

EPES Software

Library Wizard

For Windows

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Introduction

The Library Wizard is a complete Library Management System designed for library personnel. It does everything a librarian does on a daily basis.

It's a Circulation, Card Catalog, and Inventory System for:

- Books
- Magazines
- Audio-Visual
- Cassettes
- and much more...

NETWORK READY

It comes Network ready, at no additional charge. That means one computer can be used for a Card Catalog. Another computer can be used for circulation. Still another computer can be used by the librarian to print reports and enter information about books to purchased.

RELATED SUBJECTS BROWSE

Imagine being able to browse through your entire library by a specific related subject. Now, you can! Simply enter the related subject and press <Enter>. Simply press one key to browse through every book in the library for the related subject you entered. Research was never easier.

Student librarians can check books in/out quickly and accurately. All books fines are calculated and tracked for you.

You'll print a wide variety of reports to the screen or printer. You can even print spine labels, card labels, and card catalog cards.

BAR CODES

The program already comes with the ability to print bar codes. All you have to do is purchase a bar code wand. With a bar code wand, circulation and inventory can be done fast and accurately.

Chapter 1: Getting Started

Installation

Place the Library Wizard Program Diskette # 1 in your Floppy Drive A (or B).

Windows 3.X

From the 'File' Menu of the Windows Program Manager, select Run.

Windows 9x

From the 'Start' button of the Windows 95 task bar, select Run.

Enter the following:

```
A:install [Enter]   or
B:install [Enter].
```

Press [Enter] for each option that appears on the screen. When the program has been successfully installed, the final message you'll see will be "Installation is complete". Put the original program diskette(s) in a safe storage place.

Installing Bar Code Font

In order to print bar codes, you must install the bar code font. To do this:

Windows 3.X

- 1) From the Control Panel, select Fonts
- 2) Put the last Master Diskette in Drive A. Select Add.
- 3) Select drive A (to look for the font).
- 4) In the 'List of Fonts' box, select BC CBar 2 to 1 Narrow (True Type).
- 5) Select OK.

Windows 9x

- 1) From Start, select Settings.
- 2) Select Control Panel.
- 3) Select Fonts.
- 4) Under the File Menu, select "Install New Font"
- 5) Put the last Master Diskette in Drive A. Select Add.
- 6) Select drive A (to look for the font).
- 7) In the 'List of Fonts' box, select BC CBar 2 to 1 Narrow (True Type).
- 8) Select OK.

You'll need a bar code wand to read the bar code labels. Call 800-424-7512 for details.

Daily Startup

To start the program, select the Library Wizard icon within the EPES Software Group of your Windows Program Manager.

Enter your ID: **SYS**
Password: **PASSWORD**

This is the ID and Password for the System Administrator. This person has complete access to every option in the program. He/she can also add new users and assign the rights for those users. See the 'Administrator Menu' options.

This was the System Administrator ID and Password originally assigned to the program. Use the 'Change Password' option under the Utilities Menu to make any changes.

For student using the program, enter the following:

ID: **PAT**
Password: **PASSWORD**

This is the ID and Password for Patrons. It permits students to view information on the screen that is needed, but not all information. It also prevents them from adding or deleting information.

Master Menu

File Edit Commands Output Window Utilities Help
Administrator

Each option on the Master Menu is a chapter in this manual. To locate information quickly, look at the title of each page.

Within each chapter, the items under each Master Menu option are explained in order from top to bottom. Use the Find option below to look up key words.

A Quick Overview of the Program

- Change Password for System Administrator so you have total control of what happens with your system. Be sure you keep this password in a safe place. (Chapter 10)
- Under the Utilities Menu, select "Program Preferences". Set up your checkout information. (Chapter 8)
- Add Teacher information. (Chapter 3)
- Add Patron information. (Chapter 3)
- Add library book information.(Chapter 3)
- Check Books Out. (Chapter 3)
- Check Books In. (Chapter 3)
- Print Reports. (Chapter 6)

Chapter 2: Getting Around in the Program

Using the Keyboard or Mouse

You can use the keyboard or mouse with the program. Keyboard short-cuts can often save you a lot of time. For example, you can press [Ctrl+A] while viewing information on the screen to add a new entry. Press [Ctrl+S] when you've finished to save your work.

With the click of a button, a mouse can accomplish the equivalent of a single keystroke or many keystrokes on the keyboard.

To select an item with the mouse, move the mouse pointer over the desired item. Click the left mouse button on the desired item.

Moving Around the Screen

Keyboard

Use the [Tab] key, [Down Arrow] or [Right Arrow] keys to move to the next item on the screen.

Use the [Shift+Tab] key, [Up Arrow] or [Left Arrow] keys to move to the previous item on the screen.

Mouse

When adding or editing information on the screen, you can move your cursor to an item simply by clicking on it with the left mouse button.

You can change the entire contents of an item by highlighting it with the mouse. After the cursor is placed in the item, double click on the left mouse button to highlight the entire contents. Then start typing.

Popup Screens and Lists

Sometimes it's hard to remember what to enter in a particular field. To simplify your data entry, you can select a popup list while adding or editing some information.

For example, suppose you were entering a Patron ID number. When you come to the Patron ID field, press [F5]. A list of names will appear in a scrolling list. Move your cursor to the column labeled Patron Name. Begin typing the first few letters of the patrons name. When you see the name, highlight it and press <Enter> to select it.

Adding or Editing from a Popup List

Sometimes when you have a popup list on the screen, the information you're looking for has not been entered or is not correct.

To add additional information while viewing the popup list, press [Ctrl+A].

To edit the information highlighted in the popup list, press [Ctrl+E].

When you've finished adding or editing the information, press [Ctrl+S] twice to save your information.

The ToolBar Menu

When you want to Add, Edit, or View information on the screen, you'll select one of the options under the File Menu.

At the top of the screen, just under the Master Menu, the ToolBar Menu will appear.

Each option is represented in a small box with a written description underneath it. Use these options to Add, Edit, or View information on the screen. To select an option, click on it with the mouse. There are 15 selections to choose from:

First Prev Next Last Add Edit Del Find List Filter Order By More Save
Cancel Close

First

Click this item to go to the first entry in the file.

Prev

Click this item to go to the previous entry in the file.

Next

Click this item to go to the next entry in the file.

Last

Click this item to go to the last entry in the file.

Add

Click this item to add a new entry. When you're done, click on "More" to save this one and add another. Click on "Save" to quit adding and return to view.

Edit

Click this item to edit the current information on the screen.

Del

Click this item to delete the current information on the screen.

Note: If you have a window at the bottom of the screen which has the options "New Change Remove" listed, you'll have to use "Remove" to delete all the detail items before you can delete the main information on the screen.

If you try to delete the information before using "Remove", a message will appear and tell you it cannot delete the information.

Find

Use this option to find information already typed into the computer. A Find Window will appear with the following options:

"Select Field to Search In:"

Press the space bar or click on the down arrow to the right to select the specific field you want to look for. For example, Grade.

"Enter Value to Search For:"

Enter the information you want to search for. For example, 10.

"[X] Ignore Case [] Exact Match Only"

If you want to find exactly what you type in, select Exact Match, otherwise leave Ignore Case marked.

Find - Use this option to view the "First" entry for the information you've just entered.

Browse - Use this option to choose from a list of entries that contain the information you've just entered. Highlight the entry you want and press <Enter> to view it.

Count - Use this option count how many times the information you typed in is found in the file. A count will appear in the upper right hand corner.

Close - Use this option to close the "Find Window".

List

Use this option to present multiple entries in a column and row format. Normally you'll view about 20 items on the screen. To get the information to fill the entire screen, click on the up arrow in the upper right hand corner of the screen (Windows 3.x) or click on the square (Windows 95).

To find an entry in the list, move the cursor to the field you want to use. For example, name. Then, begin typing the first few letters of the name. When you see the information you want, highlight it and press <Enter>.

Note: The cursor will only go into columns where an index is defined. You will not be able to use this option on every list column.

Filter

Use this option to limit the information you view on the screen.

The following example illustrates this option:

Suppose you want to look at all the checkout information for one book. Select "Check Out" under the File Menu.

Click on < Filter > with the mouse. A "Filter" Window will appear with the following options:

"Select Field to Search In"

Press the space bar or click on the down arrow to the right to select the specific field you want to look for. For example, Accession Number.

"Enter a Search Condition"

Press the space bar or click on the down arrow to the right to select one of the following conditions:

- Is Equal To
- Is NOT Equal To
- Is More Than
- Is Less Than
- Is Equal TO or More Than
- Is Less Than or Equal To

"Enter value to Search For"

Enter the specific information you want to see. For example, to look at all the checkout information for a book with Accession Number equal 1, enter the number 1.

"[X] Ignore Case [] Exact Match Only"

If you want to find exactly what you type in, select Exact Match, otherwise leave Ignore Case marked.

Set - Use this option to set your filter. A message will appear in the upper right hand corner telling you how many records met your criteria.

Once you close the Filter Window, you'll only be able to view the information on the screen that met the criteria you typed in. In our example, you'd only be able to view checkout entries for accession number 1.

The Filter box on the ToolBar Menu will have a check in it. This indicates a filter is set.

Clear - Use this option to clear the filter so you can view all records on the screen for the file you've selected. You can also do this same thing by selecting the "Clear Filter" option under the Commands Menu.

Close - Use this option to close the "Filter Window".

Setting Multiple Filters

If you already have a filter set and select the filter option again, the following message will appear:

"A filter is in effect. Only records that match the current filter AND the new filter criteria will be found. Clear Filter?"

Yes - Use this option to erase the current filter.

No - Use this option to keep the existing filter in tact and add another filtering condition to it.

For example, we originally set a filter to look at only checkout information for accession number 1. You could now add a filter for a patron id number. Then, the only checkout information you'd view would be the book with accession number 1 and the patron ID number you just entered.

Cancel - Use this option to exit and leave the existing filter in place.

Order By

Use this option to select the order in which information is presented on the screen. To set the order:

- 1) Highlight the box under "Order By".
- 2) Press the spacebar or click on the arrow to the right of the box to show a list of fields.
- 3) Select the field which determines the order the information will be presented on the screen.
- 4) By default, the order will be Ascending (from lowest to highest). If you want the order to be Descending (highest to lowest), click on the down arrow box to the right of "Order By:".

To change the order back to Ascending, click on the Up Arrow to the right of "Order By:"

More

Click this item when you've finished adding an entry and want to add another one. The current entry will be saved and a new screen will appear.

Save

Click this item to save the information you've just added or edited. You'll then return to view mode.

Cancel

Click this item to close what you're doing without saving the information.

Close

Click this item to close the file you've selected and clear the screen.

Chapter 3: File Menu

Library Books

Use this file to enter information about your library books.

Accession No: Each book is assigned a unique accession number as it is purchased. This is normally a whole number like 1,2,3 etc. However, story collections, collected biographies, or books that have more than three related subjects may contain a decimal number.

When the computer does a book count, it only looks at whole numbers. The decimal numbers are considered subsets of another book. Let's suppose you have a book on Presidents of the United States and it's accession number is 201. You want to put in two additional entries using a Subtitle of Lincoln and Washington. These two entries would have an accession number of 201.1 and 201.2 respectively.

The only difference in these last two entries is that the subtitle Lincoln and Washington would be typed in. (This is the purpose of the Subtitle line. Subtitles may not be used on normal whole number accession entries.)

Section: If you want to designate some area(s) of your library as a special section for grouping purposes, enter a three digit code here. This code, REF, is used by the program to designate reference books. You may also develop your own codes to use in other parts of the library.

Call Num: Enter the books classification number.

Type Media: This field enables you to have a card catalog and circulation system for every type of media in your library.

Enter a one digit media code. For example, you might use the following: B=Books, A=Audiovisual, C=Cassettes, M=Magazines, V=Videos. By default the letter B is inserted into this field. This stands for books. You may use any other letters to identify other types of media.

To globally enter a letter for your type media (for any range of accession numbers,) see the Change Type Media option under the Utilities Books option.

Be consistent in the information you enter. Then, when you run your reports, you can include only the type of media you want printed. This allows you to check in/out and report on all types of media in your library from one main source.

In/Out: Press <Enter>. The computer automatically assumes the book is In. (Press the letter O if it's out.)

Author: Enter the Author's name, last name first.

Call Auth: Enter the first three letters of the authors last name.

ISBN No: Enter the ISBN number.

Title: Enter the title of the book.

SubTitle: Enter a subtitle if this is a second entry of a story collection or collected biography. This means that the accession number is a decimal number. See the discussion under Accession Numbers above. You cannot use the subtitle for a whole number accession entry. The program will stop you and tell you to change it.

Publisher: Enter the name of the publisher.

Place: Enter the place of publishing. For example, New York.

Copyright: Enter the copyright year for the book.

Pages: Enter the number of pages in the book.

Comment: Enter comments as needed. For example, Illustrated by Pat Anderson. This comment will show up on the catalog cards!

Summary: Enter a brief summary of the book. The program will automatically wrap around to the second line like a word processor.

Purchased: Enter the date the book was purchased.

Cost: Enter the cost of the book.

Funds: Enter a code to identify the type of funds used to purchase the book. This may be especially helpful with federal funds.

Source: Enter the source where you purchased the book.

Flagged: Enter the date the book was flagged (not discarded). This means the book is not accounted for.

Whocheck: Who can check this book out. By default the letter "A" is automatically entered. This means all patrons may check out this book. If the book does not contain the letter A, only faculty members will be able to check out the book.

Discarded: Enter the date the book was discarded.

Why Disc: Enter a brief description of why the book was discarded. For example: Lost.

Print Barcode Label: (See Barcode Labels for Books under the Output Menu). This option allows you to print bar codes for only those books you mark. To print a barcode for this book, mark this box [X]. To mark/unmark this box, press [Alt+M].

Related Subjects Browse (Library Books)

This window appears in the lower left hand corner of the library books screen. Use these five options to select and browse your library by related subject: Select, First, Next , Prev, and Last.

To select a related subject from the list and browse:

- a) Click on the related subject list so the cursor is active in the related subject browse window. Begin typing in the related subject you're looking for. When you see the subject you're looking for, highlight it.
- b) Click on 'Select' with the mouse. The number of books in the library containing this related subject will appear in a window in the upper right hand corner.
- c) Click on First, Next, Prev or Last to view books in the library that contain the related subject you've selected.
- d) Follow steps a-c above to select another related subject.

Note: Use the Bibliography Report under the Books option of the Output Menu to view or print all books in the library that have the same related subject.

Adding Related Subjects (Library Books)

Use the following options to add related subjects to your books.

New

Use New to add additional related subjects for this book. When the related subjects field appears on the screen, press [F5] to select from a popup list of related subjects. Once the popup list is on the screen, begin typing the first few letters for the related subject you want to enter. When you see the related subject you want, make sure it's highlighted and press <Enter>.

If the related subject does not exist, press <Ctrl+A> to add a new related subject title. When you're finished adding a related subject title, press <Ctrl+S> twice to save the information. Once the new related subject title is saved, it will be highlighted. Press <Enter> to add this related subject to the book you're entering.

Change

Highlight a related subject in the list in the lower right hand corner of the library books screen and select Change to Edit the related subject title.

Remove

Highlight a related subject and select Remove to erase the related subject. Selecting Remove will ask if the currently selected record in

the list should be deleted. If the response to this question is Yes, the item will be removed from the list. If no information is displayed in the list the Change and Remove push buttons will be disabled.

Add Decimal Accession (Library Books)

Click on the "Add Decimal Accession" button in the library books screen to automatically add a decimal accession number entry for the current book on the screen.

A decimal accession number indicates that the entry is part of a story collection or a collected biography.

For example, suppose accession number 100 was a book about "Presidents of the United States".

The book with Accession number 100.01 would be identical to the book with accession number 100, except the entry with the decimal accession number can use the subtitle field to provide additional clarification. For example, the subtitle might be "George Washington"

The decimal accession number could also have different related subjects.

Subtitles may not be used on normal whole number accession entries. The purpose of the subtitle line is to add additional information about a story collection or collected biography.

Check Out Books

Use this file to check out books.

Accession: Enter the Accession number of the book by hand or bar code wand.

Patron Id: Enter the Patrons ID number by hand or by bar code wand.

These two items are all that is required to check out a book. The computer will automatically fill in the Teacher, Date Out, and Date Due (based on the number of days you set up).

The computer will automatically your Library Book File to Out and add one book in the Patron File.

If the patron has already reached the limit on the number of books allowed to check out, the computer will warn you, but will allow you continue.

If the patron is restricted, the computer will tell you and will not allow the book to be checked out.

There are four shortcut options to use with the book currently on the screen.

F4 Re-Check this Book

Press the F4 function key to recheck the book currently on the screen. The date in will automatically be entered in the current entry. A new entry will be added to the end of the checkout book file.

F6 Check in this Book

Press the F6 function key to check in the current book. Today's date will automatically be entered for you.

Use the Check In Books option under the File Menu to check in multiple books at the same time.

F8 Credit for Fine Paid

Press the F8 function key to credit the current book fine, if any, as paid.

F10 Calculate Current Fine

Press the F10 function key to calculate the current fine for this book.

Use the "Calculate All Book Fines" option under the Utility Menu Books options to calculate the current fine for all books.

Check In Books

Use this screen to check in multiple books at the same time.

Accession: Enter the accession number of the book to be checked in.

The program automatically:

a) Updates the Checkout information.

If the book was not found in the check out file, a message will tell you it was not checked out. This message simply warns you to double check your processes and procedures. If the book is to being checked back in, evidently it was checked out at some point. The remaining steps below will also be done.

b) The library book [In/Out] field is changed to In.

c) The number of books checked out by the patron is decreased by 1.

Patrons

Use this file to enter information about your patrons.

Patron ID: Enter a unique ID number for the patron.

Patron: Enter the name of the patron, last name first.

Grade: Enter the grade of the patron.

Teacher ID: The teacher information must have been entered before you can enter information in this item. Press the <F5> to select from a popup list.

Note: You'll probably want to use the patron's homeroom teacher here to have someone to distribute overdue notices to.

If the patron is a Faculty member, press <Enter> to leave this item blank.

Type Patron: Press <Enter> for a normal patron (Student).

Enter FAC for a faculty member.

Enter RES for a restricted patron. (This means a patron who cannot check out a book!)

Note: When a book is checked out, the computer checks the information under type patron to determine if a book may be checked out and for how long.

Address: Enter the address of the patron.

City: Enter the city where the patron lives.

State: Enter the two digit abbreviation for the state.

Zipcode: Enter the zipcode for the patron.

Note: The computer automatically adds and subtracts the number of books checked out by each patron.

Print Barcode Label: To print barcodes for only selected patrons, mark this box [X]. Use [Alt+M] to mark/unmark this box

Print Office Clearance Notice (Patrons)

If a patron has no books out, click on this button to print a clearance report for the main office when a student is leaving school.

If the student has books checked out, this button will be disabled. You will not be able to print a clearance report. Check all books in for the student and then return to the patron's screen to print the clearance notice.

Teachers

Use this file to enter information about your teachers.

Teacher Id: Enter a unique ID Number for this teacher.

Tch Name: Enter the name of the teacher, last name first.

Room Number: Enter the teacher's room number.

Related Subjects

Use this file to enter related subject titles for your books.

Related Subject Title: Enter a descriptive title for this related subject.

Note: All related subject titles are all caps. This is to facilitate the look up of related subjects from the library books screen.

Inventory

Use this file to enter information for your book inventory.

To do your inventory, use the following steps:

- 1) Use the Book Inventory option under Book Utilities of the Utilities Menu to Mark all books in the library as Out.
- 2) Use the Inventory option under the File Menu to enter the accession number of every book that is in the library.
- 3) Use the Book Inventory option under Book Utilities of the Utilities Menu to Mark all books from inventory as In.
- 4) Use the Book Inventory option under Book Utilities of the Utilities Menu to erase all accession numbers in the inventory file.
- 5) Print the report "Inventory List of Books Out" under Book Reports of the Output Menu. This will print a list of all books that did not show up during the inventory process.

Book Orders

Use this file to enter information about books you have reviewed and may want to order. You'll enter the same information as you do in the library books file with the exception, that you will not assign an accession number until you have actually ordered and received the book.

Marc Records (Book Orders)

When you order books and receive the information on disk, use the MARC Record option under the Utilities Menu to read the information into your computer. This information is automatically posted to the Book Orders file. If you told your book company the accession numbers to use for these books, they will automatically be entered for you by the MARC record option. If not, you must enter an accession number into the book order entry before it can be posted to the books file.

After reviewing the orders file, use the 'Post Book Orders' program under Book Utilities of the Utilities Menu to post book orders to the orders books file. This option will check to make sure no duplicate accession numbers have been used. If there are duplicate accession numbers, a list of books with duplicate accession numbers will be displayed for you. The orders will NOT be posted until all duplicate accession numbers have been corrected.

Close

Use this option to close the current file that is displayed on the screen.

Printer Setup

Use this option to select a default printer or add/remove a printer driver from your windows operating system. See your Windows operating instructions for detailed information.

Exit

Use this option to exit the program.

Chapter 4: Edit Menu

Use the following commands while adding or editing information on the screen. (See note on how to highlight information below.)

Cut Ctrl+X

Select "Cut" from the Edit Menu or hold down the Ctrl key and press the letter X to delete (Cut) highlighted information in a field on the screen.

Copy Ctrl+C

Select "Copy" from the Edit Menu or hold down the Ctrl key and press the letter C to copy highlighted information to the computer clip board.

Paste Ctrl+V

Select "Paste" from the Edit Menu or hold down the Ctrl key and press the letter V to copy information copied onto the computer clip board into the current field on the screen.

Note: To highlight information in a field on the screen:

Using the Keyboard:

- 1) Move the cursor to the first letter where you want to begin highlighting.
- 2) Hold down the Shift key and press the right arrow key. You'll actually see the information being highlighted on the screen.
- 3) Use the copy or cut command on the highlighted information.

Using the Mouse:

- 1) Move the mouse to the first letter where you want to begin highlighting.
- 2) Click on the left mouse button and HOLD the button down.
- 3) Move your mouse to the right. You'll actually see the information being highlighted on the screen.
- 4) Use Select the "Copy" or "Cut" command under the Edit Menu.

Chapter 5: Commands Menu

The Commands Menu is the pull down menu equivalent of the ToolBar Menu. It shows the keyboard equivalent for most of the ToolBar Menu options. For example, Ctrl+Home means hold down the Ctrl key and press the Home key.

Top Ctrl+Home

Go to first entry in the file.

Bottom Ctrl+End

Go to the last entry in the file.

Next Ctrl+PgDn

Go to the next entry in the file.

Prev Ctrl+PgUp

Go to the previous entry in the file.

Add Ctrl+A

Add a new entry. When you're done, select "More" to save this one and add another. Select "Save" to quit adding and return to view.

Edit Ctrl+E

Edit the current information on the screen.

Del Ctrl+D

Click this item to delete the current information on the screen.

Note: If you have a window at the bottom of the screen which has the options "New Change Remove" listed, you'll have to use "Remove" to delete all the detail items before you can delete the main information on the screen.

If you try to delete the information before using "Remove", a message will appear and tell you it cannot delete the information.

Browse Ctrl+B

(Same as List on ToolBar Menu)

Use this option to present multiple entries in a column and row format. Normally you'll view about 20 items on the screen. To get the information to fill the entire screen, click on the up arrow in the upper right hand corner of the screen (Windows 3.x) or click on the square (Windows 95).

To find an entry in the list, move the cursor to the field you want to use. For example, name. Then, begin typing the first few letters of the

name. When you see the information you want, highlight it and press <Enter>.

Note: The cursor will only go into columns where an index is defined. You will not be able to use this option on every list column.

Filter Ctrl+L

See details, page 16.

Find Ctrl+F

Use this option to find information already typed into the computer. A Find Window will appear with the following options:

"Select Field to Search In:"

Press the space bar or click on the down arrow to the right to select the specific field you want to look for. For example, Grade.

"Enter Value to Search For:"

Enter the information you want to search for. For example, 10.

"[X] Ignore Case [] Exact Match Only"

If you want to find exactly what you type in, select Exact Match, otherwise leave Ignore Case marked.

Find - Use this option to view the "First" entry for the information you've just entered.

Browse - Use this option to choose from a list of entries that contain the information you've just entered. Highlight the entry you want and press <Enter> to view it.

Count - Use this option count how many times the information you typed in is found in the file. A count will appear in the upper right hand corner.

Close - Use this option to close the "Find Window".

Order

This option is similar to the "Order By:" option of the ToolBar Menu. However, it brings up the "Change Viewing Order" window on the screen to choose the field to order by and the direction.

To change the view order of the information on the screen:

- a) Highlight the field to use in ordering the data on the screen.
- b) Select "Ascending" or "Descending".

Clear Filter

Select this option to quickly clear all filters that have been set on the data you are viewing. If no filters are set, this option is disabled.

More Ctrl+M

Use this option when you've finished adding an entry and want to add another one. The current entry will be saved and a new screen will appear.

Save Ctrl+S

Use this option to save the information you've just added or edited. You'll then return to view mode.

Cancel

Use this option to quit adding or editing without saving any changes or additions.

Chapter 6: Output Menu (Reports)

This chapter explains how to select and print reports from the Output Menu. This option is Not available if you are viewing information on the screen. Close what you're doing and return to the Master Menu.

Using the Report Query Dialog

All reports, except Catalog Cards and Barcodes, use what is called a "Report Query Dialog" to select the information to print. On these type of reports, you have a lot of flexibility in deciding what information to print and in what order.

First, we'll explain the Report Query options. Then, we'll provide a couple of specific examples to better help you understand this option.

Select your report from the "Output" option of the Master Menu.

Preview

Select this option to view the entire report on the screen.

Print

Select this option to print the entire report to your printer.

Done

Select this option to exit and return to the Master Menu.

Selecting Information to Include in the Report

Use the "Report Query" Window to build conditions about what data should appear on your reports.

The following options are available in the "Report Query" Window.

Field List Box

The box in the upper left hand corner of the "Report Query" Window lists all the fields you may select from in order to limit the information to print out.

For example, do you want to limit the information you print out by Accession number, Call Number, Author, etc.

Operator List Box

The box in the upper middle of the "Report Query" Window displays all the comparison operator. These operators vary depending on what type of information you select. All operators and their corresponding descriptions are explained below.

* **Begins With**

Finds records where the information recorded in the computer begins with the first few letters/numbers you type in.

* **Is Equal To**

Finds records where the information recorded in the computer equals what you typed in.

* **Contains**

Finds records where the information recorded in the computer contains the letters/numbers you type in anywhere in the field you've selected.

For example, suppose you want to print books by a specific author, but can't remember all of the name. You do remember that the authors name does includes the letters ander (Anderson). Type in this information. All author names which have Ander in their name at the beginning, end, or middle will be selected.

* **Ends With**

Finds records where the information recorded in the computer ends with the letters/numbers you typed in.

For example, you know a author's name ends in the word son, but can't remember the rest of the name. Select Author, < Ends with >, and type son. All authors whose name ends with son will be selected.

SELECTING INFORMATION TO INCLUDE IN THE

* **Is In List**

Finds records where the information recorded in the computer is contained in the list of information you typed in. Remember to separate each item by a comma.

For example, suppose you want a list of all books whose call number begins with 589, 598, or 599. Select Call Num, < Is In List >, and type in: 589,598,599 Remember, the comma separates the three call number entries.

* **Is More Than**

Finds records where the information recorded in the computer is greater than the value you typed in under the "Compare To" box.

Suppose you want to a report of all fines that are more than \$1.00. Select one of the overdue book reports. Select Amt Fine, <Is More Than>, and type in: 1

* **Is Less Than**

Finds records where the information already recorded in the computer is less than the value you typed in under the "Compare To" box.

Suppose you want to a report of all fines that are less than \$2.00. Select one of the overdue book reports. Select Amt Fine, <Is Less Than>, and type in: 2

* **Is Between**

Finds records where the information recorded in the computer is between values you typed in under the "Compare To" box. Remember to separate the values you type in by a comma.

For example, to limit a report between Sep 1, 1998 and Sep 30, 1998, you'd select Date Due, < Is Between >, and type: 09/01/98,09/30/98 Remember the comma between the items.

* **Year Is**

Finds records where the year recorded in the computer equals the year you typed in.

* **Month Is**

Finds records where the month recorded in the computer equals the month you selected from the popup list under the "Compare To" box.

For example, suppose you wanted a list of all books checked out in September. Select one of the checkout reports. Select Date Out, < Month Is >, and select 'September' from the popup list.

* **Day Is**

Finds records where the day recorded in the computer equals the day you selected from the popup list under the "Compare To" box.

For example, suppose you wanted a list of all books checked out on Monday. Select one of the checkout reports. Select Date Out, < Day Is >, and select 'Monday' from the popup list.

Note: Most of the time you'll use

< Year Is >, < Month Is >, and < Day Is > together. Don't forget, to select < Accept Condition> after each selection.

* **Is Yes**

Finds records where the information recorded in the computer equals true. (.T.)

* **Is No**

Finds records where the information recorded in the computer equals false. (.F.)

Compare to Box

This box is where you type in the information to use in selecting your report. In some cases, you'll enter more than one item. You must separate multiple items with a comma. See the < Is In List > example above.

[X] Ignore Case

This option tells the computer to ignore upper and lower case for anything you typed in under the "Compare To" box. Normally, you'll leave this box checked. It makes it easier to select your information.

[] Negate

Select this box to make the condition the opposite of what you've just typed in. Normally, you'll leave this box blank.

For example, if you wanted all books checked out in May and then marked this box, your report would contain all books NOT checked out in May. (See < Year Is > example above.)

[Accept Condition]

This option tells the computer to Accept what you've typed in or selected. The condition appears in the "Query Conditions" box in a descriptive English-like phrase.

[] Output Order

Use this option to select the order in which to print your report. In some cases the option will already be marked [X]. This means the report has already been set up with a pre-determined sequence which you cannot alter.

Query Conditions Box

Displays the currently selected conditions in a descriptive English-like phrase.

[Add OR]

Use this option to add an "OR" condition when selecting your report.

For example, suppose you wanted a list of all books checked out in August OR September. To do this:

- 1) Select one of the checkout reports. Select Date Out, < Month Is >, and select "August" from the popup list.
- 2) Click on < Accept Condition >.
- 3) Next, click on < Add Or >.
- 4) Select Date Out, Month Is, and select "September".
- 5) Click on < Accept Condition >.

[Remove]

To remove one of the conditions you've entered in selecting your report, highlight the condition (English-like phrase) in the Query Conditions box and select [Remove].

[Clear All]

Select [Clear All] to removes all conditions from the Query Conditions box.

[Save]

Use this option to save your Report, with Query conditions, for future use.

When < Save > is selected you will be asked to enter a meaningful name for the report you've created.

[Retrieve]

Use this option to retrieve previously saved reports and re-use or edit them.

[Printer]

This option brings up the Windows Printer dialog to select a printer for your report or label.

[] **Print Setup Page** Not used.

[Print]

Select this option to print the report to your printer.

[Preview]

Use this option to view your report on the computer screen. While viewing the information on the screen, use the control buttons on the right and the scroll bars of the report window to look over your report:

*** Next**

Shows the next page of your report.

*** Previous**

Shows the previous page of your report.

*** Page**

Use this to select the page to go to.

*** Zoom In**

Shows specific parts of your report in close up view.

*** Zoom Out**

Shows the entire page of your report.

*** OK**

Select < OK > to exit the screen report.

[Done]

Select this option to exit and return to the Master Menu.

Book Reports

Accession Record

This report prints an Accession record report of the books in your library.

Discarded Books

This report prints a list of books discarded

Flagged Books

Use this report to print a list of books that have been flagged. If they are returned, don't forget to update the Flagged Date field. If they are permanently lost, update the Discarded Date field.

Related Subjects - Bibliography

Use this report to print a list of books by related subject.

Shelf List Report

Use this report to print a shelf list report of books in your library.

Inventory List of Books Out

Use this report to print a list of books still out after completing your inventory.

Book Orders

Use this report to order books by author or title.

Checkout Reports

Overdue by Teachers

Use this report to print a list of overdue books by grade and teacher.

Overdue by Patron by Grade

Use this report to print a list of overdue books by grade and patron.

Overdue 1/3 Page

Use this report to print a 1/3 page overdue report to give to patrons.

Overdue Patrons Alphabetically

Use this report to print a list of overdue books patron name.

Books Out by Grade and Patron

Use this report to print a list of books out by grade and teacher.

Summary of Books Checked Out by Date

Use this report to print a list of books checked out by date.

Summary of Books Checked In by Date

Use this report to print a list of books checked in by date.

Circulation Reports**Count of Books by Date**

Use this report to print a count of books checked out by date.

Count of Books by Accession Number

Use this report to print a count of books checked out by accession number.

Patron Reports**Patrons by Grade and Teacher**

Use this report to print a list of patrons by grade and teacher.

Patron Address Information

Use this report to print a list of patron address information.

Books Read by Patrons

Use this report to print a list of books read by each patron. It includes the title of the book, number of pages in book, total pages, and total books read.

Teachers

Use this report to print a list of teachers and their room number.

Card Labels

Select your type printer. Then, select the card labels you want printed.

Spine Labels

Select your type printer. Then, select the spine labels you want printed.

Catalog Cards

Select this option to print catalog cards for your books.

1) Mark the box for the cards you want printed: Shelf List, Author, Title, and/or Related Subject Cards.

2) Select the type printer: Dot Matrix or Laser.

3) Enter the lowest and highest accession number to use in selecting the cards to print.

4) Mark the box [X] if decimal accession cards are to be printed.

Barcode Labels

Books

Use this option to print barcode labels for your books.

- 1) Select the type printer: Laser or Dot Matrix.
- 2) Enter the lowest and highest accession number to use in selecting the book barcode labels to print.
- 3) **Print Marked Books only.**

If you want to print only those individual books you marked in the books file, mark this box [X]. This will override the information entered in step 2 above. After these barcodes are printed, the books will automatically be unmarked.

Patrons

Use this option to print barcode labels for patrons.

- 1) Select the type printer: Laser or Dot Matrix.
- 2) Decide how you want to select patrons: Select bar codes by: Patron ID, Grade, Patron Name, or Marked Patron File Entries.

Note: If you select Marked Patron Entries, then only those individual patrons marked in the patron file will be printed.

- 3) Enter the lowest and highest value to use in selecting the patron barcode labels to print. This is based upon the item you selected in step 2 above. For example,

From Grade: 10 From Name: Beasley, Rae
To Grade: 10 To Name: Beasley, Rae

Report Writer

This chapter explains how to enter your report parameters for the reports utilizing the R&R Report Writer.

For our example we are using the Outstanding Check report. All reports use the same method to include/exclude data and select sort sequences.

Once you have selected the report you will see the "Report Query" screen. The "Report Selected" is preset and cannot be changed. You can enter whatever information you desire on the "Report Title" line. This information will print on the top of each page of your report.

The 3 items you will need to enter to generate the report (if you choose to not enter any parameters, a report of all data in the file will be printed or displayed).

The items required to limit reporting are:

Select Fields to Limit:

The information shown under this column are the fields that can be used to limit data. These are not necessarily the only information that prints on the report but these are the only fields you can select to

include/exclude information. You cannot eliminate any of these fields from the report but you can limit the data printed using this field.

Enter Lowest/Highest Values to include on Report:

These 2 columns are where you will enter the information that you want to see on the report. In our example below we will explain its usage.

Enter Sort Order:

This column can be used to specify in what order you want the report to print.

Example:

On the Outstanding Checks report the fields shown under the "Select Fields to Limit" column are:

Check Number
Date
Total Amount
Payee
GL Account

Notice the box to the left of the "Select Fields" column.

If you want to use this field to enter your selection criteria, you must first click on the box to the left to indicate your usage of this field.

Ex: If we wanted to print a list of Outstanding Checks for the month of July, 2001 we would first click on the box to the left of "Date" then we would tab over to the "**From**" field under the "Enter Lowest/Highest value"

column and we would enter 07/01/2001, then we would tab to the "**To**" field under the "Enter Lowest/Highest value" column and we would enter 07/31/2001 then we would click on [**Print**]. This would produce a report that shows all outstanding checks from July 1 thru July 31, 2001.

There is no limit to the number of fields you can use with your selection criteria. If you wanted to print outstanding checks for July 2001 that were written to a specific Vendor (for example Walmart), you would enter the same information as above, plus you would check the box to the left of "Payee", tab to "From:" under the "Enter Lowest/Highest" and enter "WALM", or whatever Vendor Code you setup for Walmart, then tab to the "To" field under the "Enter Lowest/Highest? column and enter "WALM". This would produce a report of all outstanding checks from 7/1/2001 thru 7/31/2001 that were written to Walmart.

Enter Sort Order 1,2,3

This column is used to sort the report in whatever sequence you prefer. Some of the reports have the first sort order predefined. You cannot change the predefined sort orders but you can indicate what sequence you want the secondary sort order in.

Ex: Lets produce a report of Outstanding checks that are between \$100.00 and \$150.00 and we want them in check number and date sequence.

First you would click on the box to the left of "Total Amount", then tab over to the "From" field, enter 100.00, tab to the "To" field, enter 150.00. Now you're ready to specify your sort order. Notice that the "Check No" field is already defaulted as the first sort sequence. You would simply click on the box to the right of "Date" under the "Enter Sort Order" column and you would put a 2 in this box.

These parameters will produce a report of all outstanding checks with a total amount of \$100.00 thru \$150.00 and they would be sorted in check number and date sequence with check number being the highest sort sequence.

All the reports using the R&R Report Writer query are developed in this same manner. After you click on "**Print**" the report will be displayed on the screen. From that display you have the option to print the report or exit back to your original screen. Once you enter data into a report query that data will be shown the next time you access this same report query screen. To start a new query you will need to click on the "**Clear Report**" option on the bottom of the screen to remove the previously defined query options.

Chapter 7: Window Menu

This chapter explains the Window Menu options. You'll learn how to move a window on the screen, change it's size, and select another window on the screen when more than one is being used.

Move

Keyboard

Press [Ctrl+F7] to move the front most window on the screen to a different position. Use the arrow keys to move the window up, down, left or right. Press [Enter] when you're done.

Mouse

Click on the very top portion of the screen with the left mouse button. Hold the mouse button down and drag the screen to a different location on the screen. Let up on the mouse button.

Size

Keyboard

Press [Ctrl+F8] to re-size a window on the screen. Use the arrow keys to adjust the size of the window. Press [Enter] when you're done.

Mouse

Click on the very outside edges of the screen with the left mouse button. Hold the mouse button down and drag the screen, up, down, left, or right to change it's size. Let up on the mouse button when you're done.

Maximize

Keyboard

Use this option with list windows, where multiple records are on the screen. Press [Ctrl+F10] to make the current window on the screen it's maximum size.

Mouse

Click on the up mark (or the box in Windows 95) in the upper right hand corner of the window to make it cover the full screen.

Minimize

Keyboard

Press [Ctrl+F9] to make the current window on the screen as small as possible.

Mouse

Click on the Up/down marker in the upper right hand corner of the List Window to return to normal size.

Note: Click on the second row of your screen. The top row of your screen contains the name of the program. The second row (to click on) contains the Master Menu options File, Edit, etc.

Selecting Different Windows on the Screen

The name of all the screens that have been opened will be listed under the Minimize Command. Multiple windows (files) may be opened at one time.

To make a window current, click on the name of it with the mouse (under the Windows Menu) or click on the window itself on the screen.

Chapter 8: Utilities Menu

Rebuild Indexes

Use this option when you've had a computer problem or power failure to rebuild the indexes of your data file(s).

To mark one file to be re-indexed, use the arrow keys to highlight the file and press [Enter] or double click on it with the mouse. Notice the arrow markers >> to the left of the file name.

Mark All

Press [Alt+A] or click on < Mark All > to mark all data files to be re-indexed.

Clear Marks

Press [Alt+M] or click on < Clear Marks > to unmark all data files.

Invert

Press [Alt+I] or click on < Invert > to change all marked files to unmarked and vice versa.

Select < OK > to reindex the data file(s) or < Cancel > to return to the Master Menu.

Erase Deleted Records

Use this option to erase all deleted entries in a file.

When you use the Delete option [Ctrl+D], the entry on the screen is marked for deletion and you no longer see it on the screen. However, it is physically still on your hard disk. This option physically erases all entries marked for deletion. They'll be gone forever!

To mark a file (in order to erase deleted records), use the arrow keys to highlight it and press [Enter] or double click on the file with the mouse. Notice the arrow markers >> to the left of the file name.

Mark All

Press [Alt+A] or click on < Mark All > to mark all data files for deleting records.

Clear Marks

Press [Alt+M] or click on < Clear Marks > to unmark all data files.

Invert

Press [Alt+I] or click on < Invert > to change unmarked files to marked and vice versa.

Select < OK > to erase the deleted records in the selected data file(s) or < Cancel > to return to the Master Menu.

Update File Structure

Use this option to update the structure of a data file when you receive updates to the program. You'll receive instructions with your update on which file(s) to select.

Press the [Spacebar] and use the arrow keys to highlight the file or click the mouse on the down arrow to the right of the filename box and click the data file to be updated.

Select < OK > to update the file or < Cancel > to return to the Master Menu.

Program Preferences

Use this screen to enter your checkout information. This includes:

- 1) How many books a patron may check out at one time.
- 2) How many days a book may be checked out by a patron.
- 3) How much a book fine will cost per day when overdue.
- 4) How many days a reference book may be checked out.
- 5) How many day a Faculty member may check out a book.
- 6) How may books a faculty member may check out at one time.

Select the type printer you'll use for printing reports in the Format box.

[1] = Laser Printer

[2] = Dot Matrix Printer

Select your computer's Printer Port. Normally, this is LPT1. When in doubt, select this option.

Tell the computer whether to turn the Century on.

When marked [X], the reports and screen will show dates in the format: 09/01/1998.

When not marked [], the reports and screen will show dates in the format: 09/01/98.

For the Year 2000, you will have to have the century box marked [X].
BOOK UTILITIES

Book Utilities

Calculate All Book Fines

Use this option to calculate and update all current book fines. If a student fails to turn in a book, this will increment each day based upon the fine per day information you've entered in your Program Preferences.

Zero Out All Book Fines

Use this option to change all fines to zero in the checkout file. It also changes the date paid to date in.

Post Orders To Books

Select OK to post books from the order file to the library book file.

An entry in the order's file must have an accession number entered in order to be posted to the library book file.

Marc Records

This program supports the MARC microlif format (1987).

If you ordered MARC records on disk, this information is automatically entered into the orders file for you. When ordering books, give the company the beginning accession number you want it to use. This should be the next number in sequence that has not been used. The company should be able to automatically include an accession number for each book purchased. This will save you a lot of data entry time.

You should review all the entries in the order's file that you want to be posted to the library books file. Make sure the information is correct.

This program will first check to make sure there are no duplicate accession numbers in the order file, i.e., an accession number in the book file can only be used once. If there is a duplication, the program will show you a list of duplicate accession numbers. No orders will be posted to the library books file, until you've corrected any duplicate accession numbers.

Recalculate Patron Books Out

This option updates the number of books a patron has checked out. It also updates the library books file to match this same book count.

Erase Discarded Books

Be sure no one else is using the system before running this option. Select OK to permanently erase any books that contain a discarded date. Select Cancel to exit and return to the Master Menu.

Erase Checkout Information

This option permanently erases checkout information. Be sure you have a backup of your data prior to using this option.

If books are still out, the information will not be erased.

If you want to erase information where the book has been returned but the fine has not been paid, mark the Erase Checkout Information box [X]. This checkout information will be erased. You will not collect the fines due.

To mark/unmark the Erase Checkout Information box, click on it with the mouse or press the spacebar.

Book Inventory

To do your inventory, use the following steps:

1) Use the Book Inventory option under Book Utilities of the Utilities Menu to Mark all books in the library as Out.

2) Use the Inventory data file under the File Menu to enter the accession number of every book that is in the library.

3) Use the Book Inventory option under Book Utilities of the Utilities Menu to Mark all books from inventory as In.

4) Use the Book Inventory option under Book Utilities of the Utilities Menu to erase all accession numbers in the inventory file.

5) Print the report "Inventory List of Books Out" under Book Reports of the Output Menu. This will print a list of all books that did not show up during the inventory process.

BOOK UTILITIES (continued)

Automatically Change Date Due

This option automatically changes the date due for a specific date.

Enter the current date. For example: 09/01/98

Enter the new date these books are to be due. For example: 09/05/98

Change Type Media

Use this option to globally change the Type of Media field in the library books file for the range of accession numbers entered. For example, you could change all books with accession numbers between 500 and 725 to be labeled as M for Magazine.

Patron Utilities

Copy Patrons To Floppy

Use this option to copy student information for students moving to another building in the district.

Place a blank formatted floppy diskette in your computer. Tell the program which drive you placed the diskette in (A or B).

Enter the grade of the students you want to copy.

For example, if students are moving from grade 9 in a Junior High building to grade 10 in a High School building, you'd copy all the grade 9 students.

Once the information is copied, you may erase the grade 9 students and promote the remaining students using the Patron Utility options under the Utilities Menu.

Copy Patrons From Floppy

Use this option to copy student information for students moving into your building from another building in the district.

Place the diskette in your computer. Tell the program which drive you placed the diskette in (A or B).

Once the information is copied, you may erase the grade 9 students and promote the remaining students using the Patron Utility options under the Utilities Menu.

After you copy the information from the floppy disk, use the Patron Utilities under the Utilities Menu to erase the students leaving your building. Then promote the remaining students to the next grade.

Increment Patron Grade Level

Select OK to add or subtract one grade level for each of your patrons. Select Cancel to exit and return to the Master Menu.

Delete Patrons In One Grade

Use this option to delete one grade of students leaving your building.

Be sure to copy these students to a floppy diskette, if they are going to another building in your district. This will save the librarian there a lot of time.

When you're ready, enter the grade you want to delete.

Change Password

This screen will allow you to change your password. You must first enter the current password. Then you can enter your new password. You must then enter the new password again to insure accuracy.

Backup/Restore

Use this option to backup and restore your library information to a floppy disk(s) or to the backup directory of your harddisk.

You must tell the program whether to backup or restore your data.

You must tell the program where the data is, i.e., floppy drive A or B, or on your harddisk.

Export File

Use this option to copy information from your computer to a floppy disk drive. For your information, the data will be copied using the ASCII format.

Follow the steps on the screen:

- 1) Select the file that you want to copy to a floppy diskette. Use the arrow keys or mouse.
- 2) Put a blank formatted diskette in floppy drive A or B.
- 3) Enter the disk drive and path for your data. For example:
A:MYFILE.TXT
- 4) If you do not want to copy the entire contents of the file to a floppy diskette, select Yes when prompted "Do you want to set a filter?" (See the example below.)

You must then select the field for the program to look at to determine what information to copy. For example, if you wanted to copy students in grade 10:

You'd select the Patron file.

When the "Filter" window appears you'd select "Grade" as the "Field to Search In".

Next, select "Equals to". Enter the grade: 10

Click on "Set". The program will tell you how many matches (patrons) were selected. Click on "Close".

- 5) Select the fields to export Window

At this point you may copy any or all of the fields in the selected file.

Click on "Select All" to copy all the information to a floppy diskette. All the fields in the box on the left will appear in the box on the right. The box to the right shows all the data fields to be copied.

To select individual fields, double click on a field in the box to the left. It will appear in the box on the right.

NOTE: If you only want to copy certain fields, it's very important that you copy them in the order you want them to be written on the disk. If another program has some of the same information (and can import data), be sure you select the fields you want in the order you want.

If you make a mistake or change your mind, use the "Deselect All" to remove all fields to be copied or the "Deselect" option to remove one field from the box on the right.

Select OK to copy the selected information to the floppy diskette.

Select Cancel to exit and return to the Master Menu.

Import File

Use this option to copy information from a floppy diskette to your computer. For your information, the data will be copied using the ASCII format.

Follow the steps on the screen:

1) Select the file that you want to copy into from the floppy diskette.

2) Put the data diskette in the disk drive.

3) Enter the disk drive and path for your data file. For example:
A:MYFILE.TXT

4) Select the Fields to Import Window

At this point you must tell the computer which fields are on the floppy disk file and the sequence in which those fields were written to the floppy diskette.

Click on "Select All" to copy all the information in the file from the floppy diskette. All the fields in the box on the left will appear in the box on the right. The box to the right shows all the data fields to be copied to your computer from the floppy diskette.

To select individual fields, double click on a field in the box to the left. It will appear in the box on the right.

NOTE: If you only want to copy certain fields, it's very important that you tell the program the order in which the fields were written onto the disk.

If you make a mistake or change your mind, use the "Deselect All" to remove all fields to be copied or the "Deselect" option to remove one field from the box on the right.

Select OK to copy the selected information from the floppy diskette to your computer.

Select Cancel to exit and return to the Master Menu.

Registration Form

Use this screen to print a copy of your registration form.

Upon receipt of your registration form and payment, you are entitled to 180 days of Free Technical Support.

Call Technical support from 9 am to 4 pm CST at 1-918-366-4454.

Convert Data From Dos

Use this option to read all the data entered into your old library book program into the current windows library wizard program.

Enter the drive and path where your old library book files are kept on your computer. The default is C:\BOOKS.

Marc Records

Use this program to copy library books stored in Microlif (1987) Marc record format to your orders file.

The name of the file on your floppy diskette will be: IBM.FIL

Select the Floppy Disk Drive where the MARC record data disk is located (A or B).

This information will be added to your Book Orders file for you to review in detail before posting to your books file.

Delete Saved Report

Use this option to delete reports you have previously saved. Use the buttons at the bottom of the screen to get the report you want to delete on the screen. Then, click on 'Delete'.

If there are no saved reports, a message will appear in the upper right hand corner telling you so.

Verify Teacher ID in Checkout

This option checks and verifies the Teacher ID in the Checkout File. If there is not a Teacher ID, the program will attempt to look up the teacher ID in the Patron File. It will also tell you how many patrons do not have a correct teacher ID referenced.

If there is not a correct teacher ID in the file, your checkout reports will not be correct.

Chapter 9: Help Menu

About

The first screen of the About Dialog displays the application name and author.

To move to the next screen, select the "More" push button. To exit the About dialog, select the "OK" push button.

The second screen of the About Dialog displays the following information:

Resource File: Location of the application resource file.

Configuration File: Location of the application configuration file read when the application was started.

Home Directory: Directory where the application was loaded from or where the application support libraries are stored.

The third screen of the About Dialog displays the following information about the current hard disk:

Available Diskspace: Total amount of free disk space on the current drive.

Temporary File Drive: Location where temporary files are created.

Temporary File Space: Total amount of free disk space on the temporary file disk drive.

Temporary File Disk Size: Total disk space on temporary file disk drive.

Current Directory: Default directory.

The fourth screen of the About Dialog displays the following environment information:

Operating System: The operating system and version in use.

Comspec: Location of COMMAND.COM.

Windows Directory: The directory where Microsoft Windows (tm) is installed. This information is only displayed if the application is being run from within Windows.

Processor: The type of processor in use on your computer.

FoxPro Version: Version of FoxPro in use.

Version Date & Time: The Date and Time stamp of the version of FoxPro.

The last screen of the About Dialog displays the following memory information:

Total Available Memory: Total amount of available system RAM in Kilobytes

Remaining Available Memory: Total amount of remaining RAM in Kilobytes

Available DOS Memory: Amount of DOS memory available in Kilobytes

Current Memory Usage: Amount of memory currently being used in Kilobytes

EMS Memory In Use: Amount of Extended memory currently in use

Contents F1

This option displays the Help window. This is the built in "Help" system for your program.

If you are on a specific item in the program and press F1, you'll get help about that item.

If the screen is blank and or specific help item is referenced, a list of help topics will appear. To get to a specific topic in the list, begin typing the first few letters of the topic. Then, highlight the topic you want and press <Enter> to get specific help about that topic. Use the arrow keys, PageUp and PageDown keys to view the information on the screen or use the mouse on the scroll arrows to the right of the box.

Help Window Options

(when viewing a specific topic)

The help window has five commands (on the left of the help window). These are:

1. Topics

Press [T] for Topic or click on Topics with the mouse. A list of all the help topics available in the program will appear in a list form. To get help on a specific topic, begin typing the first few letters of the topic you want. Use the arrow keys to highlight the topic and press <Enter> or click on it with the mouse. The detailed information about that topic will be displayed.

2. Next

Press [N] or click on < Next> with the mouse to move to the next help topic in the topics list.

3. Previous

Press [P] or click on < Previous> with the mouse to move to the previous help topic in the topics list.

4. Look Up

You can highlight a key word in the help window when you're viewing the information about a specific topic. Then, click on < Look Up > to see if there are any references in the help file for that word.

5. See Also

Use this option when viewing information about a specific topic to look up a "Cross Referenced" related topic. To select this option press [S] or click on <See Also> with the mouse. A list of related topics will appear, if available. Type the first letter(s) of the topic you want to see. Use the arrow keys to highlight the related topic or click on it with the mouse to go to that related topic.

Note: To return to the Topic(s) you've already viewed, press [S] again. Notice the line dividing the 'See Also' box. The topics above the line are ones you've already viewed. The topics below the line are topics still available for view. Highlight the topic you want to see and press [Enter] or click on it with the mouse.

To Exit Help, press the <Esc> key or click the mouse in the upper left and corner to clear the help window.

On Line Manual

This is a copy of the Library Wizard instructional manual. Use the buttons at the bottom of the screen to browse the manual or look up specific key words:

Top - First Page

Find - Type in key word(s) to look up. Don't worry about capitalization

Next - Next Page

Prev - Previous Page

Again - Find next occurrence of key word(s)

Last - Last Page

Go To - Go to a specific page

Use the buttons at the side of the page to go to a specific chapter or section.

TOC - Table of Contents

Intro - Introduction

1- Chapter 1: Getting Started

2- Getting Around in the Program

3- File Menu options

4- Edit Menu options

5- Command Window options

6- Output Menu (Reports)

7- Window Menu options

8- Utilities Menu options

9- Help Menu options

10- Administrator Menu options

Edit - Edit (add) information to this page.

Save - Save any changes made while editing this page.

Print On Line Manual

Use this option to print a copy of the on line manual to your printer.

Chapter 10: Administrator Menu

Administrator

This chapter explains the Administrator Menu options. This Menu will only appear when the System Administrator is logged in. When you first installed this program, the instructions explained how to log into this program as the System Administrator:

ID: **SYS**

PASSWORD: **PASSWORD**

This is the ID and Password for the System Administrator when you receive the program.

The System Administrator has total access to everything in the program. As the System Administrator, you'll use the Administrator Menu options to enter additional users for the program. You can also change the password, under the 'Change Password' option of the Utilities Menu.

User Information

Use this screen to change all rights a specific user has when using the program.

One person must have total rights to everything in the program. This person is called the 'System Administrator'. If only one person is using the program, this person should log in as the System Administrator.

The System Administrator uses this option to:

- 1) Add new users for the program.
- 2) Give Add, Edit, Delete, and View rights to each user.
- 3) Assign Group Managers.
- 4) Change individual user's password.

Adding New Users to the Program

Press [Ctrl+A] or click on < Add > with the mouse to add a new user. A blank "User Information" window will appear.

Enter the following information:

First Name: Enter the first name of the user. For example, John.

Last Name: Enter the last name of the user. For example, Doe.

User Id: Enter a three letter user ID for this person. The initials of the person are often used. However, this is a unique field. If two people have the same initials, you must make them different in some way. For example, LDA or LA2.

Password: Enter the user's password. The user may change his/her password from the 'Change Password' of the Utilities Menu. However, as the System Administrator, you will always be able to view the user's password from this option.

Group: If you want groups of people to use the same data files and have the same rights, enter a group name. For example, PATRON.

Once you've set up all the rights for at least one member of this group as explained in this chapter, you may add another person and enter their group as PATRON. This new individual will have all the same rights you've previously set up for the patron group... without going through the "Rights" options for every file again.

System Administrator: One person is assigned the System Administrator. This was already set up for you when you installed the program. The User ID was 'SYS' and the Password was 'PASSWORD'.

Group Manager: If you assign groups of users, you may assign one or more users as Group Managers.

The Group Manager may add new users and assign rights to this new user. However, the Group Manager cannot assign rights he/she does not have. The Group Manager doesn't necessarily have all the rights of the System Administrator.

For example, a Group Manager may have all rights with respect to PATRON, but no rights for any other group.

If a group manager is logged in, the Administrator Menu will appear on the Master Menu.

Rights: Use this option to assign individual rights to each user. This option determines whether a user may add, edit, or even view information in a file.

This option is available when you are adding or editing information about a user.

Press [Ctrl+A], [Ctrl+E], or click on < Add > or < Edit >.

Use the arrow keys to highlight the file you want to assign user rights on, and press [Enter] or double click on the file.

A "User Rights" window will appear.

Use the box at the top of the "User Rights" Window to assign the rights a user may have in this file.

These rights are explained below. To assign rights, click on it with the box or press the underlined letter of the option. When the button to the left of the option is filled, it means this is the right the person has to this file.

- **Full Access** - This allows the users to add, edit, or change any information in this file.
- **Read Only** - This allows the user to see information on the screen, but he/she cannot add, edit, or change any information.
- **Add Only** - This allows the user to see the information on the screen and add new records to the file.
- **Edit Only** - This allows the user to see the information on the screen and edit existing records to the file.
- **Add + Edit (No Delete)** - This allows the user to see the information on the screen, add new records, or edit existing records. However, this person may not delete any information.
- **No Access** - This option prevents the user from even viewing the information in the file.

<p>Note: Ignore the box at the bottom of the "User Rights" screen. Restricted Access information is not used in your program.</p>
--

System Reports

User List

This option prints a list of users for the program.

Printer Setup - This option takes you to the Windows Printer Setup Dialog to change printers, if needed.

Print - This option prints the List of Users to your printer.

Preview - This option prints the List of Users to the screen.

Done - Select this option to return to the Master Menu.

Error Log

Select "System Reports" under the Administrator Menu. Press [E] or click on "Error Log".

This report prints any problems that occurred while using the program. This is primarily used by the System Administrator and technical support for trouble shooting.

Printer Setup - This option takes you to the Windows Printer Setup Dialog to change printers, if needed.

Print - This option prints the List of Users to your printer.

Preview - This option prints the List of Users to the screen.

Done - Select this option to return to the Master Menu.

You will be asked whether you want to < Clear the error log file > upon exit. Select < Yes > and the information in this error file will be erased.

Note: Once a problem is resolved, there is no need to keep the information on file.

Peer To Peer Networks

On peer to peer networks, like Lantastic, you will need to make certain files READ ONLY if more than one person is to use the program at the same time.

The current EPES Software programs for Windows are written using the FoxPro database language. One of the programs you'll have in your main directory after installing the program is called: FOX2600.ESL. This program will be shared by all users. To do this on a peer to peer network, go to the directory where the program was installed. For example: F:\LIBW.

Type the following: ATTRIB +R FOX2600.ESL and press <Enter>.

You'll also need to do this for the main program. It ends in the suffix .EXE.

For example, on the Library Wizard Software program, this file is called: LIBW.EXE.

Type the following: ATTRIB +R LIBW.EXE and press <Enter>.

Installing the Program a Second Time

If you have to install the software again, for any reason, after you've made these files READ ONLY as explained above, do the following:

- 1) Be sure no one is using the program. That means get everyone to exit the program.
- 2) Go to the directory where the program is installed. For example:
F:\LIBW
- 3) Type: ATTRIB -R *.* and press <Enter>.

Now you can install the software again. When you're done, you must make the Fox2600.ESL and LIBW.EXE files READ ONLY as explained above if you want more than one person to access the program at the same time.

If you do not follow these steps, you'll get an error message "Permission Denied", when you install the software again.
Enter any notes that will help you with the program here.

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