



How to set up Library

STEPS

1. Set up the System File
2. Set up a Loan Type
3. Generate Patrons
4. Enter the Books
5. Create Copies

Once the above steps have been completed read the Borrowing and Returns Quick Start Guide.

Step 1 – Set up the System File

Path: Back Office → System File tab

Below are Important all other fields are optional, read the User Guide for further descriptions.

1. It's up to the School to give this Library a name.
2. Leave this blank but you must create a blank loan type.
3. Enter a default maximum items to loan out.
4. Optional: Tick the box to enable changing the Accession number.
5. Optional: Enter an accession number, this would normally be based on the Digits in the bar code if the digits are 6 I would enter 100000, the first book would then be 100001 if no number is entered the first number would be 000001, this is up to the schools how they want it.
6. Enter the barcode length for books.
7. I select Speed Returns here but once again it's up to the schools.

STEP 2 – Set up a Loan Type

Path: Authority → Loan Types

Apart from Patrons tab and Loan Types tab all the rest of the tabs in here can be set up as you go along.

In the Authority area you need to Set up the Loan Types.

1. Leave the Loan Code Blank, this will be the default Loan Type
2. Enter Standard Loan
3. Enter the Loan Period in days
4. All other information is optional, click Save when finished.

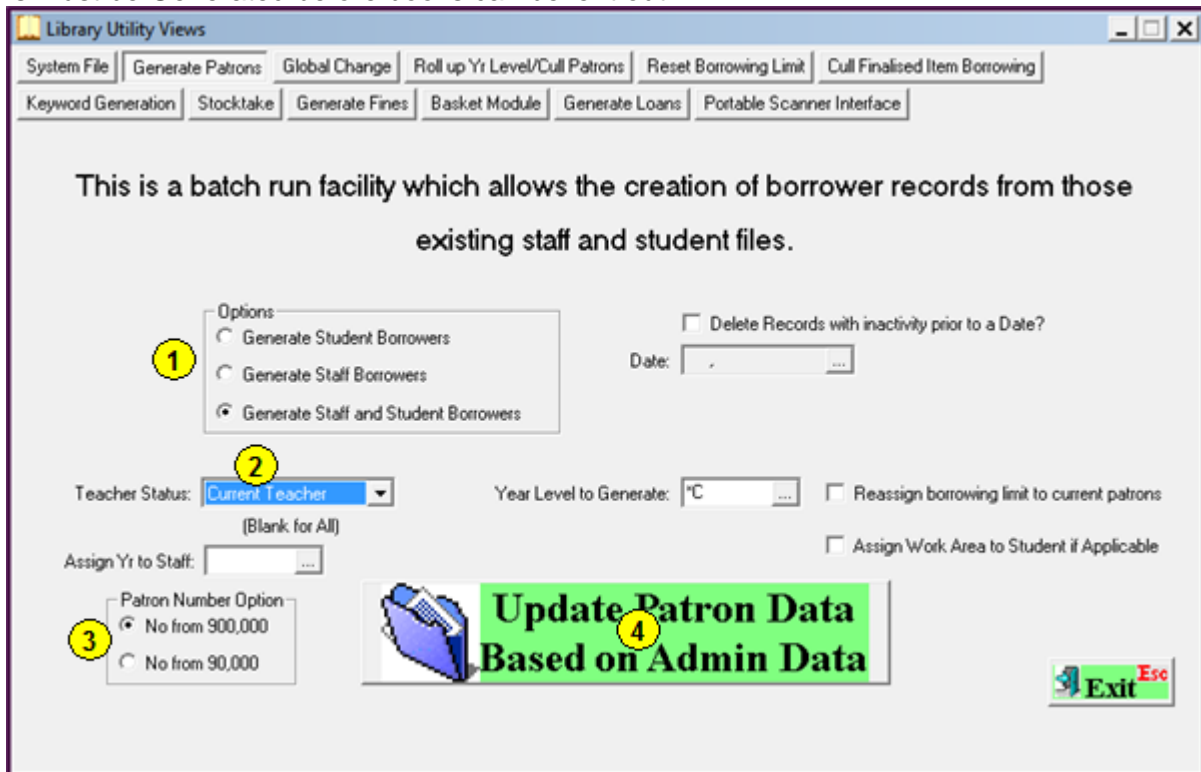
Other Loan Types can be created now or at a later date.

All other fields are optional read the User Guide for further information.

STEP 3 – Generate Patrons

Path: Back Office → Generate Patrons

Patrons must be Generated before books can be lent out.



1. Select an Option.
2. If selecting Teachers do not use All Staff as this will bring in Past Employees as well as current.
3. If uncertain leave the default, this will not be an issue with the new Library.
4. Click the button.

One of the most common problems is a duplicate error, this happens with a name change, ie a staff member marries. This can be corrected by manually changing the name in the Libpat file I then do a Global change in the LibHire file. This also won't be an issue with the new Library.

STEP 4 – Enter the Books

Path: Catalogue → Title Information

Most of the small schools I have helped enter the books manually, if this is a larger school they will probably have a csv to be imported, this shows the manual entry only.

Library Master Book View

1 Add New Item F5 Accession: 10302328 Type: NF 2

Master Accession: 10302328

Show
Master Copies
All Items

Select Series

1 Title Information 2 Item Details 3 Subjects 4 Abstract 5 Show Accessions of Copies 6 Serials 7 Picture 8 Resource Box

Title	Master Title	Langu...

Save →
Clear →
Delete →

Title Sup: _____
Author: _____ 4
Author Sup: _____
Illustrator: _____
Description: _____
Series: _____
Theme: _____ 5 Language: _____ Year Level: _____

Save F2 Clear F5 Exit Esc

1. Click Add New Item to add the next Accession Number or type in the Accession number you want to use.
2. Select or Enter the Type, warn new schools to be careful with this field, I have seen accession numbers and book titles in here
3. Enter the Title of the book or copy and paste it
4. Most schools will enter an Author but all fields are optional
5. Click Save

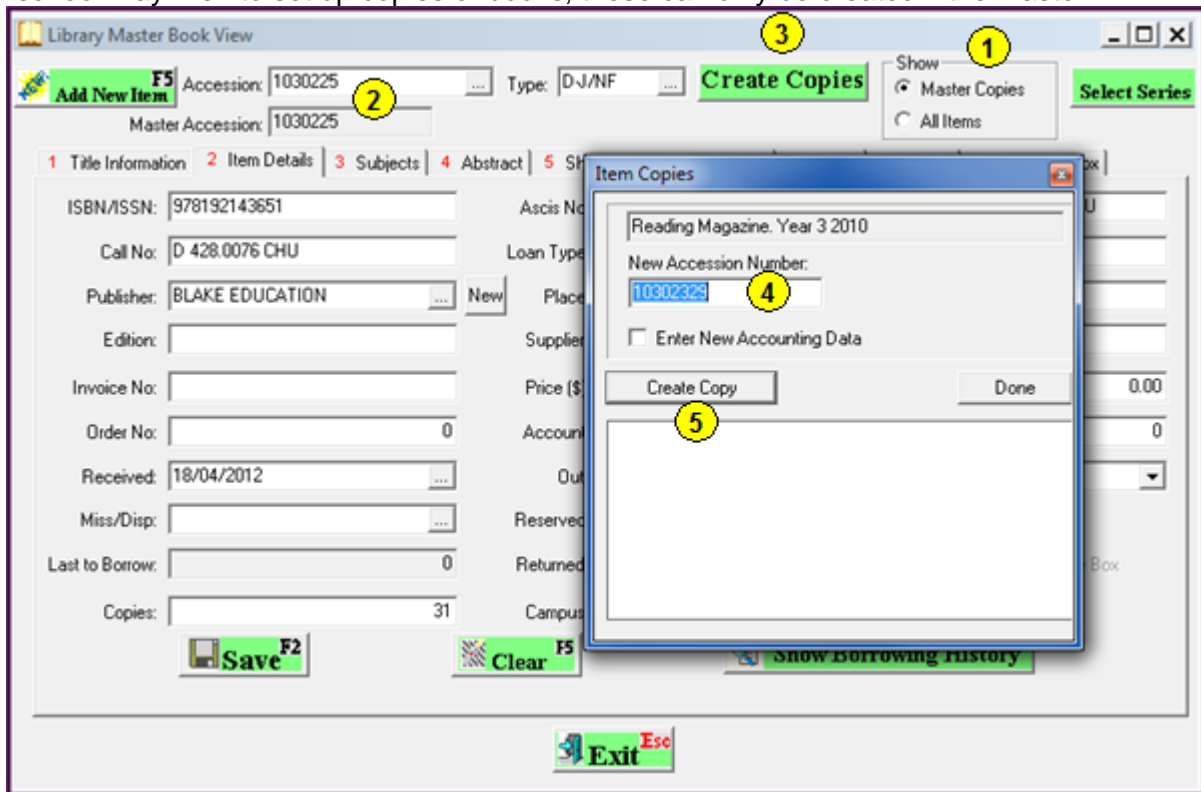
Path: Catalogue → Item Details

Apart from the fields that automatically default all fields are optional, read the user Guide for full information. But do note that is a school has multiple Loan Types if it in this view that they can change the Loan Type.

The screenshot shows the 'Library Master Book View' window. At the top, there is a toolbar with 'Add New Item' (F5), 'Accession: 1030232', 'Type: D-J/NF', 'Display Master', 'Show Master Copies', and 'Select Series'. Below this, the 'Master Accession' is 1030225, with a note: 'It is recommended that you only work on 'Master Copies''. A tabbed interface shows 'Item Details' selected. The main area contains various input fields: ISBN/ISSN (978192143651), Ascis No (1415428), Dewey (428.0076 CHU), Call No (D 428.0076 CHU), Loan Type, Location (res room), Publisher (BLAKE EDUCATION), Place, Yr (2010), Edition, Supplier, Department, Invoice No, Price (\$), Replace Cost (\$), Order No, Account, Dissection, Received, Out, Status (Available), Miss/Disp, Reserved, Last to Borrow, Returned, Copies (1), and Campus (<Undefined>). At the bottom, there are buttons for 'Save' (F2), 'Clear' (F5), 'Show Borrowing History', and 'Exit' (Esc).

STEP 5 – Create Copies

A new school may wish to set up copies of books, these can only be created if the Master



1. Select Master Copies
2. The Accession and Master must be the same
3. Click Create Copies this is only visible with a Master Accession selected
4. Use the default or you can enter a number to use
5. Click Create copy

Read the User Guide for full instructions