



Mandarin M3[®]
Library Automation System

M3 Tutorial

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Mandarin M3 may also be referred to herein as M3. Mandarin Library Automation, Inc. may also be referred to herein as Mandarin.

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This product may contain technical errors or inaccuracies.

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INTRODUCTION

1

INTRODUCING MANDARIN M3

Thank you for your interest in the Mandarin M3 Library Automation System. We have prepared this tutorial to give you a tour of M3.

After you have imported bibliographic and patron records into M3, you can use this guide to familiarize yourself with M3, to conduct training, etc. This guide is not intended to replace our Users Guide as it only briefly touches on many of M3's capabilities.

If you prefer to use Mandarin's sample record database instead of importing your own records, we offer a version of the M3 Server that includes sample patrons and bibliographic items. This version of M3 Server is available through the same link as the free M3 download on the Mandarin Web site.

Note: ReportTool is available This tutorial will walk you through all M3 modules (except ReportTool):

- Windows OPAC (Online Public Access Catalog)
- Circulation
- Cataloging
- Group Editor
- Inventory

While you're using M3, please contact Mandarin Customer Service if you have questions about M3 and its many features, or if you would like to purchase a Service & Update Agreement. Our toll-free number is 1-800-426-7477.

On-Screen Help

An on-screen users guide is available in each module to aid users. To start the Help in most modules, click **Help Topics** on the **Help** menu to display the topics for the current module.

***Note:** To start the Help in the OPAC module, click the **Help** button; in the Group Editor module, click the question mark (?) button.*

M3 Tutorial Conventions

This tutorial is not intended to replace our Users Guide or on-site training as it only briefly touches on many of M3's capabilities.

Throughout this guide, you will encounter a variety of instructions to follow as part of the tutorial. These instructions are designed to help you gain a better understanding of M3's features and functions. To set them apart, they display with a ➤ preceding the instruction. For example:

➤ On the **File** menu, click **Print**.

In many cases, there are several ways to perform a function or command. For this tutorial, we have generally chosen to present just one of the options.

NOTES

M3 WINDOWS OPAC

2

OVERVIEW

Note: This tutorial may not explain all features available in the OPAC.

With the Windows-based OPAC module, you can:

- Conduct Standard, Enhanced, and Visual Catalog searches of your library's holdings
- Select different interface languages
- Determine item availability and location
- Work with search results in brief and expanded record formats
- View book cover images
- View and link to "See" and "See also" cross-references with the optional Authority Control module
- Print records or save records to file
- Add records to the Bookbag; print or save records in the Bookbag
- Use Shelf Browse to locate records
- Review your search session history and return to prior searches
- Allow patrons to view their transaction history and personal information with the My Account tab
- Enter or scan barcodes into the Bookbag to create a list of items
- Use the Bulletin Board to deliver information to patrons
- Customize the appearance of the OPAC with your library name
- Customize the Visual Catalog interface

STARTING THE OPAC

- Open the Mandarin 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

The header can be customized to display the name of your library or institution.



Language Options

Patrons can change the interface language of the OPAC at any time; this does not change the language of the information in the MARC records. Patrons may choose from English (default), French, Spanish, German, and Italian.

- Click **Languages**. This displays the Languages dialog box with the list of language choices.

Bulletin Board Feature

The Bulletin Board feature links to a local HTML file or a Web page. Use this feature to link to customized information, the library home page, or a page of public service announcements.

- Click **Bulletin Board**. This displays a blank bulletin board.

To configure your bulletin board, click the **Start** button, select **Programs**, select **Mandarin M3**, select **Utilities**, and then click **Setup Bulletin Board**. Follow the prompts.

STANDARD SEARCH

Tip: To ensure a successful search, M3 automatically searches as follows:

- The **Subject** field searches all Subject and Summary fields of the MARC Record.
- The **Title** field searches Title, Added Title, Contents, and Notes fields of the MARC Record.
- The **Author** field searches Author, Added Author, and Responsibility Statement of the MARC Record.

Standard Search allows patrons to easily search your catalog with the familiar **Subject**, **Title**, or **Author** fields. A patron can enter a search term in the keyword box or click **Browse** to view a list of all data currently contained in the corresponding record index. M3 can be configured to search more or fewer fields of the MARC record or to default to different record indexes at the librarian's discretion.

Search Example 1

- In the **Subject** keyword box, type a keyword, then click **Search**. This displays the Search Results list (Figure 2.2).
 - A media type icon displays next to the call number of each record. Media type icons in this results list include book, music, video, and Web site. Scroll through the search results list to view titles.
 - When the mouse points to the media type icon, the icon type displays. (It may take a moment for the text to display.)
 - A green box to the left of the record indicates that the item is available; a red box indicates that the item is not available. Clicking this box tags the record for functions such as printing or adding to the Bookbag.

FIGURE 2.2

Cross-Reference box
(not in free version)

Tips:

- Click **Sort** to sort by Author, Call Number, Call Number by Prefix, Copyright Date, or Title.
- Active Web links can be enabled in the OPAC by entering a Web address and optional description in the bibliographic record.



Note: For more information on the Authority Control module, see "Authority Control" on page 8-3.

If you add the optional Authority Control module to your M3 system, "See" and "See also" cross-references will display in the **Cross-Reference** box (shown in Figure 2.2). You will be able to view records associated with a cross-reference by clicking the "See also" term.

Tip: Use the truncation asterisk (*), wildcard question mark (?), and phrase quotation marks (" ") with your keywords.

Examples:

- **Farm*** finds farms, farmer, farmers, farming, and so on.
- **Wom?n** finds woman and women.
- **"African American"** only looks for the keywords when they appear next to each other. This eliminates false results in which the words are listed separately.

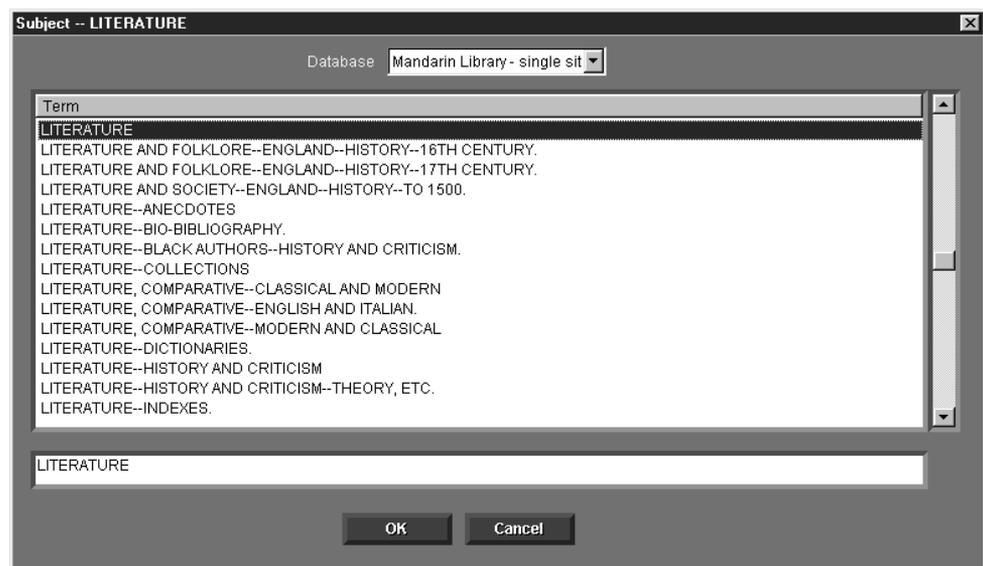
FIGURE 2.3

Search Example 2

- Click the **Search** tab, and then click **Clear**.
- In the **Title** keyword box, type a title, and then click **Search**. This displays the Search Results list.
- Select a record, then click **Record Details**. This displays detailed information about the selected title.

Search Example 3

- Click the **Search** tab, and then click **Clear**.
- In the **Subject** keyword box, type a keyword, and then click **Search**.
- Click the **Search** tab.
- Click the **Browse** button next to the **Subject** keyword box to display a list of subject headings (Figure 2.3). This list allows you to narrow your search to a specific area of interest.



- Select a subject heading in the list, and then click **OK**. The selected term appears in the **Subject** keyword box.
- Click **Search** to view the Search Results list for this subject.

Search Example 5

- Click the **Search** tab, and then click **Clear**.

A patron can search the Author field by entering a name in any order: for example, **Steinbeck, John** or **John Steinbeck** or just **Steinbeck**.

- In the **Author** keyword box, type any form of an author's name and then click **Search**. This displays the Search Results list. By default, the records display in bibliographic record format.

Tip: Record Format allows patrons to choose the display format that best suits their needs. Standard options include Bibliographic, List, Full MARC, Catalog Card, Brief Labeled, Expanded Labeled, and Compressed List.

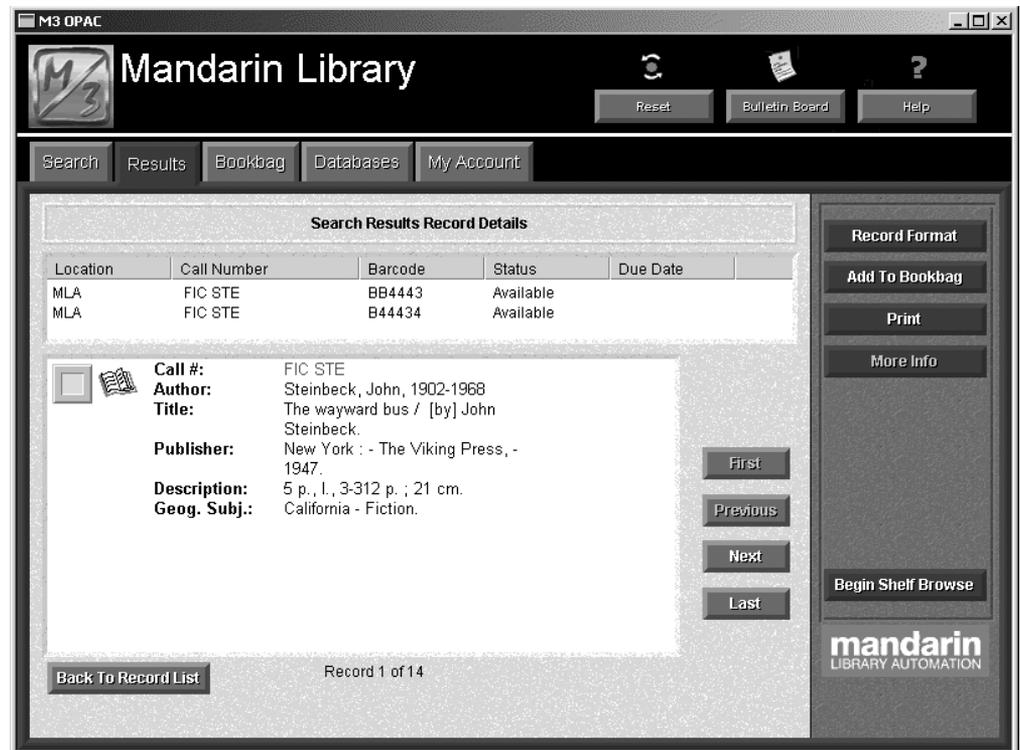
- To view other record format display options, click **Record Format**. Select a different format to view, and then click **OK**.

OR

Click **Cancel** to close the Record Format dialog box.

- To view record details, select a record and then click **Record Details**. This displays detailed information about the selected title and lists all copies owned by the library, as shown in Figure 2.4.

FIGURE 2.4



Tip: Shelf Browse allows you to quickly find records with a call number similar to that of a selected record. This feature creates a virtual electronic shelf and simulates a patron browsing the shelves and discovering books/items that may not be discovered any other way.

- When finished reviewing the record details, click **Back To Record List**.

USING THE BOOKBAG

To create a reading list or bibliography, click the green/red check box to tag individual records in the Search Results list. (Green indicates the item is available; red indicates unavailable.)

- Tag at least three records.
- Click **Add to Bookbag**, and then click **Add Tagged**.
- Click the **Bookbag** tab to view the records you added.

From here, you can print or save the list. You can also add records to the list by scanning or entering barcodes, but this feature is not enabled by default; refer to the M3 Users Guide for instructions on enabling this feature.

ENHANCED SEARCH

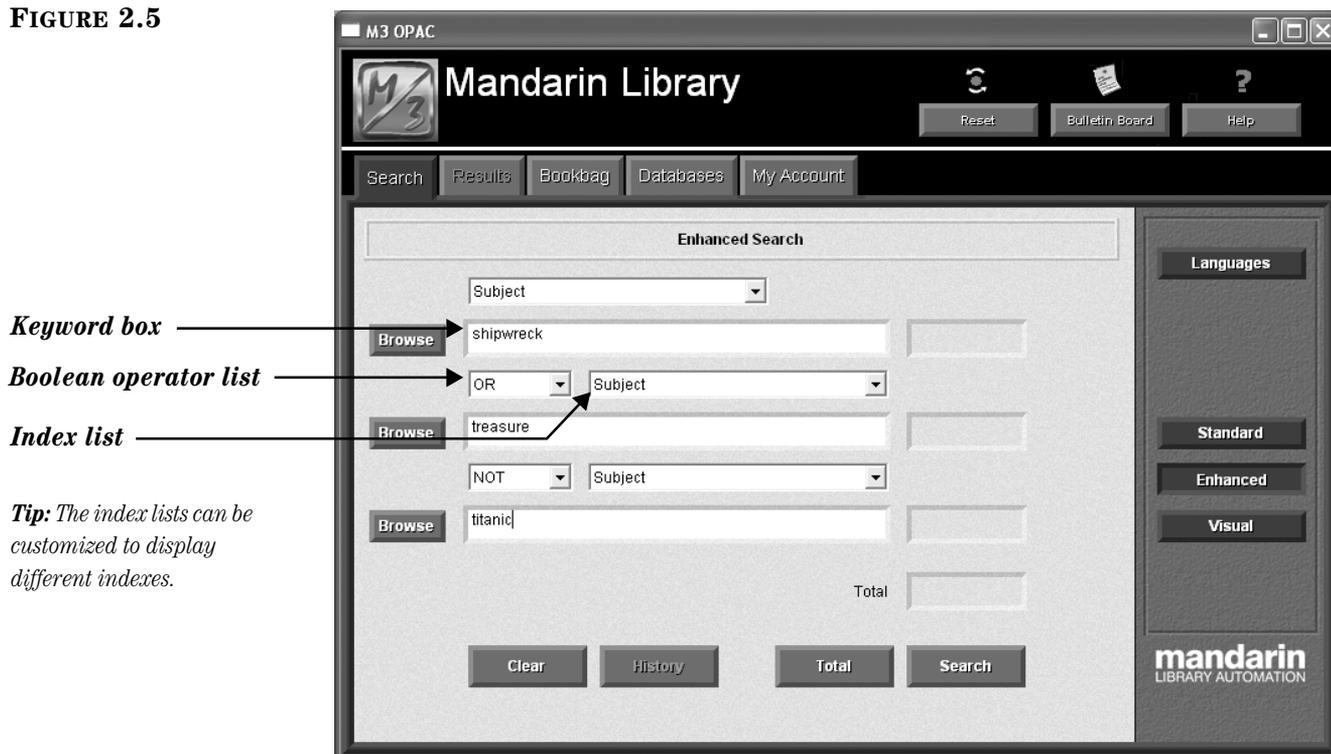
Tip: If a patron is not sure what index to search, the Enhanced Search index list includes the **Anywhere** option. This option searches for the entered term anywhere in the MARC record.

Enhanced Search allows the user to type a search query into one or more of three keyword boxes. To select different record indexes or Boolean operators, click the corresponding arrow button, and then select from the list. (You can also use the Browse button to enter a search term, as explained in “Search Example 3” on page 2-4.)

Search Example

- Click the **Search** tab, and then click **Enhanced**. This displays the Enhanced Search window (Figure 2.5).
- In the first keyword box (under **Subject**), type **shipwreck**.
- In the Boolean operator list below, select **OR**.
- In the second index list, select **Subject**, then type **treasure** in the second keyword box.
- In the second Boolean operator list, select **NOT**.
- In the third index list, select **Subject**, then type **titanic** in the third keyword box (shown in Figure 2.5).

FIGURE 2.5



Tip: Click **History** to view a list of your Enhanced Search queries during this session.

- Click **Search**. If matches are found, the Search Results list displays. Your options are the same as those described in “Standard Search” beginning on page 2-3.

VISUAL CATALOG SEARCH

Visual Catalog Search combines library-definable queries that are organized into a hierarchy of topics and subtopics utilizing graphics and text. This easily configurable graphical interface offers the following benefits:

- Helps younger patrons quickly find library materials via visual cues, such as **Animals** or **Countries & Cultures**
- Creates databases for special groups, faculty, and students, such as “Home Schoolers” or “Rotary Club”
- Queries special collections, such as “New Books,” “e-Books,” or “Video Collection”
- Launches software applications, such as WordPad
- Launches CD-ROM applications, such as an encyclopedia
- Launches URLs (MARC field 856), such as “Featured Web Sites of the Week”

To perform a Visual Search:

- Click the **Search** tab, and then click **Visual**.
- Click each of the eight buttons featured in the Visual Catalog interface and tour on your own.

FIGURE 2.6

Tips:

• M3 includes over 75 colorful graphics for use in the Visual Catalog. Additional graphics can be used from sources on the Internet or your own files.

• Topic, query, and launcher buttons look alike. What they do when selected differentiates them. A topic button opens a sub-menu. A query button returns search results. A launcher button opens an application or a Web page.

• Two navigation buttons function as follows: **Back** returns to the previous menu level; **Start Over** returns to the first menu level.



DATABASES TAB

M3 can be configured to host the collections of a single library or the collections of many libraries either as a Classic Merged Union Catalog or Virtual Union Catalog. The system can be configured to search the local collection first and, if the desired record is not found, to then search other collections.

A patron can choose which collections to search by clicking the **Databases** tab.

- Click the **Databases** tab to review layout.

MY ACCOUNT TAB

This feature allows patrons to view their own open and closed transactions as well as their personal information on file with the library. This tab is not enabled by default; refer to the M3 Users Guide for instructions on enabling this feature.

- Click the **My Account** tab. This displays the My Login dialog box.
- In the **Patron Barcode** box, type a patron barcode that exists in the system. (If you are using Mandarin's sample record database, type **P2**.)
- In the **Password** box, type the patron's password, then click **OK**. (If you are using Mandarin's sample record database, type **demo**.) This displays **Open Transactions** with any current, or open, transactions that the library has on file for the patron. The **Current** button is now active.
- Click **Historical** to view closed or historical transactions.

You can also view patron contact information and a patron photo (if there is one on file), but this feature is not enabled by default; refer to the M3 Users Guide for instructions on enabling this feature. After enabling, a **My Info** button will appear in this window.

M3 CIRCULATION

3

OVERVIEW

Note: This tutorial may not explain all features available in Circulation.

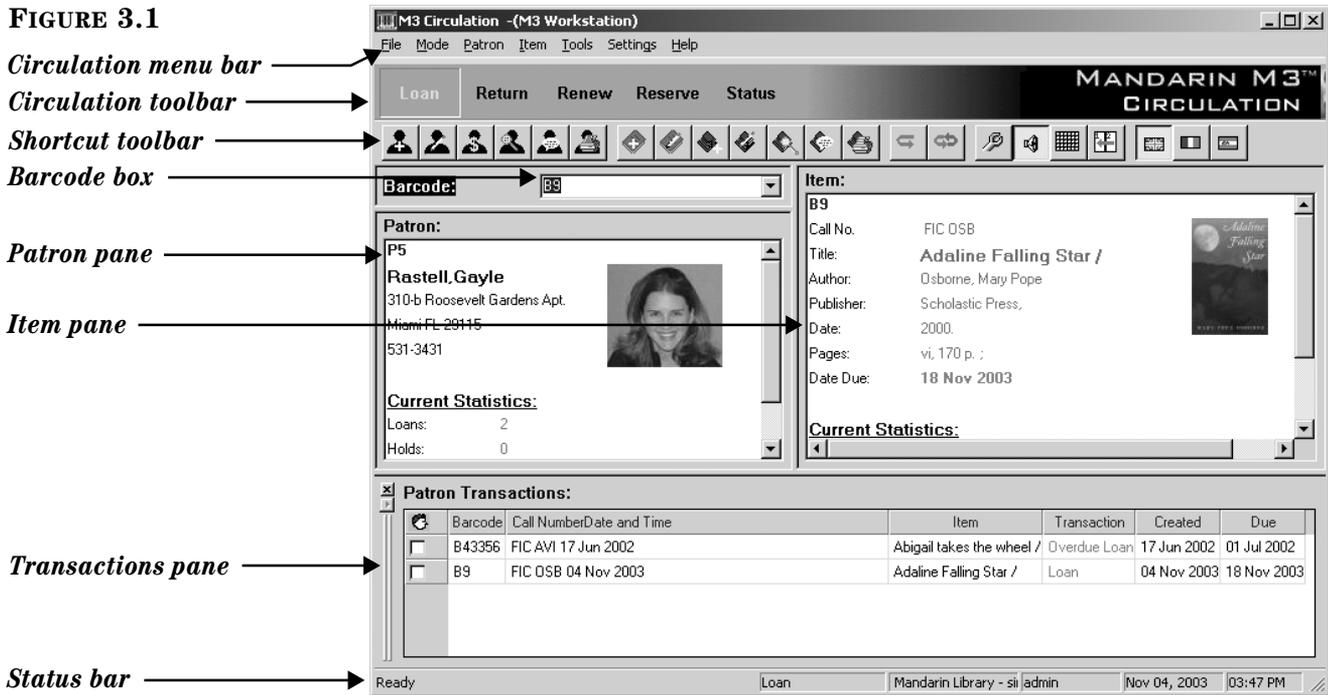
With the Circulation module, you can:

- Conduct loans, returns, reserves, holds, bookings, renewals, and fine processing
- Select different interface languages
- View patron and item status
- Add, edit, and search for patron and item records
- Add book cover images and patron photos to records so they can be viewed in Circulation and OPAC
- Temporarily change the system date
- Set up one or more circulation schedules
- Add and delete patron and item messages
- Attach, edit, and detach messages to patron and item records
- Enable self checkout, self return, and quick return
- Send e-mail notifications to patrons who owe a fine or have overdue items.
- Send automatic e-mail notifications to patrons when items they reserved are available
- Track in-house usage
- Run transactions reports
- Upload transactions from portable scanners
- Print receipts

STARTING CIRCULATION

- Open the Mandarin M3 folder on your desktop, then double-click the **Circulation** icon. This displays the Login dialog box.
- In the **Login Name** box, type **admin**.
- In the **Password** box, type **boca raton**, and then click **OK**. This displays the main Circulation window (Figure 3.1).

FIGURE 3.1



- **Circulation menu bar** – Contains File, Mode, Patron, Item, Tools, Settings, and Help menus.
- **Circulation toolbar** – Contains Loan (green), Return (red), Renew (blue), Reserve (yellow), and Status (purple) functions.
 - Click each of these buttons to observe the color change with each function.
- **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.
 - Rest your mouse pointer on each toolbar button for a moment to view a tooltip that explains the function of each button. 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, type a patron or author’s last name, or type an item’s title to access the matching record.

Images can be added to patron and bibliographic records. Patron and item images will display in the Circulation and OPAC modules.

CONDUCTING TRANSACTIONS

All circulation transactions are accessed from the main Circulation window. You can view patron and item status, loan items, return items, renew items, reserve and hold items, book equipment and rooms, attach patron and item messages, process fine payments, forgive fines, and record patron claims of lost, previously paid, never had, and previously returned. Many of these procedures are covered in the following sections.

Loaning Items

There are three ways to access the loan function:

- On the toolbar, click **Loan**.
- On the **Mode** menu, click **Loan**.
- Press F5.

Tip: If a patron has a fine, a warning appears. 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.

Loan Example

- On the toolbar, click **Loan**.
- In the **Barcode** box, type a barcode or patron name, and then press ENTER. This displays information for the patron in the Patron pane. The Patron pane can be customized to display any information that is stored in the patron record.
- In the **Barcode** box, type an item barcode, and then press ENTER to check out the first item.
- Type another barcode and press ENTER to check out a second item.

Returning Items

Returning a Single Item

- On the toolbar, click **Return**.
- In the **Barcode** box, type the barcode of the item being returned, and then press ENTER. This returns the item.

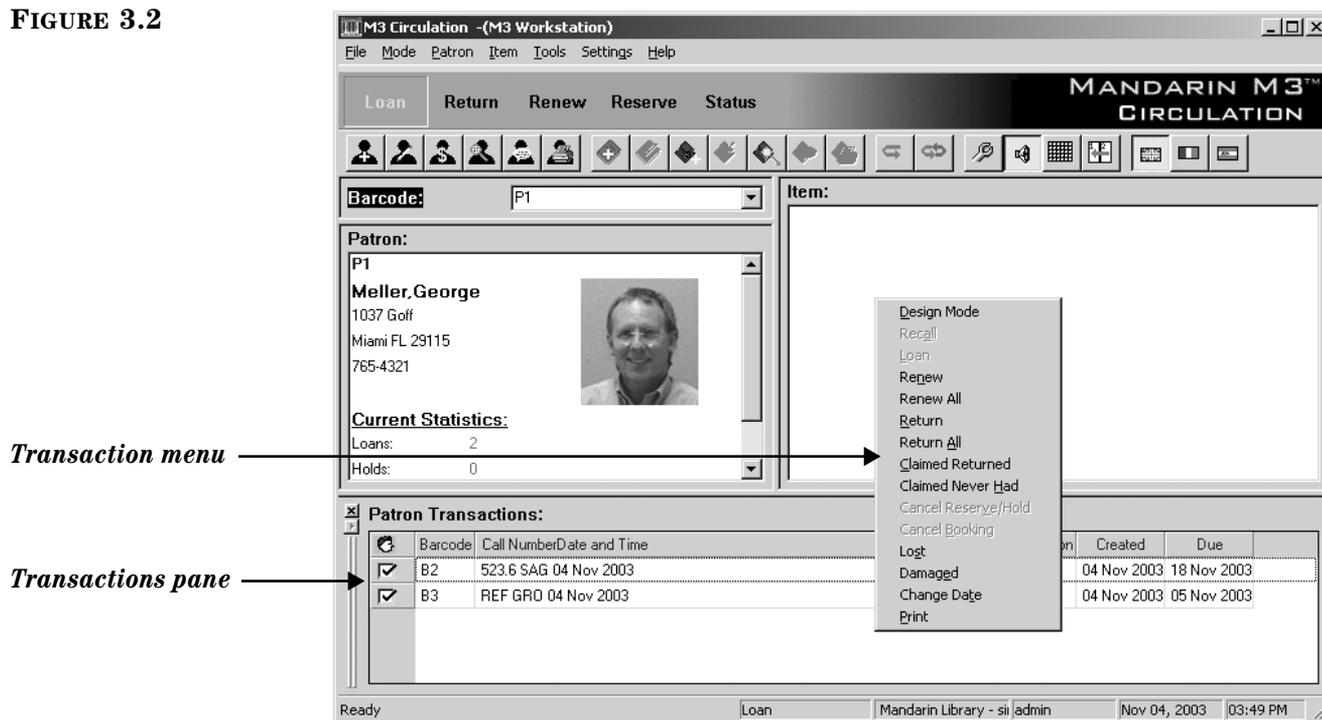
Returning Multiple Items for the Same Patron

- On the toolbar, click **Loan** to reset the screen.
- In the **Barcode** box, type the patron's barcode, and then press ENTER.
- In the Transactions pane, select the check boxes next to the items being returned.
- Right-click in the Transactions pane to access a transaction menu (shown in Figure 3.2).

Tip: There are several methods for returning items:

- **Single Return** – Returning a single item from a patron.
- **Multiple Return** – Returning multiple items from one patron.
- **Return All** – Returning all items listed.
- **Quick Return** – Scanning in bookdrop returns without patrons present.
- **In-House Circulation Return** – Returning items left on tables and desks after in-library use.

FIGURE 3.2



- Click **Return**. This batch-returns all checked items.

NOTE: You can also return all loaned items by clicking **Return All** on the transaction menu; you do not need to select the check boxes next to the items.

Attaching a Message to a Patron Record

- In the **Barcode** box, type a patron barcode, and then press ENTER.
- On the **Patron** menu, click **Messages**.

This displays a list of any messages in the system. You can select a message from the list or add a new message for this patron.

- Click **New**. Type a message, click **OK**, and then click **Accept**.
- In the **Block Type** list (click the arrow to view the list), select **Information** as the block type, and then click **Accept**.

This message will appear the next time this patron's barcode is entered.

Message Block Types in M3	
Information block – You can bypass the message by clicking anywhere on the Circulation window (the least intrusive block type).	Nudge block – On first occurrence, you must select an option in order to proceed. Any time this message appears again, it will act as an information block.
Blocking block – You must select an option in order to proceed.	Privilege block – You must type a password to bypass the message (the most intrusive block type).

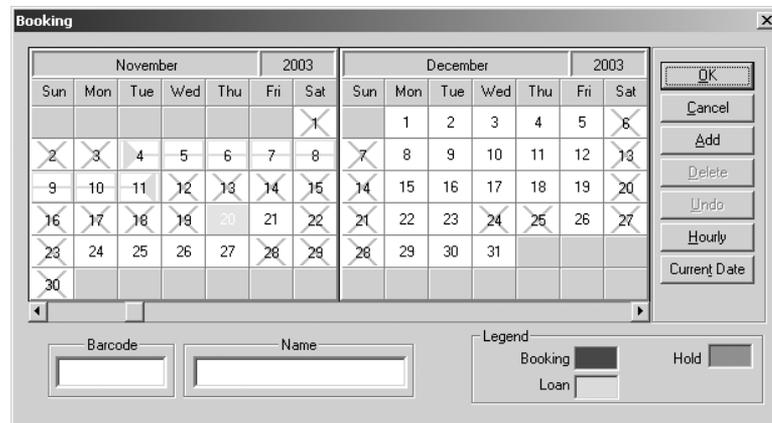
Booking an Item

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

- On the toolbar, click **Loan**.
- In the **Barcode** box, type a patron's barcode, and then press ENTER.
- On the **Mode** menu, click **Booking**.
- In the **Barcode** box, type the barcode of an equipment item that exists in the system, and then press ENTER. This displays the Booking dialog box (Figure 3.3).

FIGURE 3.3

*Tip: Click **Hourly** to display the current day's agenda. Click **Daily** to return the calendar to a two-month view.*



- Click the first day you want the item and drag the mouse to the last day you want the item. Click **Add**, and then click **OK**.

OR

Click **Hourly**, then click the first hour you want the item and drag the mouse to the last hour you want the item. Click **Add**, and then click **OK**.

- To exit Booking mode, click **Loan** on the toolbar.

Locating a Patron

- Clear the Circulation window by pressing ESC.
- In the **Barcode** box, type a patron's last name. This displays the Select Barcode box, which lists all matches for this name.
- Select a patron and click **OK**. This displays the patron information in the Patron pane of the Circulation window.

Locating and Loaning an Item

- With a patron displayed in the Patron pane, type an item's title in the **Barcode** box, and then press ENTER.

This displays the bib and holding information in the Item pane of the Circulation window and loans the item to the patron.

Setting Up the Library Calendar

- On the **Tools** menu, click **Schedule**. This displays the Circulation Schedule dialog box.
- Click each tab and review the contents.
 - **General tab** – Establishes loan period rules.
 - **Schedule tab** – (Shown in Figure 3.4) Establishes the calendar period and the library's opening and closing hour for each day of the week. Create multiple calendar periods to apply to different times of the year.
 - **Holidays & Exceptions tab** – Allows you to eliminate or add irregular dates. Identify days when library is closed because of holidays, and so on.
 - **Global Recalls tab** – Allows you to specify the date when all items have to be back in the library.

FIGURE 3.4

Period 1 of 3		Day		Circulation Hours	
				Start Time	End Time
From:	08/25/2010	Mon	Open	7:00 AM	4:00 PM
To:	06/11/2011	Tue	Open	7:00 AM	4:00 PM
		Wed	Open	7:00 AM	3:00 PM
		Thu	Open	7:00 AM	4:00 PM
		Fri	Open	8:00 AM	3:00 PM
		Sat	Closed		
		Sun	Closed		

Buttons: Add, Remove, OK, Cancel

- When finished, click **Cancel** to close this dialog box.

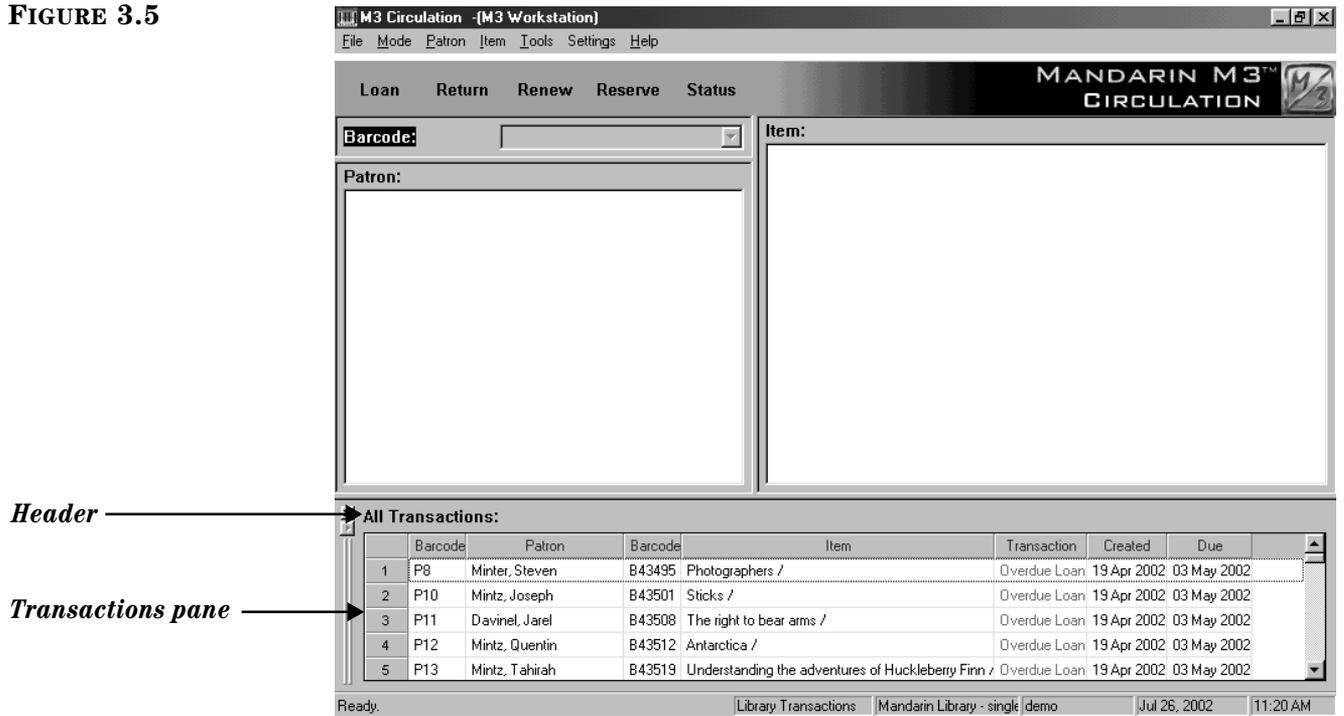
Transaction Report Utility

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

➤ On the **Mode** menu, click **Library Transactions**.

In Figure 3.5, notice the **All Transactions** header in the Transactions pane.

FIGURE 3.5



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

- Right-click in the Transactions pane to open a shortcut menu with a list of report choices.
- Click **Select Transactions**. This displays the Select Transactions dialog box.
- Under **Transaction Type**, click **Overdue Loans**.
- Under **Overdue Loans**, click the second option and type **30** in the **days or more** box.
- Click **OK**.

Notice the header in the Transactions pane has changed.

NOTES

M3 CATALOGING

4

OVERVIEW

Note: This tutorial may not explain all features available in Cataloging.

With the Cataloging module, you can:

- Add, edit, delete, and search for MARC records
- Use the find and replace utility to modify records
- Import and export records, including pictures

STARTING CATALOGING

- Open the Mandarin M3 folder on your desktop, then double-click the **Cataloging** icon. This displays the Login dialog box.
- In the **Login Name** box, type **admin**.
- In the **Password** box, type **boca raton**, and then click **OK**. This displays the main Cataloging window (Figure 4.1).

EDITING AN EXISTING RECORD

- On the **Edit** menu, click **Search**. This displays the Search dialog box.
- In the **Search For** list, select **Bibliographic**.
- In the first index list, change **Subject** to **Title**.
- In the first keyword box, type the title of an item that exists in your system, and then click **Search**. This updates the main Cataloging window with the records matching your search (Figure 4.1).

4-2 M3 Cataloging

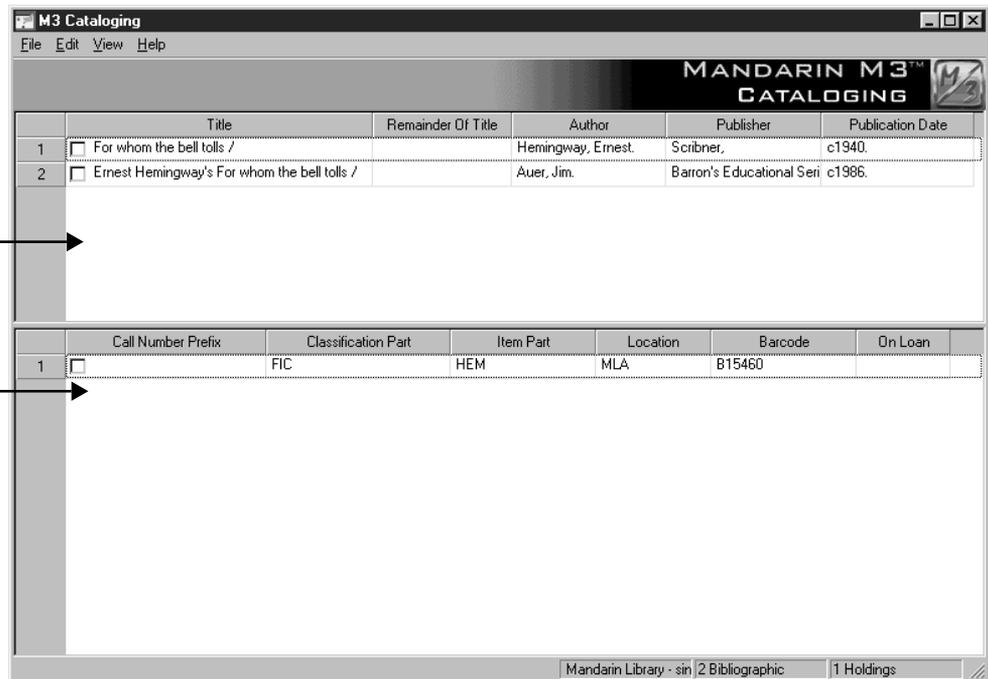
FIGURE 4.1

Bibliographic records pane

Holding records pane

Tips:

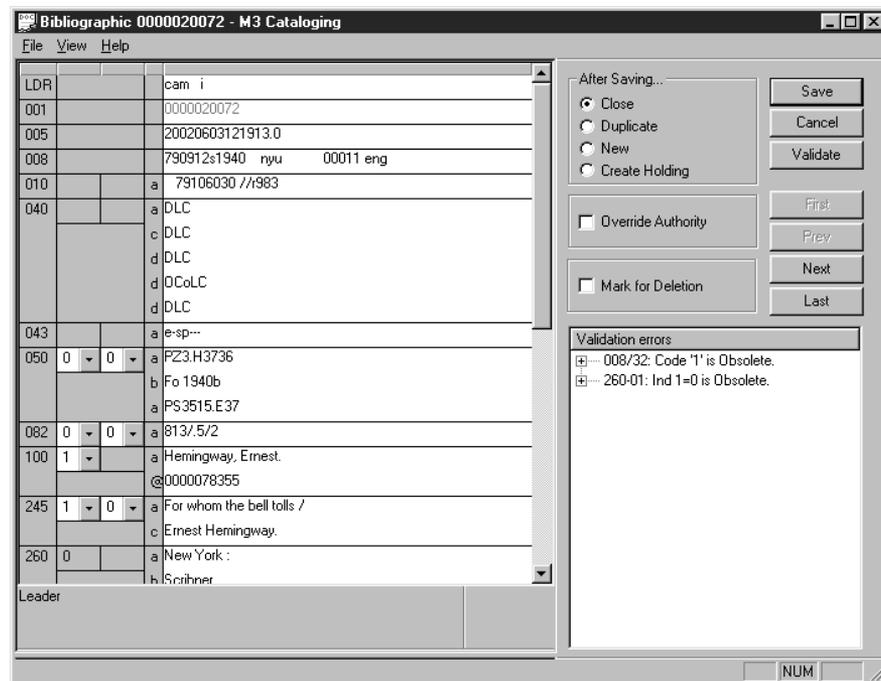
- You can sort information by any field in the pane by clicking the field's column heading.
- The Holding records pane displays all copies linked to the bibliographic record selected in the upper pane.



- Double-click the first bibliographic record in the Bibliographic records pane. This displays the Bibliographic-Cataloging window with the selected record in full MARC format (Figure 4.2). The record can now be edited.

FIGURE 4.2

Tip: Once you have clicked a MARC field to activate the record pane, you can go to the end of a record by pressing **CTRL+END**. You can also go to the beginning of a record by pressing **CTRL+HOME**.



- Right-click any field or subfield to access a context-sensitive menu for editing. In the menu, click **Toggle Prompts** to switch the display of the MARC numeric tags to text fields.

Note: For more information on the Authority Control module, see "Authority Control" on page 8-3.

- The **Override Authority** check box is available if you have purchased the optional Authority Control module. With this module, a window automatically appears when you select a field containing a name, subject, or series heading. This window displays all headings in your authority file valid for use in the selected field. You select the desired heading, and the heading is then added to the bibliographic record and a link is created to the authority record. Authorized users can edit an authority controlled bibliographic field directly by selecting the **Override Authority** check box, then typing the new text in the field.
- Any errors or cataloging inconsistencies in the record appear in the **Validation errors** box on the right. To view information explaining each error, click the plus (+) sign to the left of the error.
- Click **Cancel** to close the Bibliographic-Cataloging window.

CREATING A DUPLICATE OF AN EXISTING HOLDING RECORD

- In the main Cataloging window, double-click the holding record in the Holding records pane (lower pane).
- Under **After saving**, click **Duplicate**. This creates a new holding record for an additional copy of this book.
- Click **Save**. This displays a new Holding-Cataloging window containing the duplicate holding record.
- In the lower pane, scroll to **852#p** (barcode) and type a barcode in the field at right (as shown in Figure 4.3).

FIGURE 4.3

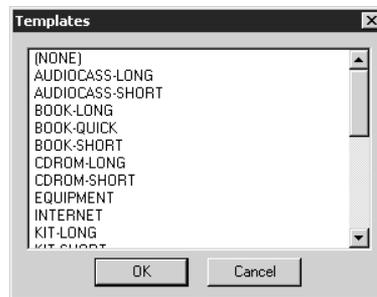
- Click **Save**.
- Click **Cancel** to close the Holding-Cataloging window.

The main Cataloging window displays the newly created holding record in the Holding records pane beneath the original holding record.

CREATING A NEW BIBLIOGRAPHIC RECORD

- On the **File** menu, select **New**, and then click **Bibliographic Record**. This displays the Templates window with the list of cataloging templates included with M3 (Figure 4.4). The templates can be used in their current form or customized.

FIGURE 4.4



- Select a template, then click **OK**. This displays the Bibliographic-Cataloging window.
- Type entries in the blank fields and subfields for the bibliographic record as desired.
- Click **Save**. This displays the Holding-Cataloging window with the newly created bibliographic record in the top pane and the associated holding record in the bottom pane.
- Type entries in the blank fields and subfields for the holding record.
- Click **Save**.

The bibliographic and holding records have been created. You can now search for this title in the OPAC.

IMPORTING RECORDS

M3 Cataloging imports bibliographic and patron records in MARC, delimited, and fixed-width formats, and authority records in MARC format. To import bibliographic records, for example, the user:

1. Selects the records, fields, and subfields to import
2. Specifies how fields are displayed
3. Checks for duplicate records
4. Generates holding records
5. Updates barcodes

The import feature is not fully documented in this tutorial; however, Figure 4.5 and Figure 4.6 show samples of the Step 1 and Step 2 windows in the import process.

FIGURE 4.5

M3 Data Import - Step 1

Please choose the data type that best describes your data and the range of records to be imported

Original Data Type

- MARC - Data is MARC based.
- Delimited - Characters such as commas or tabs separate each field.
- Fixed width - Fields are aligned in columns with spaces between each field.

Start import at row: Stop import at row:

Preview of file

Row #	Record
1	Across the river and into the trees /
2	Across the river and into the trees /
3	At the Hemingways :
4	Big two-hearted river
5	Broken drum /
6	1st land entry book of Wayne County, IN /
7	2 to 22 days around the Great Lakes :
8	3 crucial questions about spiritual warfare /

< Back Next > Cancel Help

FIGURE 4.6

M3 Data Import - Step 2

Please select or define the field mapping configuration to be used during this import

	Field	Field Data	Action	Map To	Occ. #
<input type="checkbox"/>	<input checked="" type="checkbox"/> 005	19981210083153.0	Keep	005	1
<input type="checkbox"/>	<input checked="" type="checkbox"/> 007		Keep	007	1
<input type="checkbox"/>	<input checked="" type="checkbox"/> 008	980612r19981950nyu 000 1 en...	Keep	008	1
<input type="checkbox"/>	<input checked="" type="checkbox"/> 010				
<input type="checkbox"/>	<input checked="" type="checkbox"/> a	98159867	Keep	010a	1
<input type="checkbox"/>	<input checked="" type="checkbox"/> 020				
<input type="checkbox"/>	<input checked="" type="checkbox"/> a	0684844648	Keep	020a	1
<input type="checkbox"/>	<input checked="" type="checkbox"/> c		Keep	020c	1
<input checked="" type="checkbox"/>	020	** Field not in current record **			
<input checked="" type="checkbox"/>	a		Keep	020a	2
<input type="checkbox"/>	<input checked="" type="checkbox"/> 024	** Field not in current record **			
<input checked="" type="checkbox"/>	a		Keep	024a	1

< > >> <<

Field Mapping Configuration:

1 of 42 imported record(s)

< Back Next > Cancel

NOTES

M3 GROUP EDITOR

5

OVERVIEW

M3 Group Editor enables the librarian to create, customize, and modify the group permissions required to gain access to M3 functions. Using an elaborate, hierarchical security scheme, librarians are able to assign levels of access for Cataloging, Circulation, OPAC, and database maintenance features.

Note: This demonstration guide may not explain all features available in Group Editor.

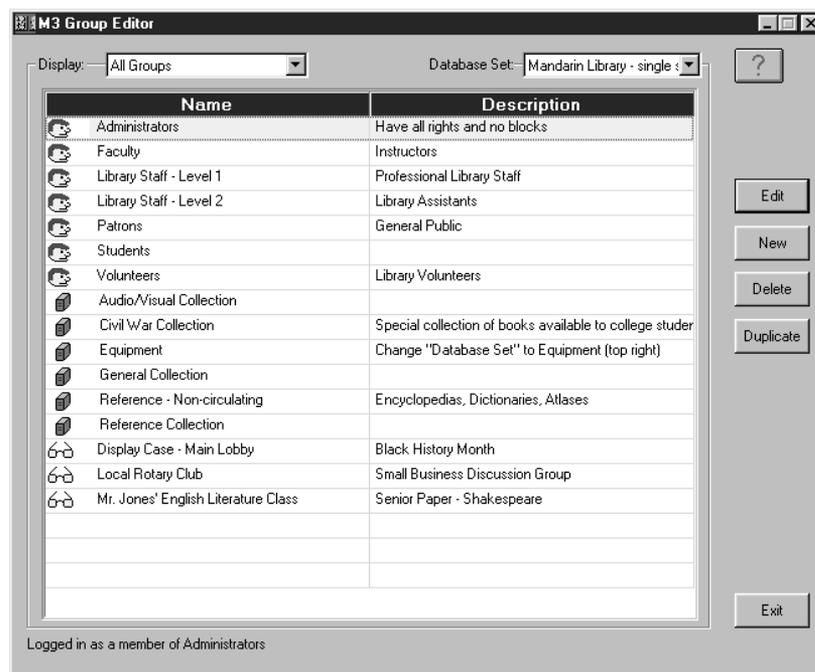
There are three types of groups: Patron, Item, and Special Reserve. When displaying a group listing, a group type icon appears to the left of each group:

- a head signifies a patron group
- a book signifies an item group
- eyeglasses signify a special reserve group

STARTING GROUP EDITOR

- Open the Mandarin M3 folder on your desktop, then double-click the **Group Editor** icon. This displays the Login dialog box.
- In the **Login Name** box, type **admin**.
- In the **Password** box, type **boca raton**, and then click **OK**. This displays the main Group Editor window (Figure 5.1).

FIGURE 5.1



CREATING A NEW GROUP

For this example, we will create a new special reserve group.

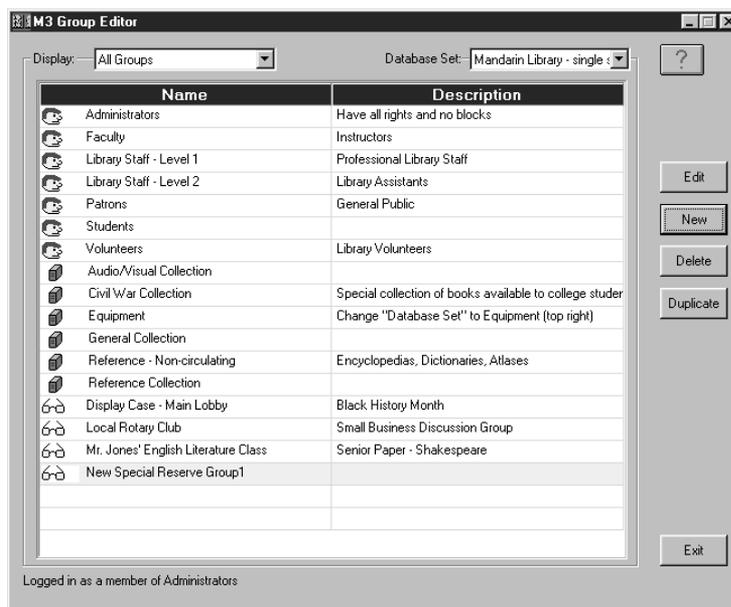
- In the main Group Editor window, click **New**. This displays the New Group dialog box (Figure 5.2).

FIGURE 5.2



- Click **New Special Reserve Group**, and then click **OK**. This places a **New Special Reserve Group** in the Group Editor window (Figure 5.3).

FIGURE 5.3



- Select the **New Special Reserve Group**, then click **Edit**. This displays the Special Reserve Group window. Here, you can customize this group's patron privileges and item parameters.
- Click the **General** tab.
- In the **Name** box, type **Computer Awareness Program**.
- In the **Description** box, type **Sponsored by FBLA Club**.
- Under **Reserve Group Expiration**, click **Expires**, and then select a date.
- Under **Created by Patron Group**, leave the entry as **Administrators**.
- Under **Circulation Access Available to**, click **All Patrons**.

FIGURE 5.4

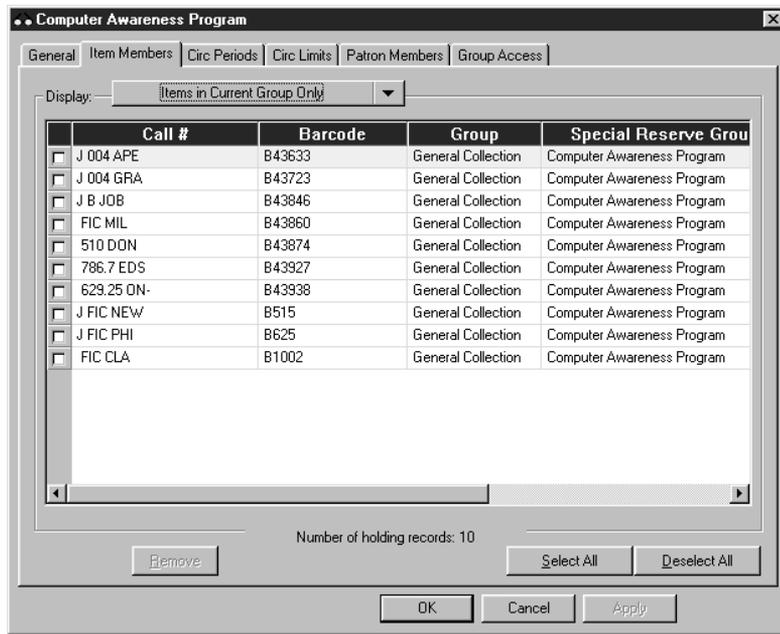
The screenshot shows a dialog box titled "Computer Awareness Program" with the following fields and options:

- Name:** Computer Awareness Program
- Description:** Sponsored by FBLA Club
- Reserve Group Expiration:**
 - No Expiration
 - Expires: 12/20/04
- Created by Patron Group:** Administrators
- Circulation Access Available to:**
 - All Patrons
 - Only patrons that are members of this group

Buttons at the bottom: OK, Cancel, Apply.

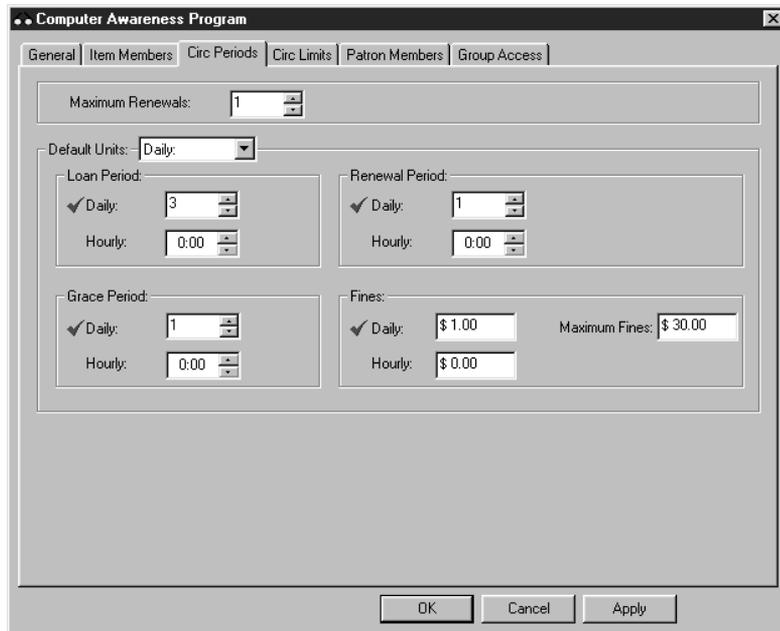
- Click the **Item Members** tab.
- A message appears indicating that there are no records found. Click **OK**.
- In the **Display** list (under the tab names), select **Search**.
This displays the Search dialog box. You can now add item members to the group just created by searching for items.
- In the first keyword box, type **computer***, and then click **Search**.
- Select the check box next to each item you want to add to the group, and then click **Add**.
- In the **Display** list, select **Items in Current Group Only**.
The list refreshes to display only the items you selected and added to the group (Figure 5.5).

FIGURE 5.5



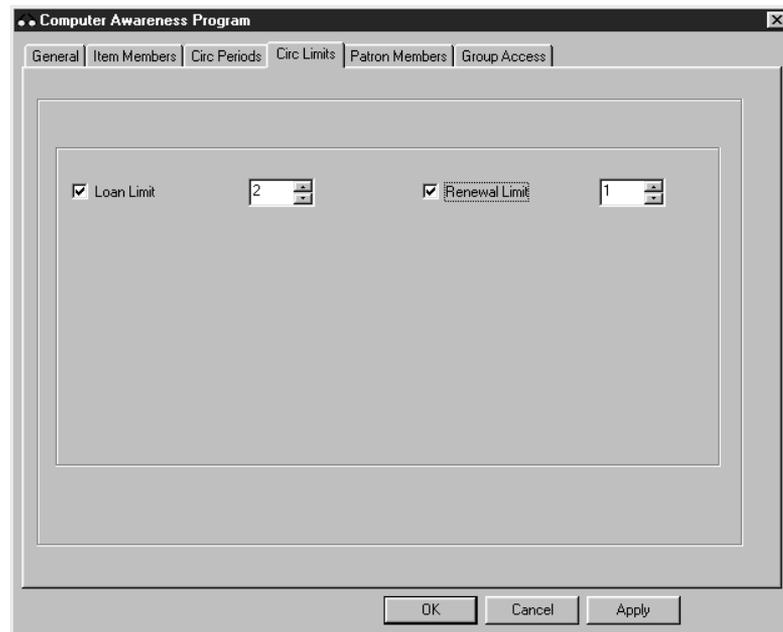
➤ Click the **Circ Periods** tab (Figure 5.6) and establish circulation time frames and fine amounts in the boxes provided. When finished, click **Apply**.

FIGURE 5.6



- Click the **Circ Limits** tab (Figure 5.7) and establish the circulation quantity limits. Select a limit type check box, then establish the limit in the corresponding box.

FIGURE 5.7



- When finished, click **Apply**, and then click **OK**. This displays the main Group Editor window with the new group listed.
- To review the Computer Awareness Program group and its attributes, select the group, and then click **Edit**.

VIEWING GROUP INFORMATION

Patron Groups

To review the privileges and parameters of a patron group:

- In the main Group Editor window, select a patron group. (If you don't have any patron groups, create one now before proceeding.)
- Click **Edit**. This displays the Patron Group window.
- Click each tab and review the contents.

NOTE: When the check box corresponding to a feature or limit is selected, the feature or limit is enabled. In this example, the patron group is comprised of Library Assistants. Therefore, you will notice that the members of this group have more privileges than general patrons/students and fewer privileges than the professional library staff.

- When finished, click **Cancel** to return to the main Group Editor window.

Tip: Use the **Item Group Overrides** tab to grant a patron group rights to override specific circulation limits connected to item groups. For example, if the item group "General Collection" has a loan period of 14 days, the "Volunteers" patron group could be given a loan period of 21 days.

*Tip: The **Members** tab lists items assigned to the item group. New items may be added or removed when necessary. Items assigned to this group adhere to the circulation parameters established in the **Circ Periods** tab.*

Item Groups

To review the parameters of an item group:

- In the main Group Editor window, select an item group. (If you don't have any item groups, create one now before proceeding.)
- Click **Edit**. This displays the Item Group window.
- Click each tab and review the contents.

NOTE: When the check box corresponding to a feature or limit is selected, the feature or limit is enabled.

- When finished, click **Cancel** to return to the main Group Editor window.

Special Reserve Groups

To review the privileges and parameters of a special reserve group:

- In the main Group Editor window, select a special reserve group. (If you don't have any special reserve groups, create one now before proceeding.)
- Click **Edit**. This displays the Special Reserve Group window.
- Click each tab and review the contents.

NOTE: When the check box corresponding to a feature or limit is selected, the feature or limit is enabled. In this example, notice that the tabs Circ Periods, Circ Limits, and Patron Members do not display any information. The items in this special reserve group are being placed into a display case in the lobby of the library; therefore, the items will not circulate.

- When finished, click **Cancel** to return to the main Group Editor window.

M3 INVENTORY

6

OVERVIEW

Note: This demonstration guide may not explain all features available in Inventory.

With the Inventory module, you can:

- Conduct a full or partial inventory
- Enter additional barcodes after the barcode records have been uploaded
- Remove barcodes during the inventory process
- Print and save inventory results
- Export a barcode list of inventory results

Conducting an inventory with M3 requires a few basic steps:

1. Scan items to be inventoried
2. Upload the results into the Inventory module
3. Set range limits (partial inventory only)
4. Perform the “Do Inventory” procedure

STARTING INVENTORY

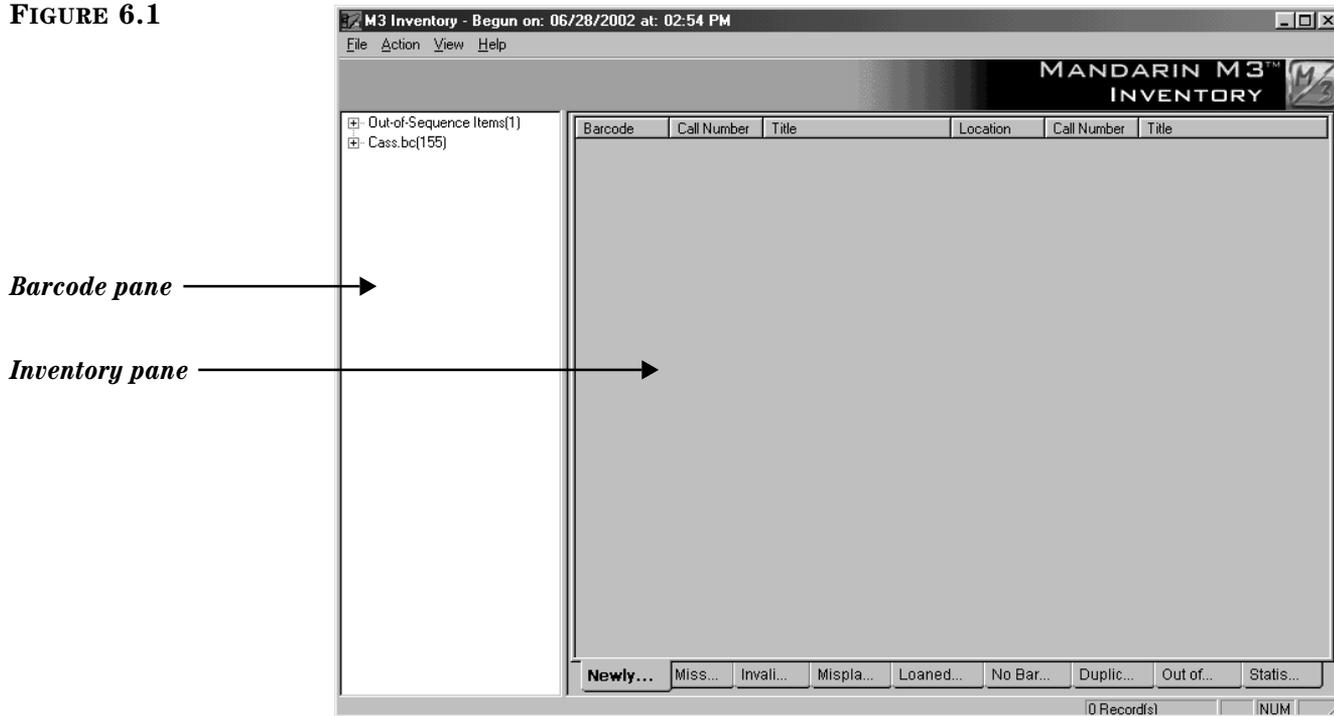
- Open the Mandarin M3 folder on your desktop, then double-click the **Inventory** icon. This displays the Login dialog box.
- In the **Login Name** box, type **admin**.
- In the **Password** box, type **boca raton**, and then click **OK**. This displays the Select Inventory Session window.

CONDUCTING AN INVENTORY

This basic example assumes that you have scanned and uploaded barcodes into M3, and then saved the barcode file. For instructions, refer to the M3 Users Guide.

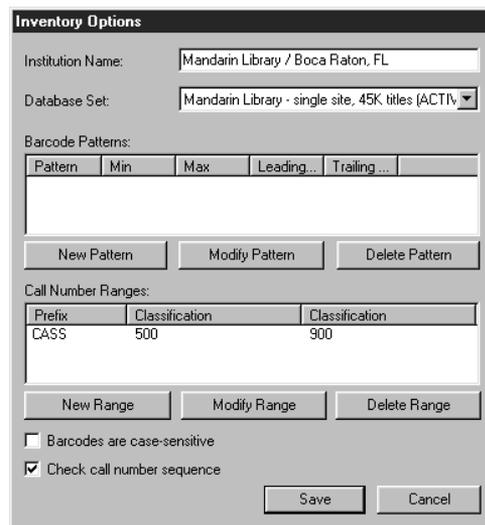
- In the Select Inventory Session window, click **Create New Session**. This displays the main Inventory window (Figure 6.1).

FIGURE 6.1



- In the File menu, click **Add Barcode File**. Navigate to your saved barcode file and click **Open**.
- In the Barcode pane, click the plus (+) sign next to the barcode file name. This displays the list of barcodes in the file.
- To review Inventory set-up, click **Inventory Options** on the **Action** menu. This displays the Inventory Options window (Figure 6.2).

FIGURE 6.2



In this window, you can:

- Configure the Inventory module to recognize a specific pattern of characters, a certain barcode length, or both
- Indicate a partial inventory by entering the range of call numbers (classification parts) and selecting a call number prefix

➤ When finished in this window, click **Save**.

➤ On the **Action** menu, click **Do Inventory** to run the Inventory procedure.

When finished, a dialog box displays with a summary of the inventory results (Figure 6.3).

FIGURE 6.3



➤ Click **OK** to close the dialog box and return to the main Inventory window.

M3 places the appropriate information in each of the nine tabs in the Inventory pane.

- **Newly Found** – Lists items present in this barcode upload, but previously flagged as missing.
- **Missing** – Lists all items missing from this barcode upload.
- **Invalid Barcodes** – Lists items that do not belong in the collection or have the wrong barcode length.
- **Misplaced** – Lists items that are in the wrong shelf position.
- **Loaned Shelved** – Lists items that have an availability status of loaned, but are actually on the shelf.
- **No Barcode** – Lists items that have no barcode on file in the catalog.
- **Duplicate Barcode** – Lists items that have duplicate barcodes.
- **Out of Range(s)** – Lists items that are not in the inventory call number range, but are in the barcode upload in shelflist order.
- **Statistics** – Displays a summary of the current inventory results, as well as statistics regarding this inventory.

➤ Click each of the tabs in the Inventory pane to view the Inventory results.

Now that all the results are compiled, the reports needed to reconcile the Inventory can be printed from within each tab by clicking **Print [List Type] List** on the **File** menu.

NOTES

M3 REPORTTOOL

7

OVERVIEW

With the ReportTool module, you can:

- Create and run new reports
- Access and run preloaded reports
- Customize your library name on a preloaded report
- Print reports or download reports to diskette

The ReportTool module is a flexible and powerful Windows report generator. More than 900 library-related reports for school, public, academic, and special libraries are offered. You can run these preloaded reports in their current form, customize the preloaded reports, or create new reports.

ReportTool is not available with the free version of M3. It is only available with purchase of the Mandarin M3 Service & Update Agreement. For more information or to purchase a Service & Update Agreement, contact Mandarin Customer Service at (800) 426-7477.

NOTES

OPTIONAL MODULES

8

OVERVIEW

Several optional modules are available for use with M3. For more information or to purchase any of these modules, contact Mandarin Customer Service.

- M3 Web OPAC
- Serials & Acquisitions
- BookWhere V4 and BookWhere Online
- ZServer
- MARC Magician
- Syndetic Solutions
- Authority Control
- Pocket Module
- SIF Agent
- Textbook Module

M3 WEB OPAC

The M3 Web OPAC™ (Online Public Access Catalog) allows patrons to search your library collection from any computer with a Web browser. It offers the same Standard, Enhanced, and Visual search methods found in the Windows OPAC, but includes many important enhancements.

A dedicated Internet connection (or static IP address) and home page with a link to the Web OPAC or Web server address are required to use the Web OPAC.

To use a demonstration version of the Web OPAC:

1. Go to <http://www.mlasolutions.com/products/webopac.htm>.
2. In the center of the page, click the link for the demo version of the Web OPAC. This launches the Web OPAC.

SERIALS AND ACQUISITIONS

Serials and Acquisitions is a tracking and purchasing application that automates serials receiving, routing, claims, and reports, as well as the acquisitions needs of today's libraries. With this application, you can track a serial through a 10-year subscription or publication period. Fast, automated purchasing methods take the place of time-consuming manual purchasing and receiving procedures. Automatic fund calculation and entry replace error-prone manual accounting. Automated

purchase orders, records, and reports eliminate inconvenient paper files. Serials and Acquisitions is integrated with M3, which allows you to maintain bibliographic and holding records for serials and other items, as well as add items from your M3 database to purchase orders.

BOOKWHERE (Z39.50 CLIENT)

BookWhere™ V4, by Web Clarity Software, is an optional module offered by Mandarin and is integrated into the M3 Cataloging module. This Z39.50 client software enables customers to search a variety of databases via the Internet, including public, academic, and state libraries worldwide. When paired with M3, you can seamlessly import these records into your M3 database.

BookWhere V4 incorporates the following features:

- Fast, direct, and simultaneous access to remote databases
- Built-in lists of hundreds of databases
- Ability to export MARC records
- Support for multiple languages
- Support for Electronic Location field 856

BOOKWHERE ONLINE

BookWhere Online duplicates the power of Windows-based BookWhere V4 through a standard Web browser. This allows catalogers to access powerful Z39.50 search capabilities from any Internet connected computer, regardless of operating system. With BookWhere Online, you can simultaneously search up to 10 databases selected from hundreds of library catalogs and related databases. Once a search is completed, BookWhere Online supports record exporting in a variety of MARC formats as well as the majority of popular citation management packages in use today.

BookWhere Online is offered through a low-cost annual subscription, allowing budget conscious individuals and organizations to tap into this powerful service that can further reduce cataloging overhead costs.

ZSERVER

The ZServer (Z39.50 server software) optional module allows anyone with Internet access and Z39.50 client software to access your catalog. ZServer is Z39.50 level three compliant.

Virtual Union Catalog

A virtual union catalog is an aggregation of individual databases containing catalog collections. ZServer allows any library to be part of a virtual union catalog. A virtual union catalog can be created by installing ZServer on all library automation servers and commercially available Z39.50 client software on all client workstations. When a search is executed, results can be gathered from an individual collection, selected collections, or all collections in the directory. Results are

returned, as well as item locations. Performance will depend on the total number of sites, circulation and patron workstations, and the communications infrastructure (T1 lines are recommended).

MARC MAGICIAN

MARC Magician[®], by Information Transform, Inc., is an optional module offered by Mandarin and is integrated into the M3 Cataloging module. MARC Magician allows you to efficiently clean up and maintain your MARC collection while always adhering to MARC standards. With this optional module, you can easily transfer MARC records from M3 Cataloging to MARC Magician, edit the records utilizing MARC Magician's tools, and transfer them back to M3 Cataloging.

MARC Magician automatically corrects dozens of MARC errors when you import records and provides a powerful array of time-saving global editing commands, which allow you to make global changes to both your bibliographic and holdings data. In addition, you can further customize the program with Active Error Checking[™], a one-of-a-kind feature that lets you define the types of errors and omissions in your data you want the program to notify you about.

SYNDETTIC SOLUTIONS

Syndetic Solutions is a provider of specialized, quality bibliographic data designed to enhance the patron's search by presenting a wealth of information about the titles retrieved. Acting as a centralized collection and distribution center for "content data" for books currently in print, Syndetics serves both booksellers and publishers alike by consolidating and standardizing data formats, and by providing the most cost efficient method of both gathering and disseminating the data for the widest audiences possible.

Mandarin offers a subscription to Syndetic Solutions, which allows your patrons to view cover images as well as summaries, reviews, and other content data for items in your collection through a link in the M3 Windows OPAC and M3 Web OPAC. It also provides thousands of cover images that you can display alongside the items in the M3 Windows OPAC, M3 Web OPAC, and Circulation modules.

AUTHORITY CONTROL

Authority Control integrates into the Cataloging module to provide authorized, consistent Name, Subject, and Uniform Title/Series headings for use in bibliographic records. With Authority Control, you can:

- Add, edit, delete, and search for authority headings and their MARC records
- Browse, select, and insert authority headings while cataloging bibliographic records
- Display "See" and "See also" cross-references in the OPAC
- Import, export, and transparently link to a real time, Library of Congress Authority File database containing over 5 million headings (offered as an

annual subscription and not included as part of the Authority Control module)

This module adheres to the Library of Congress MARC 21 Authority Standard. It is easy to use, enabling librarians to create consistent bibliographic records by eliminating common errors such as duplication and inconsistent entry points.

Library of Congress Authority Database Hosted by Mandarin Library Automation

Mandarin Library Automation offers access to an online Library of Congress (LC) authority database. Mandarin libraries using this option are able to import and immediately utilize this data as headings are added, or as existing records are modified. The process is seamless and automatically corrects headings in bibliographic records without staff intervention. This real-time LC database provides over 5 million subject and name headings. Mandarin libraries can subscribe to the authority database on an annual basis.

Authority Record Processing Service

When there is consistency in the forms of headings for personal, corporate, and place names, subjects, and uniform and series titles, patrons will easily locate materials in your catalog. Mandarin offers an authority record processing service through a third-party vendor that updates your library collection with the most current Library of Congress name and subject headings.

Processing your bibliographic records will verify and update the headings in each bibliographic record with the current authorized LC heading, providing you with a complete authority record for that heading. The end result will be complete, up-to-date authority and bibliographic tables, ready for import into your M3 system. These records will be accessible through your Cataloging module's authority and bibliographic record databases. Applicable "See from" and "See also from" terms will be present in these authority records, enabling your OPAC to immediately display "See" and "See also" cross-references.

POCKET MODULE

The Pocket Module™ delivers convenience and functionality by enabling librarians to conduct circulation and inventory functions while moving throughout the library. The Pocket Module harnesses the power of the Palm OS® and the Symbol® scanner, helping librarians easily manage data. Using the Pocket Module is as simple as scanning barcodes, uploading them to a computer using the HotSync® application, then importing the barcodes into M3 Circulation or M3 Inventory.

The Pocket Module is offered with the Symbol SPT 1550 or SPT 1800, which feature integrated scan engines and conveniently placed scan triggers, enabling fast, efficient, and accurate data capture. Either model loaded with the Pocket Module adds versatility and flexibility to your circulation and inventory functions.

SIF AGENT

The SIF Agent is an optional module that communicates with your other SIF-compliant instructional and administrative software, automatically updating student information in M3. For example, changing a student's phone number in one SIF-compliant application will also update that number in your M3 system. Likewise, your M3 student data can be accessed by other applications; this could be useful for school administrators if, for example, end-of-year report cards are typically not released to students who have outstanding library loans or fines.

The SIF Agent helps you manage information more efficiently. By allowing student data to be entered once into one application, it saves time and decreases errors. It also enables you to create powerful reports by accessing data from different applications. You can configure which applications you want to have communication privileges with M3.

Schools Interoperability Framework (SIF) is a non-profit membership organization comprised of over 100 software vendors, school districts, state departments of education and other organizations active in primary and secondary (K-12) markets, who have come together to create a set of rules and definitions to enable software programs from different companies to share information. The goal of SIF is to make it possible for school administrators, teachers and other school personnel to have secure, appropriate access to the most current and accurate data available.

TEXTBOOK MODULE

The Textbook Module allows you to store and manage your textbooks. Textbook information such as title, author, and all publication information can be entered as a bibliographic record. Any number of copies can be added, and multiple copies can be added at once. Barcodes can be attached to each textbook and scanned when textbooks are loaned or returned from students or staff. Inventory provides another method for recording missing textbooks that are kept in storage rooms. The system allows the school to determine loan periods that can be assigned by semester, day, week, month, year, or hour. In addition, reports can be generated by homeroom, student, teacher, subject, and so on. Lists of items not returned can be produced for teaching staff.

NOTES

MANDARIN M3 SUPPORT

9

These benefits and services are included with the purchase of an Annual Service & Update Agreement.

Technical Support

Mandarin's technical support team is available via modem, fax, e-mail, and toll-free telephone support 24 hours a day, seven days a week, 365 days a year.

Software Updates

Mandarin M3 software updates are distributed on CD or via the Mandarin Web site. Updates to the M3 software are released approximately twice a year.

Mandarin E-mail Discussion List Membership

Mandarin hosts an e-mail discussion list exclusively for Mandarin customers. This independent group allows customers to discuss M3 software and share tips and ideas. Special announcements regarding Mandarin products are also posted to the list.

Mandarin Newsletter

Impressions, Mandarin's customer newsletter, is periodically mailed to all Mandarin customers. The newsletter is used to communicate new Mandarin developments, user tips, and other library news.