



**A budget-friendly, feature-rich, fully integrated and complete system supported by renowned customer service.**

# Impressions

## Mandarin Library Automation Newsletter

May 2011 - Vol 4, Num 05

### **To request a consultation**

with a library automation specialist, [click here](#)

### **To request a live webinar**

with a library automation specialist, [click here](#)

**To request a sample**

### **Free Live Webinar Series**



Please join your Mandarin team for a

## **Free Webinar: Conducting Inventory and Year End Procedures.**

Let Mandarin show you how to maximize your investment in Library Automation.

To request a sample data conversion, [click here](#)

**For Technical Assistance:**

[support@mlasolutions.com](mailto:support@mlasolutions.com)

Phone +1 561 995 4010 opt 4

Toll Free

1 800 426 7477 opt 4 (USA & Canada only)

**For Customer Service:**

[custserve@mlasolutions.com](mailto:custserve@mlasolutions.com)

Phone +1 561 995 4010 opt 3

Toll Free

1 800 426 7477 opt 3 (USA & Canada only)

**For more information:**

or to request a call from one of our Library Automation Specialists,

[automation@mlasolutions.com](mailto:automation@mlasolutions.com)

Phone +1 561 995 4010  
ext 751

Toll Free

1 800 426 7477 ext 751 (USA & Canada only)

Fax +1 561 995 4065

[www.mlasolutions.com](http://www.mlasolutions.com)

Thursday June 9<sup>th</sup>  
11:00AM EST for M3  
1:00 AM EST for Oasis

[Click here to sign up](#)



REDISCOVER **mandarin**.COM

## End of the Year Guidelines for School Libraries

For many libraries, it is that time of year again - the time when students are leaving for the summer, budgets are due and inventory must be completed. Over the years, Mandarin customers have asked numerous questions regarding which end-of-year procedures should be followed to make the transition to the upcoming year as smooth as possible. In response to these inquiries, Mandarin has compiled a few guidelines to assist our customers with their Mandarin M3 and Oasis software. Please note these are only guidelines. Mandarin suggests you assess the needs of your library and use these guidelines as an outline.

A preparatory note about PURGING records:

When you purge bibliographic, holding, or patron records, Mandarin purges - obliterates, deletes finally - all records of the type you are purging. Mandarin stores statistical information in holding, bibliographic, and patron records. So, purging destroys statistical information connected to any records that you purge. For this reason it is advisable to leave records marked for deletion unpurged until you run your statistical reports for the year. Mandarin's search speed will not be slowed, and patrons do not see these records in the OPAC. If you purge your records marked for deletion AFTER statistical reports have been run, your statistics will have been captured, and you won't lose information.

- Fully backup your data

Fully backup all your data before you begin wrapping up your year. Consult your network administrator if you need assistance with backing up. Mandarin provides a backup utility with the installation of your server software, or your institution may use other backup procedures. Hosted Oasis customers can disregard this step, since Mandarin fully backs up all hosted installations.

- Conduct a full or partial inventory

Conducting a full inventory, of course, requires scanning all items in your collection over a short period of time, so it's much easier to do once students have left. On the other hand, some find it more workable to conduct a series of partial inventories at intervals over the year for an idea of the collection's status. The Inventory chapters in the M3 and Oasis Users Guides have detailed instructions for conducting full and partial inventories.

- Run required reports

Run your choice of year-end reports. Your year-end information should suit your library's needs, so reports used will vary from library to library. Statistical reports in both Report Tool and Oasis Reports offer various date range choices as well as patron and item groupings.

- Modify or promote students

a. If you keep the same student records from year to year, use the find/replace function in Cataloging to promote students to the next grade by changing the grade field. Remember to begin at the uppermost grade and work down. Also remember to mark the patron records for deletion before promoting any students.

b. If you replace patron records with new records every year, ensure that you first mark all current patron records for deletion before importing the new records.

c. If you modify patron records by merging them with new information, use the import function from within Cataloging and the records will automatically merge based on the barcode or other field specified in the cataloging.ini file.

- Run the Transaction History Purge utility

Please note: Run any statistical reports BEFORE purging your transaction history. Transaction History Purge is found in the CleanUp 2.0 utility. Run this to remove any closed transactions before a selected date.

After running Transaction History Purge, you should pack the transaction table using the M3Utility program found in the M3 Server directory. This applies to Oasis users as well.

Run M3Utility from the command line with the command M3UTILITY PACK. This may need to be done by your IT staff. Hosted Oasis customers can disregard this step since it is taken care of at the Mandarin headquarters.

- Purge records marked for deletion

Purging bibliographic and patron records removes records marked for deletion from your database. Be sure you have read the preparatory note above regarding Purging.

- Rebuild all indexes

Re-index using the M3Utility program found in the M3 Server directory. Run M3Utility from the command line with the command M3UTILITY REINDEX. This may need to be done by your IT staff. Hosted Oasis customers can disregard this step since it is taken care of at the Mandarin headquarters.

- Set calendars in Circulation

Set the calendars for the coming school year in Circulation. Enter all holidays for the coming year, and set the Global Recall date.