

# *Mandarin M3<sup>®</sup>*

## *Library Automation System*

### *Daily Use Handbook*

This handbook explains routine library tasks using Mandarin M3. It is designed to supplement on-site training by providing simple, step-by-step instructions for common procedures in the Circulation and OPAC modules, as well as daily maintenance tasks that should be performed only by an authorized administrator.

*May 2003*

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Printed in the USA  
May 2003  
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ISBN 1-931653-15-1

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# M3 CIRCULATION

## 1

*For detailed instructions on the procedures included in this chapter, as well as Circulation procedures not included in this chapter, refer to the Mandarin M3 Users Guide or the M3 on-screen Help.*

This chapter describes:

- How to view patron and item status
- How to conduct loans and temporarily change a due date
- How to conduct returns, including quick returns and in-house circulation
- How to conduct renewals, reserves, and holds
- How to process fines
- How to create patron and item records
- How to attach messages to patron and item records
- How to print transaction reports

## STARTING CIRCULATION

1. Open the M3 folder on your desktop, then double-click the **Circulation** icon. This displays the Circulation Login dialog box.
2. Type your user ID in the **Login Name** box, your password in the **Password** box, and then click **OK**. This displays the Circulation window (Figure 1.1).

**FIGURE 1.1**



*Note: This feature may not have been enabled by your system administrator.*

- **Toolbar** – Contains Loan (green), Return (red), Renew (blue), Reserve (yellow), and Status (purple) functions. These functions are also available through the Mode menu.
- **Shortcut toolbar** – Contains buttons for commonly-used functions, such as adding an item or patron, accessing circulation options and the schedule, and changing the interface language. To view the function of each button, rest your mouse pointer on the button for a moment to display a ToolTip. To turn the shortcut toolbar on or off for the current session, press CTRL+T.
- **Barcode box** – Allows you to type or scan a patron or item barcode to access the matching record.
- **Patron pane** – Displays vital statistics for the selected patron. The information contained in this pane is customizable, but typically contains data such as the patron name, ID number, address, phone number, and patron transaction statistics. Any MARC record field tag and set of statistics can be configured to appear in this pane. A convenient transaction menu can be accessed when information appears in this pane by right-clicking in the pane.
- **Item pane** – Displays brief information about the selected item. As with the Patron pane, the type of information displayed here can be configured. A convenient transaction menu can be accessed when information appears in this pane by right-clicking in the pane.
- **Transactions pane** – Lists the transactions related to the active patron or item in the upper panes. The type of information displayed here can be configured. A convenient transaction menu can be accessed when information appears in this pane by right-clicking in the pane.

### NOTES:

- Most transaction modes can be accessed by several different methods. Loan, Return, Renew, Reserve, and Status are available on the toolbar (shown in Figure 1.1), on the Mode menu in the menu bar, and by pressing F5, F6, F7, F8, and F10 (respectively) on your keyboard. In this handbook, we generally present only the toolbar method.
- When conducting transactions, patron and item barcodes can be entered by typing or scanning the barcode into the **Barcode** box (shown in Figure 1.1). In this handbook, we generally present only the typing method.
- On-screen Help, which provides instructions on performing a variety of tasks, can be accessed by clicking **Help Topics** on the **Help** menu (or by pressing F1).

## VIEWING PATRON AND ITEM STATUS

Status mode provides information on open and closed transactions for patrons and items. By default, it lists the following information:

***Note:** The information displayed may have been modified by your system administrator.*

- Patrons – Current and/or historical statistics for loans, holds, reserves, and fines.
- Items – Current and/or historical statistics for loans, holds, reserves, bookings, fines, and in-house usage.

To view the status of a patron or item:

1. In the **Barcode** box, type the patron or item barcode, and then press ENTER. This displays a record in the Patron or Item pane, depending on the type of barcode you entered. Open transactions are listed in the Transactions pane.
2. To view the status of another patron or item, enter a different barcode in the **Barcode** box. Or, select another transaction mode to exit Status mode.

## LOANING ITEMS

1. On the toolbar, click **Loan**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER.

NOTE: If the patron has a fine, a fine message displays. You can:

- Click **Override** to ignore the message and continue with the transaction.
- Click **Payment** to go to the Payment dialog box.
- Click **Cancel** to stop the transaction.

3. In the **Barcode** box, type the item barcode, and then press ENTER. This loans the item.

### Temporarily Changing the Due Date

1. On the toolbar, click **Loan**.
2. In the **Barcode** box, type the item barcode, and then press ENTER. If multiple items are involved, enter the barcode for each item. This processes the loan transaction(s) based on the default loan period. The loaned item(s) appear(s) in the Transactions pane. You now need to revise the expiration date.
3. In the Transactions pane, select the check box(es) corresponding to the item(s) you just loaned. Right-click an item to display a transaction menu.
4. Click **Change Date**.
5. Click the desired expiration date. If you need to select a day in the next month, click the right (>) arrow to select a month, and then click the expiration date.
6. Click **OK**. The revised expiration date appears in the Transactions pane.

*After this change date transaction is completed, the date automatically returns to the default loan expiration date.*

## RETURNING ITEMS

### Returning a Single Item

1. On the toolbar, click **Return**.
2. In the **Barcode** box, type the item barcode, and then press ENTER. This returns the item.

### Returning Multiple Items for the Same Patron

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

### Quick Returns

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

*This method is used for situations such as bookdrop returns when the patron is not present. It does not display patron messages.*

### In-House Circulation Returns

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

*This method is used to return items left on tables and desks after in-library use.*

### Returning Damaged Items

1. On the toolbar, click **Loan**, **Reserve**, or **Status**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER.
3. In the Transactions pane, select the check box by the damaged item, and then right-click to open a transaction menu.
4. Click **Damaged**. At the confirmation prompt, click **Yes**. This records that the item has been returned damaged, and attaches a fine to the patron's record.

*If a patron returns a damaged item, you can attach a fine to the patron's record.*

### Claiming an Item as Lost, Returned, or Never Had

1. On the toolbar, click **Loan**, **Reserve**, or **Status**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER.
3. In the Transactions pane, select the check box by the item the patron wants to claim as lost, and then right-click to open a transaction menu.
4. Click the appropriate claim type (**Claimed Returned**, **Claimed Never Had**, **Lost**). The item is removed from the listing in the Transactions pane.

## RENEWING LOANS ON ITEMS

### Renewing a Single Item

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

NOTE: If the item is overdue, an overdue message displays. Click **Override** to ignore the message, or **Cancel** to stop the transaction.

### Renewing Multiple Items for the Same Patron

1. On the toolbar, click **Loan**, **Reserve**, or **Status**.
2. In the **Barcode** box, type the patron's barcode, and then press ENTER.  
NOTE: If the patron has overdue items, an overdue message displays. Click **Override** to ignore the message, or **Cancel** to stop the transaction.
3. In the Transactions pane, select the check box by each item the patron is renewing, and then right-click to open a transaction menu.
4. Click **Renew**. This renews all selected items.

NOTE: If any of the selected items are overdue, an overdue message displays. Click **Override** to ignore the message, or **Cancel** to stop the transaction.

## RESERVING OR HOLDING ITEMS

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

1. On the toolbar, click **Reserve**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER.
3. In the **Barcode** box, type the item barcode, and then press ENTER. This reserves or holds the item.

## PROCESSING PATRON FINES

Before you can receive payment or forgive a fine, the overdue item must be returned or claimed as lost or damaged (see “Returning Items” beginning on page 1-4).

1. On the toolbar, click **Loan**, **Reserve**, or **Status**.
2. In the **Barcode** box, type the patron barcode, and then press ENTER.
3. Click **Payment**. This displays the Payment window (Figure 1.2). The current fine total appears in the **Total** box under **Payment**. If the patron intends to pay the fine total now, skip to step 4.

**FIGURE 1.2**

*Pay check box* → ☒ *Current overdue item* → In harm's way :

Title	Fine	Refunded	Balance	Payment	Forgiven	Reason	Claimed Paid	Date Returned	
In harm's way :	1.00	0.00	1.00	1.00	0.00	MISSING	<input type="checkbox"/>	11/05/2002	1

*Current fine total* →

	Payment	Balance
Total:	1.00	0.00
Tendered:		
Change:	0.00	

Buttons: OK, Cancel, History, New Fine, Refund

- To exclude an item from payment at this time, clear the **Pay** check box.
- To accept a partial payment on an item's fine, click the item's listing in the **Payment** column and type the amount being paid now.
- To forgive all or part of a fine, click the item's listing in the **Forgiven** column and type the amount to be forgiven.
- To see if a patron previously paid a particular fine, click **Paid Fines**. To record that the item was previously paid, select the **Claimed Paid** check box by that item. This eliminates the item's fine amount in the **Payment** column, and reduces the payment amount in the **Total** box.
- To increase an item's fine amount, click the item's listing in the **Fine** column and type the new amount. (This is useful if you want to charge for not rewinding a tape, damage, and so on.)
- To add a new fine, click **New Fine**. Type the amount of the fine and a note, if desired (the note will display in the **Title** column of the Payment window). Click **OK**.
- To apply a refund, click **Refund**. Type the amount of the refund and a note, if desired (the note will display in the **Title** column of the Payment window). Click **OK**.

*Tip:* To view refunds, click **History**.

4. Type the amount of currency received in the **Tendered** line, then click **OK**. If change is due back, a dialog box displays the amount to be returned to the patron. To close the dialog box, click **Close**.



5. This displays a dialog box asking if you want to print a receipt. Click **Yes** or **No**.

NOTE: If the amount typed in the **Tendered** box is less than the **Total** payment amount, an error message displays. Click **Close** to close the dialog box, then adjust the appropriate entry in the Payment window.

## CREATING QUICK PATRON AND ITEM RECORDS

At times, it may be convenient to create a bibliographic (and holding) or patron record while using the M3 Circulation module. Later, you may want to replace a record created on-the-fly with a more complete record.

### Creating an Item Record

1. On the **Item** menu, click **Add Bibliographic**.
2. Select a template, then click **OK**.
3. In the 100#**a** field, type the author's name (last name, first name). (If you are using a version of M3 that supports Authority Control, the Authority Records dialog box displays. Select an author, then click **OK**.)
4. In the 245#**a** field, type the title.
5. In the 852#**h**, **i**, and **k** fields, type the call number (if desired).
6. Click **OK**.
7. At the prompt "Create Holding Record?" click **Yes**.
8. To add the call number, right-click in the 852 field, and then click **Insert Subfield**. In the Insert Subfield dialog box, click **k**, and then click **OK**. This inserts a line into 852#**k**, where you can type the call number.
9. If you are a multi-site library, select your library's location in the 852#**a** field.
10. In the 852#**p** field, type the barcode.
11. In the 991#**a** field, select the item group to which this item will be assigned.
12. If this is a temporary holding, select the **Temp** check box. When the item is returned, the record is marked for deletion, and the barcode record is labeled "detached" so it can be used again.
13. Click **OK**.

**Tip:** Once you have clicked a MARC field to activate the record pane, you can press CTRL+T to switch between field tag names and numbers.

### Creating a Patron Record

1. On the **Patron** menu, click **Add Patron**. (If more than one patron template exists, the Templates dialog box displays. Select the template you want to use, then click **OK**.)
2. To make sure the patron is not already in the system, type the patron's last name in the first keyword box, then click **Search**.

- If there is no patron in the system with this name, the Create New Patron Record window displays.

**OR**

**Note:** If you think the name may be misspelled in the system, use truncation to broaden your keyword search. For example, type **whitn\*** to locate *whitney*, *whitnee*, *whitnie*, and so on.

- If there is a patron in the system with this name, the Patron Search Results window displays the search results. Review the list to confirm that the patron you are entering is not included, then click **Cancel**. This displays the Create New Patron Record window.
3. In the 100#a field, type the first name of the patron.
  4. In the 100#c field, type the last name of the patron.
  5. In the 852#p field, type the barcode for the patron.
  6. In the 991#a field, select the patron group to which this patron will be assigned.
  7. If you are a multi-site library, select your library's location in the 852#a field.
  8. Enter information in other fields as desired.
    - For a school library, suggested minimum fields are:
      - 852#b – Homeroom
      - 852#c – Teacher or advisor
      - 852#g – Grade level
    - For a public library, suggested minimum fields are:
      - 110#a – Address
      - 110#b – City
      - 110#c – State or province
      - 110#e – Zip code or postal code
      - 110#k – Telephone number
  9. Click **OK**.

## ATTACHING MESSAGES TO PATRON AND ITEM RECORDS

**Tip:** The message block types are:

• **Information Block** – Click anywhere on the Circulation window to proceed (the least intrusive block type).

• **Blocking Block** – Select an option to proceed.

• **Nudge Block** – On first occurrence, select an option to proceed. On future occurrences, it acts as an information block.

• **Privilege Block** – Type a password to proceed (the most intrusive block type).

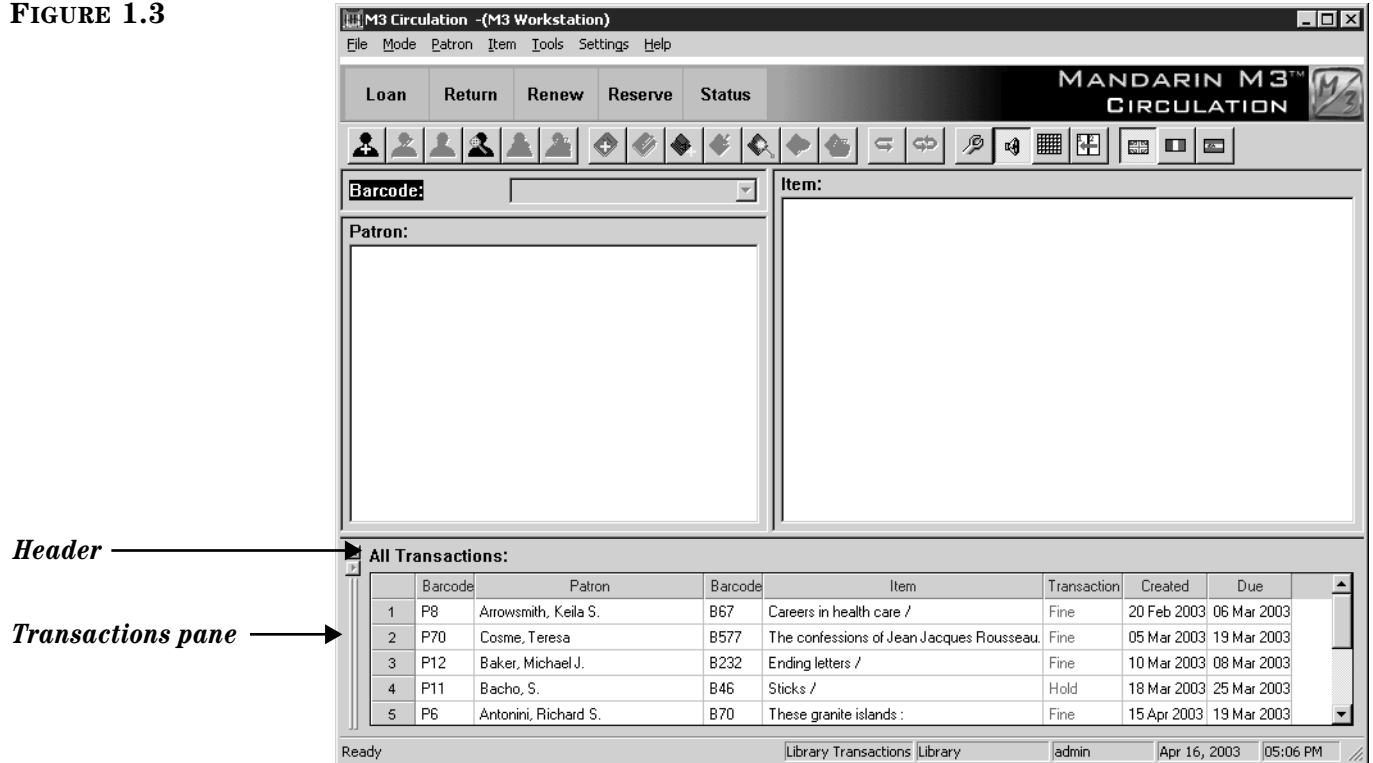
1. On the toolbar, click **Loan**, **Reserve**, or **Status**.
2. In the **Barcode** box, type the patron or item barcode, and then press ENTER.
3. On the **Patron** or **Item** menu (depending on the type of record you're attaching the message to), click **Messages**.
  - If an appropriate message is available, select the message and click **Accept**.
  - If you need to create a message, click **New**. Type the message, then click **OK**.
4. In the **Block Type** list, select a block type, and then click **Accept**.

## PRINTING TRANSACTION REPORTS

M3 provides basic transaction reports to monitor your library status and activity.

1. On the **Mode** menu, click **Library Transactions**. The heading **All Transactions** appears in the Transactions pane (Figure 1.3).

**FIGURE 1.3**



**Tip:** To resize the bottom pane to allow for easier viewing, drag “up” the bar at the top of the Transactions pane.

2. Right-click in the Transactions pane to open a command menu. You can:
  - Sort transactions by transaction type or time period by clicking **Select Transactions**. In the Select Transactions dialog box, click a transaction type and a time period, and then click **OK**.
  - Limit the transactions to today’s data by selecting the sort option that suits your needs: **Today’s All**, **Today’s Fines**, **Today’s Loans**, **Today’s Holds**, **Today’s Bookings**, or **Today’s Reserves**.
3. When the desired transactions are displayed, right-click again and then click **Print**. If a Print dialog box displays, change the settings if desired, and then click **OK**.

# M3 OPAC

## 2

*For detailed instructions on the procedures included in this chapter, as well as OPAC procedures not included in this chapter, refer to the Mandarin M3 Users Guide or the M3 on-screen Help.*

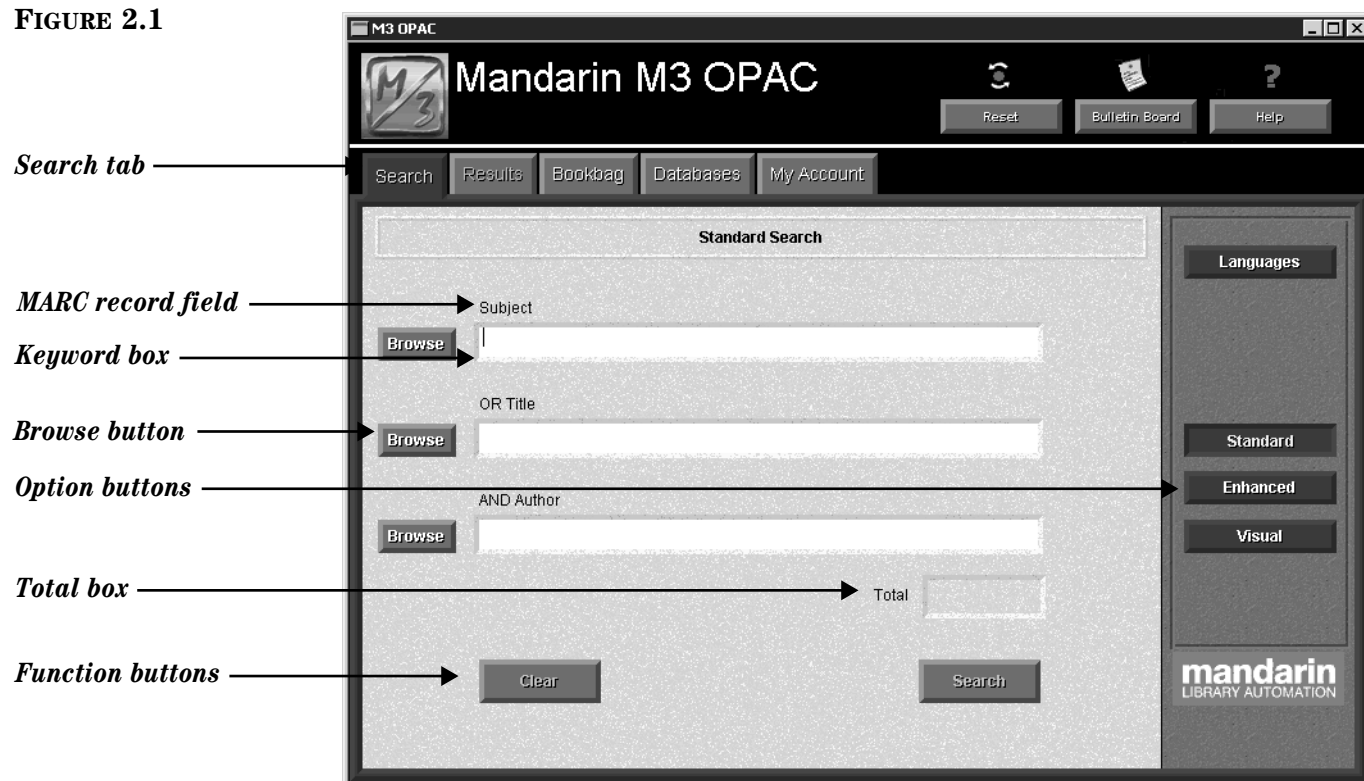
This chapter describes:

- How to conduct Standard, Enhanced, and Visual Catalog searches of your library's holdings
- How to work with search results, including viewing the record details
- How to use the Bookbag
- How to print records or save records to a file
- How to use Shelf Browse to locate records
- How to use the My Account tab

## STARTING THE OPAC

Open the M3 folder on your desktop, then double-click the **OPAC** icon. This displays the main OPAC window (Figure 2.1) with Standard Search selected.

**FIGURE 2.1**



## ABOUT THE M3 OPAC

The M3 Online Public Access Catalog (OPAC) is a flexible, multilingual search interface that enables the patron to search for records using three different search methods. The patron can then work with the search results in a variety of brief and expanded record formats.

The three available search methods are:

- **Standard Search** – A basic keyword search method that recognizes Boolean logic, truncation, and phrase searches, and allows index browsing.
- **Enhanced Search** – A more advanced search method that offers search flexibility and options. Patrons can enter simple or complex keyword search queries, and use index browsing.
- **Visual Catalog Search** – An easy point-and-click graphical search method. Patrons click colorful buttons to narrow their searches from broad topics to more defined sub-topics, ultimately reaching search results.

The following six features enhance the patron's search session.

- The Bookbag allows a patron to set aside selected records throughout the course of the search session for additional review or batch printing.
- The Shelf Browse function quickly locates records with a call number similar to that of a selected record. This is equivalent to looking at items to the left or right of a specific item on a library shelf.
- The History function keeps a cumulative list of Enhanced Search queries. A time-saving AutoSearch feature lets you select a search in the list and return to that search by clicking a button. To ensure privacy, a patron can clear this cumulative list at any time.
- The Reset feature deletes all information stored in the History, and returns all OPAC settings to their default positions.
- The Bulletin Board links to either a local HTML file or a World Wide Web address that your library wants patrons to view.
- On-screen Help, which provides instructions on performing a variety of tasks, can be accessed by clicking the **Help** button on the Header bar.

## STANDARD SEARCH

***Tip:** You can also click **Browse** to select a search term from a list of the indexed entries for the selected MARC field.*

1. On the **Search** tab, click **Standard**. This displays the Standard Search window (Figure 2.1).
2. Type your search query into one or more of the three keyword boxes. Each box is labeled to indicate the MARC record field it searches. The two lower boxes also indicate the Boolean operator applied to the box below.
3. Click **Search**. If matches are found, the Search Results window displays a list of search results (Figure 2.4). See "Working with Search Results" on page 2-5 for details on your options in the Results tab.

## ENHANCED SEARCH

1. On the **Search** tab, click **Enhanced**. This displays the Enhanced Search window (Figure 2.2).

**FIGURE 2.2**

***Tip:** You can also click **Browse** to select a search term from a list of the indexed entries for the selected MARC field.*

2. Type a search query into one or more of the three keyword boxes. To use different MARC record fields or Boolean operators, select a different field or operator from the appropriate list.
3. Click **Search**. If matches are found, the Search Results window displays a list of search results (Figure 2.4). See “Working with Search Results” on page 2-5 for details on your options in the Results tab.

## VISUAL CATALOG SEARCH

1. On the **Search** tab, click **Visual**. This displays a button menu (Figure 2.3).

FIGURE 2.3



**Tip:** Two navigation buttons function as follows:

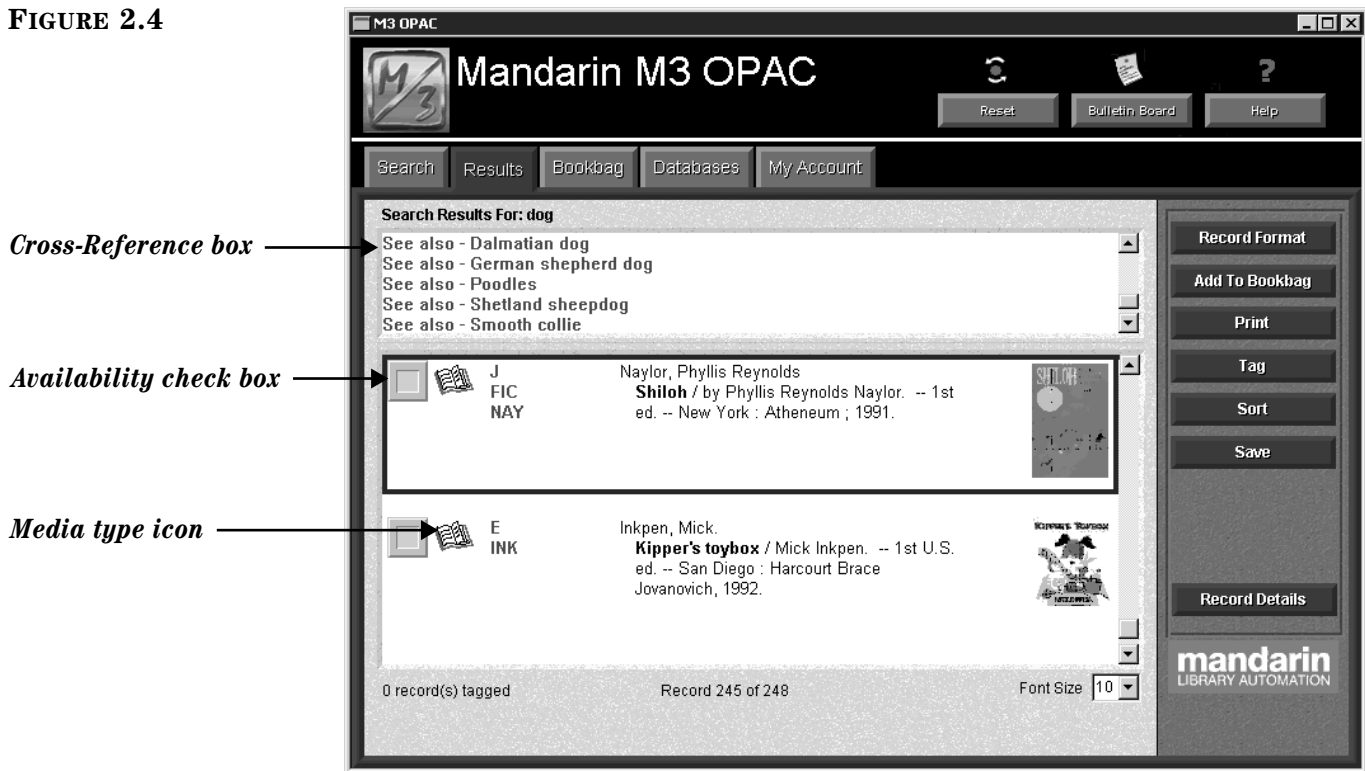
- **Back** returns to the previous button menu.
- **Start Over** returns to the first button menu.

2. Click the button for the desired topic. This displays another level of buttons. Depending on the number of button menus in your OPAC, you may have to navigate several levels to narrow your search.
3. When the search is complete, the Search Results window displays a list of search results (Figure 2.4). See the next section, “Working with Search Results,” for details on your options in the Results tab.

## WORKING WITH SEARCH RESULTS

After conducting a search, the Search Results window displays in the Results tab (Figure 2.4).

FIGURE 2.4



For more information on Authority Control, refer to the document titled "Using M3 Authority Control," which is available on the M3 CD.

- **Cross-Reference box** – If you are using a version of M3 that supports Authority Control and the search query you entered is defined under Authority Control, cross-references display in the **Cross-Reference** box. Click a "See" or "See also" link to view the search results for that heading.
- **Availability check box** – Indicates whether the item is available: green indicates available, red indicates unavailable.
- **Media type icon** – Displays the media type of the record.

### Viewing the Record Details

To access more information about a specific record, including the location of the item, select the record and click **Record Details**. This displays the Record Details window. See "Working with Record Details" on page 2-6 for more information.

### Using the Bookbag

To use the Bookbag to create a reading list or bibliography:

1. Click the Availability check box next to each record you want to add to the Bookbag.
2. Click **Add to Bookbag**, and then click **Add Tagged**.
3. You can then view the records in the Bookbag by clicking the **Bookbag** tab.

**Tip:** You can also double-click the record to view the Record Details window.



## Printing Records

To print records:

1. Click the **Availability** check box next to each record you want to print.
2. Click **Print**, and then click **Print Tagged**.

## Saving Records

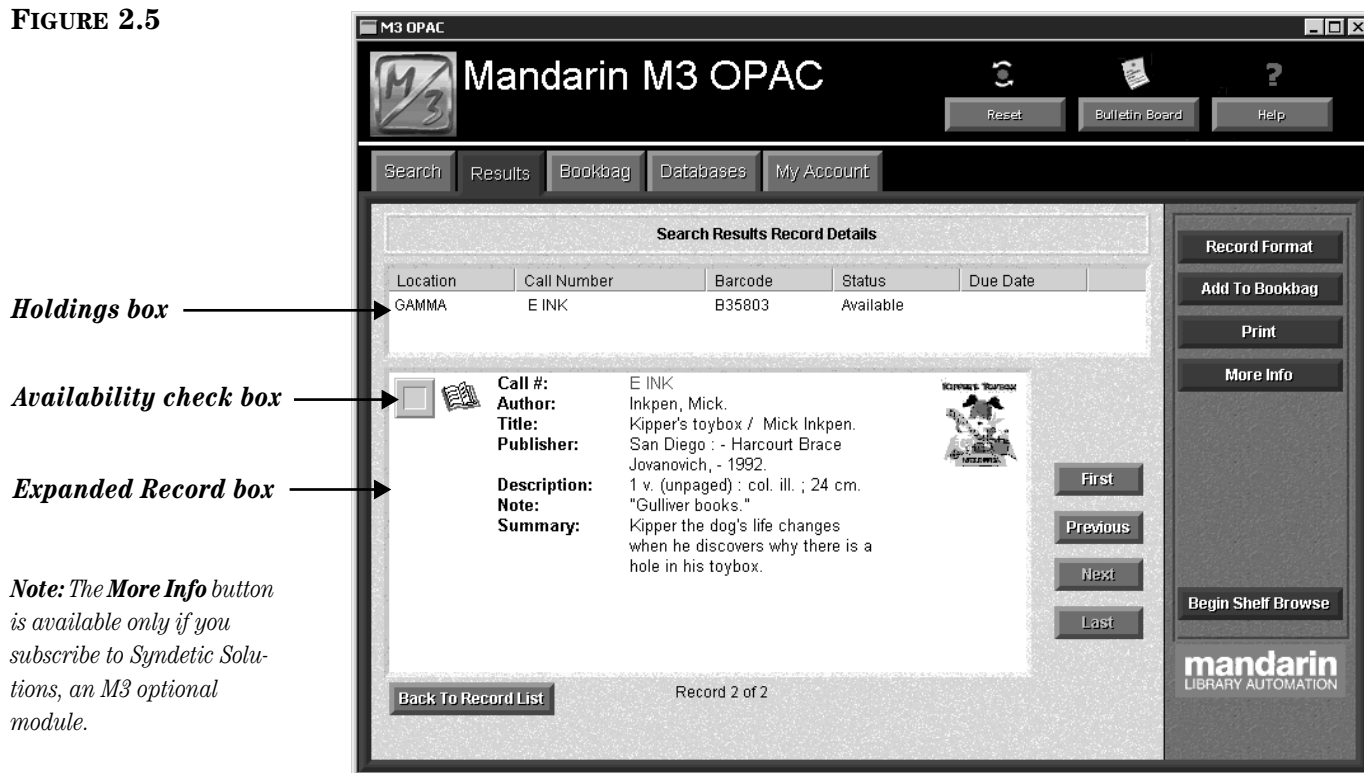
To save records to a file:

1. Click the **Availability** check box next to each record you want to save.
2. Click **Save**, and then click **Save Tagged**.
3. Navigate to the location where you want to save the record(s). In the **File name** box, type a name for the file, and then click **Save**. This saves the record(s) in rich text format (RTF).

## WORKING WITH RECORD DETAILS

The Record Details window (Figure 2.5) provides details about the record selected in the Search Results list, including location and status information.

FIGURE 2.5



- **Holdings box** – Lists each copy of the item. By default, this holding record information includes the location, call number, availability status, and, if applicable, due date.
- **Expanded Record box** – Displays an expanded version of the bibliographic record, along with an **Availability** check box and media type icon.

## Using the Bookbag

To use the Bookbag to create a reading list or bibliography, click **Add to Bookbag**. You can then view the records in the Bookbag by clicking the **Bookbag** tab.

## Using Shelf Browse

Shelf Browse allows a patron to quickly find records with a call number similar to that of a selected record. The patron can move one bibliographic record at a time forward or back. This is similar to looking at items to the left or right of a selected item on a library shelf. To use Shelf Browse:

1. Click **Begin Shelf Browse**. This changes the window to Shelf Browse mode and the active call number for this record appears in the status bar.
2. From here, your options include:
  - To view the previous record “on the shelf,” click **Previous**.
  - To view the next record “on the shelf,” click **Next**.
  - To end this Shelf Browse session, click **End Shelf Browse**.
  - To return to the Search Results window, click **Back To Record List**.

## USING THE MY ACCOUNT TAB

***Note:** This tab is available only if it has been activated by your system administrator.*

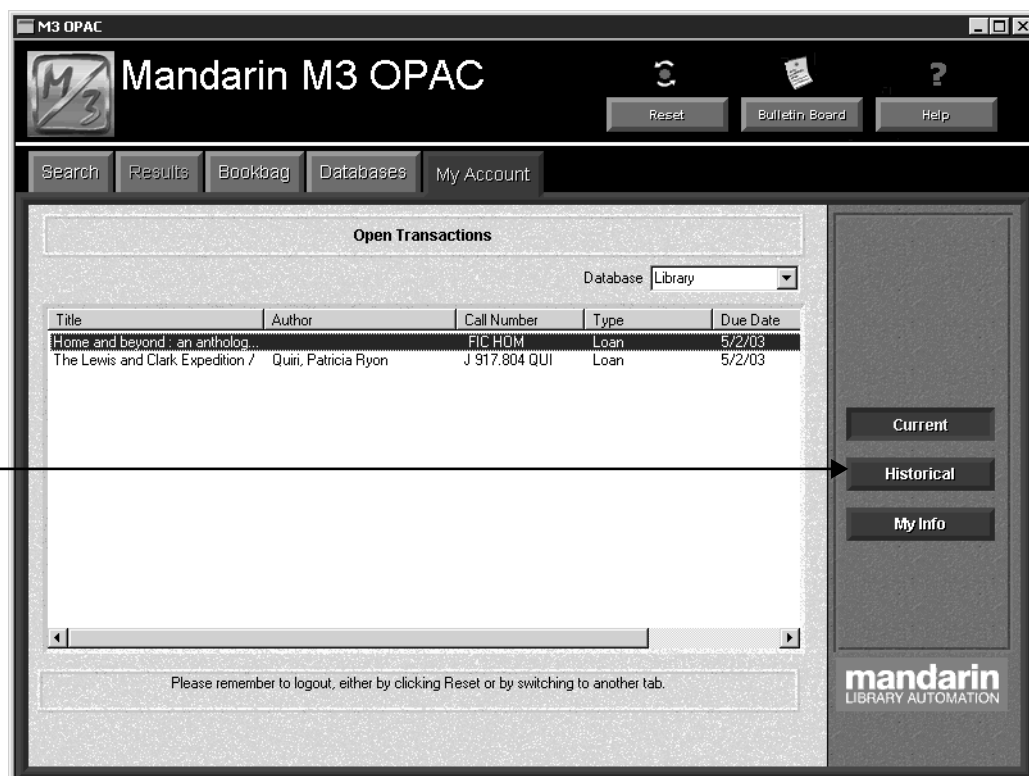
This feature allows patrons to view their own open and closed transactions as well as their personal information on file with the library.

To access your account:

1. Click the **My Account** tab. This displays the My Login dialog box.
2. In the **Patron Barcode** box, type the barcode from your library card. If your patron record has a password assigned to it, type your password in the **Password** box (if not, no password is required). Then click **OK**. This displays the My Account tab with your transactions listed (Figure 2.6).

FIGURE 2.6

*Option buttons*



The option buttons provide the following choices:

- Current – View your open, or current, transactions.
- History – View your closed, or historical, transactions.
- My Info – View personal information that the library has on file for you.

**The procedures in this chapter should be performed only by an authorized administrator.**

## M3 SYSTEM BACKUP INFORMATION

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

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

## BACKUP RECOMMENDATIONS

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

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

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

## Backup Methods

Two recommended backup methods are as follows:

- **Partial backup** – Backs up only the data that is critical to daily operation of M3. This entails selecting the specific location where M3 data is stored (the default path is `c:\m3 server\registry`) and starting the backup. This operation completes within a few minutes, and is a reliable solution for restoring M3 data. This type of backup does not back up the operating system or any other files on the computer. If a server failure occurred and the data on the hard disk was lost, the operating system and all applications would have to be reinstalled; M3 would be restored from the latest backup, repairing all data and transactions. This type of backup is typically performed by a network administrator.
- **Full backup** – Backs up the entire server, including the operating system, users, security, login scripts, applications, and all M3 data. This entails selecting the drive(s) and starting the backup. This operation may take a half hour to several hours to complete. This type of backup is typically performed by a network administrator.