor along with the periodical details, like Serials (or Periodicals), Subscription Number, Volume Number, Issue Number, etc. This can be sent as an email or by post as you desire.
4) The **Date** is set as current date by default, which can be changed as per the requirement. Enter the correct address of the vendor and give the relevant details regarding the periodicals that are yet to arrive.
5) Here, **Notes** is provided so that you are able to add any extra details when required.
6) **Generate and Send as E-Mail** button will generate the reminder and send it, if the internet facility is available.
7) **Generate Reminder and Print** button will generate the reminder and display it in the Notepad format which can be printed and send by post if you require.
8) **Print** button will display the preview in the Notepad format and the print out can be taken by clicking on the Print icon in the menu bar. In this case, the reminder will not be generated.
9) Once, all the relevant details have been entered click on the **Down Arrow** button to add the *Serials, Subscription Number, Volume Number* and *Issue Number* in the grid. In this way, you can add multiple records to the grid. Now, click on any one of the three buttons as per your requirement.

6.5.3. Routing:

1) To activate this screen click on the **Serials Reminders** menu and select **Routing** submenu.
2) This screen will help you in keeping a track regarding which member has issued a particular periodical.
3) Select the name from **Serial** and enter the **Member id**. You can search about the member details by clicking on the **Three Dot** button.
4) After entering both the options click on the **Add** button to save the record and add it to the list.
5) **Modify** and **Delete** buttons are provided for performing the required function.

6.5.4. Weekly Cardex:

This screen gives a graphical representation of weekly periodicals that you have selected along with highlighted issue numbers for a particular subscribed year.

To open this screen select the **Weekly Cardex** submenu from the **Serials Reminders** pull down menu. This screen basically helps you to obtain a monthly statistical report for the periodicals that have been subscribed from the library.

6.5.5. Received / Receivable Report: (This has been removed from version, 4.2.21 onwards)

1) This screen will keep a track of the periodicals, which you have subscribed for a particular year. The periodicals that have been received will be highlighted in green color; those that are not received in pink color and those that are yet to received will be highlighted in yellow color.
2) This screen can be referred to, as a different kind of reminder as well as report screen, which can be accessed by selecting **Received / Receivable Report** submenu from the **Serials Reminders**, pull down menu.
3) Select the **Year**, **Frequency** and any one from the **Vendor/Source/ Department** and click on the **List** button to view the records displayed in the grid. The **Year** and **Frequency** are mandatory here.
4) The list is displayed as **Title**, **Copy no.**, **Volume no.** and **Issue no**. for the corresponding **Frequency** that has been selected.

5) The issue numbers for a particular frequency, say for example, Monthly periodical will be displayed in various color. The Green color indicates that the particular Issue no. has been *Received*, the Pink color indicates *Not Received* Issue no., the Yellow color indicates *Yet to Receive* Issue numbers while the White color indicates *No Issue*.
6) **<u>Print Received</u>**, **<u>Print Not Received</u>**, **<u>Print Receivables</u>** and **<u>Print All</u>** buttons, allow you to view the print preview in the **Excel** format. This helps you to avoid unnecessary reports.
7) Similarly, print preview in the **HTML** format is also available in which you have to select from **Received, Not Received, Receivables** and **All** to get the customized report.

6.5.6. Monthly Cardex:

This screen gives a graphical representation of monthly periodicals that you have selected along with highlighted issue numbers for a particular subscribed year.

To open this screen select the **Monthly Cardex** submenu from the **Serials Reminders** pull down menu. This screen basically helps you to obtain a monthly statistical report for the periodicals that have been subscribed from the library.

6.5.7. Periodical Report:

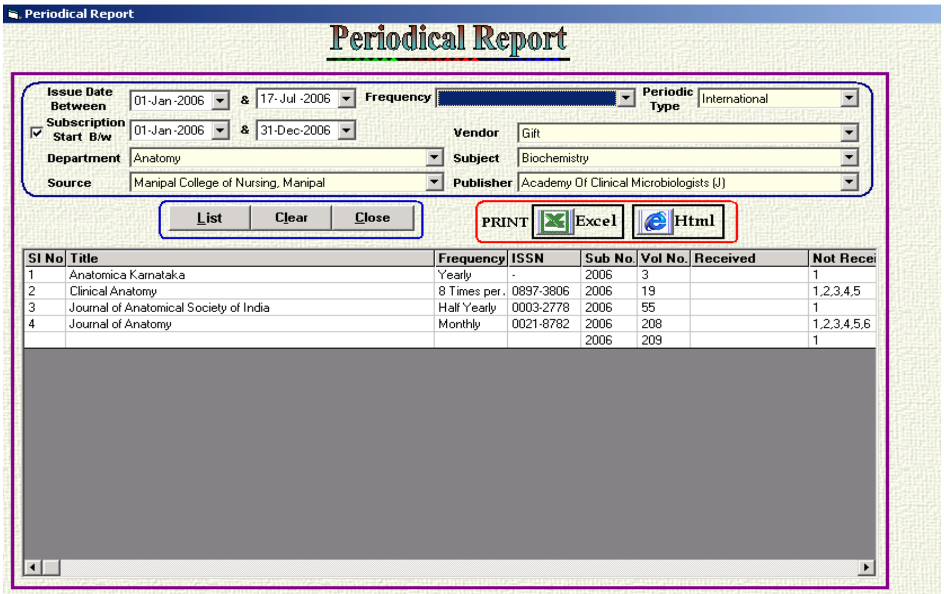


Figure 6.5.7

1) This report screen will keep a track of the periodicals that you have subscribed based on department, source, subject, vendor, frequency, periodical type and issue date.
2) This report screen can be accessed by selecting **Periodical Report** submenu from the **Serials Reminders** pull down menu. You can also open the screen, by entering **Ctrl + I** from the keyboard.
3) Several search criteria has been given here like, Issue Date Between, Frequency, Periodic Type, Vendor, Department, etc. The Issue Date Between is a mandatory field.
4) Click on the **<u>List</u>** button to view the matching search criteria in the grid.
5) The records will be listed under various fields like, Serial No., Title, Frequency, ISSN, Subscription No., Volume No., Received, and Not received respectively.
6) The above list can be printed in **Notepad** and **Excel** formats. When you click on any of the two print icons, a small screen appears asking you, whether the reports should be generated for **Received**, **Not Received** or **All** that are mentioned in the grid.

<u>6.6. Reports:</u>

6.6.1. Customized Reports – Articles:

1) With this screen you are able to perform customized search on article based on the various search criteria present in the screen. This will also be useful while generating the reports.
2) To enable this report screen click on the **Customized Reports – Articles** submenu present in the **Reports** menu.

3) This screen is basically used for searching about articles that have already been indexed and generating report for the same.
4) A screen titled as **Customized search on Articles** appears wherein various types of search combinations can be performed by selecting the *AND/OR* options.
5) Click on the **Search** button to see the matching records displayed in the **Customized Search Results - Articles** screen.
6) Sorting of the displayed list can be done by, selecting you requirement from **Sort Criteria** list box.
7) The **Total No. of Records** will be displayed at the bottom of the screen.
8) The above list can be printed in three formats namely, HTML, Notepad and Excel, by clicking on the Print icon present in the respective format screens.

6.6.2. Subscription Search:

Using this screen, you are able to perform customized search on the subscribed periodical based on the various search criteria present in the screen. This will also be useful while generating the reports.

This is also a different type of customized search and report screen, which can be accessed by selecting the **Reports** menu and clicking on the **Subscription Search** submenu. This has been explained under ***Search Journals, Serials and Periodicals*** heading in the **OPAC** module. You may refer the document there.

6.6.3. Yearwise Statistical Report:

The Yearwise Statistical Report will display a list of the periodicals that have been subscribed/not subscribed /not received for a particular period.

6.6.3.1. Statistical Report:

1) This prepares a general report for all the listed periodicals depending on **From Year** and **To Year**, which you have entered. It also allows you to judge the status of a particular periodical.
2) Go to **Reports > Yearwise Statistical Report > Statistical Report** to enable this function.
3) After selecting the respective year range, click on the **List** button to display all the records in the grid.
4) When the list is too long only 25 titles will be listed in the same screen. In such cases, click the **Next** button to go the next page and **Back** button to go the previous list.
5) **List All** button will display the entire list on the same screen.
6) The list will be displayed as Serial No., Title, Periodicity, ISSN, From Year and To Year.
7) In this screen, the following notations have been used: -
   YES == Subscribed and received (at least one copy),
   NO == Not subscribed
   NR == Not received
   * == Old Periodical Titles
8) The above list can be printed in three formats namely, **HTML**, **Notepad** and **Excel** by clicking on the Print icon present in the respective format screens.

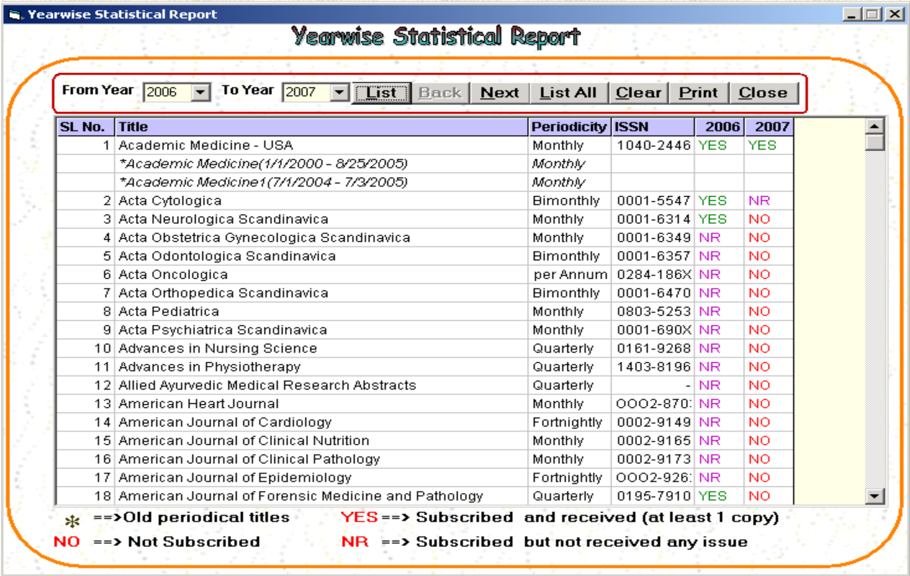


Figure 6.6.3.1

6.6.3.2. Customized Statistical Report:

1) This screen allows you to obtain a statistical report based on the search criteria present in the screen like Publisher code, frequency, department, etc.
2) To access this screen go to **Reports > Yearwise Statistical Report > Customized Statistical Report.**
3) The difference here is that this will give you a customized report according to your requirements. Various types of search combinations can be performed by selecting the *AND/OR* options.
4) Click on the **Yearwise Statistical Report** button to view the list displayed in the **Yearwise Statistical Report** screen. All the functions of this screen are same as described in the above submenu.

6.6.4. Continued Discontinued List:

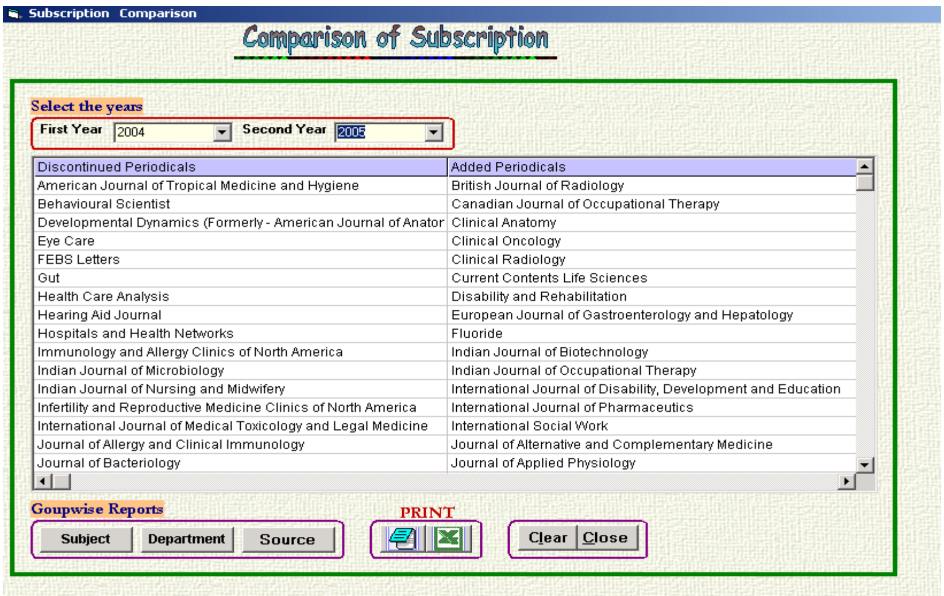


Figure 6.6.4

1) Sometimes you might want to discontinue some of the periodicals and instead subscribe a new one. Using this screen you are able to compare the periodicals that have been newly added/subscribed with those that have been discontinued for the specified period.
2) To activate this function select **Reports** menu and click on **Continued Discontinued List** submenu.

3) A screen titled as **Comparison of Subscription** appears where you have to first **Select the Years** in the *First Year* and *Second Year*. For example, select 2004 and 2005 from the *First Year* and *Second Year* respectively.
4) This will display all the *Discontinued Periodicals* in 2004 and simultaneously display all the *Added Periodicals* in 2005.
5) **Groupwise Reports** can be obtained for **Subject**, **Department** and **Source**. On selecting each of these buttons, the corresponding Crystal Reports are generated which can be printed by clicking on the Print icon button in the menu bar.
6) To view the print preview of the report displayed in the screen, select either the **Notepad** or **Excel** print button.

6.6.5. All Serials List, Along With Their Volume and Issue Details:

Using this screen, you are able to keep a track of the entire periodicals that are present in the library along with their volume and issue details.

This screen can be accessed by selecting the **Reports** pull down menu and clicking on the **All Serials List, Along With Their Volume and Issue Details** submenu. A screen titled as **All Serials List** appears where the records are displayed under as ***Periodical Name***, ***Subscription Number***, ***Start Date***, ***End Date***, ***Received*** and ***Not Received***. Here, the records of the all the periodicals are displayed in the grid beginning from the first entered data. The displayed list can be printed in two formats namely, **Notepad** and **Excel** by clicking on the Print icon present in the respective format screens.

6.6.6. Cardex System:

1) Cardex report is a report of received volumes and corresponding issues based on their frequency. The report is generated for a particular period according to your requirement.
2) Select **Reports** menu and click on **Cardex System** submenu to prompt a screen titled as **Cardex Report** to appear.

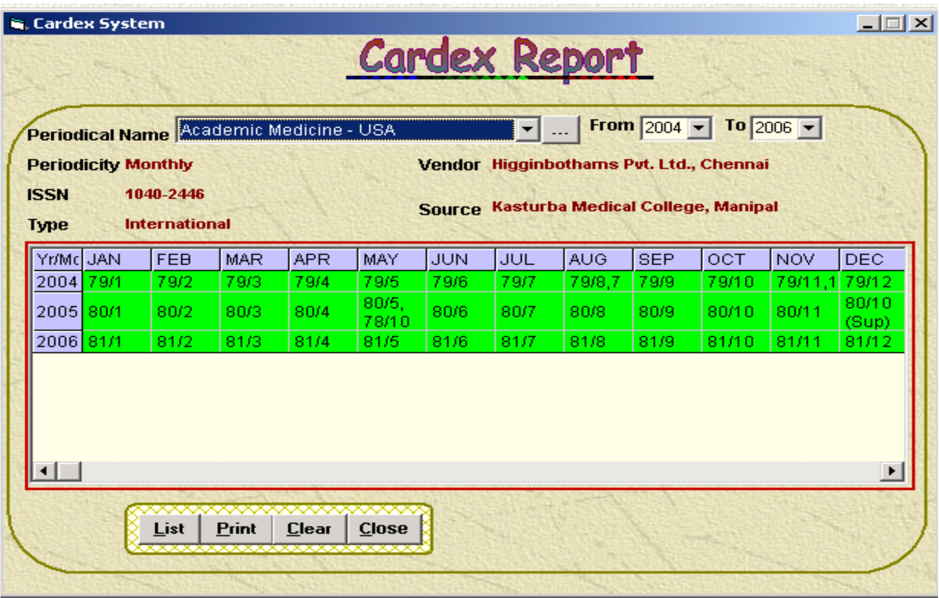


Figure 6.6.6

3) Select the **Periodical Name** and the **Date**. The records will be displayed in the grid, according to the Year and frequency of the selected periodical. Other details of the selected periodical like Periodicity, Vendor, ISSN, Type and Source will be displayed above the list.
4) The grid display will be adjusted according to the periodicity. The division of columns will depend on periodicity of the periodical. For odd frequencies like 18 times per annum a twelve-month grid is chosen as the display format.
5) The issues are displayed in the month corresponding to the issue date. The background color is green if the issue has been received otherwise the background color is white.
6) To adjust the font format double click anywhere in the grid to select the desired font.

7) **List** button contains two options namely, Default Format and Volume Separately. Default Format will display the list as per the previously set format where as if you select the Volume Separately option then it will add Volume field separately to the display list.
8) Printing of the report is possible in two formats namely, HTML and Excel format.

6.6.7. Subscription Report:

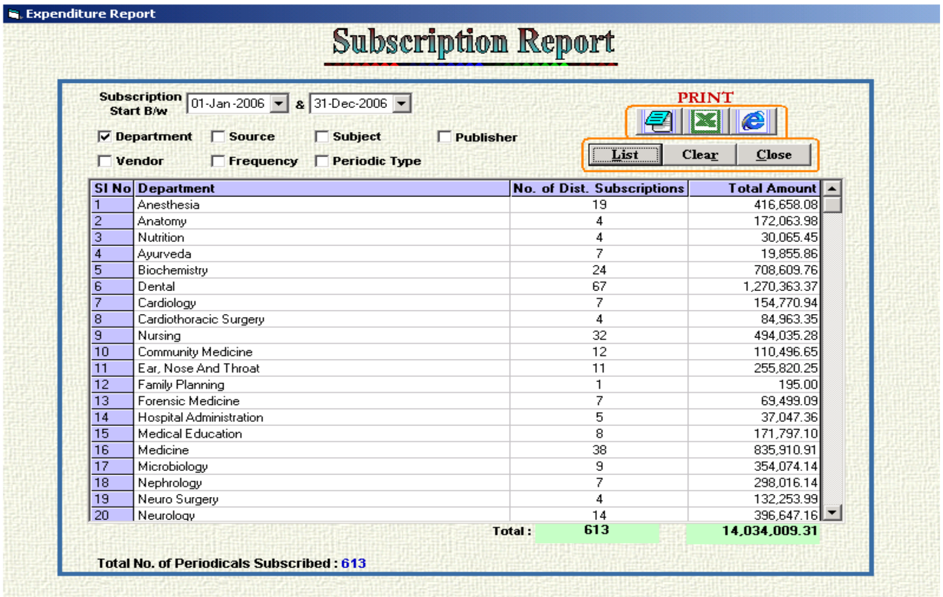


Figure 6.6.7

1) This screen gives you a statistical report regarding the total amount of money spent on the different subscriptions by each department in the institution.
2) To enable this function click on the **Subscription Report** submenu present in the **Reports** menu.
3) Select the **Subscription Start between Dates** and also any one from other options like Department, Vendor, Source, Frequency, etc.
4) Press the **List** button to view the list, which is displayed as Serial Number, Number of distinct subscriptions and Total amount corresponding to the selected field.
5) The above list can be printed in three formats namely, **HTML**, **Notepad** and **Excel** by clicking on the Print icon present in the respective format screens.
6) The **TOTAL** for both Number of distinct subscriptions and Total amount is calculated and displayed at the bottom of the list.
7) The *Total Number of Periodicals Subscribed* is listed at the bottom of the screen.

6.6.8. Generate Barcodes:

This function can be accessed by selecting the **Reports** menu and clicking on **Generate Barcodes** submenu. The description of this screen has already been explained in the **Reports** menu present in the **Catalogue and Accessioning** module. For any reference you may go to the specified module.

6.6.9. Other Reports:

To view this report screen select **Other Reports** submenu from the **Reports** menu. The screen opens displaying *Periodical Subscription Expiry Reminder* title under the **Reports – Periodicals** heading. On clicking the *Periodical Subscription Expiry Reminder* subtitle, a small screen appears asking you to select from and to dates. Click on the **Ok** button to generate the report displaying the **Subscription Date, Expiry Date, Subscription No.** and **Copies** along with other details, such as **Periodical ID, Periodical Name, Publisher** and **Supplier**. This report helps in reminding the expiry date of the subscriptions so that necessary action can be taken.

6.7. Search:

6.7.1. See the List of Journals Subscribed:

This screen can be accessed by clicking on the **Search** menu and selecting **See the List of Journals Subscribed** submenu. This screen features have been discussed in the **Periodicals List** submenu.

6.7.2. Received Periodicals List:

Select the **Search** menu and click on the **Received Periodicals List** submenu to access this screen. The screen titled as **Receive Periodical** appears which has been explained in **Receive Periodical** submenu.

6.7.3. Search by Article Title, Keyword:

Click on the **Search** menu and select **Search by Article Title, Keyword** submenu to open the screen titled as **Article Search.** This has been explained in OPAC module. You may refer the document by going there.

6.8. Setup:

6.8.1. System Parameters – Periodicals:

This screen allows you to set the mandatory fields, which are useful while entering the periodical information.

This setup screen can be accessed by, clicking on the **Setup** menu and selecting the **System Parameters – Periodicals** submenu. The mandatory fields can be set by clicking on the **Set Mandatory Field(s)** button. This action will take you to another screen where all the fields present in the **Periodical Information** screen are displayed. Select the field/fields that you want to set it as mandatory and click on the **Save** button. Close this screen and open the **Periodical Information** screen to see the changes that you have made.

Note: All the submenus displayed below have been explained in detail in the **Setup and Security** module under the **Initial Setup Screens** submenu. You may refer the document by going to the above submenu.

6.8.2. Publishers

6.8.3. Vendors

6.8.4. Frequency

6.8.5. Departments

6.8.6. Subjects

6.8.7. Source

6.8.8. Periodical Type

6.8.9. Currency

6.8.10. Html Setup

6.8.11. Tool Bar

6.8.12. Screen Setup

7. <u>Circulation:</u>

This module primarily handles functions related to circulation like Issues, Return, Renewal, Reservation and Cancellation of books as well as non-book items.

<u>How to access the Circulation module? :</u>

a) Click once on the **<u>Circulation</u>** module, which appears on the front page of Easylib software, to open the **Easylib Login** screen.
b) Enter the correct ***User ID*** and ***Password***.
c) The main page appears containing a list of all the menus and sub-menus of **<u>Circulation</u>** module which are displayed below: -

7.1. Circulation

7.1.1. Circulation

7.1.2. Charging

7.1.3. Overnight Circulation

7.1.4. Periodical (Loose Issue) Circulation

7.2. Listing

7.2.1. Item Status

7.2.2. Circulation List

7.2.3. Periodical (Loose Circulation) List

7.2.4. Member Due List

7.2.5. Reservation Status

7.3. Reminders

7.3.1. Circulation – Reminders

7.3.2. E-mail reminder to all (Reservation)

7.3.3. E-mail reminder to all (Due)

7.4. Reports

7.4.1. Customized Reports – Circulation

7.4.2. Circulation Statistics

7.4.3. Circulation Statistics datewise

7.4.4. Circulation Statistics Datewise (Advanced)

7.4.5. Other Reports

7.5. Analysis

7.5.1. Usage Statistics

7.5.2. Profilewise Issue Statistics

7.5.3. Reading Analysis

7.6. Setup

7.6.1. System Parameters – Circulation

7.6.2. Member Parameters

7.6.3. Holidays

7.6.4. HTML Setup
7.6.5. Toolbar
7.6.6. Screen Setup

7.7. *Window*

7.8. *Help*

7.1. *Circulation:*

7.1.1. Circulation:

How to view the details regarding Circulation of items?

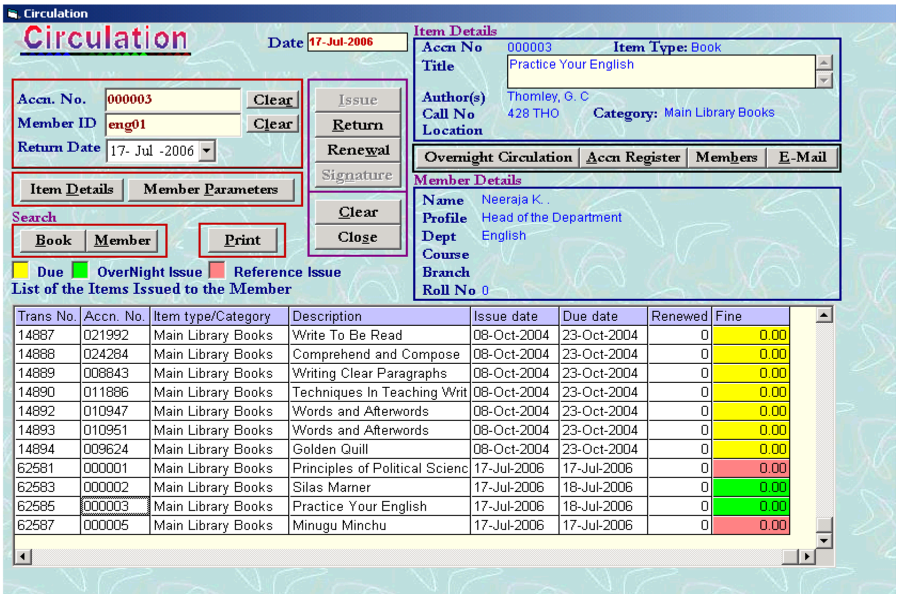


Figure 7.1.1

1) This is a very important screen of Easylib. This screen allows you to perform the circulation function such as issuing, returning and renewal of an item, by entering the member ID and accession number.
   Circulation can be done in two ways.
   A) Using a scanner
   B) Using Keyboard.
2) This screen provides you with the option to do multiple functions from this single page. To open this page, select the **Circulation** menu and click on the **Circulation** submenu or you have the option to go directly to this page, by pressing the **Ctrl + K** buttons from the keyboard.
3) Here, you are able to see all the items that have been borrowed from the library, by a particular member. This can be done by entering the correct **Accession Number** or **Member ID** in the respective fields.
4) As soon as you enter the **Accession Number**, the **Member ID** is automatically generated for the member, who has taken an item with that particular accession no. Also, the **Item Details** and the **Member Details** are displayed on the right side of the screen. This will also list all the other items, borrowed by the particular member, in the grid for your reference. In this way, you can see whether a specific item has been issued or not.
5) This screen is also used for issuing items, related to a particular accession number, to the member by entering the correct **Member ID** and clicking on the **Issue** button.
6) If the book is issued, then it will be added to the displayed list in the grid. Otherwise it will display a message box saying that the ***"Member is not authorized to borrow this item. Check circulation parameters for the profile"***. In such cases, you have to go and make changes in the **Member Parameters** screen if you are authorized to do so.

7) If a particular item has to be returned, then select the item from the displayed list, by clicking on the mouse. Select the date of returning from the **Return Date** combo box and click on the **Return** button. This will move the selected record from the grid and will be ready for issuing again.
8) Click on the **Renewal** button for renewing the item once again. If the book is **overdue**, you will not be able to renew it. You must return the item and then re-issue it. This is to help you, collect the due before renewing the book.
9) You can take the digital signature of the members, by clicking on the **Signature** button, which acts as a proof of borrowing the books from the library. In the screen titled as **Signature Pad**, the list of all the books that have been issued for that particular member id will be displayed on the screen. Enter your signature in the space provided below.
10) **Item Details** button takes you to the **Item/ Reservation Status** screen, where you are able to see the **Item Status** of a particular record that you have selected from the grid. From this screen, you can reserve the item by clicking on the **Reserve** button. Enter the relevant details in the message box that appears on the screen. Once reserved the item details will now be present in the **Reservation Status** screen. Since the book has already been issued the item status will be set as ***Waiting (1)*** and so on. You can also **Inquire** and **Print** the reports, for a particular accession number or title number.
11) By clicking on the **Member Parameters** button, you are able to view the corresponding screen, where the Book and Non Book parameters related to a member profile will tell you, the maximum number of items the person is authorized to borrow, maximum number of renewals, issue days and reserve days. You have the option to set the daily fines and the surcharge amounts for the items.
12) Extensive search facility for **Members** as well as **Books** is also provided, which will take you to the respective search screens. The details about non-book items can also be found from the **Books** search button. Once you find the desired member through the search screen, double click on the selected record. This will directly copy the **Member ID** into the respective field in the **Circulation** screen.
13) Three types of **Print** format are available for Circulation Details.
14) Here, there is an option to go directly to the **Book Accession Register** and **Library Member** screens by clicking on the **Accession Register** and **Members** button.
15) You have the option to do **Overnight Circulation** as well. This screen also provides due reminder facility so that you can send the due information by e-mail to any member as you require by clicking on the **E-Mail** button.

List of Common Buttons:

- **CLEAR** button allows you to clear the records from the currently viewing screen.
- **ADD** button allows you to add a record to the database.
- **MODIFY** button allows you to modify or change any record or fields according to your preferences.
- **DELETE** button allows you to delete a record from the database.
- **CLOSE** button allows you to end the current operation and return back to the previous or main page.
- **PRINT** button allows you to view the print preview of a particular page or record. In this software you have an additional feature of printing it in three formats namely, Notepad, Excel and HTML.
- **NEW** button allows you to enter a new record.
- **INQUIRE** button gives you the option to view whether the particular record exists or not. If the record exists then it will display it or else a message appears that this record does not exist.
- **FIND** button allows you to find a particular record related to the entered accession number by directly going to the Search screen.
- **CANCEL** button allows you to cancel the present action and return back to the previous screen.

List of Keyboard Shortcuts for the buttons:

1) Clear ➔ Alt + R
2) Clear ➔ Alt + L
3) Issue ➔ Alt + I
4) Return ➔ Alt + R
5) Renewal ➔ Alt + W
6) Signature ➔ Alt + N

7) Clear ➔ Alt + C
8) Close ➔ Alt + S
9) Item Details ➔ Alt + D
10) Member Parameters ➔ Alt + P
11) Book ➔ Alt + B
12) Members ➔ Alt + M
13) Members ➔ Alt + B
14) Print ➔ Alt + P
15) Accession Register ➔ Alt + A
16) E- Mail ➔ Alt + E

7.1.2. Charging:

1) In this screen you can issue multiple items at one time. This can be done in two ways, that is, either by using a scanner or entering the accession numbers manually from the keyboard in the top left corner of the screen.
2) Select **Circulation** menu and click on the **Charging** submenu, to activate the screen titled as **Issue/ Charging**.
3) Once you select **Charging,** a message box appears as ***"Are you using scanner..."***Click the **Yes** or **No** option based on your preference.
4) If you are not using the scanner, then after inserting the **Accession Number,** you have to press the **Enter** key from the keyboard.
5) Insert the **Member ID** and enter all the desired accession number of the items. The entered details will be displayed in the grid along with other details as *Accession no*., *Item type/ Category*, *Title*, *Due Date*, *Status*, etc. Also, the Member Details can be viewed at the top of the screen.
6) Click **Issue** button, to issue the items in the list. If the item has been allotted, then it will display that the item is already issued, else it will give as issued.
7) **Issue and Print** button will first display the list in the grid and then will take you to the preview in **Notepad** format for the item that has been issued, along with the member details at the top of the page.
8) Also, **HTML** and **Excel Print** options are present in addition.
9) This screen, allows you to take the signature of the concerned member in the space provided at the bottom of the screen.

List of Keyboard Shortcuts for the buttons:

1) Issue ➔ Alt + I
2) Issue And Print ➔ Alt + A
3) Clear ➔ Alt + L
4) Close ➔ Alt + C
5) Signature ➔ Alt + N

7.1.3. Overnight / Reference Circulation:

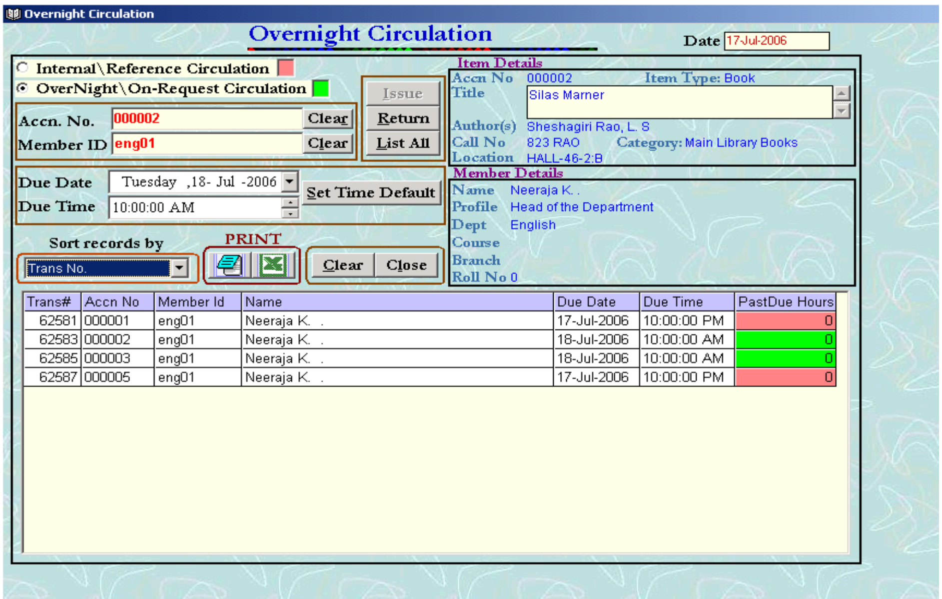


Figure 7.1.3

1) This screen allows you to issue an item under the overnight circulation or reference circulation category. Here, you are also able to perform the return operation for an item that is issued under Overnight/Reference circulation.
2) This screen can be accessed by, selecting the **Circulation** menu and clicking on the **Overnight Circulation** submenu. You can open this screen directly from the Circulation screen by clicking on the **Overnight Circulation** button.
3) Once the screen is activated, select whether the transaction is being made for *Internal/ Reference Circulation* or *Overnight/ On-Request Circulation*.
4) If *Internal/ Reference Circulation* is selected then only **Due Time** is enabled, as this item, has to be returned back within the working hours of the library. This option is highlighted by red color.
5) If *Overnight / On-Request Circulation* is selected then both **Due Date** and **Due Time** are enabled as this item can be issued for only 24 hours. These fields are set automatically as soon as the options are selected. This option is highlighted by green color. You have the option to set the time by making the changes in the corresponding field and then clicking on the **Set Time Default** button.
6) Enter the **Accession number** and the **Member ID** and press the **Issue** button to issue the item. The corresponding **Item Details** and the **Member Details** are displayed on the right side of the screen for your reference. Once the item is issued it will be displayed in the grid along with other details.
7) To return the item, select the item from the list and press the **Return** button.
8) **List All** button, displays all the items in the grid, which are currently under circulation, for any of the above two options.
9) **Sort Records By** option allows you to search for records more easily by selecting any one of the options from the list. Also, you can view the print preview in **Notepad** or **Excel** format.

List of Keyboard Shortcuts for the buttons:

1) Clear ➔ Alt + R
2) Clear ➔ Alt + L
3) Issue ➔ Alt + I
4) Return ➔ Alt + R
5) List All ➔ Alt + L
6) Set Time default ➔ Alt + S
7) Clear ➔ Alt + C
8) Close ➔ Alt + L

7.1.4. Periodical (Loose Issue) Circulation:

How to perform Circulation of Periodicals?

1) This is a very important screen wherein you are able to perform the circulation function such as issuing an item, returning an item and renewal of an item by entering the member ID and accession number.
2) Click on the **Periodical (Loose Issue) Circulation** submenu from the **Circulation** pull down menu.
3) Through this screen you can perform **Issue**, **Return** and **Renewal** of the periodicals by pressing the respective buttons.
4) In order to see, if a specific item has been issued, simply enter the accession number. The *Periodical name*, *Issue date*, *Due date* and *Renew date* will be displayed in the grid. Also, the **Item Details** of the record will be shown at the right side of the screen.
5) Similarly, if you enter the **Member ID**, the information of the member will be displayed on the right side as **Member Details**.
6) Extensive search facility for **Loose Issues** and **Members** are also provided, which will take you to the respective search screens. Once you find the desired records through the search screen, double click on the selected record. This will directly copy the **Accession Number** and **Member ID** separately into the respective fields, in the **Periodical (Loose Issue) Circulation** screen.

List of Keyboard Shortcuts for the buttons:

1) Issue → Alt + I
2) Return → Alt + R
3) Renewal → Alt + W
4) Loose Issues → Alt + L
5) Members → Alt + M
6) Clear → Alt + C
7) Close → Alt + L

7.2. Listing:

This menu helps you in keeping a track of all the circulated items through different types of list screens.

7.2.1. Item Status:

How to check the Item Status and Number of Copies in the Library:

1) Using this screen, you are able to know the status of an item, whether an item is available, issued or in waiting. Also you are able to keep a track of the number of copies present in the library for the desired item, by entering the Accession Number or Title number.
2) To access this screen, select the **Listing** menu and click on the **Item Status** submenu or by using the keyboard shortcut **Ctrl + I**. This screen can also be opened from Catalogue and Accessioning module.
3) An **Item/Reservation Status** screen appears, prompting you to enter the **Title Number or Accession Number**. Now, click on the **Inquire** button to search for your desired record.
4) A brief description about the item will be displayed at the top right corner of the screen. Also, all the details that were entered for the particular title no. or accession number will be displayed in the tables.
5) Two tables titled as **Item Status** and **Reservation Status** is displayed on the screen.
6) **Item status** table gives information about to whom the book has been issued to. It will tell when it was issued, when it was renewed and when is the due date. It also shows you, the **status** of the item whether it is *Issued, Allotted or Available* and other related information.
7) Similarly, **Reservation status** table provides information related to reservation status of book or non-book item, along with the date of reservation, time, member id, name, reservation expiry date and status of the reserved item.
8) Here you can reserve any book for yourself, whether the selected book is available or allotted, by clicking on the **Reserve** button. The detailed procedure for reserving a book has been explained in **OPAC** module titled as **Procedure for reserving any item**. You may refer the document by going to the above module.

List of Keyboard Shortcuts for the buttons:

1) Inquire ➔ Alt + I
2) Reserve ➔ Alt + R
3) Clear ➔ Alt + L
4) Close ➔ Alt + C

7.2.2. Circulation List:

1) This screen allows you to keep a track of all the past circulation as well as the current circulation based on item type, member type, issue date and return date. You are also able to list the items that have been categorized under only due and with/without due sections, by selecting due only and all option respectively.
2) To open this screen click on the **Circulation List** submenu from the **Listing** menu.
3) Start entering the details in the **Selection Criteria** box present at the top of the screen.
4) After you have entered the details select the **Type of Listing** that you wish to view like, *All*, *Current Circulation* and *Past Circulation*.
5) If you select *Current*, then you can see all the current circulations of item types and also the items that are having dues. If you select *Past Circulation*, then you can see all the items types that were circulated in the past and so on.
6) There is also an option to view either *All* or the *Due Only* circulation list. This will help in saving your time as you are able to view for particular criteria.
7) Once all the selection criteria have been entered, click on the **List** button to get list displayed on the screen.
8) In the **Sort Criteria** list box, you have the option of sorting the displayed list as per your requirement.

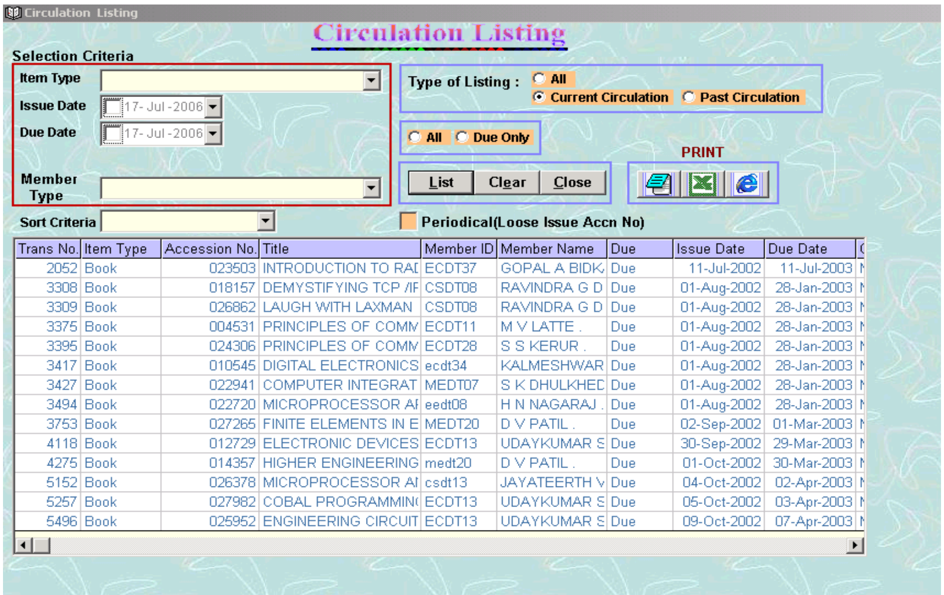


Figure 7.2.2

List of Keyboard Shortcuts for the buttons:

1) List ➔ Alt + L
2) Clear ➔ Alt + E
3) Close ➔ Alt + C

7.2.3. Periodical (Loose Circulation) List:

This screen will list the current circulation of periodicals corresponding to a particular member. This will be useful while generating the reports.

Select the **Listing** menu and click on the **Periodical (Loose Circulation) List** submenu to view the screen. This is a separate screen mainly used for listing records related to all the Periodicals that are circulated from the library. Enter the **Member Id** and click on **List** button, so as to get the periodical name, to whom and when it has been issued, how many times it has been renewed and what is the return date etc. You can also sort the list as per your requirement by selecting any one from the **Sorting Criteria**. Print preview for **<u>Notepad</u>** and **<u>Excel</u>** formats are also present.

<u>List of Keyboard Shortcuts for the buttons:</u>

1) List → Alt + L
2) Close → Alt + L

7.2.4. Member Due List:

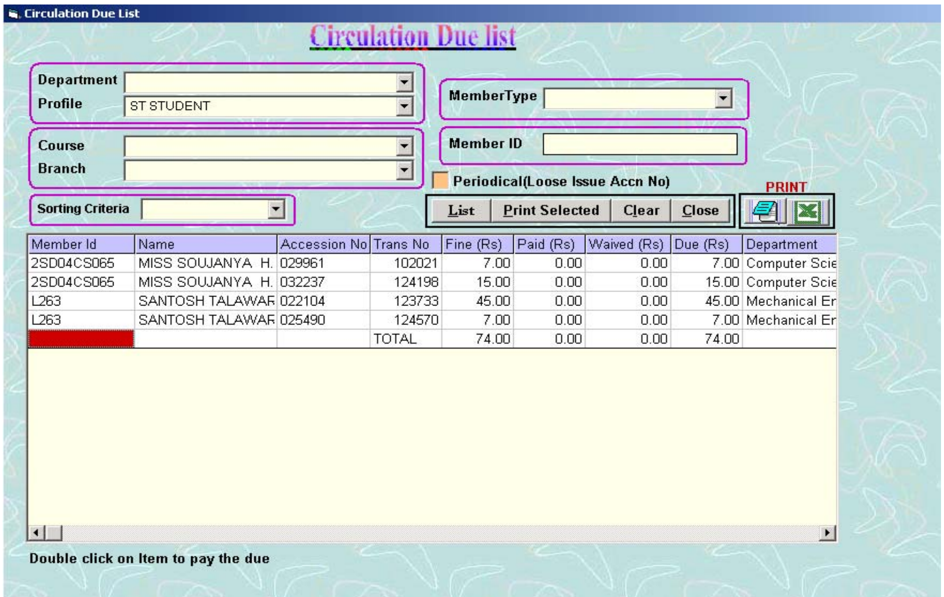


Figure 7.2.4

1) This screen allows you to keep a track of all the transactions, which are due, depending upon member type, member id, department, profile and course and the same dues can be paid back with the help of this screen. This will also be helpful while generating the reports.
2) The screen titled as **Circulation Due List** can be accessed by, selecting the **Listing** menu and selecting the **Member Due List**.
3) The due list can be displayed for **Department**, **Profile**, **Course**, **Branch**, **Member Type** and **Member ID**.
4) Select any criteria from the above options and click on the **<u>List</u>** button, to view the corresponding list that is displayed in the grid along with other information.
5) You can sort the list as per your requirement by selecting from the **Sorting Criteria**.
6) When you have to pay the due, double click on the desired record from the list. This will prompt a small screen **Due Payment** to appear on the screen. The **Member ID** and the current **Date** will be automatically generated. Now select the **Transaction Number Accession Number** for the particular member id. This will automatically generate the **Amount Paid** and **Amount Waived**. If you want you can also enter the amount in the above field but it should be noted that the amount should be less or the same as displayed in the grid. Enter the **Receipt Number** and select either **<u>Pay & Display Receipt</u>** button or **<u>Pay & Printer O/P</u>** button.
7) If you select **<u>Ok</u>** button without selecting the other two then the data will be updated and the due record will be removed from this list.
8) One additional feature of this screen is that you can send this due list to the concerned member by selecting the member id from the list and pressing the **<u>Print Selected</u>** button.

<u>List of Keyboard Shortcuts for the buttons:</u>

1) List → Alt + L
2) Clear → Alt + L
3) Close → Alt + C
4) Print Selected → Alt + P

7.2.5. Reservation Status:

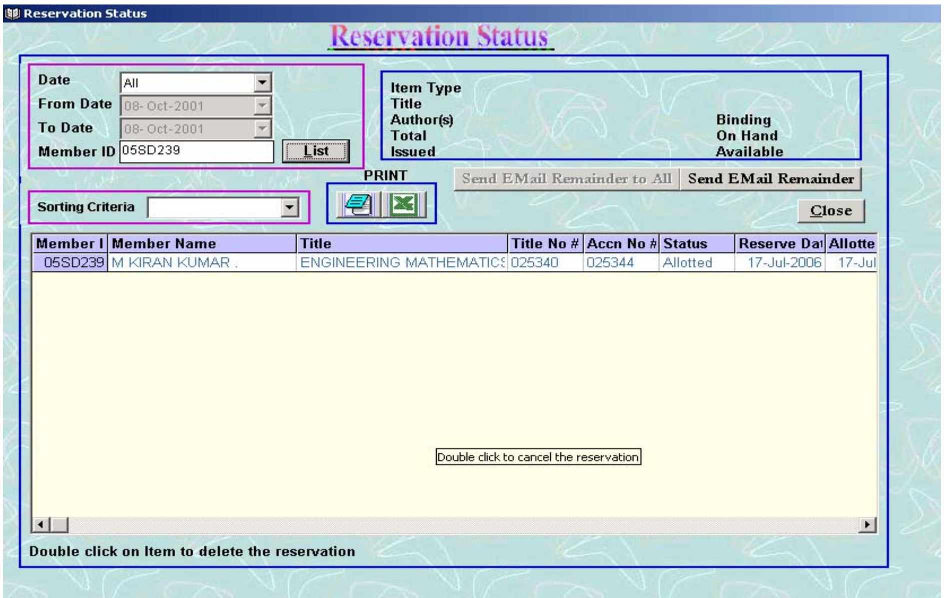


Figure 7.2.5

1) This screen allows you to keep a track on the status of a particular item by selecting the date option present in the screen. Here you can also cancel the reservation of an item by double clicking on that particular item displayed in the grid.
2) This screen can be accessed by, selecting the **Reservation Status** submenu from the **Listing** pull down menu.
3) Once the screen is opened it prompts you to enter the **Date and Member ID**.
4) Select Date as *All* and enter Member Id. Now, click on the **List** button to get the list with all dates like reserved date, allotted date, expiry date, etc.
5) If you select any record other than *All* date, then the **From Date** and **To Date** are also enabled, so that you can select the desired time period. If you click on **List** button, without entering member id you will get the list of all the members. The **Send E-Mail remainder to all** button will be enabled and you can send the status of the reservation to all the members whose names are listed in the grid.
6) If you click on **List** button after entering the member id, you will get information about only the entered member id. The **Send E-Mail remainder** will be enabled and you can send the status of the reserved item only to the above member.
7) When you want to cancel the reservation, double click on the item. A message box appears asking you whether you want to cancel the reservation of the particular title number by the respective member id. Press **Yes** button to cancel the reservation. Now, the particular item will be removed from the displayed list.
8) The **Item Details** can be seen at the top of the screen, by selecting any record from the list. Here also, **Sorting Criteria** is present so as to sort the list as per your requirement.

List of Keyboard Shortcuts for the buttons:

1) List ➔ Alt + L
2) Close ➔ Alt + C

7.3. Reminders:

7.3.1. Circulation – Reminders:

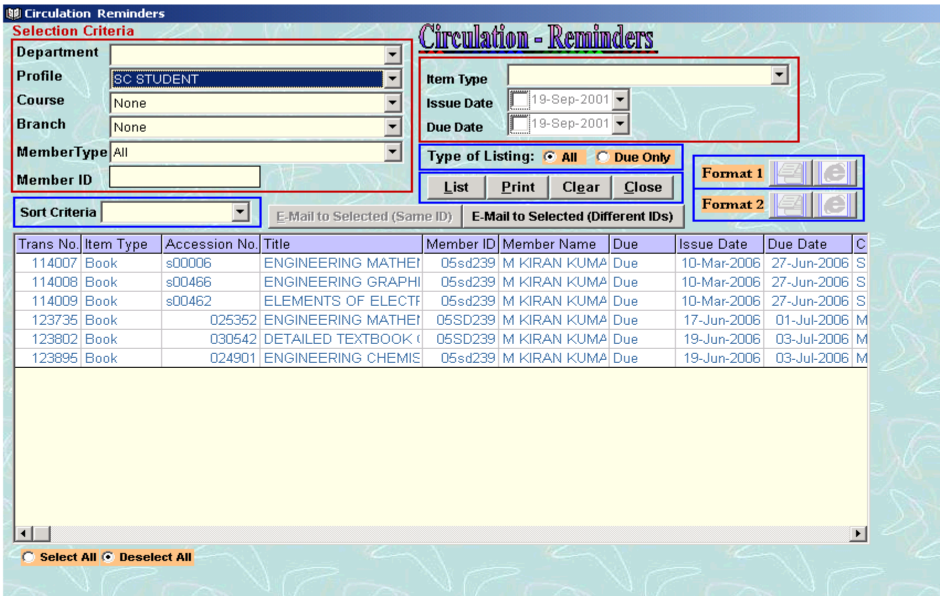


Figure 7.3.1

1) Using this screen, you are able to send the reminders to all the members who have issued items under the current circulation. You can send reminders either to an individual or to all the members.
2) To enable this function, select **Circulation Reminders** submenu from **Reminders** pull down menu.
3) Here also, you have the option to select from the **Department**, **Profile**, **Course**, **Branch**, **Member Type** and **Member ID** that are grouped under **Selection Criteria**. After selecting, click on the **List** button to view the entire list. To customize the list, you can choose either **All** or **Due Only** radio buttons from the **Type Of Listing**.
4) More options like **Item Type**, **Issue Date** and **Due Date** are provided to further customize the list.
5) Select any record from the list and click either of the two **Formats** to see the preview in Notepad/ HTML format of the selected record only. You can send this format as e-mail reminder to the concerned member.
6) **E-mail to Selected (Same ID)** and **E-mail to Selected (Different IDs)** button are provided to help you in sending reminders to the respective members.

List of Keyboard Shortcuts for the buttons:

1) List ➔ Alt + L
2) Clear ➔ Alt + E
3) Close ➔ Alt + C
4) Print ➔ Alt + P
5) E-Mail to selected (All) ➔ Alt + E

7.3.2. E-mail reminder to all (Reservation):

This screen can be opened from the **Reminders** menu and selecting E**-mail Reminder to all (Reservation)** submenu. The importance of this screen is that from this screen you can send e-mail reminders to all the members regarding the reservation of any items. For this feature, Internet facility must be present in the system.

7.3.3. E-mail reminder to all (Due):

This screen will generate reminders and send them through E-mail to all the library members who have borrowed an item that has extended beyond the due date.

This screen can be accessed from **Reminders** > **E-mail Reminder to all (Due)** submenu. Here, you are able to send e-mail reminders to all the members regarding the due details of any item. For this feature, Internet facility must be present in the system.

7.4. Reports:

7.4.1. Customized Reports – Circulation:

1) This screen gives you the customized reports of the current as well as the past circulations. You can search for the items by selecting from the various fields, and then get the corresponding reports from the result screen.
2) To activate this function select **Reports** menu and then click on the **Customized Reports-Circulation** submenu.
3) A screen titled as **Customized Search Circulation** appears along with **Current circulation** and **Past circulation (Already returned) options**. Enter your preference by selecting from the various search criteria present in the screen.
4) You can search by Accession Number, Category, Department, etc. While selecting a particular criterion, the corresponding fields will be displayed next to it from which again different selections have to be made.
5) This feature allows you to enter one or more search criteria, along with the combination of Boolean Functions such as *AND* /*OR.*
6) For e.g., suppose you select *AND* option and go for next selection criteria, then it searches for the circulation, which satisfies both the condition. If *OR* option is selected, then it searches for the circulation which satisfies any of the two conditions.
7) After listing the desired search criteria from the various fields, click on **Search** button. This will prompt the results of the selected criteria to be displayed in another screen named as **Customized Search Results Circulation** screen.
8) Once the records are displayed on the **Customized Search Results Circulation** screen, you can sort the records, by choosing the available data from the **Sort criteria** option. Here, you are able to view the **No. of Records** for the entered criteria along with other information like title, author, item type, subject etc, which are displayed in the grid.
9) Click **Print** to print your report in HTML, Excel or Text Format. Select the boxes of the required **Fields** and **Field Length** from the given options. All the marked fields are listed in the box, provided at the right side of the screen.
10) If you want to arrange the marked fields according to your priority, then select the particular field from box, by a single click of the mouse. Now, click on the **Up** or **Down** arrow keys depending upon your priority.
11) Also, you can sort the records, by three combinations present in the **Order By** fields namely **First**, **Second** and **Third**, where the preference is given to the **First.**
12) In the **Notepad Format**, two additional options, **“Comma separated (Full Length)** and **Comma Separated**” are given. This will cause the reports to be displayed in such a way, where all the fields are separated by commas, instead of being displayed in the default tabular format.

List of Keyboard Shortcuts for the buttons:

1) Search → Alt + S
2) Clear → Alt + L
3) Close → Alt + C
4) Print → Alt + P

7.4.2. Circulation Statistics:

1) This screen allows you to keep a track of the current and past circulation statistics depending on the item type, member profile, category, department, course, vendor and subject fields as well as generate the respective reports.
2) To enable this function, click on the **Reports** menu and select the **Circulation Statistics** submenu.
3) A screen titled **Current and Past Circulation Statistics** appears prompting you to select from the **Choose Field** combo box.
4) The list will be displayed in the screen with statistical reports for the Current and Past Circulations.

5) **Sort By** allows you to sort the list as per your preferences and also you are able to view the **Print** preview of your reports in three formats namely, HTML, Excel or Text Format.

List of Keyboard Shortcuts for the buttons:

1) Close ➔ Alt + C

7.4.3. Circulation Statistics datewise:

1) This screen allows you to keep a track on the statistics of issued and returned items, within a specified date range. This screen provides detailed reports regarding the transactions that have been performed each day.
2) Go to **Reports** menu and select the **Circulation Statistics – Datewise** submenu to open the screen.
3) In the screen titled as **Date Rangewise Circulation Statistics** select the required **Date Range** and click the **Ok** button.
4) The entire records starting from the *From* date will be listed in the screen in the Date – Day form along with the issued and returned statistics.
5) **Sort By** is provided, so as to sort the list as your requirements. Print option is also provided.

List of Keyboard Shortcuts for the buttons:

1) Close ➔ Alt + C

7.4.4. Circulation Statistics Datewise (Advanced):

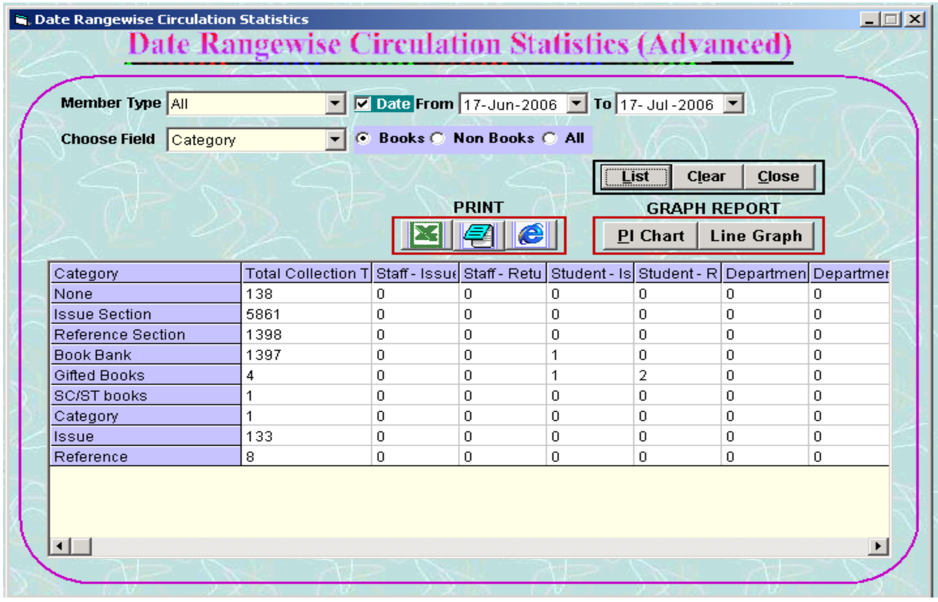


Figure 7.4.4

1) Using this screen, you are able to keep a track of all the transactions that are performed within a specific date range, based on member type, member profile, category, department and course. This will be helpful while generating the reports.
2) This screen can be viewed by selecting **Circulation Statistics Datewise (Advanced)** submenu from the **Reports** menu.
3) Here, more additional features have been provided for giving you an advanced statistical report corresponding to the desired **Date** range that you enter.
4) Select the desired **Member Type** from the combo box. According to the criteria that you have selected, additional fields will be added. Select from those fields if you prefer and click on the **List** button, to view the list along with other information like Issued, Returned, Renewed, Total Transactions, etc.
5) Apart from the **Print** reports you can also view **Graph Reports** for the displayed statistical list. **PI Chart** and **Line Graph** options are present for the graphical reports.
6) **Sort By** allows you to sort the records in the Ascending or Descending types.

List of Keyboard Shortcuts for the buttons:

1) List ➔ Alt + L

2) Clear → Alt + L
3) Close → Alt + C
4) PI Chart → Alt + P

7.4.5. Other Reports:

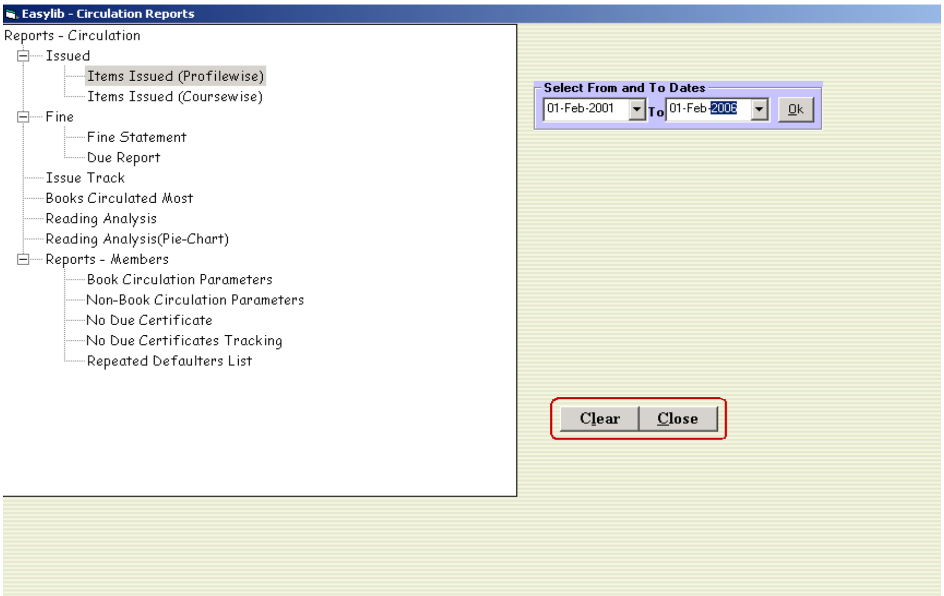


Figure 7.4.5

1) The entire reports in Circulation system have been grouped under this submenu. This screen can be accessed by selecting the **Reports** menu and clicking on the **Other Reports** submenu.
2) Issued, Fine and Reports-Members are some of the main topics for which reports can be generated. Plus sign (+) indicates that there are various sub reports available under that particular main report.
3) The list has been shown below for your reference:-

A. Issued

Items Issued (Profilewise)
Items Issued (Coursewise)

B. Fine

Fine Statement
Due Report

C. Issue Track

D. Book Circulated Most

E. Reading Analysis

F. Reading Analysis (Pie Chart)

G. Reports – Members

Book Circulation Parameters
Non-Book Circulation Parameters
No Due certificate
No Due certificates tracking
Repeated Defaulters List.

7.5. Analysis:

7.5.1. Usage Statistics:

1) This screen is required to keep a track of the usage statistics of each item present in the library, based on your requirements.
2) To enable this screen go to **Analysis** menu and select **Usage Statistics** submenu.
3) This report analyzes the entire circulation data for a given period and gives the usage statistics of that particular item in the library.
4) Start Date, To date and Desired % of usage are the mandatory fields that must be filled.
5) With the help of this screen we can do an analysis about the **Most/Least Used** items by clicking the above button.

6) **Analyze Data** button will allow the system to upload all the records that are present in the library and do the analysis.
7) On clicking **All Items** or **Most/Least Used** buttons, you are able to view the crystal reports according to the respective departments.
8) The way the calculation for the usage statistics is done has been shown below:-

   For e.g. you have 10 copies of a particular book.
   Possible circulation days:-
   365 days x 10 copies = 3,650 days
   Suppose the total number of days the books are out of library = 3,000 days
   Circulation Percentage = 3,000 * 100 / 3,650 = 82.19 %
   This means that the book has been in library for only 17.81% of days and on remaining days it has been out.
   Usage percentage has been = 82.19%.
   Suppose you want to maintain availability at 40% and the usage percentage at 60%, then the system would tell you how many books you need to procure.
   Here in this case, the number of copies to be procured is:--
   For 82.19 %, you need 10 copies
   For 60%, how many copies are needed?
   = (82.19 x 10) / 60
   = 13.69 copies
   = 14 copies needed total (approximately)
   Since, you have already 10 copies,
   The number of additional copies need to be procured = 4
   This calculation can be done for all books and the circulation data for a given period can be obtained accordingly. It will also calculate the associated cost and calculate the sum total by each department.
   Using this report, straight away you will be able to come up with the cost estimation.

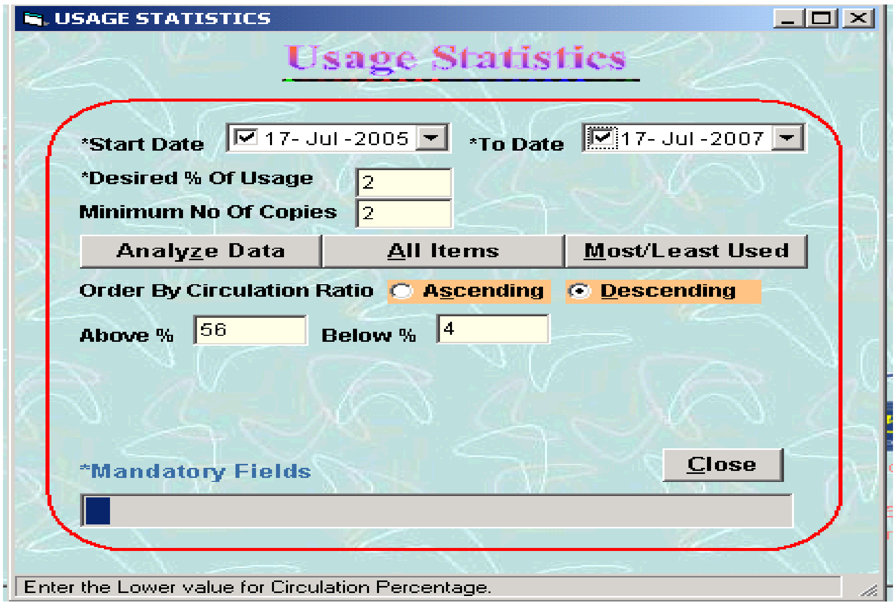


Figure 7.5.1

List of Keyboard Shortcuts for the buttons:

1) Analyze Data ➔ Alt + Z
2) All Items ➔ Alt + A
3) Most/Least Used ➔ Alt + M
4) Close ➔ Alt + C

7.5.2. Profilewise Issue Statistics:

This screen allows you to keep a track of the usage statistics of each item present in the library, according to each profile.

To access this screen, click on **Profilewise Issue Return** submenu present in **Analysis** main menu. This screen gives you a comparative picture of who is borrowing what. This will help you to set the circulation parameters like who can borrow how much and where it's allocated extra but not used much. Here also, the **Start Date** and **End Date** are mandatory fields. The crystal reports can be viewed by clicking on the **Tabular Report** and **Pie chart** buttons. Before the reports can be generated the data analysis must be done by clicking on the **Analyze Data** button. The crystal reports will be generated according to the profile of the users for each department.

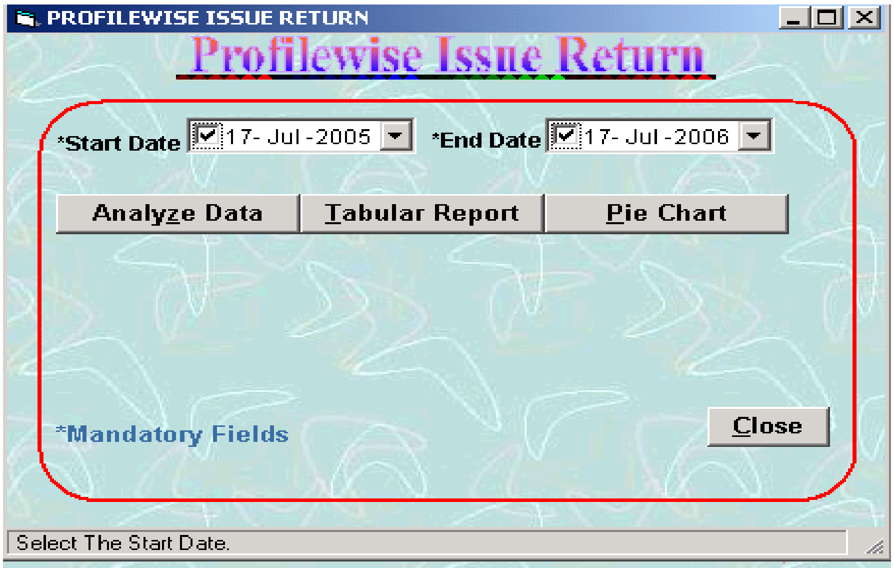


Figure 7.5.2

List of Keyboard Shortcuts for the buttons:

1) Analyze Data → Alt + Z
2) Tabular Report → Alt + T
3) Pie Chart → Alt + P
4) Close → Alt + C

7.5.3. Reading Analysis:

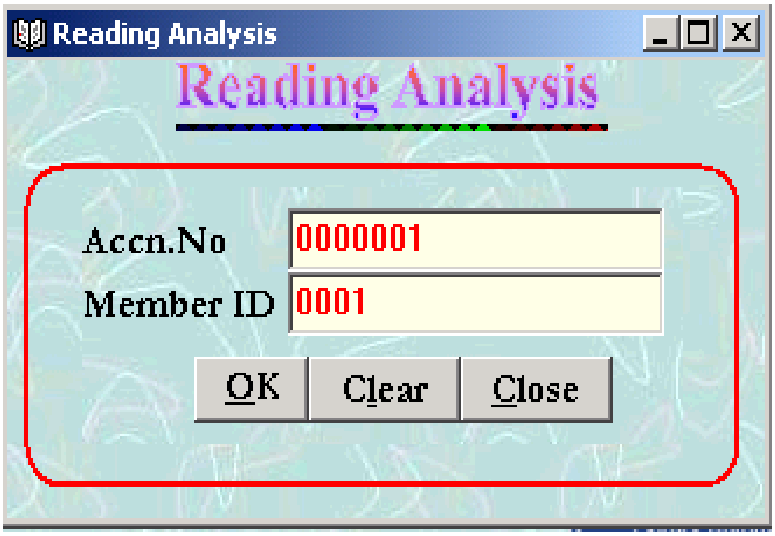


Figure 7.5.3

This screen can also be viewed from the **Analysis** menu. Using this screen, you are able to keep a check on the readers as well as the number of times a particular item has been issued or transactions that have been.

List of Keyboard Shortcuts for the buttons:

1) Ok → Alt + O
2) Clear → Alt + L
3) Close → Alt + C

7.6. *Setup:*

7.6.1. System Parameters – Circulation:

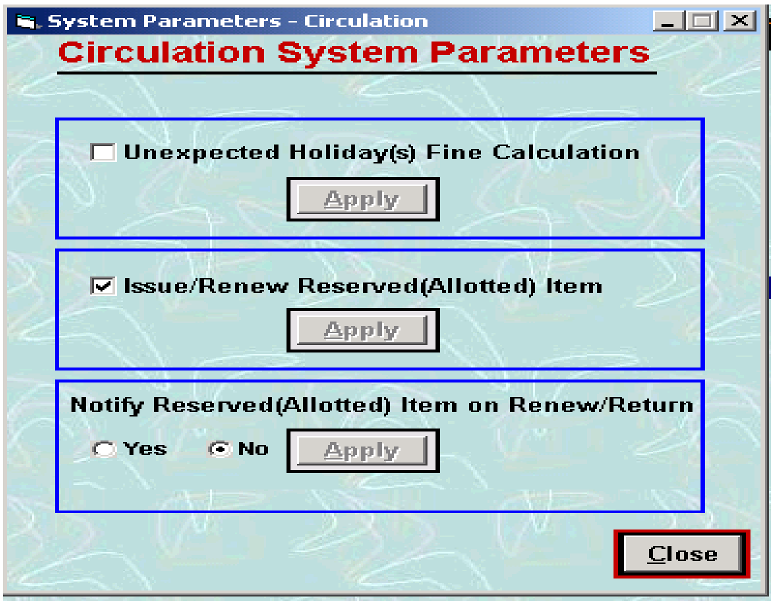


Figure 7.6.1

This is a simple screen where you can set the system parameters for **Unexpected Holiday(s) Fine Calculation**, **Issue/Renew Reserved (Allotted) Item** and **Notify Reserved (Allotted) Item on Renew/ Return**. Select the required fields and press the **Apply** button to set the changes.

List of Keyboard Shortcuts for the buttons:

1) Apply ➔ Alt + A
2) Close ➔ Alt + C

Note: All the submenus displayed below have been explained in detail in the **Setup and Security** module, under the **Initial Setup Screens** submenu. You may refer the document by going to the above submenu.

7.6.2. Member Parameters:

1) This screen is essential for setting the member parameters like, category of books allowed, maximum number of items renewed, maximum number of items issued, maximum number of reserve days, etc. Here, you are also able to set the surcharges for a particular category along with the corresponding profile.
2) This function can be accessed from the **Setup** menu, by clicking on the **Member Parameters** submenu.
3) The setup screen appears prompting for member profile to be selected. Here, you can choose any profile from among the entire list of users in the library like, Professor, Reader, Lecturer, and so on.
4) After the member profile has been selected, you can set the parameters for that profile according to your preference. If the parameter has already been set then it will be displayed on the screen as soon as you select the profile.
5) In this screen, two main parameters namely, **Book Parameters** and **Non – Book Parameters** can be set for a particular profile.
6) Parameters will be like **category of books allowed, maximum number of items permitted**, **max no. of issue days, maximum no. of reserve days, Fine/day in INR and maximum number of renewals**. These are same for both Book Parameters and Non – Book Parameters.
7) To add a new parameter, just type the information and press **Ok**. If **Ok** button is disabled, then press **Clear** button to enable it. Once you enter information and press **Ok**, the information gets inserted and circulation parameters come into immediate effect.
8) With this feature, you can restrict a certain section of the books to a certain profile, as you prefer.

9) Another advantage of this screen is that, you can set the default **Maximum Number of Allotments/ Reservations** for book as well as non-book for a particular profile.
10) **Surcharge** button allows you to calculate the surcharges for the respective members. You can also add or delete the surcharges.
11) Once you set the parameters, this will be applicable to all the functions. In case, any change has to be made, then you have to come back to the member parameters screen and modify the changes.
12) The print preview for the Notepad and Excel format can be viewed by clicking on the respective buttons.

7.6.3. Holidays

7.6.4. HTML Setup

7.6.5. Toolbar

7.6.6. Screen Setup

8. ***Digital Library*:**

Digital Library is a mechanism for storing information in digital form and giving easy access to the material. It acts as a databank for all the softcopy documents that are present in the library. This module allows you to keep a track of all these documents in an effective manner.

How to access the Digital Library module?

a) Click once on the **Digital Library** module, which appears on the front page of Easylib software, to open the **Easylib Login** screen

b) Enter the correct ***User ID*** and ***Password***.

c) The main page appears containing a list of all the menus and sub-menus of **Digital Library** module which are displayed below: -

8.1. Digital Library

8.1.1. Manage Digital Subscriptions

8.1.2. Digital Subscriptions

8.1.3. URL Indexing

8.1.4. Digital Subscription Content Manager

8.2. Reports

8.2.1. Customized Reports - Content Subscriptions

8.2.2. Customized Reports – Digital Subscriptions

8.3. Search

8.3.1. See the list of Digital Subscription

8.4. Setup

8.4.1. Department

8.4.2. Publisher

8.4.3. Vendor

8.4.4. Frequency

8.4.5. Currency

8.4.6. Subject

8.4.7. Html Setup

8.4.8. Screen Setup

8.5. Window

8.6. Help

8.1. Digital Library:

8.1.1. Manage Digital Subscriptions:

This screen can be accessed by going to the **Digital Library** menu and selecting the **Manage Digital Subscriptions** submenu or you can open this screen by pressing **Ctrl + D**, from the keyboard. A screen titled, as **Digital Subscriptions Details** appears, where you are able to view the list of previously entered data, if any. This screen has been explained in detail in the **OPAC** module. You may refer the document by going to the respective module.

8.1.2. Digital Subscriptions:

1) Using this screen you are able to enter all the details regarding the digital subscriptions. This will be helpful while generating the reports, maintaining online subscriptions, etc.
2) This screen is similar to the book accession register screen wherein all the details about the subscription can be entered.

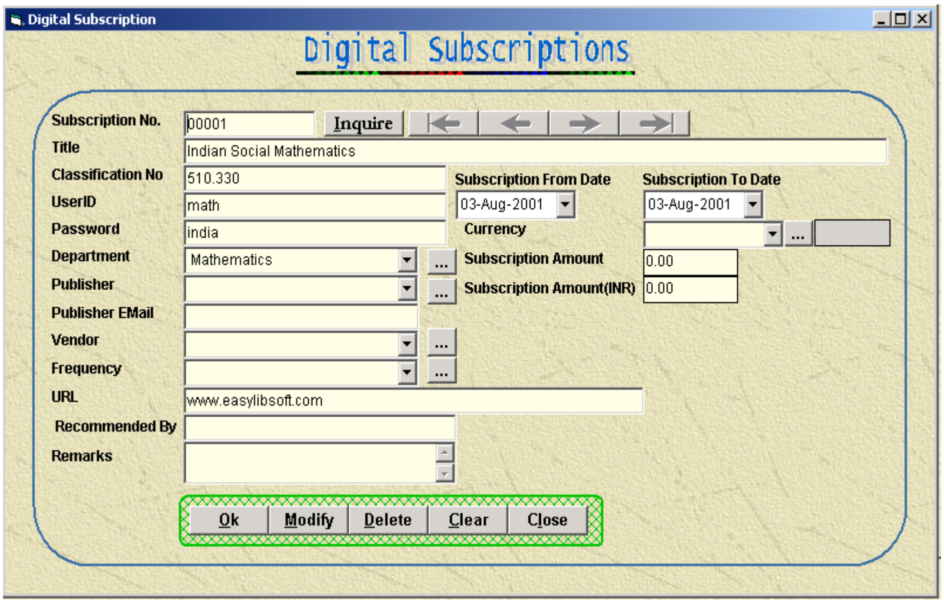


Figure 8.1.2

3) To activate this function, click on the **Digital Subscriptions** submenu present in the **Digital Library** menu.
4) Enter the data in the **Subscription Number**, **Title**, **User ID**, **Password** and **URL,** etc. to enter a new record and then click on the **Ok** button.
5) If records are already present, then it will display the first previously entered record on the screen.
6) Scrolling through the saved records can be done with the help of the navigation buttons.
7) To find a particular record, enter the **Subscription Number** and press the **Inquire** button. It will display all the entered fields on the screen.
8) All the digital records that you enter through this screen will be listed in the **Digital Subscriptions Details** screen for your reference.

List of Common Buttons:

- **Ok** button allows you to add a record to the database.
- **MODIFY** button allows you to modify or change any record or fields according to your preferences.
- **ADD** button allows you to add a record to the database.
- **DELETE** button allows you to delete a record from the database.
- **CLEAR** button allows you to clear the records from the currently viewing screen.
- **CLOSE** button allows you to end the current operation and return back to the previous or main page.
- **INQUIRE** button gives you the option to view whether the particular record exists or not. If the record exists then it will display it or else a message appears that this record does not exist.
- **CANCEL** button allows you to cancel the present action and return back to the previous screen.
- ← And → buttons allows you to scroll through the Previous Record and Next Record respectively.
- |←And →| buttons allows you to go directly to the First Record and Last Record respectively.

List of Keyboard Shortcuts for the buttons:

1) Ok → Alt + O
2) Modify → Alt + M
3) Delete → Alt + D
4) Clear → Alt + C

5) Close ➔ Alt + L
6) Inquire ➔ Alt + I

8.1.3. URL Indexing:

1) This screen is used for adding the URL path and other details of a particular periodical so that whenever you want to subscribe that periodical again you can do so by getting the details about the URL from this page.

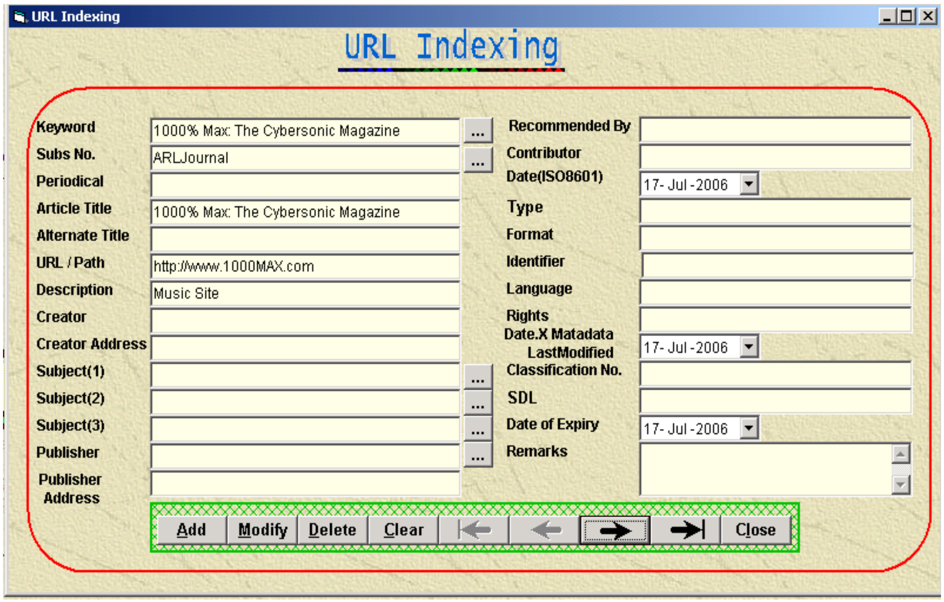


Figure 8.1.3

2) To enable this function point to the **Digital Library** menu and click on the **URL Indexing** submenu.
3) Enter the details in the keywords, subscription number, article title, URL/path, etc. and click on the **<u>Add</u>** button to save the record.
4) With the help of navigation buttons you have the option to scroll through all the previously entered record.
5) You can also **<u>Modify</u>** and **<u>Delete</u>** records by clicking on the respective buttons.

<u>List of Keyboard Shortcuts for the buttons:</u>

1) Add ➔ Alt + A
2) Modify ➔ Alt + M
3) Delete ➔ Alt + D
4) Clear ➔ Alt + C
5) Close ➔ Alt + L

8.1.4. Digital Subscription Content Manager:

This screen allows you to search for and display the records that have been entered through the **URL Indexing** submenu. Go to the **Digital Library** menu and click on the **Digital Subscription Content Manager** submenu. This screen has been described in **OPAC** module under the **Search Digital Library** menu.

8.2. <u>Reports:</u>

8.2.1. Customized Reports - Content Subscriptions:

1) Like all customized search screens, this screen also allows you to first perform the customized search on URL indexing, based on the entered criteria and then generates report for the same in the HTML, Notepad and Excel format.
2) This screen can be accessed by selecting the **Reports** drop down menu and clicking on the **Customized Reports - Content Subscriptions** submenu.
3) A screen titled as **Customized Search on Digital Content Manager** appears, where you select the fields according to your search criteria and click on the **<u>Search</u>** button.

4) **Customized Search Results - Digital Content Manager** screen appears displaying the matching records.
5) **Print** button allows you to get the print preview in the **HTML**, **Notepad** and **Excel** format.
6) **Sort Criteria** helps you to sort the displayed list in the required format.
7) It should be noted that, this screen basically allows you to search for records that have already been entered from the **URL Indexing** submenu.

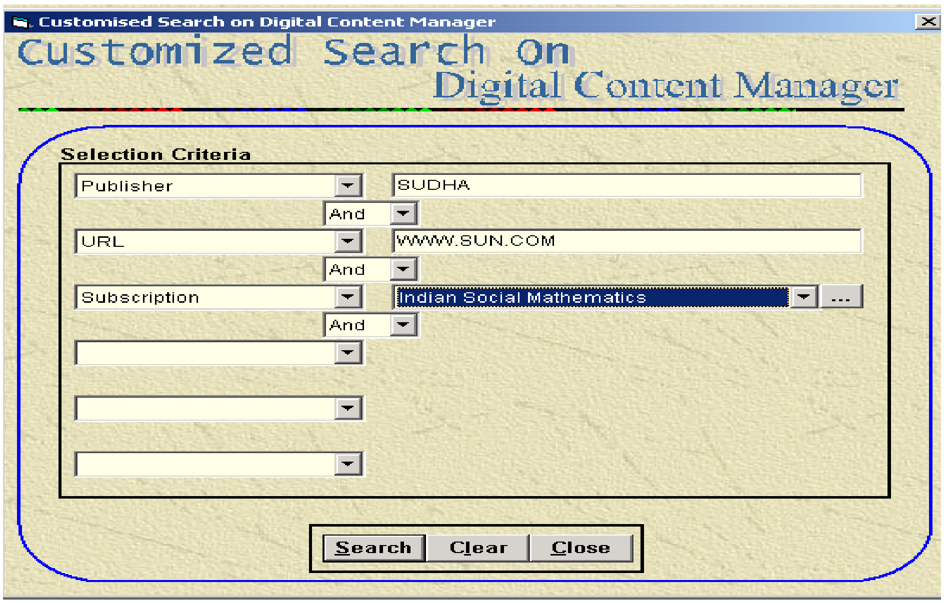


Figure 8.2.1

List of Keyboard Shortcuts for the buttons:

1) Search ➔ Alt + S
2) Clear ➔ Alt + L
3) Close ➔ Alt + C
4) Print ➔ Alt + P
5) Ok ➔ Alt + O
6) Cancel ➔ Alt + C

8.2.2. Customized Reports – Digital Subscriptions:

The second type of report generation screen can be opened, by clicking on the **Customized Reports – Digital Subscriptions** submenu present in the **Reports** menu. This screen has been described in **OPAC** module under the **Search Digital Library** menu.

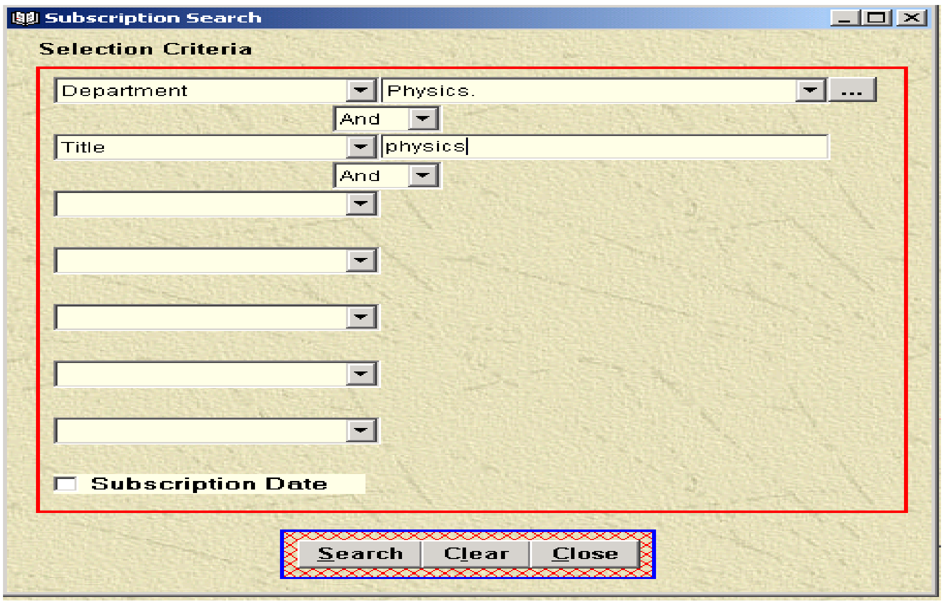


Figure 8.2.2

8.3. Search:

8.3.1. See the list of Digital Subscription:

1) This is a different kind of search screen, where the lists of records that have been previously entered in the **Digital Subscriptions** are displayed. This will be useful while generating the reports.
2) To enable this screen, select the **Search** menu and click on the **See the list of Digital Subscription** submenu.
3) This prompts a screen titled **Digital Subscriptions Details** to appear. Double click on any selected record to go to the **Digital Subscriptions** screen. You can also go here by clicking on the **Digi Subs** button.
4) **Sorting Options** helps you to arrange the list according to your requirement.
5) **Notepad** and **Excel** format print button are present for generating the print preview and take the print when necessary.

List of Keyboard Shortcuts for the buttons:

1) Close ➔ Alt + C
2) Ok ➔ Alt + O
3) Modify ➔ Alt + M
4) Delete ➔ Alt + D
5) Clear ➔ Alt + C
6) Close ➔ Alt + L
7) Inquire ➔ Alt + I

8.4. Setup:

All the submenus displayed below have been explained in detail in the **Setup and Security** module under the **Initial Setup Screens** submenu. You may refer the document by going to the above submenu.

8.4.1. Department

8.4.2. Publisher

8.4.3. Vendor

8.4.4. Frequency

8.4.5. Currency

8.4.6. Subject

8.4.7. Html Setup

8.4.8. Screen Setup

9. ***Reports***:

All the reports that are generated for books as well as non-book items, in each module of Easylib software, have been grouped together under this module.

How to access the Reports module? :

a) Click once on the **Reports** module, which appears on the front page of Easylib software, to open the **Easylib Login** screen.

b) Enter the correct ***User ID*** and ***Password***.

c) The main page appears containing a list of all the menus and sub-menus of **Reports** module which are displayed below: -

9.1 Reports

9.1.4. Other Reports

9.1.5. Generates Barcodes

9.1.6. Date Rangewise Statistics

9.2 Analysis

9.2.4. Usage Statistics

9.2.5. Profile Issue Statistics

9.2.6. Reading Analysis

9.3 Window

9.4 Help

9.1. ***Reports***:

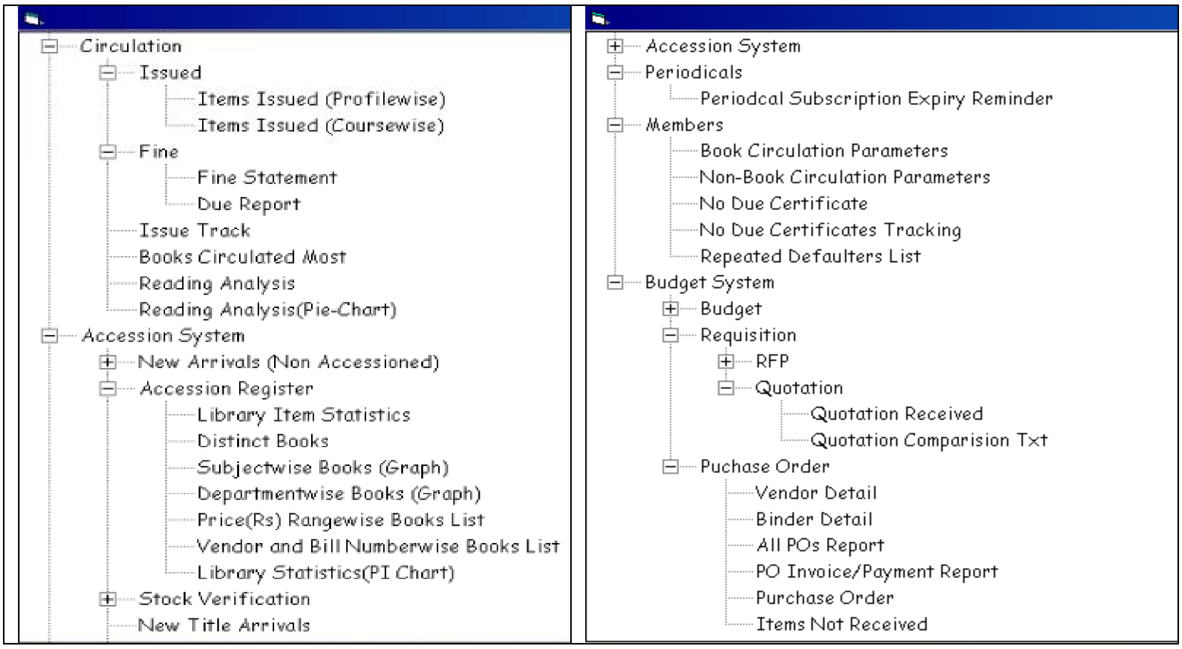


Figure 9.1

9.1.1. Other Reports:

1) This screen contains all the reports of the respective modules. To activate this function, select the **Reports** menu and click on the **Other Reports** submenu.
2) In the screen, you see the following report options appear in a tree view structure: -
   - [+] Circulation

- [+] Accession System
- [+] Periodicals
- [+] Members
- [+] Budget System

3) [+] sign indicates that, there are various sub reports present under each menu. By clicking on [+] mark, you are able to see other reports, which may contain further sub reports. To see each of the reports click on the desired field and single click on the mouse to get the corresponding reports displayed in the screen.
4) The reports that are generated here are of two types namely, Crystal reports and Graphical reports. If you want to take printouts, then click the Print Icon on the menu bar, to print the reports as your specifications, along with the current date that is displayed at the top of the page.
5) The entire tree view structure has been briefly described below:-

1. Circulation:

- **Issued**
  - <u>Item Issued (Profilewise)</u> ---- Select ***From*** and ***To Dates*** and press **<u>Ok</u>** button, to view the statistics of all the items, which have been issued, corresponding to a particular profile. The displayed list contains ***Profile*** and ***Number of Items Issued*** along with the entered Date Range.
  - <u>Item Issued (Coursewise)</u> ---- Select ***From*** and ***To Dates*** and press **<u>Ok</u>** button, to view the statistics of all the items, which have been issued, corresponding to a particular course and branch. The displayed list contains ***Course & Branch*** and ***Number of Items Issued*** along with the entered Date Range.
- **Fine**
  - <u>Fine Statement</u> ---- After selecting ***From*** and ***To Dates,*** press **<u>Ok</u>** button to see the total fines that has been collected for the entered date range. The displayed list contains ***Member ID**, **Accession Number, Date, Receipt Number, Fine, Amount Waived, Amount Received***, along with the ***Total Amount Collected, Amount Collected From*** date and ***Accountant***.
  - <u>Due report</u> --- Enter the number in ***Enter # of Days*** text box and press **<u>Ok</u>** button. This will show the report for all the items that are due from more than the entered days. The displayed list contains ***Accession Number, Item Type, Title, Author, Member ID, Member Name, Grade, Section, Department, Issue Date, Due Date*** and ***Fine*****.**
- **Issue Track ----** Insert the number in the *"**Enter Accession Number**"* text box and press **<u>Ok</u>** button. This will give the report regarding the number of times this item has been issued by all the members. The displayed list contains **Issue Date,** ***Member ID, Member Name, Due Date, Return Date*** *along with the* ***Accession Number, Title*** and ***Author*****.**
- **Books Circulated Most ---** Click on this option to view the crystal report for the items that have been circulated the most. The displayed list contains ***Title number, Item Type, Title, Authors*** and ***Number of Times Circulated*****.**
- **Reading analysis ---** Select ***From*** and ***To Dates*** and press **<u>Ok</u>** button, to view the statistics about the number of times an item has been referred for the entered date range in the crystal report. The displayed list contains ***Title number, Title, Author, Number of Copies*** and ***Number of Times Referred*****.**
- **Reading analysis (Pi Chart) ----** Select ***From*** and ***To Dates*** and press **<u>Ok</u>** button, to view the graphical report for the usage of items by member category – wise for the entered date range.

2. Accession system:

- **New Arrivals (Non Accessioned)**
  - <u>New arrivals books by Department (Non-Budget)</u> --- After selecting the ***Department***, press **<u>Ok</u>** button, to view the details about the newly arrived books for the entered department. These reports are for the non-budgeted items. Here, ***Title, Authors, Publisher, Cost (Rs.)*** and ***Number of Copies*** are displayed in the crystal report along with the ***Total Cost*** and ***Number of Copies*****.**

   - New arrivals books by Department (Budget) --- Select the ***Financial Period*** and ***Department*** to view the details regarding the newly arrived book for the selected department in the entered financial period.
   - Periodwise New arrival books (Budget) --- Select ***From*** and ***To Dates*** and press **Ok** button, to view the crystal report for all the newly arrived books purchased from the college or library budget, for the specified date range. The displayed list contains ***Serial Number, Title, Author*** and ***Number of Copies.***
   - New arrival Vendor and Bill Numberwise Book List --- Select the ***Vendor Name*** and the ***Bill No.*** to view the report regarding ***Title, Author, Subject, Publisher, Price, % Discount, Net Cost, Copies, Edition, Entry Date, Class No, No. of Pages*** along with the ***Total*** displayed at the end of the table.
- **Accession Register**
   - *Library Item Statistics* --- Click on this option to see the statistics regarding the number of items in your library. ***Item Type, Number of Items*** and ***Number of Distinct Titles*** are displayed in the crystal report.
   - *Distinct Books* --- Single click on this option to see the entire records that has been entered in the library starting from the first accessioned item. The displayed list contains ***Title number, Title, Author*** and ***Number of Copies.***
   - *Subjectwise Books (Graph)* ---- This displays the graphical statistics, regarding the number of books present for each subject in the library.
   - *Departmentwise Books (Graph)* ----- Here, you are able to view the graphical statistics regarding the number of books present in each department in the Bar Graph format.
   - *Price (Rs.) Rangewise Books List* ---- Enter the ***Amount Range in From*** and ***To Dates*** for which you want to generate the crystal report and press **Ok** button. This shows the details of all the items that are priced between the entered amount ranges. The displayed list contains ***Serial Number**, **Title number, Title, Authors, Price*** and ***Copies*** along with the ***Amount Range***, ***Total Titles*** and ***Total Copies***.
   - *Vendor and Bill Numberwise Books List* --- Select the ***Vendor*** and ***Bill No.*** and click on **Ok** button, to generate reports regarding the books purchased from the entered vendor according to the bill numbers that have procured from the concerned vendor.
   - *Library Statistics (Pi chart)* --- This gives the graphical report about the number of items present in each department in the Pie-Chart format.

- **Stock Verification**
   - Available Stock
      - *Available Items (Non Issued)* --- Single click on this feature to see the entire list of items that have not been issued by any members from the library. ***Accession Number, Item Type, Title, Authors*** and ***Subject*** are displayed in the crystal report.

   - Physical Stock Available
      - *Physical Stock Verification* --- Select ***From*** and ***To Dates*** and press **Ok** button to see the details, about all the items present in the library that have been stock verified by the authorized person. The crystal report contains ***Accession Number, Item Type, Title, Authors*** and ***Subject***.

- **New Title arrivals ---** Select ***From*** and ***To Dates*** and press **Ok** button, to view the crystal report for the new items that has arrived in the library in the specified date range. The displayed list contains ***Title number, Title, Call Number, Author, Subject*** and ***Copies*** along with the entered date range.
- **Item Statistics ----** Select ***From*** and ***To Dates*** and press **Ok** button to see the details of items present in each category for all the departments in the library. ***Department, Category (None, Issue Copy, Reference Copy, Damaged, CD Audio, CD- DVD, CD Multimedia*** *and* ***Total for Accessioned Copies, Unique Title*** and ***Net Cost*** are the fields that are displayed in the crystal report.

3. **Periodicals:**
    - **Periodical subscription expiry reminder ---** Select ***From*** and ***To Dates*** and press **Ok** button to obtain a report, regarding the expiry dates of the various periodicals, which can be sent to the respective vendors. ***Periodical ID***, ***Periodical Name, Publisher, Supplier, Subscription Date, Expiry Date, Subscription Number*** and ***Copies*** are the different fields that are displayed in the report along with the entered date range.

4. **Members**
    - **Book circulation Parameters ---** Click on this feature to see the parameters for all the member profiles in each book category that you have already set in the Members module. Here, ***Profiles, Maximum number of Items, Maximum Issue Days, Maximum Renewals*** and ***Fine Per day (Rs.)*** are displayed in the report.
    - **Non-Book circulation Parameters ---** This report is similar to the above report, the difference being that here you can view the parameters for all the member profiles in each non-book category that has been already set in the Members module. The displayed list contains ***Profiles, Maximum number of Items, Maximum Issue Days, Maximum Renewals*** and ***Fine Per day (Rs.).***
    - **No Due Certificate ---** Enter the ***Member Id*** in the text box and click the **Ok** button. This will show the format of the ***No Due Certificate*** along with the details of the member, like ***Member ID, Member Name, Course, Branch, Register Number*** and ***Department***. If the certificate has already been given to the member then it will allow you to take a Duplicate of this certificate. The word ***"Duplicate"*** will be mentioned at the top of the page to avoid any confusion.
    - **No Due Certificates Tracking ---** Select the ***Start Date*** and the ***End Date*** and click on the **NDC Issued List** button. This shows the report regarding all the ***No Due Certificates*** that has been issued to the members department wise for the entered date range. ***Profiles, Grade-Section, Member ID, Member Name*** and ***Date NDC*** are displayed along with the respective ***Departments.***
    - **Repeated defaulters list ---** Select ***From*** and ***To Dates*** and press **Ok** button to view the list regarding the details about all the members who have failed to return the books in time. ***Member ID, Name, Department, Number of Times Borrowed, Due, Paid Fine, Due Fine*** and ***% Due*** are displayed here.

5. **Budget system**
    - **Budget**
        - Annual budget summary --- Select the ***Financial period*** and press the Ok button to view the list regarding the Annual Budget Summary of the selected financial period. ***Department, Amount Allocated, Amount Spent, Balance*** and ***Total*** along with the selected financial year are displayed in this crystal report.
    - **Requisition**
        - RFP
            - RFP Details --- Select the ***RFP No***. that has been entered already from the combo box and click on the **Ok** button. This will generate the crystal report for the selected RFP No. along with other details such as ***RFP No., Date Placed, Department, Item Type, Quotation Expected, Status, Requisition No., Title, Description, No of Copies*** and their ***Total***.
    - **Quotation**
        - Quotation Received --- For a particular RFP No. more than one quotation is received which can be viewed by selecting the ***RFP No***. and clicking on the **Ok** button. The records are displayed under ***RFP No***., ***Department***, ***Item Type***, ***Requisition No.***, ***Description***, and the ***Vendor*** names along with the ***Unit price quoted*** by each vendor.
        - Quotation Comparison Txt --- For a particular RFP No. more than one quotation might have been received from different vendors to whom the request was send. By selecting data from ***Select the RFP No.*** list box and ***Select the Vendor*** list box followed by clicking on the **Ok** button, the quotations comparison reports are generated in Excel format. Other details like Item No., Title, Author, V1, V2, etc., along with the Date and RFP No. details are displayed here. V1, V2, etc., represents Vendor Name.

- **Purchase order**
  - Vendor Details --- Single click on this feature to see the entire list of vendors that has been entered in the library. The crystal report that is generated contains ***Vendor No.***, ***Name***, ***Address*** and ***Phone No.*** details. You can scroll through the corresponding pages with the help of the navigation buttons.
  - Binder Details --- Single click on this option to see the entire list of Binders that has been entered in the library. ***Binder NO., Name, Address*** and ***Phone No.*** are displayed in the crystal report.
  - All POs report --- Select from the ***Financial Period*** list box and click ***Ok*** button to view the details regarding the Purchase Order that has been sent to the respective Vendor for procuring the item. Here, the report is displayed under two subparts. The ***Date*** subpart contains ***PO No., Placed*** and ***Delivery*** functions while the ***Amount*** subpart contains the ***Total, Discount, Discount Type, Net cost*** and ***Paid*** functions along with the Total that is displayed at the end of the table.
  - PO Invoice or Payment Report – After placing the Purchase Order to the concerned vendor, the vendor supplies the items along with the Invoice (or Receipt) to the library. These records can be tracked by generating the crystal report for that particular financial year. Select the desired data from the ***Financial Year/PO***. The PO for the corresponding year range will be listed in the second combo box. You may select any one option as you prefer and click on the **Ok** button to generate a report with the ***Invoices*** and ***Payment***. The ***Grand Total*** is displayed at the bottom of the report.
  - Purchase Order --- Select from the ***PO No.*** list box and click on **Ok** button to generate crystal report for the entered Purchase Order details ***like PO No., Department, Item Type, Vendor Name, Financial Period, Date Received, Status, Requisition No., Description, Currency, Unit price, Quantity, Discount %, Quantity received*** and the ***Net Amount***
  - Items Not Received ---

    List of Common Buttons:
    - **CLEAR** button allows you to clear the records from the currently viewing screen.
    - **CLOSE** button allows you to end the current operation and return back to the previous or main page.

    List of Keyboard Shortcuts for the buttons:
    1) Clear ➔ Alt + L
    2) Close ➔ Alt + C

9.1.2. Generates Barcodes:

This submenu has been explained in **Catalogue and Accessioning** module under the Reports menu. You may refer the document in the above specified menu.

9.1.3. Date Rangewise Statistics:

1) This screen is required to generate reports according to the daily statistics of items issued, returned, books added, serials received, digital subscriptions created, etc.
2) This screen can be accessed from the **Reports** menu by clicking on the **Date Rangewise Statistics** submenu.
3) A screen titled as **Date Rangewise Daily Statistics** is opened, where you have to select the **Date Range** and click on either the **Notepad** or the **Excel** button. This will prompt the respective format screens to appear, where you can view the print preview of the statistics, regarding the *Books added, Serials Received, Digital articles, Digital subscriptions created, Items issued, Items returned, Members added, No due certificate issued* and *Requisitions added*.
4) You can also view the above result in the **Date Rangewise Daily Statistics** screen itself.
5) The list can be sorted by selecting data from the **Sort By** list box.
6) The **CLOSE** button allows you to close the screen and return back to the previous page.

List of Keyboard Shortcuts for the buttons:

1) Notepad ➔ Alt + N
2) Excel ➔ Alt + X
3) Close ➔ Alt + C

9.2 Analysis:

All the submenus displayed below, have been explained in detail in the **Circulation** module under **Analysis** menu. You may refer the document by going to the above menu.

9.2.1. Usage Statistics

9.2.2. Profile Issue Statistics

9.2.3. Reading Analysis

10. OPAC:

OPAC stands for Online Public Access Catalogue. As the name suggests, this is the main screen that any member of a library can access, to get more information about the library. The members will be able to operate **OPAC** by themselves without taking the help of any library staff. Just click on the **OPAC** module, which appears on the front page of Easylib software, to view the home page. In addition, the front screen of **OPAC** is customizable. You can put in your organization image as well as customize what users can access. Here, the members are able to search by using various search criteria. Also, they are able to reserve the book by themselves. As soon as the book becomes available, the system will send an e-mail reminder to them so that they can come and pick it up.

In general, **OPAC** provides the features of general search, multi language search, periodical search, digital library search, learn more about your library, member information and other related details. **OPAC** is a window to the library for all members.

While exiting the home page, the **OPAC** Password message box appears. Enter the correct password and click on the **Ok** button to close the screen. This is usually done by an authorized person.

10.1. Search Catalogue:

Search, is one of the most basic and important feature of this software. This function is basically based on, one of the five laws of library science, as founded by Dr. S.R. Ranganathan, which is, “Save the time of the users”. Here, we have tried to help you, implement this law.

This function allows you, to search for your book, by using various types of search criteria. Here you are also given the choice, to do combination search or filter the information content, according to your preferences. You can search, by entering first few characters of keywords or by just scrolling through the list of keywords. The list as well as the details, of the selected book is displayed.

10.1.1. By Title, Author, and Keyword:

How to Search for a particular book?

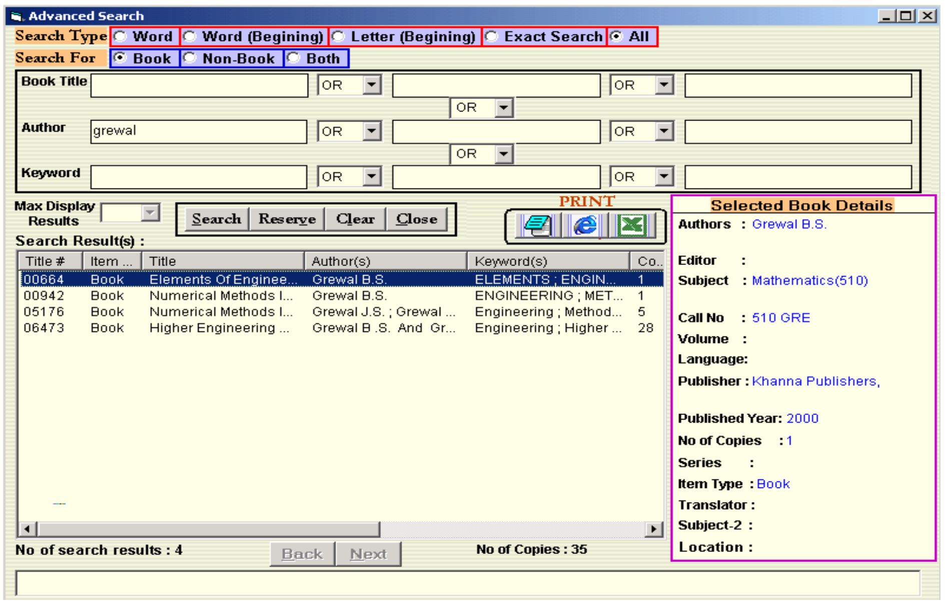


Figure 10.1.1

1) This is an advanced search screen that allows you to search the catalogue details based on title, author and keyword. Here, you can search for items based on the Search Type and Search For fields. Reservation of items can be done from this screen.
2) Click on **By Title, Author, and Keyword** menu. This action brings you to **Advanced Search** screen, wherein you can perform combination search, between **Book Title**, **Author** and **Keyword.**
3) Let us take an example, so as to understand this well.

Example 6:

- Enter *Machine*, in the **Book Title** text box and *Gopal* in the **Author** text box.

- Select *OR* from the drop-down list box, provided in between the **Book Title**, **Author** and **Keyword**, as here, we are trying to search for books, with either the **Book Title** as *Machine* **or** the **Author** as *Gopal*.
- Select **Word** radio button from **Search Type** option and **Book** from **Search For** option, for this example.
- Hit the **Search** button, to see a list of all the books matching these criteria.
- Next, select any record, to see the additional details of the selected book, on the right hand corner of the screen.
- After you have found your preferred book by this search method, you can reserve the same book, by selecting the book, followed by clicking on the **Reserve** button.
- Also, if you place the mouse cursor on the selected book and double click on it, then another screen titled **Copy Details** appears, wherein you can see item and reservation status also. You can reserve the book, from this screen also.
- The process for reservation of book is the same as mentioned above in Book Accession Register.
- Here, you also have the option to customize the display result, by selecting the number in the **Maximum Display Result**.

4) The print preview of can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.
5) **Clear** and **Close** are the other features present in this screen.

10.1.2. By Extensive Fields:

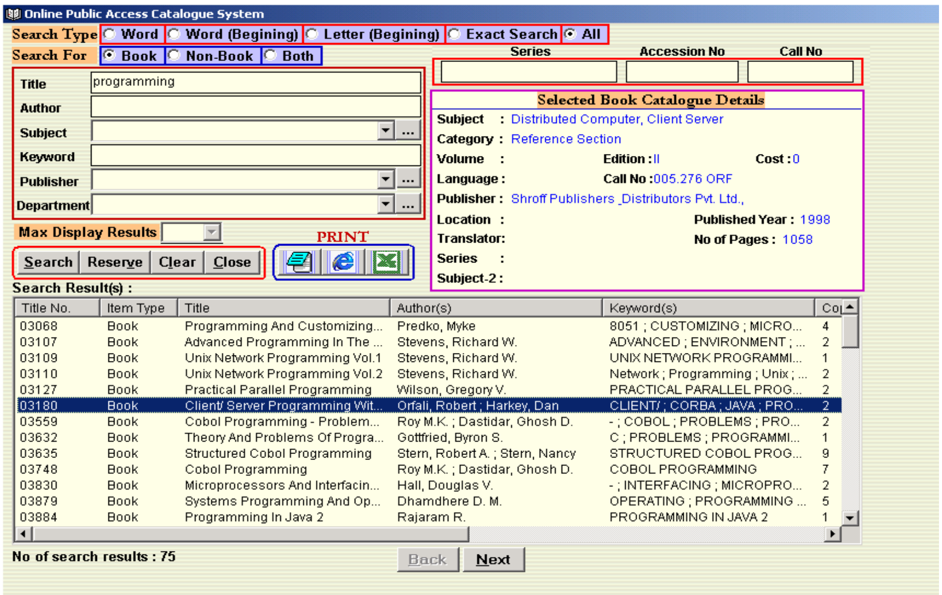


Figure 10.1.2

1) This screen allows you to search for your desired items extensively, with the help of some extra details like ***Subject, Publisher, Department, Accession Number, Series, Call Number***, etc. Reservation of items can be done from this screen.
2) Click on **By Extensive Fields** menu to open the screen titled as **Online Public Access Catalogue System.**
3) Before beginning with the search function, select the details from the ***Search Type*** and ***Search For*** functions.
4) Enter the search criteria according to your preference and click on the **Search** button, to view the list of records matching these criteria. Here, AND/OR options are not present.
5) Select any record by single click of the mouse, to see the details under the **Selected Book Catalogue Details** at the right hand corner of the screen.
6) To reserve the same book, ensure that the item is selected and click on the **Reserve** button. Enter the relevant details in the corresponding message boxes that appear one after the other. This function will allow you to reserve a particular item either by Title wise or by Copy wise.
7) Also, if you place the mouse cursor on the selected book and double click on it, then another screen titled **Copy Details** appears, wherein you can see item and reservation status also. Here, you can reserve the book by Copy wise only.

8) If the displayed list is large you may select either the **Back** or **Next** button to view the records.
9) Here, you also have the option to customize the display result, by selecting the number in the ***Maximum Display Result***.
10) The print preview of can be obtained in HTML, Notepad and Excel formats and the print can be taken by clicking the Print Icon button in the menu bar.

10.1.3. List by Keywords:

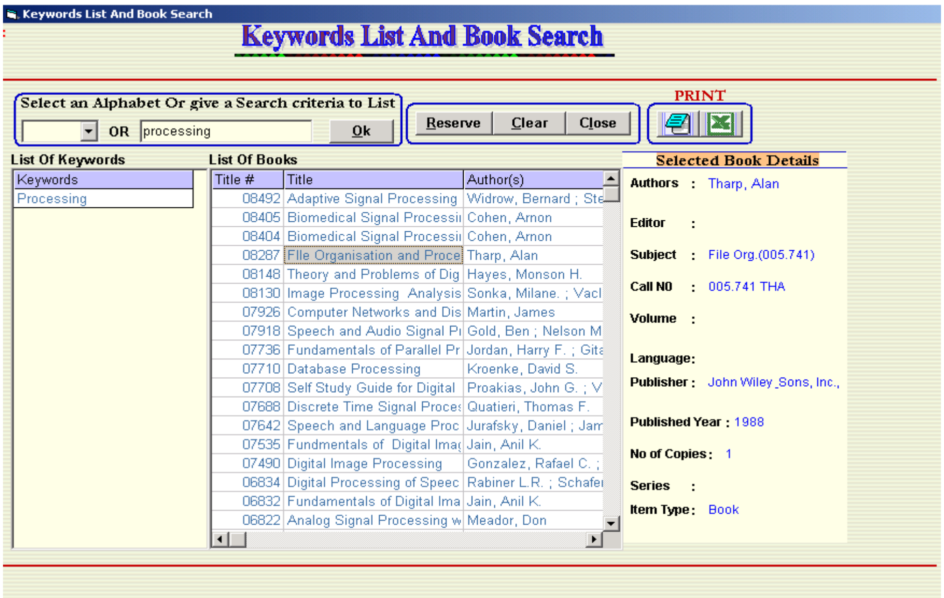


Figure 10.1.3

1) This screen allows listing of the book details based on the keywords. Reservation of items can be done from this screen.
2) It is one of the user-friendly screens of this software and is aimed at providing easy and powerful search with very few keystrokes. Click on **List by Keywords** menu to activate the screen titled as **Keywords List and Book Search.**
3) The best feature of this screen is that, here you just have to select an alphabet so that the corresponding **List of Keywords**, beginning with that alphabet is displayed.
4) Now, select the keyword that you were looking for. A list of all the books with the matching keyword will be displayed in the **List of Books**.
5) Single click on the desired record, to see the **Selected Book Details** in the right side of the screen.
6) Here also, you have the option to go to the **Copy Details** screen, by double clicking on the selected record in the **List of Books**.
7) It should be noted that, you have the option to either **Select an Alphabet** or **Give a Search Criteria to List**.
8) **Reserve**, **Clear**, **Close** and **Print** are the additional features present in this screen.

10.1.4. Location Help:

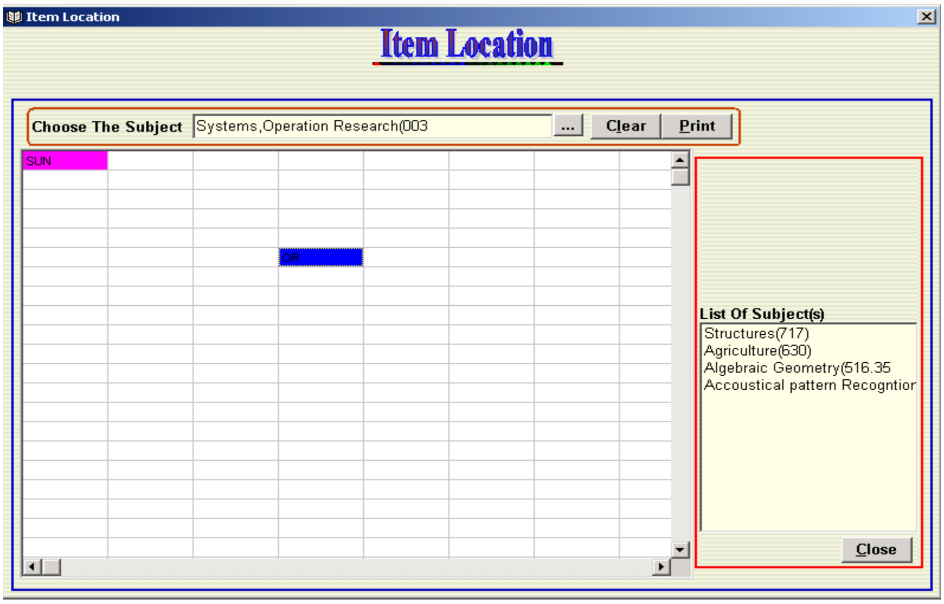


Figure 10.1.5

1) Many times, members have difficulty in locating the books. The importance of this screen is that, it helps you set your own library map on the system, so that you will be able to know what, is the location of a particular book. It allows you to search for your item by identifying the rack name and the rack color that will be displayed in the grid, once the *Subject* has been selected.
2) To enable this feature click on the **Location Help** menu to open a screen titled as **Item Location**.

   Example 5:

   - Select *Economics* from **Choose the Subject** drop-down list box.
   - Enter *ECO* in the **Rack Name** text box.
   - Select any cell, from the Grid, that is displayed in the middle of the page.
   - Now click on the **Select Color** button and select any color of your choice, say for example, *Green*. Hit the **Ok** button, to confirm your selection.
   - Immediately, the selected cell from the Grid will be displayed in *Green* color and the **Rack Name** *ECO* will be written on top of it.
   - The next step now, is to select which all subject books should be kept in this rack. For this, click on **Add Subject(s)** button and select the subject name from **Subject** window, by double clicking the mouse or by hitting the **Enter** button, from the keyboard.
   - Here, let us select *Economic and professional ethics (174)*. You can add any number of subjects and all the added subjects will be displayed in the **List of Subject(s)** list box.
   - If you want to delete a particular subject from the list then, first select the subject from the list to delete and then click on the **Delete Subject(s)** button.
   - Now click on **Ok** button to completely add all the records.
   - **Delete** button will delete this newly created rack, from the database.
   - By giving the **Print** option, you can see as well as take a print in the notepad format of the, rack wise subjects that you have created, for a particular rack.
3) This screen will thus, help you in solving your difficulty, in locating the books in the library.

10.1.5. See New Arrivals:

1) This screen is useful in keeping a track of all the newly arrived items for the particular period that you have entered. Click on the **See New Arrivals** menu to activate the feature.
2) Before list screen appears, an input box pops up asking you to, ***"Please enter since last how many days you want to see the report"***.
3) Enter say, 20 and hit the **Ok** button. This action prompts another screen, titled **Report Format**, where you have the option, to select any one of the three formats.

4) Select the *Text Report* as an e.g. Now, you can see the New Arrival Title Report categorized as Title No, Title, Call No, Author, Subject and Copies along with the date period, that you had entered in the beginning.

10.1.6. Quick Search:

1) With this screen the members will be able to search the details by using various search criteria such as subject, author, keyword, etc. In addition the members will be able to reserve the book by themselves.
2) Click on the **Quick Search** menu to view the corresponding screen.

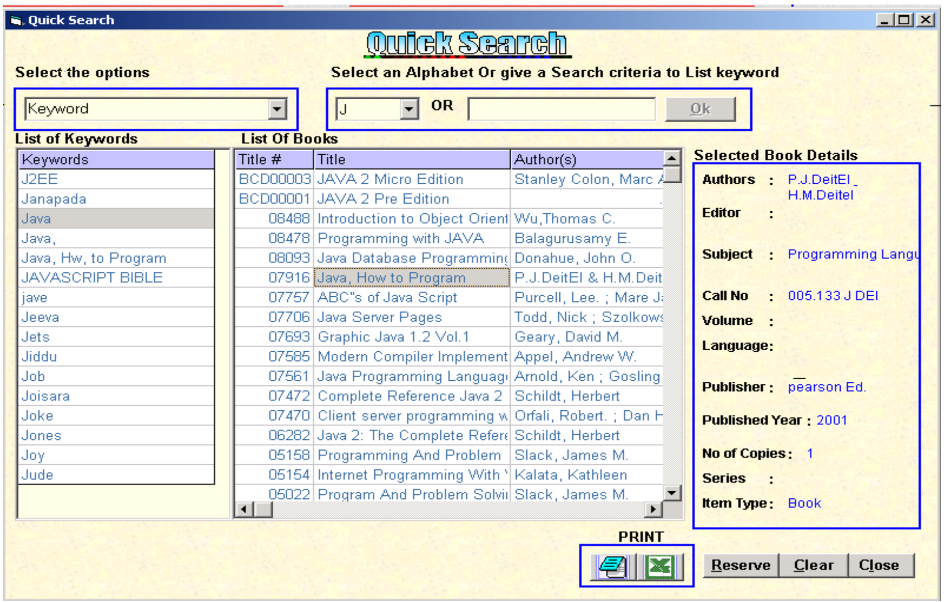


Figure 10.1.7

3) This screen is similar to the **Keywords List and Book Search** screen mentioned above.
4) Here, there is one additional option named as "**Select the Option"**, wherein you can select Keyword, Author, Subject, Publisher and Vendor.
5) For example say, first you select *Author* from the **Select the Option**. Next, select an alphabet, say *A*, from the **Select an alphabet** drop-down box.
6) This action, will display a **List of Authors**, whose name starts with *A*. In this manner, you can search for your particular book in an easy way.
7) The same procedure can be used for other criteria also, wherein you can see **List of Subjects**, **List of Keywords**, etc.
8) Common functions like **Print**, **Clear**, **Reserve** and **Close** are also added in this screen, for effective search functions.

10.1.7. Item Status:

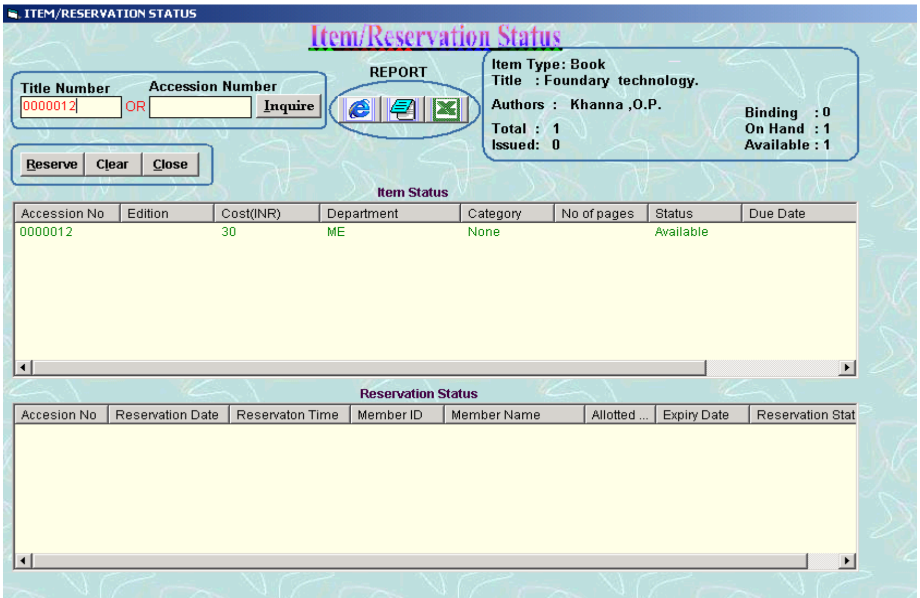


Figure 10.1.8

1) The main importance of this reservation screen is that, here you have the freedom to choose a particular copy which interests you, from a list of all the available books having the same title no. In addition, the members will be able to reserve the item by themselves from this screen.
2) On clicking the **Item Status** menu a screen titled as **Item / Reservation Status** appears.
3) The Accession number for a book is unique. Because of this feature, reservation of each individual copy of the book can be done efficiently.
   This Reservation can be done from two forms.
   a) Copy details form
   b) Item Reservation/Status form
4) To begin in this screen, start by entering the **Title Number** or **Accession Number**. E.g., you enter *99999* in the **Title number**. Press the **Inquire** button to see the list displayed on the screen.
5) If there are 5 copies of this book corresponding to the same **Title number** then, all these books will have the same Title number but different accession numbers.
6) You are able to see the details of each record by single click of the mouse.
7) Click on the **Reserve** button, after selecting any accession number. This action will result in the selected book being changed from *Available* status to *Allotted* status
8) The allotted book can now be viewed, in the **Reservation Status** table, as well as in the **Item Status** table.
9) A book, which is already *Allotted*, can again be reserved, by clicking on the **Reserve** button. Now it will appear as, *Waiting (1)* in the **Reservation Status** table.
10) You can also take a **Print** of this page, for your reference.

10.1.8. Rackwise Subject Search:

Many times, members have difficulty in locating the books. By using this screen you are able to search for an item by entering the subject name. This will display the rack number, rack name and the subjects in the rack.

Click on the above menu to activate the screen titled as **Search Rack**. This screen helps you to search for your item according to a particular rack. This is possible only if the items have been classified according to the subjects in the Location Help menu. Enter the subject name in the ***Enter Subject*** and click on the **Search** button to view the list, displayed as ***Subject, Rack No, Rack Name, Other Subjects*** etc. This helps you to locate the items very easily and thus avoids wasting of time.

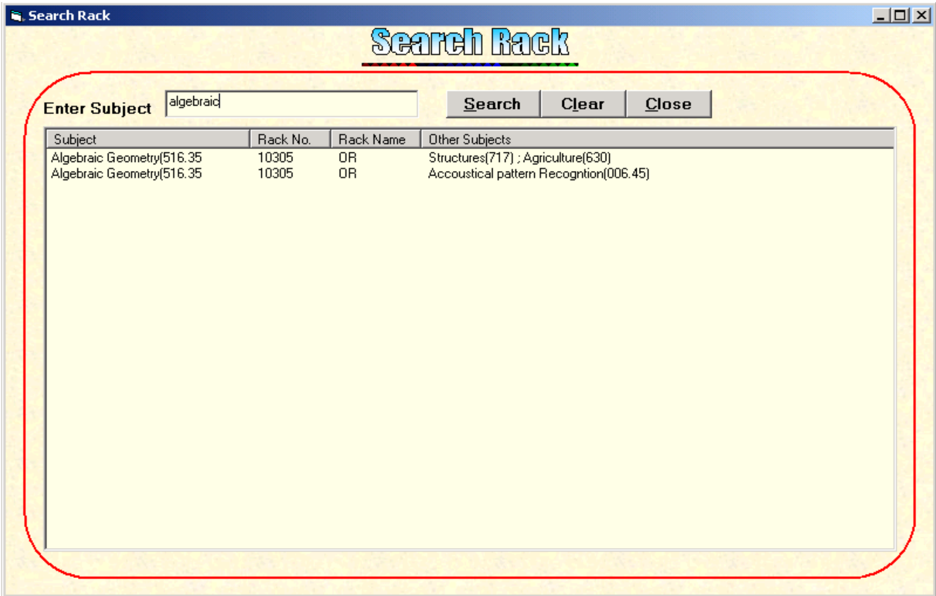


Figure 10.1.9

10.2. Search Journals, Serials and Periodicals:

10.2.1. See the List of Journals Subscribed:

1) This will keep the track of all the periodicals that you have subscribed which is useful during the generation of the reports and also while searching for a particular periodical.
2) A screen titled as **Periodicals List** appears on clicking the **See the List of Journals Subscribed** menu.

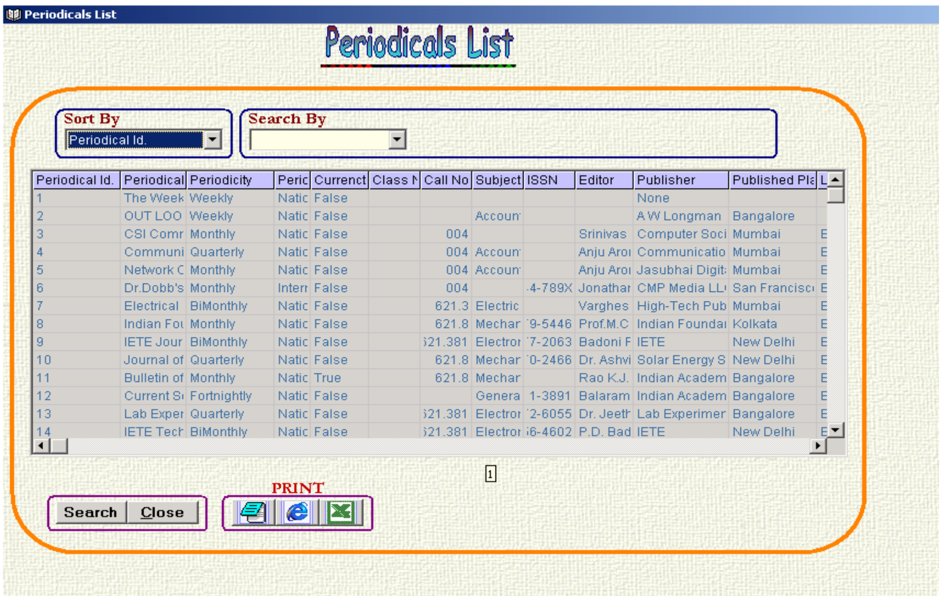


Figure 10.2.1

3) This is basically a list screen, which displays the entire records that have been entered in the database, starting from the first record.
4) Double click on the mouse or press enter key after selecting any single record from the grid. This will allow you to see the details of the selected record as displayed in the **Serials Control** screen.
5) **Sort By** function helps you to sort the entire list according to your requirement.
6) As the listed records are too large, you have the option to do a quick search by selecting any data from the **Search By** function and entering the data in the corresponding list box.
7) On clicking the **Search** button, **Subscription Search** screen appears, wherein you can do customize search and view the results.

8) The **Periodicals List** can be printed in three formats namely, HTML, Notepad and Excel by clicking on the Print icon present in the respective format screens.

10.2.2. Received Periodicals List:

1) This screen allows you to search for all the periodicals that you have subscribed based on *Received by date and vendor* criteria along with *Vendor, From date* and *To date*.
2) To activate this screen click on **Received Periodicals List** menu.

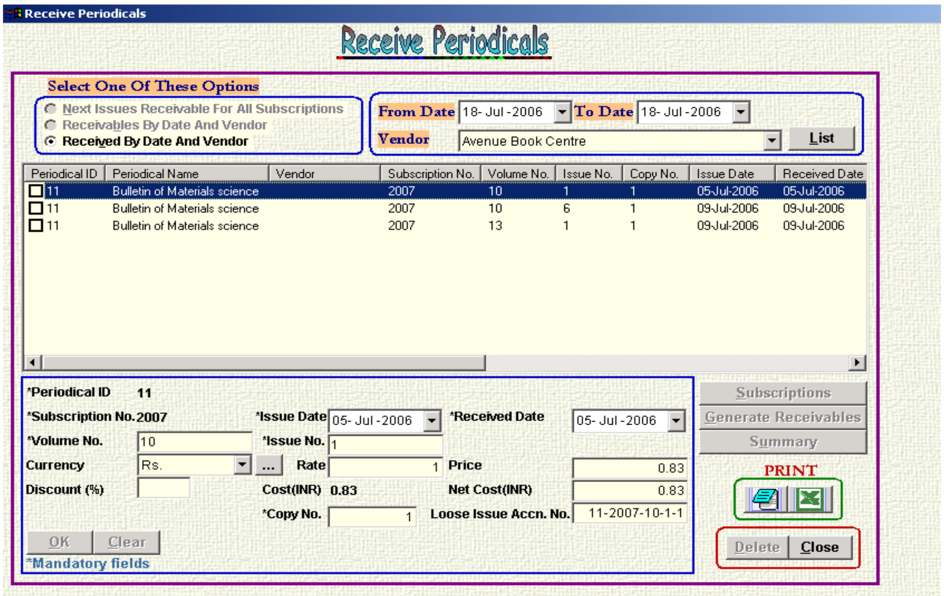


Figure 10.2.2

3) This is a kind of search screen where you have the option to view the details regarding the receiving of a particular periodical.
4) Under ***Select One of these Options*** select **Received by Date and Vendor** radio button to list the records that have been already received by the library, from a particular vendor for a certain date range. This allows you to keep a track, regarding when all the periodicals were received, along with the received date, issue date, etc. You can also press **Alt + V**, from the keyboard to select the above radio button.
5) Next, select any record from the displayed list to view the Periodical details present below the grid. Here, you cannot modify any field as they have been disabled.
6) The above list can be printed in two formats namely, **Notepad** and **Excel** by clicking on the Print icon present in the respective format screens.

10.2.3. Search by article Title, Keyword etc.:

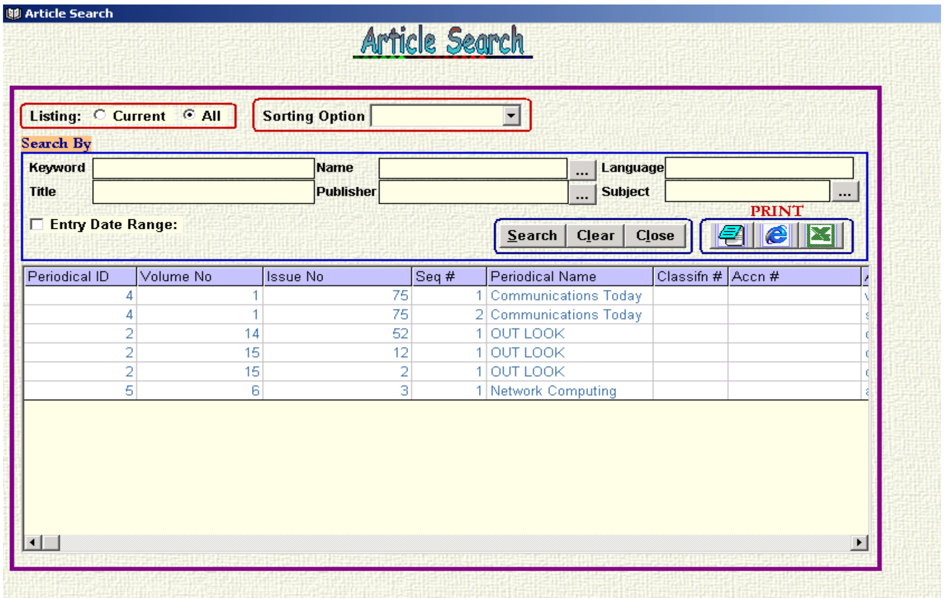


Figure 10.2.3

1) This screen is required to search the details about a particular article that you have indexed based on article title, creator, etc. Here, the articles will be listed according to the Current or All option. Also, you can sort the list according to your requirements and generate the respective reports.
2) Click on the **Search by Article Title, Keyword** menu to open the screen titled as **Article Search.**
3) **Listing** of the records can be obtained for two options namely; **Current** that will display the record related to the current article and **All** that will display both past and current details.
4) **Sorting Option** function helps you in sorting the record according to your requirement by selecting any criteria from the field.
5) **Search By** option allows you to search the records based on Keyword, Title, Name, Publisher, Language and Subject criteria. You also have the option to search records based on the **Entry Date Range** criteria by selecting From and To dates.
6) Click on the **Search** button to execute the action and the matching records will be displayed in the grid.
7) Printing of the report is possible in two formats namely, Notepad, HTML and Excel format.

10.2.4. Customized Search:

1) With this screen you are able to perform customized search on the subscribed periodical based on the various search criteria present in the screen. This will also be helpful while generating the reports.
2) This is also a different type of customized search and report screen, which can be accessed by clicking the **Customized Search** menu. A screen titled as **Subscription Search** appears.

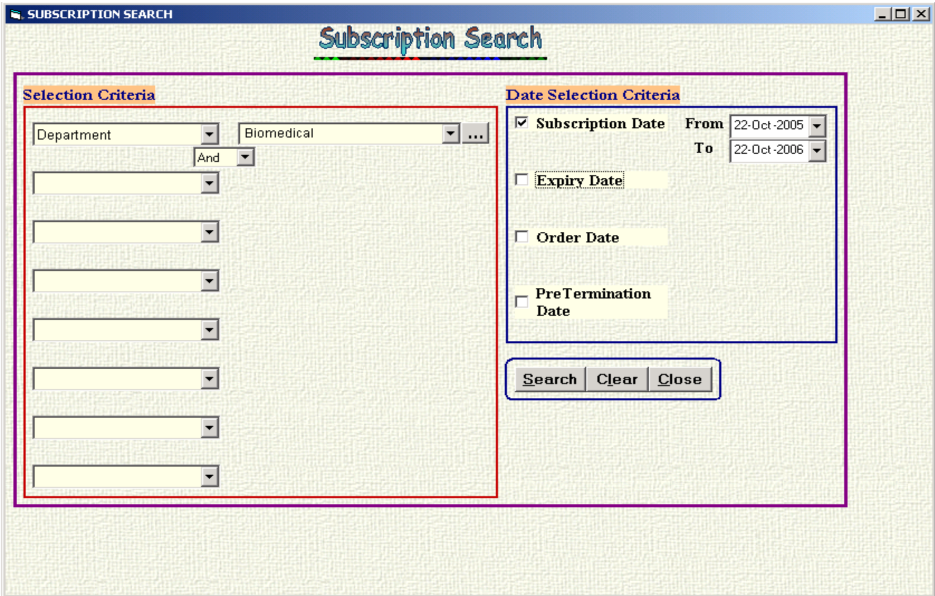


Figure 10.2.4

3) Here, two types of search criteria namely, **Selection Criteria** and **Date Selection** Criteria are given. Various types of search combinations can be performed by selecting the *AND/OR* options from the Selection Criteria subpart. **From** and **To** Date has to be selected if the search criteria is based on the Date Selection Criteria.
4) After entering the criteria click on the **Search** button to view the list of all the matching records on another screen titled as **Subscription Management.**
5) The functions of this screen have already been described in **Subscription Management** submenu, which can be used for your reference.

10.2.5. Received and Receivables:

1) All the periodical details that have been recorded earlier can be generated as received whenever the issue comes to the library. This is done with the help of **Receivables Generation and Tracking** submenu present in the **Periodicals** module. This same screen has been added in the **OPAC** module so that you can view the list of items that have been received and also the items that are yet to receive. This will be useful while maintaining a track of all the issues that are subscribed by the library.
2) Select the periodical from the **Periodical Name** list box, whose issue has to be generated. Next, select the **Subscription Number** from the combo box.
3) This generates the periodical list automatically. The issues that have already been received by the librarian will be displayed under the **Received** box and the issued that are yet to arrive in the library will be displayed under the **Receivables** box.
4) You can separately sort both the **Received** and **Receivables** list according to your requirements by selecting from the **Sort By** list box. It should be noted that for the **Received list,** you have the option to sort by *Expected Receive Date,* whereas in the **Receivables list,** you have the option to sort by *Received Date*.
5) It should be noted that you do not have the authority to add, delete or modify any record.

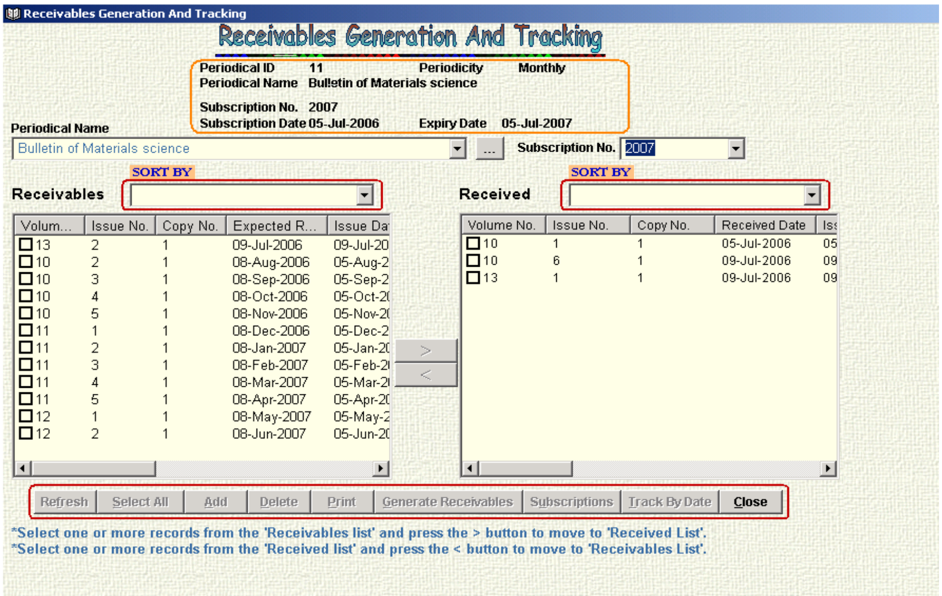


Figure 10.2.5

10.3. Search Local Language Catalogue:

10.3.1. See the Complete Catalogue:

1) This screen allows you to keep a track of all the accessioned items that have been entered in the local language.
2) Click on **See the Complete Catalogue** menu to activate the screen titled as **Multi Language Entry**.

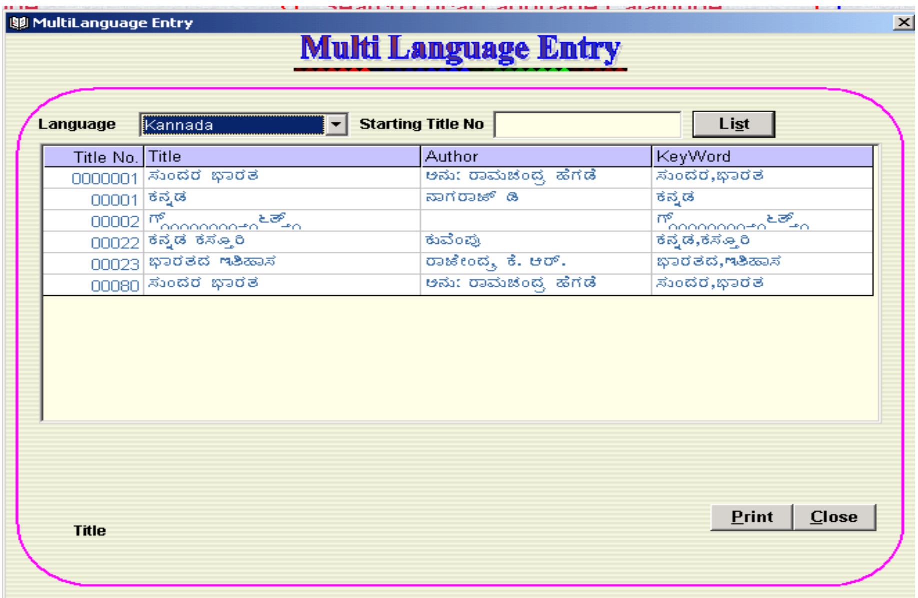


Figure 10.3.1

3) This feature enables you to see all the records that have been entered through **Multi Language Accession Register,** for a select language of your choice.
4) For example, you can view all the item records, entered in *Kannada* language, by selecting *Kannada* from the **Language** drop down list box.
5) If you feel, the displayed list is long then you can enter a particular title number, in the **Starting Title Number** list box and click on the **List** button.
6) This will now show you the list of books, starting from the entered title number onwards.
7) Also, if you double click on any record, in the displayed list then, the details of that record can be viewed at the bottom of the screen.

8) Again if you want to change any fields then, you can do so by making the changes in the bottom of the screen. Select **Add** button. A message box appears as ***"This Record already exist do you want to modify the record?"*** Enter "**Yes"** option to view the newly modified record in the display list.
9) The other buttons like **Delete**, **Clear**, **Print** and **Close** have got the same functionality, as mentioned in the **List of Common Buttons.**

10.3.2. Search by Title, Author and Keywords:

1) This software is multi lingual and it supports various Indian languages for searching and reporting the details based on title, author and keyword. This is useful during generation of reports.
2) This is a different kind of search screen, which can be enabled by clicking on **Search by Title, Author and Keywords** menu.

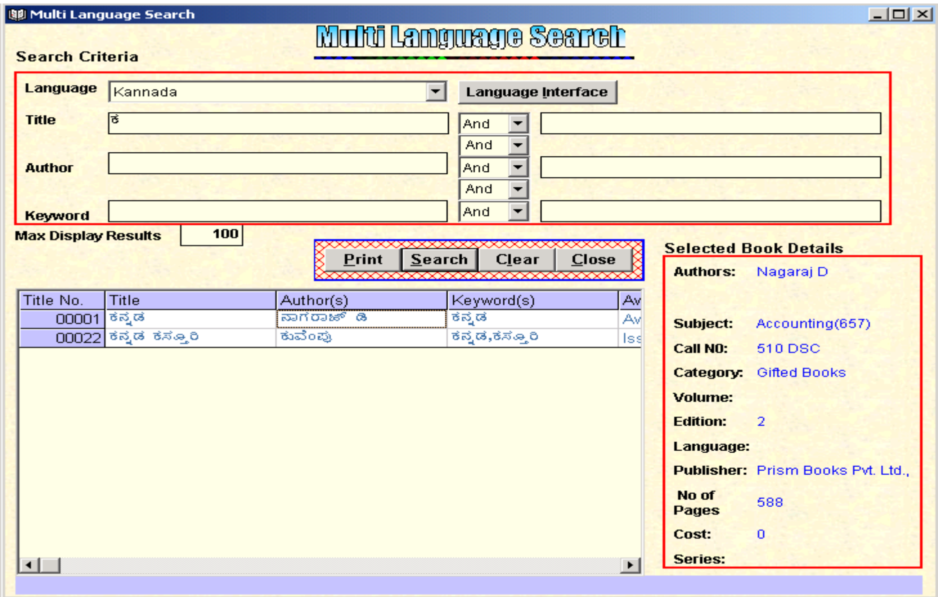


Figure 10.3.2

3) This action will prompt **Multi Language Search** screen to appear where you have to select the **Language** from the combo box.
4) Click on the **Language Interface** button, to start the Baraha Application Window, which will help you to enter the search criteria in the corresponding language that you have selected.
5) Enter the appropriate value in the options like Title, Author and Keywords and press the **Search** button. It will list out the record that matches the criteria. Also, you can select a record from among the list to see more details about it, which will be displayed under the **Selected Book Details**.

10.3.3. List by Keywords:

1) This screen allows you to search and list the book details in the selected local language based on the keywords. This is useful during the generation of reports.
2) A screen titled as **Keyword List and Book search** will appear when you click on the **List by Keywords** menu.
3) Start the search by selecting from the **Language** drop down list box or type few characters of the keyword that you are looking for and then press **Ok** button.
4) Now you will see a list of key words from your library, which matches your entered criteria.
5) Click on the keyword that you prefer from the displayed list. This will list out all the books associated with that keyword, along with the availability status.
6) To see more details of the book, which are listed aside, single-click on it to see the **Selected Book Details**.

7) You can switch *ON* and switch *OFF* the **Language Interface**, by just clicking on the **F11** key.

10.4. Search Digital Library:

10.4.1. See the List of Digital Subscription:

1) This screen lists all the details regarding the digital subscriptions that have been entered in the library. This will be useful while generating the reports.
2) A screen titled as **Digital Subscription Details** appears when you click on the **See the List of Digital Subscription** menu.
3) Here, you are able to view the list of previously entered data if it has already been entered.
4) The details of the subscription have to be entered from the **Digital Subscriptions** submenu so that you are able to see the list in the **Digital Subscriptions Details** screen.
5) Double click on any one of the records to see the details of that particular subscription or you can also go to this page by clicking on the **Digi Subs** button.
6) The list can be arranged according to your preference by selecting from the **Sorting Options** list box.
7) The print preview of the listed records can be seen by clicking on either the **Notepad** or the **Excel** format buttons.

10.4.2. Customized Digital Subscription Search:

1) Using this screen you are able to perform customized search for digital subscriptions based on the various search criteria present in the screen. This will be useful during the generation of reports.
2) Click on the **Customized Digital Subscriptions Search** menu to open the **Subscription Search** screen.

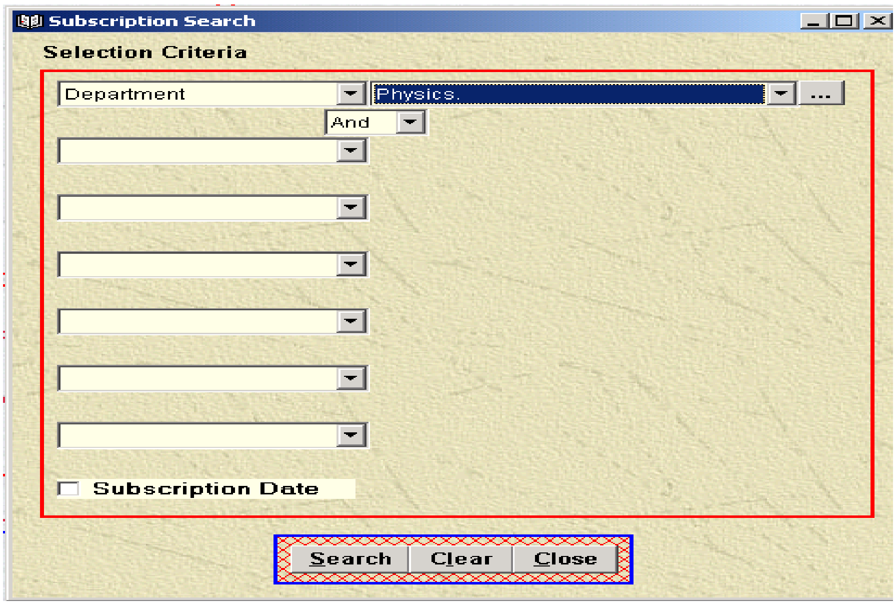


Figure 10.4.2

3) Here also, any kind of combination search can be done by selecting the AND /OR options and clicking on the **Search** button. It should be noted here that, the search fields displayed in the combo box are based on the fields present in the **Digital Subscriptions** screen, that is, the searching of records can be done for records entered in the **Digital Subscriptions** submenu.
4) ***Subscription Date*** is an additional option that has been provided in this screen for your customized search.
5) The corresponding search results are displayed in the **Subscription Search Result** screen where the **Sort Criteria** helps in sorting the records according to your requirement.
6) **Print** button allows you to get the print preview in the **HTML**, **Notepad** and **Excel** format.

10.4.3. Search by Content Title, Keywords etc:

1) This screen allows you to search for and display the records that have been entered through the **URL Indexing** submenu. This will be useful while generating the reports.
2) Click on the Search by Content Title, Keywords, etc. menu to enable the screen titled as **Digital Subscription Content Manager**.

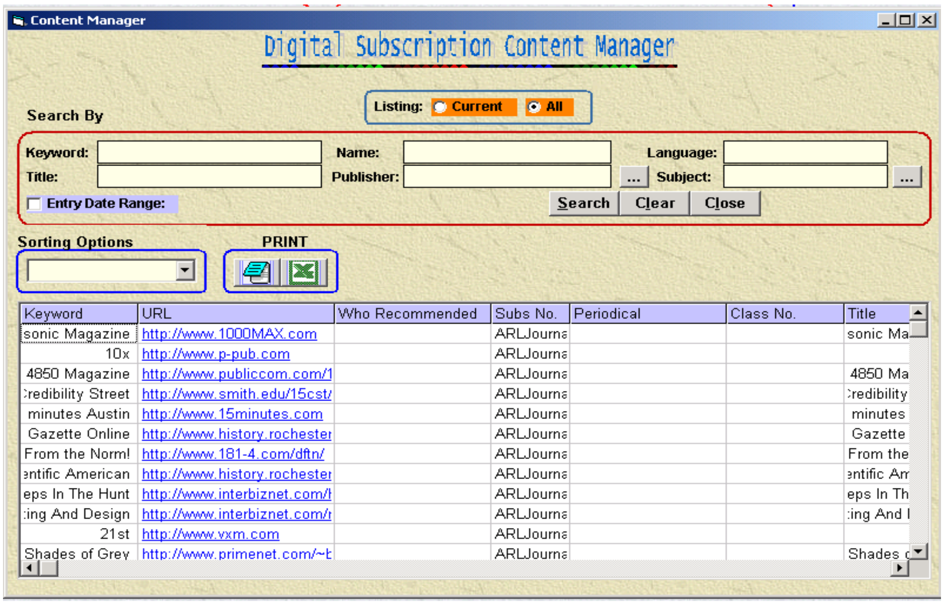


Figure 10.4.3

3) Once the screen opens, you are able to see the list of previously entered records in the grid.
4) Listing of the records can be done in two ways, that is, either by selecting the **Current** radio button or by selecting the **All** radio button. **Current** option will display the current or recently entered record while **All** option will display both the current and the past records.
5) Here, you have the option to Search for any record that has been previously entered from the **URL Indexing** submenu. Enter any one of the following options like keyword, language, name, title, publisher, subject and click on the **Search** button to view the result.
6) If you want to search for the records within a particular date range then select the **Entry Date Range** check box and give the **From** and **To** dates. The results will be displayed in the grid if it matches the date range.
7) Sorting of the records in the required order can be done by selecting your criteria from the **Sorting Options**.
8) Print preview of the search results can be obtained in the Notepad and Excel format.

10.5. Other Details:

10.5.1. Learn More about Library:

This screen will give a brief statistics about the library like the number of library members, books in library, non book items in library, digital library articles, national and international serials subscribed, readers per day, issue/return per day, purchases for the last year, as well as budgeted purchases for the current year. Print preview of this screen can be viewed in **Notepad** and **Excel** formats and the respective printouts can be taken by clicking on the Print icon button present in the menu bar.

10.5.2. See the List of Items you have borrowed / reserved:

1) This screen allows you to see the list of all the books or items, that you have borrowed or reserved and when are the due dates of the borrowed items, by entering your ***Member ID***. Here, you are also able to see if a specific book / item that had been reserved previously is available or not.
2) Click on this menu to activate the screen titled as **Items-Borrowed Reserved**.

3) Enter the ***Member ID*** to view simultaneously, the ***List of Items Borrowed*** and ***List of Items Reserved*** by that member. Click on the **Print** button to generate the report and take the print.
4) **E-Mail** button allows you to send this list to the concerned person. When you click on the **E-Mail** button, the Microsoft Outlook Express window opens containing the displayed list. Enter the relevant details in the To, CC, etc. before sending the mail.
5) It should be noted that for sending the mail, Internet facility must be present in the system that you are using.

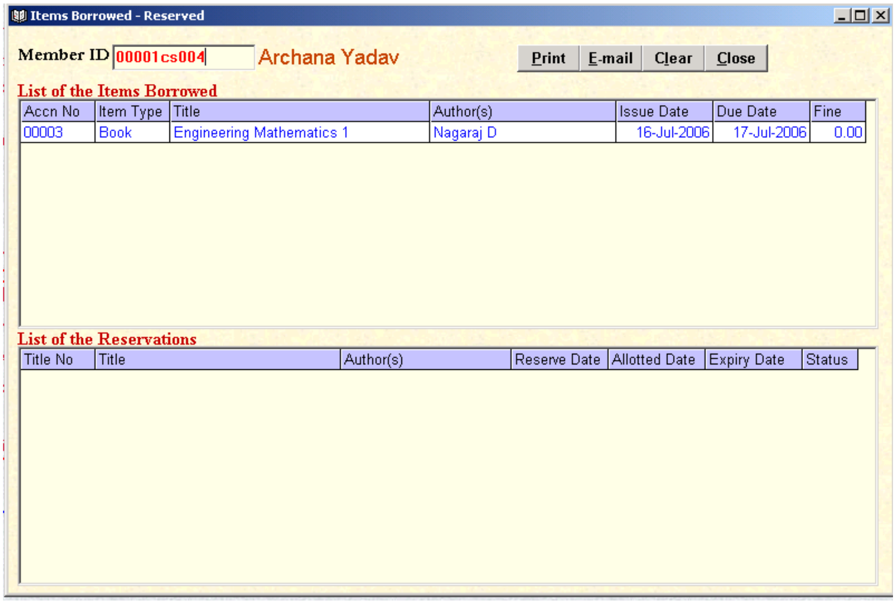


Figure 10.5.2

10.5.3. Submit Request for a New Item:

On clicking on this menu, Microsoft Outlook Express window appears where you can enter the request for a new item and submit it to the Librarian or the concerned person. As mentioned earlier, Internet facility must be present in the system, to send the mail.

10.5.4. Submit feedback:

This additional feature allows you to submit any kind of feedback to the library. On clicking the **Submit Feedback** menu, Microsoft Outlook Express window opens where you may type the relevant matter and send it to the concerned person. Here also, Internet facility must be present in the system that you are using.

Procedure for reserving any item:

Reservation can be carried out in two ways namely,
1) Reservation by Title number
2) Reservation by Accession Number

Reservation by Title Number (Title):

According to this concept, a user may make reservations on the basis of title numbers. But title numbers are not unique. The same title number may be assigned to more than one copy. The copies differ according to Accession Number and may have slight differences in Edition, etc. So for a user who is not interested in a particular copy, reservations are made according to the Title No.

Reservation by Accession Number:

The Accession number for a book is unique. Because of this feature, a reservation of each individual copy of the book can be done. This Reservation can be done from two forms namely,
1) Copy Details form
2) Item Reservation/Status form

In this mode of reservation the user is given the freedom to choose the particular copy of interest, from a list of all the available books having the same title no.

For better understanding of this function, the procedure has been explained below with the help of an example.

Example:

- Select any item from the displayed list and click on the **Reserve** button. Two types of pop up message box appear based on the kind of selection you have made.
    - ***Case 1***: Suppose you have selected an item having more than one copy. On selecting the **Reserve** button, a pop up message box appears asking you whether to **"*Reserve the item by Title or Copy*"**. Select the desired option.
        - If you select the **Title** option then the next pop up message appears as **"*The item by the Title # 000001 will be reserved*"**, select **Yes** or **No.** If you select **No**, the action will be terminated and the cursor returns back to the search screen.
        - If you select **Yes** then a **Member Id input box** appears asking you to **"*Please Enter the Member Id*"**. Enter the specific Id and select **Ok** button.
        - This prompts another pop up message box informing you that the **"*Default Reservation days are set to – 10, Do you want to continue?*"**, if you select **Yes**, another pop up message box appears as **"*The Book is available, Reservation is allotted*"**. Press **Enter** to obtain a successful reservation of your book.
        - If you want to change the Default Reservation days then select the **No** option from the message box given as **"*Default Reservation days are set to – 10, Do you want to continue?*".**
        - This action will prompt another pop up message box showing **"*Please enter the numeric values for reservation of days*"**. Select **Ok** to get **Reserve Days** input box in which you will be asked to **"*Please enter the reservation days*"**. Enter the desired number of days and select **Ok**. Now the message box shows **"*The book is available, Reservation is allotted*"**. Press **Enter** button to accept the change.
        - On the other hand, if you select **Copy** option from **"*Reserve the item by Title or Copy*"** message box, then a new screen named as **Copy Details** appears.
        - To reserve a book in this screen you need to select the book present in the **Item Status** table and click on the **Reserve** button. This will prompt the pop up message screens to appear in the order as discussed above. The important feature of this page is that you can see all the copies of a particular book and also whether each copy is available or allotted.
        - Once you reserve any copy of the book it automatically appears in the **Reservation Status** table along with Member id, their Names, Time and Date of reservation and also the expiry date of reservation. The image of the book can also be seen in this screen.
        - When you reserve a copy that has already been allotted the book appears in the **Reservation Status** as ***Waiting (1)***. Next reservation of the same book will give the **Reservation status** as ***Waiting (2)*** and so on. You can also take a printout of this screen by selecting the **Print** button. Click on the **Close** button to come back to the **Accession Register screen.**

    - ***Case 2***: Suppose you have selected an item, which has got only one copy. On selecting the **Reserve** button, a pop up message box appears as **"*The item by the Title # 000001 will be reserved*"**, select **Yes** or **No.** Here, the option for reserving the item by Copywise is not provided as only one copy is there.
        - The rest of the procedure is same as described above in ***Case 1***.

11. <u>In/Out Management:</u>

This module helps in managing a systematic and detailed report about members as well as non-members who visit the library each day according to the respective date and time.

<u>How to access the In/Out Management module? :</u>

a) Click once on the **<u>In/Out Management</u>** module, which appears on the front page of Easylib software, to open the **Easylib Login** screen.

b) Enter the correct ***User ID*** and ***Password***.

c) The main page appears containing a list of all the menus and sub-menus of **<u>In/Out Management</u>** module which are displayed below: -

11.1. In/Out

11.1.1. In/Out Register

11.2. Reports

11.2.1. In/Out Report

11.3. Setup

11.3.1. Screen Setup

11.3.2. HTML Setup

11.4. About

11.1. <u>In/Out:</u>

11.1.1. In/Out Register:

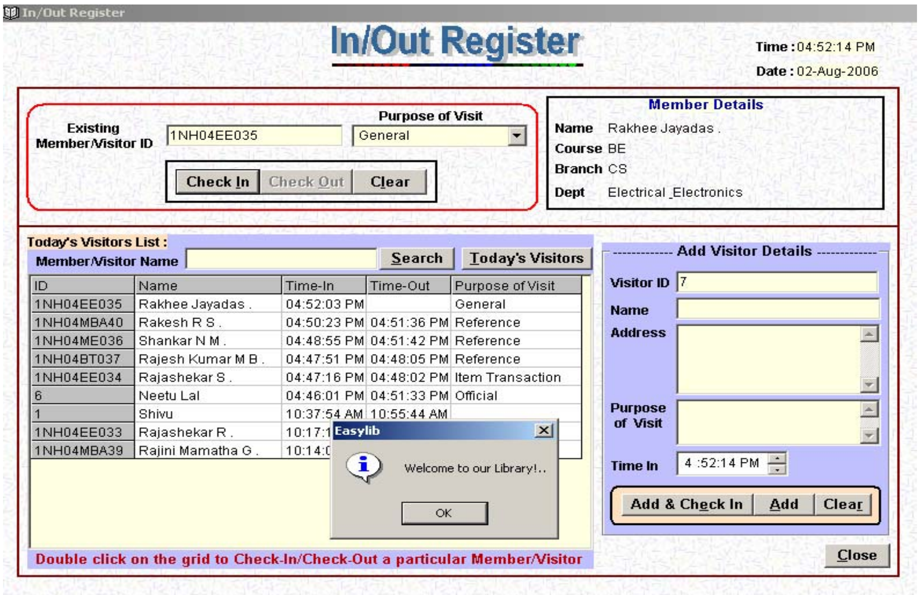


Figure 11.1.1

1) Many people visit the library everyday for various purposes. By using this screen, you are able to keep a track of the members as well as non-members (no membership), coming to the library according to the date and time.
2) This screen can be accessed by selecting **In/Out Register** submenu from the **In/Out** drop down menu or by pressing the **Ctrl + I** buttons from the keyboard.

3) If the visitor is already a member of the library, then you can directly enter the member id in the **Existing Member/Visitor ID** text box. This will display the member details on the top right corner of the screen under the **Visitor Details** subpart. Here, you can also specify the reason for the visit by selecting the desired option from the **Purpose of Visit** list box such as *Item Transaction*, *Reference, Official, Personal* or *General*. Next, click on the **Check In** button, to add the record in the grid. Whenever you check in a confirmation message box appears as ***"Welcome to our library!"***
4) Double click on the grid to display the ID in the **Existing Member/Visitor ID** text box. Now click on the **Check Out** button to record the exit time of the respective person. Also whenever you check out a confirmation message box appears as ***"Thank you for visiting our library!"***
5) If the visitor is coming to the library for the first time then you have to first create a separate id for the respective visitor.
6) This can be done by adding the required details in the **Add Visitor Details** subpart. The **Visitor ID** is automatically generated.
7) Once the relevant details have been entered, you can click on **Add & Check In** button to directly add the record in to grid. If you click on **Add** button, it will only save the record. You will have to enter the ID once again to record the check in timings.
8) You can also search for the member/visitor records by entering the name in the **Member/Visitor Name** text box.
9) **Today's Visitors** button will list the entire records about all the people who have visited the library.
10) The current time and date will be displayed at the top right corner of the screen.

11.2. Reports:

11.2.1. In/Out Report:

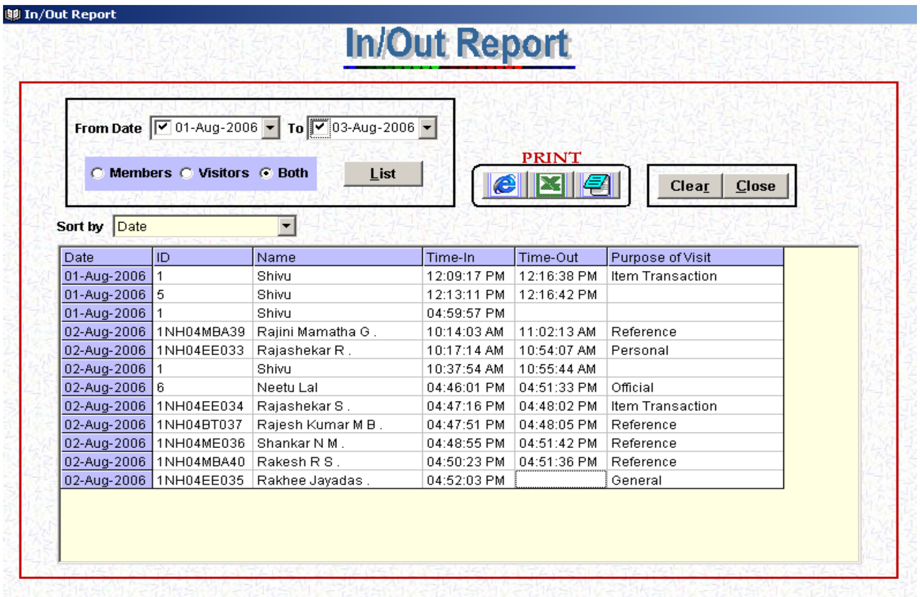


Figure 11.2.1

1) This screen allows you to keep a track of the library users by generating Datewise reports based on Member, Visitors or Both.
2) Select **In/Out Report** submenu from the **Reports** menu or press **Ctrl + R** buttons from the keyboard, to activate this feature.
3) Select **From** and **To Date** ranges for which you want to generate the report. Next select any one from the **Member**, **Visitors** or **Both** radio buttons and click on the **List** button to display the data in the grid. The records will be listed as *Date, ID, Name, Time-In, Time-Out* and *Purpose of Visit*.
4) The displayed records can be sorted according to your requirements by selecting the data from the **Sort By** list box.
5) The print preview of the above list can be obtained in **HTML**, **Notepad** and **Excel** formats and the print can be taken by clicking the Print Icon button in the menu bar.

11.3. Setup:

11.3.1. Screen Setup:

All the screens present in the module can be set according to the respective profile or user that is logging into this module. To access this feature, click on the **Setup** menu and select the **Screen Setup** submenu or press the **Ctrl + S** buttons from the keyboard.

11.3.2. HTML Setup:

This screen can be accessed by clicking on the **Setup** pull down menu and selecting the **HTML Setup** submenu. The features of this screen have already been explained in the **Setup and Security** module.